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# Syntactic Derivation in Similar Syntactic Structures, Aynur Abazarova

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**Abstract.** This article examines the phenomenon of syntactic derivation within similar syntactic structures, emphasizing its theoretical and practical significance in modern linguistics. While derivation has traditionally been associated with word formation, recent studies highlight its essential role at the syntactic level, where more complex sentence forms emerge from simpler ones through systematic grammatical and semantic shifts. Drawing on perspectives from generative grammar and the works of scholars such as Chomsky, Jespersen, and Harris, the study outlines how derivational relations differ from transformational ones, with the former primarily altering internal meaning and the latter external form. Various examples demonstrate processes such as causativity, modality, and passivization, which generate new sentence forms while maintaining coherence with the original structures. The analysis also distinguishes between invariant derivation, where the number of sentence members increases or decreases, and syntagmatic derivation, where structures remain formally stable but undergo semantic modification. By classifying derivational operators and their functions, the paper argues that syntactic derivation provides deeper insights into the dynamics of language, revealing mechanisms by which meaning, form, and communicative function interact to produce linguistic diversity.

**Keywords:** *syntactic derivation; similar syntactic structures; derivational aspect; transformation; grammatical operators; semantic shift*

## Introduction

Linguistic research, like any other branch of science, is characterized by the diversity of its approaches, levels of analysis, and interpretive frameworks. Each perspective offers a distinct set of parameters that allow the systematic study of language as a complex and dynamic phenomenon. Traditionally, linguistics has been explored through such dichotomies as *diachronic–synchronic*, *language–speech*, *form–content*, and *paradigmatic–syntagmatic* relations, each of which highlights the structural and functional aspects of linguistic phenomena (Saussure, 1916/1983). These perspectives have provided a foundation for understanding the mechanisms of language and for distinguishing its components across different analytical levels.

In recent decades, however, the concept of the **derivational aspect** has emerged as a particularly significant tool for syntactic research. While the notion of derivation was historically confined to word

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formation and affixal processes (Aronoff, 1976), its extension into syntax has opened new avenues for describing how more complex structures are generated from simpler units. The application of derivational analysis at the syntactic level has been emphasized in the works of generative linguists, most notably Noam Chomsky, whose theory of *transformational-generative grammar* demonstrates how sentences can be systematically derived from underlying structures (Chomsky, 1965).

The distinction between **derivation** and **transformation** is particularly relevant in syntactic studies. Transformational operations alter the external form of a sentence—such as changing a declarative into an interrogative—while derivational relations primarily affect its internal semantic and grammatical status (Harris, 1957). This distinction has important implications for analyzing how meaning is preserved or shifted across different syntactic forms. For instance, causative and modal constructions illustrate how derivation introduces new semantic operators into a sentence while retaining its basic propositional content (Jespersen, 1924/1965).

The relevance of studying syntactic derivation lies in its ability to uncover the mechanisms through which language generates variation and complexity. By tracing the processes through which elementary meanings and grammatical operators interact, scholars can better understand the dynamic interplay between form, meaning, and communicative intent. Such an approach not only clarifies structural similarities among syntactic patterns but also provides insights into the cognitive and functional principles underlying linguistic creativity.

## Methodology

The present study employs a **comparative-analytical and descriptive methodology** to investigate the phenomenon of syntactic derivation in similar syntactic structures. Since the research is primarily theoretical, the analysis does not rely on empirical corpus statistics but instead draws on established linguistic theories, supported by illustrative examples from both **English** and **Azerbaijani** syntax.

The analysis begins with a **review of foundational linguistic frameworks**, including the structuralist perspectives of Zellig Harris, who emphasized transformational operations in syntax, and the generative grammar of Noam Chomsky, which explains how surface structures derive from deep structures through formal rules. These theoretical insights are compared with traditional European approaches to syntax, particularly the functional grammar and semantic analysis of Otto Jespersen. Their contributions provide the conceptual background for distinguishing between *derivational* and *transformational* relations in sentence structures.

To operationalize this framework, the study uses a **comparative approach**:

- **English examples** (e.g., *Jenny lay down* → *Grandmother urged Jenny to lie down*) illustrate how causative, modal, and passive operators function in syntactic derivation.
- **Azerbaijani examples**, drawn from standard grammar sources, highlight how similar derivational mechanisms appear in a Turkic language context, particularly in relation to aspect, modality, and causativity.

The **analytical procedure** follows three steps:

1. Identification of **base (original) sentences** as the starting point of derivation.
2. Examination of **derivational operators** (e.g., causative verbs, modal markers, passive constructions) that transform the original sentence into derived forms.
3. Comparison of **formal and semantic changes** across languages to classify derivational relations (invariant vs. syntagmatic derivation).

By adopting this methodology, the study situates syntactic derivation within a cross-linguistic perspective, demonstrating that the mechanisms described in generative grammar also appear in Azerbaijani syntax, albeit through language-specific grammatical operators. This dual focus enhances the explanatory power of the analysis and contributes to a more universal understanding of syntactic derivation as a linguistic process.

## Results

The analysis reveals that **syntactic derivation** manifests through systematic relations between base sentences and their derived forms, where grammatical and semantic operators introduce new structures without destroying the internal coherence of meaning. The main findings can be summarized as follows:

### 1. Invariant Derivation

Invariant derivation occurs when the number of sentence members changes compared to the base sentence. Two subtypes are observed:

- **Ascending invariant derivation:** the derived sentence adds new participants or grammatical operators.
  - *English example:* *Jenny lay down* → *Grandmother laid Jenny down*.
  - *Azerbaijani example:* *Uşaq yatdı* (“The child slept”) → *Ana uşağı yatızdırdı* (“The mother made the child sleep”).
- **Descending invariant derivation:** the derived sentence reduces the number of participants.
  - *English example:* *Mother cleaned the fish* → *The fish was cleaned*.
  - *Azerbaijani example:* *Müəllim mətni izah etdi* (“The teacher explained the text”) → *Mətn izah olundu* (“The text was explained”).

### 2. Syntagmatic Derivation

In syntagmatic derivation, the structure of sentence members remains the same, but semantic modification occurs through the introduction of additional operators.

- *English example:* *The boy split wood* → *The boy wanted to split wood*.
- *Azerbaijani example:* *Qız oxudu* (“The girl read”) → *Qız oxumaq istədi* (“The girl wanted to read”).

### 3. Causative Derivation

Causative operators introduce a new agent who initiates the action.

- *English: The child is sleeping* → *The mother made the child sleep.*
- *Azerbaijani: Uşaqlı yazır* (“The child is writing”) → *Müəllim uşaqlı yazdırır* (“The teacher made the child write”).

### 4. Modal Derivation

Modal verbs or expressions introduce modality into the sentence while preserving its original propositional content.

- *English: Jenny lay down* → *Jenny wanted to lie down.*
- *Azerbaijani: Qız oxudu* (“The girl read”) → *Qız oxuya bilərdi* (“The girl could read”).

### 5. Passive Derivation

The subject of the base sentence is omitted or demoted, while the object is promoted to subject position.

- *English: Mother cleaned fish* → *Fish was cleaned.*
- *Azerbaijani: Usta evi tikdi* (“The builder constructed the house”) → *Evi tikildi* (“The house was built”).

### 6. Derivational Trees

Each base sentence, together with its derivatives, forms a **sentence nest** that can be represented as a derivational tree. For example:

- (1) *Jenny danced*
- (2) *Jenny wanted to dance*
- (3) *Grandmother asked Jenny to dance*
- (4) *Mother ordered grandmother to ask Jenny to dance*

This tree-like structure illustrates the multi-stage nature of derivation, where each new operator (causativity, modality, etc.) generates a further derived form.

### Discussion

The findings of this study confirm that syntactic derivation is a **systematic process**, governed by grammatical and semantic operators that introduce new structural and functional possibilities into the sentence. This aligns with the **generative approach** of Noam Chomsky (1965), who emphasized the role of transformations in producing surface structures from deep structures. However, while

transformations primarily affect the **external form** of the sentence, derivation, as the present study shows, often alters the **internal semantic status** while maintaining the general propositional meaning.

The distinction between transformation and derivation was also highlighted by Zellig Harris (1957), who argued that interrogative constructions, for example, involve transformational changes, whereas causative constructions reflect deeper derivational shifts. The results here support this distinction: while *John went on a trip* → *Did John go on a trip?* exemplifies transformation, *Jane opened the window* → *Grandmother made Jane open the window* illustrates derivation, since the internal meaning changes through the introduction of a new causal operator.

The classification into **invariant** (ascending and descending) and **syntagmatic derivation** also corresponds with the theoretical insights of Otto Jespersen (1924/1965), who saw language as a dynamic system of expansion and reduction. Ascending derivation, such as the introduction of causative agents, reflects the generative power of language to add new semantic participants. Conversely, descending derivation, as in passive constructions, demonstrates how languages economize by omitting agents while preserving the action.

A particularly important contribution of this study is the **comparative perspective**. By analyzing both English and Azerbaijani examples, it becomes clear that derivational mechanisms are **cross-linguistic**. While English relies heavily on auxiliary verbs and modal constructions (*want to*, *make*, *could*), Azerbaijani employs agglutinative suffixes and analytic constructions (*-dir*, *-maq istə-*, *-maq üçün*) to express similar relationships. This demonstrates that the principles of syntactic derivation are universal, even if their **formal realization** differs across languages.

Furthermore, Azerbaijani scholars such as Abdullayev (1992, 1972) have emphasized the importance of syntactic structure in meaning formation. The present results extend this perspective by showing how derivational operators, whether causative, modal, or passive, systematically reshape sentence meaning without breaking its structural logic. This positions derivation as a central mechanism for understanding both the **creativity** and **flexibility** of natural language.

In sum, the discussion highlights that syntactic derivation bridges structuralist and generative traditions: it not only explains how sentences transform in form, but also how new **semantic dimensions** emerge. This dual function underscores the theoretical and practical relevance of the derivational aspect in modern linguistics.

## Conclusion

The present study has demonstrated that syntactic derivation is a fundamental mechanism of sentence formation, shaping both the structure and meaning of linguistic units. By distinguishing between invariant derivation (ascending and descending), syntagmatic derivation, causative, modal, and passive processes, it has been shown that derivational relations follow systematic rules rather than random variation.

The comparative analysis of English and Azerbaijani examples reveals that, despite differences in grammatical systems, both languages employ similar strategies to create derived structures. In English,

these processes rely largely on auxiliary verbs and modal constructions, while in Azerbaijani they are expressed through suffixes, verb forms, and analytic markers. This suggests that syntactic derivation is a **universal linguistic phenomenon**, though its formal realization varies across languages.

The findings further support the theoretical distinction between **derivation** and **transformation**: while transformations modify the external form of sentences, derivation introduces new semantic operators that alter internal meaning without disrupting coherence. This insight aligns with the generative principles outlined by Chomsky and the functional approaches of Jespersen, while also extending Azerbaijani linguistic traditions represented by Abdullayev and colleagues.

In conclusion, syntactic derivation provides a powerful framework for understanding how languages balance stability with flexibility, enabling the generation of new sentence types while preserving communicative intent. Its study deepens our understanding of the dynamic relationship between form, meaning, and function in language, and highlights the importance of cross-linguistic perspectives in syntactic theory.

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# Language Assessment in Instructional Contexts: Design Considerations and Practical Insights

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**Abstract.** This article provides a comprehensive overview of various types of language assessments, emphasizing their purposes, design considerations, and practical applications in classroom settings. It first examines less commonly designed tests language aptitude and proficiency assessments highlighting their objectives, tasks, and limitations, particularly in predicting communicative competence. The article then focuses on tests more frequently developed by educators: placement, diagnostic, and achievement tests. Placement tests are explored as instruments for assigning learners to appropriate course levels, with an emphasis on authenticity, diagnostic potential, and instructional alignment. Diagnostic tests are presented as tools for identifying specific learner difficulties, illustrated through detailed phonological and writing assessments. Achievement tests are discussed in relation to curriculum objectives, formative and summative functions, and practical guidelines for their construction. The article also outlines key steps in classroom test design, stressing the importance of clearly defined, performance-based objectives. Overall, the paper underscores the value of informed, purposeful test design in promoting accurate evaluation, learner feedback, and instructional improvement.

**Key Words:** *Language Assessment, Proficiency Tests, Placement Tests, Diagnostic Tests, Achievement Tests, Test Design*

**Introduction:** The initial step in constructing an assessment for learners involves identifying its primary purpose. Clarifying the aim of the test not only facilitates the selection of an appropriate test type but also ensures that the assessment remains aligned with clearly defined objectives. At this point, attention will be directed first toward two categories of tests that classroom teachers are less likely to design language aptitude tests and language proficiency tests and subsequently toward three types that educators are more commonly required to develop: placement tests, diagnostic tests, and achievement tests.

## Language aptitude tests

One type of test- though relatively uncommon, aim to predict an individual's potential success before actual exposure to a second language. Such tests are constructed to assess a learner's capacity or overall ability to acquire a foreign language, as well as the likelihood of achieving proficiency in that process.

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In principle, language aptitude tests are intended to be applicable to the classroom learning of any language.

In the United States, two standardized aptitude assessments have been widely employed: the Modern Language Aptitude Test (MLAT) developed by Carroll and Sapon (1958) and the Pimsleur Language Aptitude Battery (PLAB) introduced by Pimsleur (1966). Both instruments are administered in English and require test-takers to complete a series of language-related tasks. For instance, the MLAT is composed of five distinct task types designed to evaluate various aspects of language learning potential.

The Modern Language Aptitude Test (MLAT) incorporates five distinct tasks, each targeting a specific dimension of language learning potential. The first, *number learning*, requires test-takers to acquire a series of numbers presented aurally and subsequently identify various combinations of those numbers. The second, *phonetic script*, assesses the ability to establish associations between speech sounds and their corresponding phonetic symbols. The third component, *spelling clues*, presents words written in a quasi-phonetic form, and examinees must choose from a list the word whose meaning most closely corresponds to the disguised form. The fourth task, *words in sentences*, evaluates grammatical awareness by asking test-takers to match the function of a given key word in one sentence with a word serving the same function in another sentence. Finally, the *paired associates* task requires rapid learning of vocabulary items from a foreign language and the memorization of their English equivalents. (Brown, J. D. 2004).

Research indicates that both the MLAT and PLAB demonstrate notable correlations with students' eventual performance in formal language courses (Carroll, 1981). However, such correlations are largely contingent upon instructional contexts where success is defined through processes such as mimicry, memorization, and problem-solving. There is insufficient empirical evidence to confirm that these tasks serve as reliable predictors of communicative competence, particularly in the context of untutored language acquisition. Due to these limitations, standardized aptitude tests are now rarely employed. Contemporary approaches to assessing language aptitude tend instead to focus on providing learners with insights into their preferred learning styles, as well as their individual strengths and weaknesses, often accompanied by strategies to enhance the former and address the latter. In fact, any test purporting to predict success in second language acquisition is inherently problematic, since research increasingly suggests that with adequate self-awareness, strategic engagement, and appropriate strategy-based instruction, nearly all learners are capable of achieving success. Thus, categorizing learners in advance prior to any actual learning experience risks making unfounded assumptions about their potential for either success or failure.

### Proficiency Tests

When the objective of an assessment is to evaluate an individual's overall competence in a language, it is conventionally referred to as a *proficiency test*. Unlike assessments that target a particular course, curriculum, or single linguistic skill, proficiency tests aim to measure comprehensive language ability. Traditionally, such tests have relied on standardized multiple-choice items assessing grammar, vocabulary, reading comprehension, and listening comprehension. In some cases, writing samples are

included, and more recent formats also incorporate tasks involving oral production. Brown, J. D. (2004). Despite longstanding concerns regarding content validity, decades of construct validation research have significantly advanced the development of communicative proficiency assessments.

Proficiency tests are generally summative in nature and norm-referenced, producing a single composite score. This outcome is deemed adequate for their primary gate-keeping function—determining whether a candidate is permitted to advance to the next stage of an academic or professional pathway. Because results are norm-referenced, with equated scores and percentile rankings holding primary importance, such tests are not typically designed to deliver diagnostic feedback. A prominent example of a standardized proficiency test is the *Test of English as a Foreign Language* (TOEFL), developed by the Educational Testing Service. The TOEFL is widely used by over a thousand higher education institutions in the United States as an indicator of an applicant's readiness to engage in academic study within an English-speaking environment. The *Test of English as a Foreign Language* (TOEFL) is composed of several components, including listening comprehension, grammatical accuracy (structure), reading comprehension, and written expression. In addition, the computer-based version of the TOEFL, announced for implementation in 2005, introduced an oral production component. (Educational Testing Service. (n.d.).*TOEFL Test*.) With the exception of the writing section, the TOEFL—similar to many other large-scale proficiency assessments—can be scored by machine, thereby ensuring efficiency, rapid results, and cost-effectiveness, which reflects the principle of practicality. Current research is also exploring the potential of speech recognition technologies to determine whether oral production can be reliably evaluated through automated scoring.

A central challenge in proficiency testing lies in clearly defining the constructs that constitute language ability. Test tasks must represent authentic and contextually relevant samples of English language use. The process of designing such tasks and validating them through empirical research is both labor-intensive and financially demanding. Consequently, it is generally impractical for individual language teachers to attempt the creation of comprehensive proficiency assessments independently. A more feasible approach is to utilize one of the commercially developed and widely available proficiency tests.

### Placement Tests

In some cases, proficiency tests may also serve the function of placement tests, which are designed to assign learners to an appropriate level within a language curriculum. Placement tests generally include a representative sample of the materials taught across different courses in the program, so that students' performance indicates the level at which the instructional content will be sufficiently challenging without being either too simple or excessively difficult. An example is the *English as a Second Language Placement Test* (ESLPT) at San Francisco State University, which is structured in three sections. In the first section, students are required to read a short passage and produce a summary essay. The second section involves writing a composition in response to an assigned article. The final section consists of multiple-choice items, in which students read an essay and identify grammatical errors. The maximum duration of the test is three hours. (Fulcher, G.2010).

The rationale behind this tripartite design is primarily supported by content validation. Since most ESL courses at San Francisco State combine reading and writing skills with particular emphasis on writing the test's format mirrors these instructional objectives. The first section simultaneously assesses reading comprehension and writing ability through summary writing. The second section evaluates the ability to express and support opinions, a central requirement of academic writing courses. The third section focuses on error detection, which parallels the proofreading process and reflects an essential academic skill in drafting and revising written work.

Instructors and administrators within the ESL program at San Francisco State University generally view the ESLPT as a more authentic assessment tool compared to its earlier multiple-choice, discrete-point grammar and vocabulary version, largely due to its ability to discriminate effectively among students. Nonetheless, the test poses certain challenges in terms of practicality, as the first two sections require evaluation by human raters a process that is more costly and time-consuming than the automated scoring of multiple-choice responses in Part III. (Brown, J. D. (2004). Concerns regarding reliability also exist; however, these are addressed through careful training of all evaluators. Although the test sacrifices some degree of practicality and reliability, it compensates by providing rich diagnostic information. For example, error analysis from the multiple-choice section reveals students' grammatical and rhetorical weaknesses, while the essay tasks serve as a valuable preview of learners' writing abilities for their future instructors.

Placement tests, more broadly, exist in diverse formats. They may assess both comprehension and production, incorporate written or oral performance, and employ open-ended responses, restricted responses, selection tasks (such as multiple-choice), or gap-filling activities, depending on the specific goals and requirements of a given program. Some institutions opt for standardized proficiency tests as placement instruments due to their practicality namely, lower costs, faster scoring, and efficient reporting. Others prioritize the more detailed performance data yielded by open-ended written or oral production tasks. Ultimately, the central purpose of any placement test is to ensure accurate placement of learners within appropriate courses or levels. Additional advantages to consider include face validity, the provision of diagnostic insights, and the authenticity of the assessment tasks. (Fulcher, G. 2010).

During a recent one-month summer program in English conversation and writing at San Francisco State University, 30 students were required to be assigned to one of two course sections. The placement test employed for this purpose consisted of a five-minute oral interview and an essay-writing task, with the primary goal of dividing the students into two evenly balanced sections based on performance. While this objective could have been accomplished through a simple, grid-scored multiple-choice grammar and vocabulary test, the inclusion of the oral interview and writing component offered additional advantages. Specifically, these tasks enhanced the test's face validity, provided a more personalized approach suitable for a small program, and generated valuable diagnostic information about the students, most of whom were previously unknown to the instructors.

### Diagnostic Tests

A diagnostic test is designed to identify specific aspects of language proficiency that require attention. For instance, a pronunciation diagnostic may evaluate phonological features of English that learners

find particularly challenging, thereby informing curriculum development. Typically, such tests provide a checklist of features for the administrator often the instructor to systematically identify areas of difficulty. Similarly, a writing diagnostic collects student writing samples to help teachers pinpoint rhetorical and linguistic elements that warrant focused instruction. (Clifford Prator (1972).

As previously noted, diagnostic and placement tests can sometimes overlap. For example, the San Francisco State ESLPT serves both placement and diagnostic functions. Placement tests that deliver information beyond simple course-level assignment may concurrently fulfill diagnostic purposes. A distinction also exists between diagnostic tests and general achievement tests: achievement tests measure the extent to which students have mastered previously taught content, whereas diagnostic tests aim to reveal areas requiring future instruction. Consequently, diagnostic assessments typically provide more granular, subcategorized information about learners. In curricula with a form-focused component, for example, a diagnostic test may yield insights into a learner's mastery of verb tenses, modal auxiliaries, definite articles, relative clauses, and similar grammatical structures.

An illustrative example of a diagnostic test for oral production is Clifford Prator's (1972) assessment developed alongside an English pronunciation manual. Test-takers read a 150-word passage while being tape-recorded. The administrator then uses a detailed inventory of phonological items to analyze the learner's performance. After repeated listenings, the administrator completes a checklist of errors organized into five main categories, each comprising multiple subcategories.

The primary categories in Prator's (1972) diagnostic test include:

- (1) stress and rhythm,
- (2) intonation,
- (3) vowels,
- (4) consonants, and
- (5) other relevant phonological factors.

For instance, the *stress and rhythm* category is further divided into subcategories such as:

- (a) stress placed on an incorrect syllable in multi-syllabic words,
- (b) improper sentence stress,
- (c) inaccurate segmentation of sentences into thought groups, and
- (d) inadequate transitions between words or syllables.

This detailed information enables instructors to determine which aspects of English phonology require focused instruction. Additionally, it provides learners with valuable feedback, raising their awareness of specific errors and promoting the development of appropriate compensatory strategies.

## Achievement Tests

An achievement test is directly linked to the content of classroom lessons, units, or an entire curriculum. Such tests are designed to assess material that has been explicitly covered within a specified instructional timeframe and are typically administered after students have engaged with the relevant objectives. While achievement tests can provide diagnostic insights into areas requiring further study, their primary purpose is to determine whether students have met course objectives and acquired the targeted knowledge and skills by the end of the instructional period. Achievement tests are often summative, administered at the conclusion of a unit or term, but they can also serve an important formative function. A well-constructed achievement test can provide washback, offering feedback on learners' performance in specific subsets of the unit or course, thereby contributing to ongoing instructional improvement. The design of an achievement test should be guided by several factors: (Weir, C. J. (2005).

- (1) the objectives of the lesson, unit, or course being evaluated;
- (2) the relative importance or weighting of each objective;
- (3) the types of tasks employed during classroom instruction;
- (4) practical considerations such as testing duration and scoring turnaround; and
- (5) the extent to which the test format facilitates formative feedback and instructional washback.

Some practical steps to test design

What is the primary purpose of a test? While it is improbable that one would be tasked with designing a language aptitude or proficiency test, understanding their characteristics is essential for accurately interpreting their results. In contrast, teachers are likely to have numerous opportunities to develop placement, diagnostic, and particularly achievement tests. It is a common misconception that every test must be an exceptionally innovative instrument capable of earning acclaim from colleagues or admiration from students. In reality, designing novel assessment formats requires substantial effort and iterative refinement through trial and error. (Bachman, L. F., & Palmer, A. S. (1996). Moreover, traditional testing methods, when applied creatively, can effectively align with the principles of an interactive and communicative language curriculum. For novice teachers, the most practical approach is to adhere initially to established and widely accepted testing practices. With experience, educators can gradually experiment with more innovative assessment strategies. Within this context, it is valuable to consider practical steps for constructing effective classroom tests.

### Assessing Clear and Specific Objectives

In addition to understanding the overall purpose of a test, it is essential to identify precisely what is intended to be assessed. Frequently, teachers may administer tests arbitrarily perhaps because it is Friday of the third week of the course creating items hastily from a quick review of the material covered. Such an approach is pedagogically unsound. Instead, assessment should begin with a careful examination of all content and skills that students are expected to master, based on the unit objectives. (Hughes, A. (2003).

Curricula should define assessable objectives in terms of observable student performance. An objective that merely states “Students will learn tag questions” or simply labels a grammatical focus as “Tag questions” is insufficiently specific for testing purposes. Such statements fail to clarify whether students should comprehend these structures in spoken or written form, produce them orally or in writing, or use them in particular contexts such as conversation, essays, or academic lectures. Therefore, the first step in test design is to determine objectives that are appropriately specified and measurable. (Brown, J. D. 2004).

For example, consider a low-intermediate integrated-skills class emphasizing social conversation and incorporating some reading and writing activities. The objectives for this unit either already established or reformulated by the instructor should be articulated in terms of the performance expected from students and the targeted linguistic domains. Each objective should thus provide clear guidance regarding what students should be able to do and in which contexts, ensuring that the assessment accurately reflects the intended learning outcomes.

Form-focused objectives (listening and speaking)

Students are expected to:

1. Identify and accurately produce tag questions in simple social conversations, demonstrating correct grammatical structure and appropriate final intonation patterns.
2. Recognize and correctly formulate wh-information questions, applying the appropriate final intonation in spoken interactions.

Communication Skills (Speaking)

Students are expected to:

3. Describe completed actions and events accurately within social conversations.
4. Request confirmation or clarification appropriately during interactions.
5. Express opinions about events in social conversations with clarity.
6. Produce spoken language that demonstrates contextually appropriate intonation, stress, and rhythm.

Reading Skills (Simple Essay or Story)

Students are expected to:

7. Identify and correctly recognize irregular past tense forms of selected verbs within a story or short essay.

Writing Skills (Simple Essay or Story)

Students are expected to:

8. Compose a one-paragraph narrative describing a simple past event.

9. Appropriately employ the conjunctions so and because when expressing opinions in writing.

## Conclusion

Effective language assessment requires a clear understanding of the purpose, scope, and objectives of each test. While language aptitude and proficiency tests provide valuable insights into learners' potential and overall competence, their practical application in classroom settings is limited. Conversely, placement, diagnostic, and achievement tests are directly relevant to instructional contexts, offering critical information for student placement, identification of learning needs, and evaluation of curriculum effectiveness. The design of these assessments should be guided by clearly defined, performance-based objectives, ensuring alignment with targeted skills and linguistic domains. Additionally, a balanced approach that combines traditional testing methods with innovative, communicative tasks can enhance both the authenticity and instructional value of assessments. Ultimately, well-constructed language tests not only measure learner performance accurately but also support ongoing learning by providing diagnostic feedback, promoting learner awareness, and facilitating strategic instructional planning. Careful attention to test design, clarity of objectives, and alignment with curriculum goals is essential for fostering meaningful, reliable, and effective language assessment practices.

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# Cultural Crisis and Its Economic Dimensions

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**Abstract.** This paper investigates the intersection of culture and economics by analyzing how culturological crises—defined as disruptions in societal values, identity, and cultural cohesion—affect economic performance. Employing a multidisciplinary framework that integrates economic theory, cultural sociology, and political analysis, the study examines both historical and contemporary cases of cultural destabilization. The findings demonstrate that culturological crises undermine social trust, reduce productivity, and weaken institutional capacity, thereby producing significant economic instability.

By challenging traditional economic paradigms that marginalize culture as an external or intangible factor, this research argues for the integration of cultural variables into macroeconomic models and policymaking. Cultural cohesion and trust are shown to function as critical forms of infrastructure for economic resilience, shaping outcomes from investment flows to institutional credibility. Recognizing the economic dimensions of cultural crises provides not only a more holistic understanding of economic failure and recovery but also new pathways for designing policies that strengthen societal stability in an era of global interconnectedness and cultural fragmentation.

**Keywords;** *Culturological crisis; cultural cohesion; economic performance; social trust; institutional resilience; interdisciplinary economics; cultural sociology; globalization*

## 1. Introduction

Global interconnectivity in recent decades has intensified the interaction between cultural systems and economic structures. Traditional economic models have predominantly emphasized financial indicators, labor, and capital, while giving limited attention to culture as a potential economic driver—or destabilizer. Yet, a **culturological crisis**, defined as the disruption or transformation of a society's values, narratives, and identity, can erode social cohesion and trust—two pillars essential for economic stability.

The purpose of this study is to examine how culturological crises affect economic performance. We argue that cultural instability can generate inefficiencies, stall policy innovation, and weaken

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institutions. By integrating cultural theory into macroeconomic analysis, this research seeks to address a critical gap in economic literature.

In the 21st century, the interconnectedness of culture and economy has become increasingly evident, yet remains underexplored in mainstream economic discourse. Macroeconomic analyses typically prioritize quantifiable variables such as inflation, employment, and capital flows, while sidelining the intangible but profound impact of culture. However, culture underpins institutions, informs economic behavior, and fosters societal trust (Farzaliyeva & Abdullayev, 2025). When this foundation is destabilized—whether through rapid social change, ideological polarization, identity loss, or value fragmentation—a culturological crisis emerges, producing consequences that reverberate throughout the economic system.

A culturological crisis can be understood as a severe disturbance in a society's cultural coherence: its collective identity, shared values, historical continuity, and normative frameworks (Javid & Sadikhova, 2025). Such crises often arise during political transitions, technological disruptions, globalization, or extended periods of social conflict. While they may first manifest culturally or socially, their long-term repercussions are economic: trust deteriorates, productivity declines, institutions weaken, and inequality deepens (Abdullayev et al., 2024).

Historical and contemporary examples illustrate this dynamic. The collapse of the Soviet Union represented not only a political and economic rupture but also a cultural one, leaving populations disoriented in their sense of identity and values. Similarly, the Arab Spring, though initially triggered by economic grievances, evolved into a cultural upheaval that reshaped entire societies, often at significant economic cost. Even advanced economies such as the United States face challenges: rising cultural polarization—fueled by ideological extremism, disinformation, and media fragmentation—has diminished institutional trust and constrained effective economic governance.

Despite such evidence, economics as a discipline has struggled to incorporate culture into its analytical frameworks. Neoclassical theory tends to assume rational actors in culturally neutral contexts. Yet, in reality, economic choices are embedded in narratives, identities, and value systems that influence both individual behavior and institutional design (Sadikhova, 2022). Neglecting cultural variables risks overlooking underlying sources of instability and the conditions necessary for sustainable development.

Accordingly, this paper seeks to bridge disciplinary divides by exploring the impact of culturological crises on economic systems. It addresses three central research questions:

1. How do breakdowns in cultural cohesion affect economic performance?
2. What mechanisms link cultural disruption to measurable economic outcomes?
3. Can economies recover without addressing the cultural roots of crisis?

Through an interdisciplinary lens—drawing on economics, cultural sociology, political science, and historical analysis—we propose a holistic framework for understanding cultural instability and its economic consequences. Using comparative case studies, we demonstrate that culturological crises are

not peripheral, but central, to economic health, shaping everything from labor productivity and investment climates to institutional resilience.

By recognizing the economic dimensions of cultural crises, we aim to encourage integrative policy responses that go beyond financial indicators to strengthen societies' cultural resilience. In an era of accelerating globalization and digitally mediated identity formation, the risks of culturological instability—and its economic ramifications—are only likely to grow (Mammadova & Abdullayev, 2025).

## 2. Methods

This study adopts a qualitative comparative case study approach, enriched by descriptive statistical analysis and a thematic framework for interpreting cultural disruption. The complex and interdisciplinary nature of culturological crises required drawing on economic data, sociological insights, and cultural indicators. By combining qualitative depth with quantitative grounding, this mixed-methods design ensures both analytical rigor and contextual sensitivity.

### 2.1 Research Design

A comparative case study design was chosen to enable in-depth exploration of contexts where culturological crises have significantly influenced economic trajectories. The intention was not to produce sweeping generalizations, but rather to identify recurring mechanisms, structural patterns, and shared consequences across diverse cultural and geographical settings. By triangulating multiple sources of evidence, the research enhances both the validity (accuracy of interpretation) and credibility (trustworthiness of findings) of the analysis.

### 2.2 Case Selection Criteria

Cases were selected using **purposive sampling** to ensure relevance to the research questions. The following criteria guided selection:

- **Existence of a culturological crisis**, reflected in identity fragmentation, loss of cultural continuity, or ideological conflict (Sadikhova, 2024).
- **Demonstrable economic consequences**, such as contractions in GDP, capital flight, or institutional weakening.
- **Availability of reliable multi-dimensional data**, including both economic and sociocultural indicators.

Based on these criteria, three cases were selected:

1. **Post-Soviet Russia (1991–2000):** Following the collapse of the Soviet Union, Russia experienced an ideological vacuum, disintegration of collective identity, institutional fragility, and prolonged economic instability.

2. **United States (2016–2024):** A period marked by deepening cultural polarization, racial and ideological division, institutional distrust, and political deadlock—accompanied by economic volatility and governance challenges.
3. **Arab Spring States (2010–2015), with emphasis on Egypt and Syria:** Cultural revolutions driven by youth movements, identity struggles, and ideological contests led to political upheaval, severe economic contractions, capital flight, and in some cases, state collapse.

## 2.3 Data Sources

To capture both **economic** and **cultural dimensions**, the study relied on diverse secondary data sources:

### Economic Indicators

- GDP growth rates
- Inflation and unemployment rates
- Foreign Direct Investment (FDI) inflows/outflows
- Trade balances and currency stability
- *Sources:* World Bank, IMF, OECD, and national statistical agencies

### Cultural and Social Indicators

- Social trust indices (World Values Survey, Edelman Trust Barometer)
- Civic engagement metrics (Pew Research Center, Arab Barometer)
- Political polarization scores (Varieties of Democracy Project, Pew Political Typology)
- Ethnic, religious, and ideological fragmentation datasets

### Institutional Performance Metrics

- World Bank Governance Indicators (WGI): rule of law, regulatory quality, control of corruption
- Freedom House scores, democracy indices
- Transparency International's Corruption Perceptions Index

### Qualitative Sources

- Academic literature, historical and policy studies
- News archives, cultural artifacts, speeches, and national narratives during crises (Sadikhova & Babayev, 2025)
- Interviews, surveys, and public opinion polls (when available)

## 2.4 Analytical Framework

The study employed a **thematic-comparative analytical framework** consisting of four stages:

### 1. Thematic Coding of Cultural Disruption

- Identification of cultural fragmentation, ideological realignments, weakening of collective identity, and breakdown of cultural institutions (e.g., education, media, religion).

### 2. Economic Consequence Mapping

- Linking cultural variables to measurable economic outcomes.
- Differentiating between **short-term crisis effects** (e.g., capital flight, inflation) and **long-term structural effects** (e.g., institutional erosion, inequality).

### 3. Mechanism Tracing

- Establishing causal pathways connecting cultural breakdown to economic destabilization.
- Special attention to mediating variables: social trust, institutional legitimacy, and investor confidence.

### 4. Cross-case Comparative Matrix

- Organization of variables and outcomes into a matrix for cross-case comparison.
- Identification of **shared patterns** and **context-specific differences** across cases.

## 3. Results

The analysis of the selected case studies—Post-Soviet Russia (1991–2000), the United States during the period of heightened cultural polarization (2016–2024), and the Arab Spring countries (2010–2015)—reveals a consistent set of patterns. Across contexts, erosion of social trust, economic destabilization, and institutional breakdown emerged as recurring dynamics (Mammadova & Abdullayev, 2025). While each case reflects its own historical and cultural specificity, the findings demonstrate that culturological crises produce tangible and measurable consequences for economic systems.

### 3.1 Collapse of Social Trust and Civic Capital

One of the most pronounced effects across all cases was the **erosion of trust**—both horizontal trust (citizen-to-citizen) and vertical trust (citizen-to-institution).

#### Russia (1991–2000):

- The disintegration of the Soviet Union dismantled the ideological and cultural framework that had unified society. Citizens faced profound uncertainty about identity and values.

- By the late 1990s, **World Values Survey** data indicated institutional trust below 20%, with interpersonal trust ranking among the lowest worldwide.
- The rapid and opaque privatization of state assets, often without ethical or legal safeguards, further deepened public disillusionment with markets and institutions.

#### **United States (2016–2024):**

- Polarization over race, ideology, and identity eroded public faith in democracy, journalism, and even science.
- According to the **2021 Edelman Trust Barometer**, the U.S. experienced the steepest trust decline among 28 surveyed nations, particularly in government and media.
- Civic capital became increasingly partisan: civil society engagement and even voting behavior reflected cultural divides, rather than unifying democratic practices.

#### **Arab Spring (2010–2015):**

- Youth-led uprisings disrupted longstanding cultural narratives, exposing sharp religious, ethnic, and generational divisions.
- In Egypt and Syria, the collapse of authoritarian legitimacy left populations without stable cultural anchors, producing a vacuum of authority.
- Trust was not only lost in former regimes but also in emergent governing bodies, making recovery fragile and contested.

### **3.2 Economic Disruption and Decline**

In all cases, culturological crises coincided with **severe economic consequences**, including GDP contraction, productivity losses, investor flight, and prolonged developmental stagnation.

#### **Russia:**

- Between 1991 and 1998, GDP shrank by more than **40%**, while **hyperinflation surpassed 2,500% in 1992**, devastating personal savings.
- Investor confidence collapsed: FDI inflows stagnated amid fears of corruption, civil unrest, and legal unpredictability.

#### **United States:**

- While the U.S. did not enter a formal recession during this period, **economic inequality widened**, productivity growth slowed, and **policy paralysis** undermined resilience.
- Trade wars (2018–2022), often framed in nationalist and cultural terms, disrupted global supply chains, raising costs for consumers and businesses.

- Business confidence surveys increasingly flagged **political instability and institutional unpredictability** as risks to long-term planning.

### Arab Spring Countries:

- In Egypt, **tourism revenues dropped by over 50% (2010–2013)**, crippling a major sector of the economy.
- Syria experienced catastrophic losses: GDP fell by more than **60% between 2011 and 2015**, alongside mass displacement.
- Persistent high unemployment, particularly among youth, highlighted the disconnect between cultural upheaval and sustainable economic opportunity.

### 3.3 Institutional Breakdown and Policy Paralysis

Cultural instability undermined the **legitimacy, efficiency, and coherence of institutions**, compounding economic difficulties.

#### Russia:

- Weak legal institutions and entrenched corruption shaped the post-Soviet transition, fueling the rise of **oligarchic capitalism**.
- Efforts to build democratic institutions lacked cultural legitimacy and were often perceived as foreign impositions.

#### United States:

- Polarization translated into **repeated government shutdowns**, stalled budgets, and inconsistent economic policies.
- Public trust in the judiciary and electoral systems eroded, raising doubts about the long-term viability of democratic governance in supporting stable markets.

#### Arab Spring:

- Institutional collapse in states such as Syria and Libya produced zones of statelessness, where economic life became informal, criminalized, or externally controlled.
- Even in relatively stable Tunisia, **elite ideological fragmentation** hindered consistent policy-making, discouraging investment and delaying reforms.

### 3.4 Emerging Patterns Across Cases

From the comparative matrix of findings, several common patterns emerge:

Theme	Russia	USA	Arab Spring
Social Trust Decline	Severe	Moderate to severe	Severe
Institutional Effectiveness	Weak and corrupt	Polarized and gridlocked	Collapsing or fragile
Policy Responsiveness	Delayed and ineffective	Highly polarized	Fragmented and reactive
Cultural Cohesion	Lost post-ideology	Fragmented by identity	Torn by competing visions

These shared characteristics support the hypothesis that culturological crises significantly impair economic systems by weakening the social and institutional conditions necessary for growth, investment, and long-term planning.

## 4. Discussion

The findings from our comparative analysis provide strong evidence that culturological crises—defined as deep disruptions in a society’s collective values, narratives, and identity structures—are not merely sociopolitical phenomena, but are fundamentally economic events. Across all three case studies, periods of cultural instability were accompanied by marked economic deterioration. This section unpacks the mechanisms behind these correlations, reflects on the implications for economic theory and policymaking, and outlines avenues for future research.

### 4.1 Mechanisms Linking Culture and Economic Performance

Our analysis reveals several causal mechanisms through which culturological crises impact economic systems:

#### 1. Trust Erosion and Transaction Costs

A breakdown in social and institutional trust leads to higher transaction costs—as described in institutional economics. Without trust, economic agents are less willing to cooperate, enforce contracts, or invest in long-term ventures. In Russia, this dynamic was evident in the reluctance of both domestic and foreign investors to participate in post-Soviet markets. In the U.S., partisan divisions undermined consensus on infrastructure, taxation, and trade policy—leading to capital market uncertainty.

#### 2. Institutional Dysfunction and Policy Paralysis

Culture forms the informal foundation of formal institutions. When shared cultural norms erode, institutions lose legitimacy and become less effective. The Arab Spring demonstrated how quickly institutions can collapse when deprived of cultural authority. Even in democratic settings like the U.S.,

cultural fragmentation led to frequent political gridlock, harming economic planning and regulatory continuity.

### 3. Identity Disruption and Labor Market Instability

Cultural instability also affects the human capital base. Shifts in identity, values, and social roles can lead to labor unrest, decreased motivation, and misalignment between education and job markets. In Egypt, for example, the post-revolutionary period saw a "brain drain" of educated youth, while in Russia, ideological disorientation contributed to the rise of informal economies and decreased labor productivity.

### 4. Economic Behavior and Risk Perception

Culturological crises often reshape individual and group perceptions of economic risk. Economic decisions—whether to save, invest, migrate, or consume—are based not only on rational calculations but also on cultural narratives and expectations. During periods of cultural flux, risk aversion typically increases, leading to capital flight, hoarding behavior, and market volatility.

#### 4.2 Implications for Economic Theory

These findings challenge the traditional neoclassical economic paradigm, which tends to treat culture as exogenous or irrelevant to market behavior. In contrast, our study supports the growing literature in new institutional economics and economic sociology that emphasizes the embeddedness of economic activity in cultural and social structures (Babayev, 2023).

Importantly, we argue that culture should not be viewed as a "soft" or secondary variable, but as a primary infrastructure of economic life. Without shared narratives, social trust, and value systems, economic institutions cannot function effectively—even if the formal legal and financial frameworks are intact.

This invites a broader rethinking of macroeconomic models, particularly in development economics and political economy, where cultural resilience must be incorporated as a variable of analysis.

#### 4.3 Policy Implications

For governments and international institutions, the study suggests several critical lessons:

##### 1. Cultural Stability as an Economic Priority

Economic policymakers must understand that cultural fragmentation is an economic risk factor. Indicators of social trust, civic engagement, and identity cohesion should be integrated into economic forecasting models alongside GDP and inflation metrics.

##### 2. Invest in Civic and Cultural Infrastructure

Much like physical infrastructure, cultural infrastructure, education systems, national narratives, public broadcasting, community networks—requires ongoing investment. Policymakers should support programs that foster social cohesion, intercultural dialogue, and shared civic identity (Putnam, 2000).

### 3. Promote Inclusive Narratives

One of the central drivers of culturological crises is exclusionary or polarizing narratives. Political leaders, educators, and media institutions must actively cultivate inclusive narratives that bridge divides rather than deepen them. This is particularly urgent in pluralistic societies where economic cooperation depends on multicultural solidarity.

### 4. Preemptive Crisis Management

Just as financial regulators monitor markets for signs of systemic risk, governments should monitor cultural indicators (e.g., polarization indices, social media sentiment analysis, public trust metrics) for early warning signs of a culturological crisis that could derail economic stability.

## 4.4 Limitations

Despite its insights, this study has several limitations:

- Subjectivity in Cultural Analysis: Cultural data is inherently interpretive. While we attempted to triangulate findings across quantitative and qualitative sources, some conclusions depend on subjective judgments.
- Case-Specific Dynamics: While we identified cross-case patterns, the generalizability of our findings is limited. Each crisis was shaped by unique historical, geopolitical, and economic contexts.
- Causality vs. Correlation: While we found strong correlations, it remains difficult to establish direct causal links between culturological breakdown and specific economic outcomes, given the complexity of intervening variables.

Future research would benefit from more longitudinal data and quantitative modeling to test the strength and direction of these relationships.

## 4.5 Directions for Future Research

This study opens several promising avenues for future investigation:

1. Quantitative Indices of Culturological Health: Developing composite indices that measure cultural resilience and fragmentation could help operationalize the cultural variables identified here.

2. Agent-Based Modeling of Cultural-Economic Dynamics: Simulations that account for cultural behavior at the individual and institutional level could provide new insights into feedback loops between culture and economy.
3. Digital Culture and Economic Behavior: Future studies should explore how digital media ecosystems—which often amplify polarization and identity fragmentation—interact with economic decision-making and policy environments.
4. Post-Crisis Cultural Recovery: Research should examine how societies rebuild cultural cohesion after a crisis, and whether successful cultural reconciliation correlates with improved economic performance (North, 1990).

## 5. Conclusion

This study set out to examine the economic consequences of culturological crises—periods of deep cultural disintegration marked by identity loss, value fragmentation, and ideological conflict. By comparing three distinct geopolitical and historical contexts—Post-Soviet Russia, the United States during its recent period of cultural polarization, and countries affected by the Arab Spring—we demonstrated that cultural instability is not merely a sociological or political problem, but a critical economic risk factor.

Our findings clearly show that culturological crises exert profound pressure on economic systems through multiple interconnected channels: the erosion of trust, the breakdown of institutional legitimacy, the destabilization of labor markets, and the amplification of risk perceptions among individuals and investors. These crises often manifest in dramatic economic downturns, policy paralysis, and long-term developmental stagnation—effects that are often underestimated or misattributed in traditional economic analyses.

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# The Methodology of Teaching Verb Conjugation in Non-Russian-Speaking Classrooms: Challenges and Effective Strategies

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**Abstract.** This article is devoted to the current challenges of teaching the system of verb conjugation in non-Russian-speaking classrooms, particularly in multinational schools where Russian is studied as a second language. The focus is on the difficulties learners face when mastering the tense-aspect forms of Russian verbs, as well as the underlying causes of these difficulties. Among the most common issues are cross-linguistic interference, insufficient understanding of aspectual distinctions, incorrect use of verb tenses, and an underdeveloped grammatical intuition.

The author analyzes how representatives of different linguistic and cultural backgrounds perceive the Russian verb system, emphasizing the importance of taking students' native languages into account in the learning process. The article highlights effective methodological strategies aimed at developing strong grammatical skills. These include visualization techniques, reliance on grammatical models, game-based learning, and communicative exercises that help learners not only understand theoretical aspects but also apply them practically in speech.

The communicative orientation of teaching is presented as a key element in the successful acquisition of Russian verb conjugation. The article also underscores the importance of a systematic and step-by-step approach, in which students move from understanding the structure of verb forms to actively using them in various communicative situations. Finally, practical recommendations are provided for teachers of Russian as a foreign language to help overcome common mistakes and enhance the effectiveness of the educational process.

**Keywords:** *Russian as a foreign language, verb conjugation, teaching methodology, grammar, non-Russian-speaking students, language interference, error correction*

## 1. Introduction

In today's rapidly globalizing educational landscape, the **Russian language** continues to hold a prominent role as both a medium of intercultural communication and a subject of academic inquiry. Across the post-Soviet region and in many other parts of the world, Russian is studied as a second or foreign language, remaining an important bridge for cultural exchange, professional mobility, and scholarly engagement.

Among the many challenges faced by learners of Russian, **verb conjugation** stands out as one of the most complex and cognitively demanding aspects of grammar. Conjugation in Russian is closely linked with multiple

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grammatical categories, including **tense, person, number, and aspect**. These categories are morphologically encoded and frequently expressed through irregular or opaque patterns. As a result, learners—especially those whose native languages lack comparable systems or who have limited prior grammatical training—often encounter difficulties that manifest as persistent errors, slowed progress, and increased cognitive load.

Importantly, acquiring mastery of Russian verb conjugation cannot be reduced to rote memorization. Effective learning requires **dynamic, contextualized, and meaningful practice** that allows learners to internalize patterns, apply them communicatively, and adapt them across diverse linguistic contexts.

This article examines **modern methodological approaches** to teaching Russian verb conjugation in classrooms of non-native speakers. It focuses on common learner difficulties and presents strategies for addressing them, with particular attention to:

- **Contrastive analysis** for highlighting cross-linguistic similarities and differences;
- **Visual modeling** to support cognitive clarity;
- **Gamification** as a tool for motivation and engagement;
- **Communicative orientation** to ensure grammatical competence is linked with real language use;
- **Psycholinguistic considerations**, including memory, perception, and cognitive load.

Additionally, the article explores the specific challenge of **mixed-level groups**, proposing differentiated instruction as an effective pathway to inclusivity and learner success.

The ultimate goal is to provide a **comprehensive, research-informed, and practice-oriented framework** for teaching Russian verb conjugation. By integrating cognitive, communicative, and cultural dimensions of language learning, the proposed methodology seeks to help instructors create classrooms that are effective, inclusive, and motivating—aligned with the diverse needs of contemporary students.

### 1.1. Difficulties in Mastering Verb Conjugation

For learners whose native languages are **analytical** (such as English, Chinese, or Turkish), mastering Russian verb conjugation presents a serious and persistent challenge. Unlike Russian, which is characterized by **rich inflectional morphology**, analytical languages rely heavily on word order, auxiliary verbs, or separate particles to express grammatical meaning. This structural divergence creates difficulties that go far beyond vocabulary acquisition, often resulting in error-prone performance and learner frustration.

**Major difficulties include:**

- **The complex conjugation paradigm.** Russian verbs change according to **person, number, tense, and aspect**, requiring learners to memorize and actively apply a large number of forms. For beginners, this abundance of paradigms can feel overwhelming.
- **Orthographic and phonological challenges.** Verb roots may change depending on person or number, as in *нечту* → *нечу*, *нечёшь*, *нечум*. Such alternations are often unpredictable for learners and add an additional cognitive burden to memorization.

- **Interference from native language structures.** Students frequently apply the grammatical habits of their first language. For example, the English “I go” is mechanically translated as *Я иду* or *Я хожу* without attention to Russian aspectual distinctions.
- **Incorrect use of tense and aspect.** A common error is *Я вчера читал книгу* instead of *Я вчера читал книгу*. This demonstrates not only misunderstanding of past tense marking, but also the failure to grasp the functional load of aspect.

As E.V. Radionova observes, “*The difficulty in mastering the Russian verb system lies not only in the number of forms, but also in their functional load. Each form in Russian carries significant information about the type and completeness of the action*” (Radionova, 2015, p. 89).

Thus, teaching verb conjugation requires more than grammatical explanation; it must address **psycholinguistic processing, cross-linguistic interference, and the need for meaningful contextualization**.

## 2. Methodological Approaches

### 2.1. Communicative Approach

At the core of modern foreign language instruction lies the **communicative approach**, which emphasizes the functional use of language in real-life contexts. Rather than drilling verb paradigms in isolation, learners are encouraged to practice conjugated forms in **dialogues, narratives, role-plays, and authentic interactions**.

For instance:

- *Что ты сейчас делаешь? — Я читаю статью.*
- *Куда ты идёшь? — Я иду в университет.*

By embedding verb forms in situational exchanges, students grasp not only grammatical accuracy but also the **intentional and pragmatic dimensions** of communication. Communicative tasks—such as planning a weekend, narrating a past event, or discussing personal routines—foster natural repetition and functional mastery of conjugation.

Peer interaction plays a central role. **Mini-dialogues, group storytelling, and interviews** place verbs at the center of expression, transforming grammar from abstract rules into tools for meaning-making. Importantly, the communicative approach also promotes **implicit grammar acquisition**, as repeated contextual exposure enables learners to internalize patterns without conscious rule memorization. Over time, this yields a **more fluent, confident, and accurate command of Russian verbs**.

### 2.2. Contrastive Method

The **contrastive method** relies on systematic comparison of Russian grammar with learners’ native languages. It is particularly effective in **multilingual classrooms**, where linguistic backgrounds strongly shape learning strategies. By explicitly mapping similarities and differences, teachers can anticipate difficulties and design targeted interventions.

For example:

- English lacks a grammaticalized aspect system but distinguishes between *I wrote* and *I was writing*. These can be used to introduce Russian perfective (*написал*) versus imperfective (*написал*) verbs.

- The English continuous tense offers an accessible analogy for the Russian imperfective, though teachers must stress that Russian aspect conveys additional nuances, such as **completeness, repetition, or duration**.

Contrastive teaching helps preempt predictable errors. English-speaking learners often overuse the perfective aspect due to native intuitions, producing sentences such as *Я написал книгу* where *Я писал книгу* would be more natural. Through **contrastive exercises**—for example, parallel sentences showing aspectual differences—students develop **metalinguistic awareness** that deepens comprehension and prevents fossilization of errors.

Ultimately, this method fosters **reflective thinking** and **critical comparison**, empowering learners to see grammatical structures as interconnected systems rather than isolated rules.

### 2.3. Visualization and Modeling

Russian verb conjugation and aspect are abstract concepts, and learners benefit from **visual scaffolding** to clarify complex paradigms.

- **Color-coded charts** can distinguish first and second conjugation verbs or contrast perfective and imperfective forms, enhancing memorization through visual association. For example, first-conjugation verbs may be marked in blue, second-conjugation verbs in green.
- **Schematic diagrams and timelines** illustrate temporal dynamics, such as initiation, continuation, repetition, and completion. These are especially valuable for teaching aspect, allowing students to conceptualize actions as **processes unfolding in time**.
- **Digital animations and interactive presentations** in blended classrooms can further increase engagement. Moving timelines, clickable verb forms, and animated characters performing actions allow learners to “see” grammar in action. Such tools reduce abstraction, reinforce memory, and stimulate motivation.

By transforming invisible grammar into visible models, visualization fosters **cognitive clarity and deeper retention**.

### 2.4. Gamification and Interactivity

**Gamification** integrates elements of play into grammar learning, reducing anxiety and increasing motivation. Grammar becomes less intimidating when reframed as a challenge or competition.

Examples include:

- **“Catch the Form!”** – Students receive a prompt and must quickly identify the correct verb form from a set of options.
- **“Conjugate the Verb”** – A timed competition where students conjugate verbs under pressure, reinforcing accuracy and automaticity.
- **“Fix the Error”** – Learners analyze sentences with deliberate mistakes, encouraging critical thinking and metalinguistic reflection.

Such activities cultivate not only accuracy but also **speed, flexibility, and confidence**. They create a classroom climate where making mistakes is part of the learning game, thereby encouraging risk-taking and resilience.

Gamification also nurtures **positive emotions**, which are crucial for long-term retention and successful second language acquisition.

### Conclusion: Practical Recommendations

The effective teaching of Russian verb conjugation requires a methodology that is **comprehensive, adaptive, and communicative**. Rule memorization alone is insufficient; learners must experience verbs as living components of speech.

Practical recommendations include:

- **Integrating grammar into communicative tasks**, not teaching it in isolation.
- **Providing meaningful repetition** across all four skills—reading, writing, listening, speaking.
- **Offering differentiated support** for mixed-level groups to ensure equitable progress.
- **Employing modeling, gestures, and visual aids** to reinforce comprehension and memory.
- **Creating opportunities for authentic language use**, where students can take risks, make errors, and learn from them in supportive settings.

Teachers should also consider the **emotional dimension of learning**: reducing anxiety, celebrating small achievements, and fostering learners' sense of agency.

Ultimately, verb conjugation is more than a technical grammar exercise. It is about giving learners the **linguistic tools to express actions, thoughts, and identities** in Russian. A flexible, student-centered, and culturally sensitive pedagogy can transform one of the most challenging areas of Russian grammar into a space of **deep linguistic development and personal growth**.

## 3. Typical Errors and Correction Strategies

The effective teaching of Russian verb conjugation requires not only the clear presentation of forms and rules, but also the **anticipation, diagnosis, and systematic correction** of errors that learners are likely to make. These mistakes typically arise from two major sources:

1. **Interference from the learners' native language**, particularly in the case of analytical languages where verbal morphology is limited or absent.
2. **Cognitive overload**, as students attempt to process the complexity of Russian verb systems while simultaneously engaging in communication.

Recognizing recurring patterns of error allows instructors to adopt **proactive and targeted correction strategies** that both address the immediate mistake and build long-term grammatical competence.

### 3.1. Mixing Aspects and Tenses

Perhaps the most frequent and persistent error among learners of Russian is the **confusion between perfective and imperfective aspects**. For example:

 *Я писала письмо и отправляла его.*  
("I was writing the letter and was sending it.")

✓ Я написала письмо и отправила его.  
("I wrote the letter and sent it.")

Such mistakes typically stem from the fact that many native languages (e.g., English, Chinese, Turkish) lack a **formalized aspectual system**. Where aspect does exist, it often functions according to different principles, making direct transfer ineffective.

### Correction Strategy: Action Modeling & Contextual Questioning

Teachers can scaffold learning by linking grammatical aspect to **real-world actions and their outcomes**, guiding learners through a sequence of questions that clarify meaning:

- *Что ты делала? → Писала.*
- *Ты закончила писать? → Да.*
- *Значит: написала.*

This guided questioning reinforces the **semantic core** of aspect (process vs. completion) and helps learners anchor grammatical distinctions in familiar contexts. Role-plays and situational tasks (e.g., telling a story about yesterday, describing a completed project vs. an ongoing one) further deepen aspectual awareness.

### 3.2. Errors in Verb Endings

Another widespread error concerns the **misuse of verb endings**, for instance:

✗ *Он говориши* instead of ✓ *Он говорит.*

These mistakes reveal incomplete **automatization of morphological patterns**. Learners may know the correct paradigm but fail to apply it consistently in real-time communication, particularly under time pressure.

### Correction Strategy: Repetition in Meaningful Contexts

- **Oral and written drills** designed around high-frequency verbs strengthen automatic recall.
- **Pair work and dialogue rotation activities** ensure multiple repetitions in varying communicative contexts.
- **Model dialogues** (e.g., “Кто говорит по телефону? — Он говорит по телефону.”) provide a scaffold for self-correction.
- **Peer feedback** encourages collaborative monitoring, reinforcing awareness of correct endings.

Through consistent, contextualized repetition, learners gradually achieve **form internalization**, moving from conscious effort to automatic fluency.

### 3.3. Syntactic Violations

Errors in verb usage often extend beyond morphology into **syntax**, disrupting the grammatical structure of the sentence. A typical example is:

✗ *Я есть хоу* (a calque from native languages that rely on different word order).

- ✓ Я хочу есть.
- ✓ Он любит читать.
- ✓ Ты умеешь писать?

Such errors illustrate how **native syntactic patterns** interfere with Russian sentence construction, producing structures that are grammatically impossible in Russian but logical from the learner's perspective.

### Correction Strategy: Patterned Sentences & Mental Templates

- Teachers should introduce **stable syntactic frames** containing high-frequency verbs, which learners can memorize and reproduce with substitutions.
- Frequent repetition of correct structures (*Я хочу + инфинитив; Он любит + инфинитив*) builds **mental templates** that replace erroneous calques.
- Incorporating these templates into communicative activities—such as surveys, interviews, or mini-dialogues—ensures that learners practice syntax as part of **natural speech flow**, not as isolated rules.

Over time, these patterned sentences establish **automatic syntactic accuracy**, reducing the intrusion of native language structures.

Together, these targeted correction strategies demonstrate that error correction in Russian verb conjugation must go beyond simply “pointing out mistakes.” Instead, it should:

- Diagnose the **source of the error** (aspectual confusion, morphological inconsistency, syntactic transfer).
- Provide **scaffolded corrective feedback** that is both immediate and meaningful.
- Reinforce correct forms through **contextualized, repeated, and communicative practice**.

This integrated approach transforms errors from obstacles into **learning opportunities**, supporting both accuracy and fluency.

## 4. Psycholinguistic Aspects of Learning Verb Conjugation

From a psycholinguistic perspective, the acquisition of Russian verb conjugation involves the activation and integration of multiple cognitive processes, including **perception, working memory, categorization, and linguistic production**. The morphological richness and irregularity of Russian verbs often result in cognitive overload for learners, especially in the early stages of acquisition.

The presence of numerous inflected forms, irregular patterns, and aspectual distinctions challenges learners' ability to categorize and retain information. For example, encountering sets like:

*nucать → пишу, пишешь, пишут*

*написать* → *напишу, напишешь, напишут*  
 can cause confusion due to phonetic shifts and unpredictable changes in the root or ending. Verbs

like *идти* → *иду*, *идешь*, *идут* deviate from regular paradigms and demand **rote memorization and high-frequency exposure**.

To mitigate these challenges and enhance cognitive processing, instructors are encouraged to use the following strategies:

**Chunking:** Teach commonly used phrases as ready-made units (*я читал книгу, он говорил по-русски*) to reduce the cognitive load and foster fluency.

**Verbal automation:** Incorporate regular speaking drills that prioritize speed and rhythm, helping learners move from conscious recall to automatic production.

**Mnemonic devices:** Use rhythmic patterns and rhymes to reinforce conjugation endings (e.g., *ю — ёю — ём — ём — ём — ём*), which help learners internalize forms in a memorable and structured way.

By understanding and addressing the psychological mechanisms underlying language acquisition, teachers can design more effective instructional approaches that align with the learner's cognitive abilities and needs.

In multilingual and mixed-level classrooms, one of the greatest challenges for instructors is addressing the diverse linguistic backgrounds, learning speeds, and cognitive abilities of students. A one-size-fits-all approach is rarely effective. Therefore, the methodology must be **tiered, flexible, and learner-centered**, offering differentiated instruction tailored to the individual needs and proficiency levels of each student.

For **beginners**, instruction should focus on building confidence and familiarity with high-frequency verbs in the **first person singular**, embedded in simple, communicative phrases:

*Я работаю, Я учусь, Я живу в Баку, Я люблю русский язык.*

These forms are personally relevant and easily memorized, helping students begin to internalize conjugation patterns through repetition and everyday usage.

For **intermediate learners**, the focus can shift to the **systematization of conjugation groups**, recognition of patterns, and the introduction of **aspectual pairs**. Visual aids such as color-coded tables, verb maps, and **mini-stories** are especially helpful at this stage:

- *Он рассказывает* → *Он рассказал*
- *Они читают книгу* → *Они прочитали книгу*

Through storytelling, students can observe verb forms in meaningful contexts, aiding both comprehension and retention.

For **advanced students**, the emphasis should be placed on **nuanced aspectual usage**, especially in complex syntactic constructions involving conditional, subjunctive, or narrative discourse:

- *Если бы я знал, я бы написал письмо.*
- *Когда он пришёл, я уже читал статью.*

Differentiated tasks can be implemented within the same lesson to ensure that all learners are appropriately challenged:

- One group might **complete conjugation charts**,
- Another **compose dialogues** using specified verbs,
- A third might **edit short texts**, identifying and correcting aspectual or agreement errors.

This approach not only maintains engagement for all levels, but also encourages peer learning and collaboration within a supportive environment.

## Conclusion

Teaching verb conjugation in Russian as a foreign language is a complex, multidimensional process that goes far beyond the memorization of endings or paradigms. To foster both accuracy and fluency, instruction must be integrated, context-rich, and interaction-oriented, ensuring that grammar is taught not as an abstract system, but as a tool for communication.

Several guiding principles are essential for effective instruction. First, verb conjugation is not an isolated skill. It must be developed holistically through listening, speaking, reading, and writing, with grammar always serving communication rather than overshadowing it.

Second, contextual repetition is indispensable. Learners should encounter the same verbs in multiple persons, aspects, and tenses to reinforce both meaning and form. For instance, the verb *читать* can appear in varied contexts: *Я читаю, Она читала, Мы прочитаем, Ты читал когда-нибудь эту книгу?*

Third, feedback must be immediate, specific, and supportive. Correction should be embedded naturally within communication, with teachers modeling correct usage and

encouraging self-correction. In this way, errors become opportunities for growth rather than sources of anxiety.

Fourth, authenticity is crucial. Learners must practice verb forms in realistic communicative tasks—interviews, role-plays, storytelling, or reflective writing—which bridge the gap between grammatical knowledge and active performance.

Ultimately, teaching Russian verb conjugation is not merely a matter of grammatical precision. It is about equipping students with the linguistic tools to express motion, time, intention, perspective, and lived experience in Russian. A flexible, learner-centered, and communicative methodology enables students to move beyond mechanical memorization toward meaningful, confident, and creative use of the language.

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# Code-Switching as a Marker of Hybrid Identity and Communicative Strategy in Multicultural Europe

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**Abstract.** This article examines the role of code-switching in constructing and negotiating identity within multicultural European contexts. Drawing on sociolinguistic theories and empirical studies, it argues that code-switching serves a dual function: as a marker of hybrid identity and as a strategic communicative resource. In its identity-marking role, code-switching enables bilinguals to express dual cultural affiliations, assert heritage, and perform hybrid selfhood in diverse settings. As a communicative strategy, it facilitates clarity, manages interpersonal relations, and conveys emotional or rhetorical nuance. Using examples from bilingual communities across Europe—such as Turkish-German youth, British Caribbean speakers, and regional bilinguals—the article demonstrates how code-switching intertwines linguistic, cultural, and social dimensions of identity. The discussion highlights implications for language policy, pedagogy, and social cohesion in multilingual societies, calling for a reframing of code-switching as a positive resource rather than a deficit.

**Keywords:** *code-switching; language and identity; multilingualism; Europe; hybrid identity; sociolinguistics; communication strategy*

## Introduction

Multilingualism is a defining feature of contemporary Europe, where daily communication often involves code-switching – the practice of alternating between two or more languages within a conversation. Far from a random or deficient habit, code-switching is now understood as a meaningful sociolinguistic phenomenon, deeply tied to identity and context. In multicultural European societies, individuals frequently switch codes to navigate complex social landscapes: a *Polish-English* bilingual in London might greet coworkers in English but share a joke in Polish with a compatriot, signaling dual belonging. Such language choices are not merely utilitarian, but carry symbolic weight in expressing “who we are, where we come from, and where we belong”.

This article argues that code-switching serves a dual role in Europe’s multicultural contexts: it is *both* a marker of hybrid identity and a deliberate communicative strategy. On one hand, switching languages can signal ethnic, cultural, or community identity—allowing speakers to claim heritage or solidarity and negotiate their “hybrid” self in a diverse environment. On the other hand, code-switching functions as a pragmatic strategy to achieve communicative goals: to clarify meaning, quote others, shift formality, include or exclude listeners, or inject emotional nuance into conversation. By drawing

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on sociolinguistic theories and empirical studies across Europe, we will demonstrate how these dual functions intertwine. We also address the linguistic, cultural, and social dimensions of identity construction through code-switching, illustrating that language alternation is a key tool for identity performance in everyday life.

In what follows, we adopt an IMRaD structure. The Introduction has outlined the scope and significance of examining code-switching in European multilingual contexts. The Methods section explains our literature-based approach to analyzing code-switching practices and identity. In the Results, we present evidence from peer-reviewed studies and sociolinguistic frameworks, highlighting how European bilinguals use code-switching to mark hybrid identities and to manage conversations. Finally, the Discussion interprets these findings, addressing linguistic, cultural, and social dimensions and drawing implications for language policy, education, and social cohesion in multilingual Europe.

## Methods

This study employs a *qualitative literature review* methodology to investigate code-switching as related to language and identity in Europe. We systematically reviewed **peer-reviewed journal articles, books, and empirical studies** in sociolinguistics that focus on code-switching among European bilingual and immigrant communities. Key theoretical frameworks were consulted, including the ethnography of communication (e.g. Gumperz's classic code-switching models), communication accommodation theory, and post-2000 perspectives on linguistic hybridity. By examining both seminal works and recent research (up to 2025), we gathered data on how code-switching operates as an identity marker and communicative tool.

Our sources encompass **diverse European contexts**. We included studies of traditional bilingual communities (such as Catalan–Spanish and Alsatian–French settings), as well as multilingual urban diasporas (e.g. Turkish-German youth in Germany, Afro-Caribbean communities in the UK, and North African-French speakers in France). The review also covered pan-European analyses and theoretical reviews of code-switching and identity. We prioritized research that explicitly addresses identity construction, cultural affiliation, or social function of code-switching, ensuring relevance to the theme of **hybrid identity in multicultural societies**.

No new fieldwork was conducted; instead, our “*desk research*” approach relied on existing data and analyses. We synthesized findings on the sociocultural and pragmatic functions of code-switching from these sources. Analytical categories were developed to separate evidence of identity-marking uses of code-switching from evidence of strategic communicative uses, though we recognize these often overlap in practice. Throughout, **real examples** from European multilingual interactions (drawn from the literature) are used to illustrate key points, and all claims are substantiated with citations to scholarly sources.

## Results

### Code-Switching as a Marker of Hybrid Identity

Across Europe, studies confirm that bilingual speakers use code-switching to express and construct complex identities. Language choices serve as powerful identity markers, allowing individuals to signal belonging to a group, assert a hybrid cultural identity, or distance themselves from certain backgrounds. Far from being a static attribute, identity is *actively negotiated* in interaction, and switching languages is one way speakers perform this negotiation.

One classic finding is that bilinguals often associate each language with particular social domains or relationships, a phenomenon Gumperz (1982) described as “we-code” vs. “they-code.” Typically, the minority or heritage language serves as the *we-code* – the language of intimacy, family, and in-group solidarity – whereas the majority or official language functions as a *they-code* for more formal, public, or out-group contexts. For example, in a Norwegian town studied by Blom and Gumperz, locals alternated between the regional dialect and standard Norwegian depending on context, thereby indexing local identity in some moments and a more national or formal identity in others. This selective alternation illustrates how code-switching reflects *dual affiliations*: speakers align with a local community through one code and with the wider society through another.

Contemporary research further shows that code-switching is a hallmark of hybrid or bicultural identities. Many Europeans of immigrant heritage fluidly mix languages to embody their blended cultural background. A study of second-generation British Caribbean youth found they seamlessly shift between Jamaican Creole and British English to manifest both a “global” Black Caribbean identity and a “local” British identity. Using Creole phrases connects them to a transnational Afro-Caribbean community and youth culture, while using the local English dialect affirms their belonging in their city (London, Birmingham, etc.). The two codes, used in tandem, enable the speakers to be authentically both Caribbean and British. Similarly, Turkish-German bilinguals in Germany have developed mixed codes that incorporate elements of Turkish and German into single utterances. This “hybrid code-switch” is interpreted as evidence of an identity shift: from an originally Turkish-dominant identity to a new German-inclusive bicultural identity. Scanlon’s research on Turkish-German youth noted that many hybrid utterances simultaneously draw on Turkish and German social contexts, reflecting the speakers’ dual sense of self in the Turkish diaspora and German society. In short, code-switching provides a linguistic mirror of hybridity, allowing individuals to project complex identities that are not confined to one culture or language.

Code-switching can also mark ethnic group boundaries within multicultural settings. Speakers may *switch to a heritage language* as a way of signaling ethnic solidarity when fellow in-group members are present. For instance, in a French city, North African-origin friends might slip into Arabic or Berber during conversation, affirming a shared background that outsiders do not share. This acts as an in-group marker, subtly proclaiming “we are of the same community.” Conversely, choosing *not* to code-switch – i.e. sticking to the dominant language – in mixed company can signal a desire to be seen as part of the broader national group rather than emphasizing ethnic distinctiveness. Individuals adeptly manage these choices. One may avoid using their minority language at a formal workplace (to project a neutral, “integrated” identity), but readily revert to it at home or among close friends to reconnect with their roots. These patterns underline how code selection becomes a form of *identity positioning*: a

conscious or subconscious way of aligning with (or distancing from) a particular cultural identity in the moment.

Moreover, research indicates that even subtle code-switching, like inserting single words or phrases from one language into another, carries identity meanings. A single colloquial expression from Polish dropped into an otherwise English sentence by a Polish Briton may signal *cultural pride or nostalgia*, instantly invoking the speaker's Polish identity. Such symbolic switches are especially common in youth slang, where multilingual European youths pepper dominant-language speech with heritage-language catchphrases, music lyrics, or exclamations. These linguistic choices become badges of ethnic pride or "street" identity in multiethnic peer groups. Even speakers who are not fully fluent in their heritage language (e.g. European-born children of immigrants) use fragments of it to assert pride in their ancestry – a creative form of identity expression noted by sociolinguists. In sum, code-switching in Europe's multicultural contexts is deeply entwined with identity construction. It enables expressions of ethnic heritage, the forging of hybrid identities, and the dynamic marking of group belonging in diverse social settings.

### **Code-Switching as a Communicative Strategy**

In addition to its identity functions, code-switching serves a range of pragmatic and communicative purposes in multilingual discourse. European bilinguals often switch languages strategically to achieve particular conversational goals or to convey nuances that would be difficult to express in a single language. In other words, code-switching is a *versatile linguistic strategy* that accommodates different communicative needs.

One common strategic use of code-switching is to facilitate understanding and emphasize meaning. Speakers may switch to whichever language best conveys a concept or sentiment. For example, a Spanish-German bilingual in Spain might use a German technical term when discussing engineering, then switch back to Spanish to explain everyday concepts – choosing the code that is more precise or natural for each topic. As the Wikipedia entry on code-switching notes, people often change languages when a specific term or idea "better conveys relevant concepts" in that language. This reflects the speaker's pragmatic judgment about clarity. Likewise, teachers in multilingual European classrooms sometimes switch to students' home language to clarify difficult concepts or ensure comprehension, even if the official medium is a national language. Such *instructional code-switching* can bridge gaps in understanding and reinforce learning by translating or rephrasing content in a more familiar code.

Code-switching is also employed to manage interpersonal dynamics. According to Communication Accommodation Theory, bilingual speakers may converge or diverge their language use to adjust social distance. *Convergence* involves switching to the interlocutor's preferred or dominant language to make them more comfortable, enhance solidarity, or smooth interaction. For instance, a Catalan-Spanish bilingual might stick to Spanish when a monolingual Spanish speaker joins the conversation, signaling accommodation and inclusivity. On the other hand, *divergence* entails switching to a language or dialect to highlight difference or create distance. A bilingual may respond in their native language even when the other speaks a different one, as a way to assert their identity or to exclude outsiders. As an illustration, second-generation Moroccan youths in the Netherlands might continue speaking

Moroccan Arabic amongst themselves when a Dutch outsider approaches, thereby marking ethnic boundaries (a divergent move that says: “we have our own code”). These strategic switches align with the speaker’s intentions—either to foster rapport and understanding (*inclusive switching*) or to assert autonomy and group identity (*exclusive switching*). In effect, code-switching allows subtle manipulation of *social footing* in conversation, much like changes in tone or register.

Another communicative function of code-switching is to convey nuances of emotion, humor, or rhetorical effect. Bilingual speakers know that some expressions carry a certain emotional *color* or cultural resonance in one language that they lack in another. They exploit this by switching codes to, say, tell a punchline or express an endearment in the language that best delivers the impact. A joke told in Italian might simply be funnier or more vivid than in Swedish, prompting an Italian-Swedish bilingual in Sweden to switch to Italian for the humorous part and then back to Swedish. Similarly, immigrants may switch to their mother tongue for intimate or personal topics – for example, switching to Greek to express a term of affection or a curse, because it feels more emotionally authentic. By alternating languages, speakers tap into different cultural frames: one language might index seriousness or formality, while another signals playfulness or intimacy, and switching helps them achieve the desired tone. Indeed, code-switching can function as a conversational *contextualization cue*, a concept introduced by John Gumperz, where a shift in language alerts listeners to how an upcoming message should be interpreted (e.g. as an aside, a quote, a confidential comment, etc.). An example is a Greek-English bilingual lowering her voice and switching to Greek to quote a proverb from her grandmother – the change in code tells listeners that a culturally rooted wisdom or a humorous aside is being shared.

Importantly, code-switching may occur spontaneously or deliberately as a strategy. In casual bilingual interactions, many switches happen almost unconsciously, as speakers follow the flow of thought or the cues of their partner. For instance, among members of a bilingual family (say, Serbian and English in Austria), switching in mid-sentence can be a *natural practice* to express solidarity and closeness. These unconscious switches reinforce bonds — the family that code-switches together affirms their unique group identity and shared space. On the other hand, speakers can also deliberately code-switch to achieve specific effects. In diaspora communities, switching to a heritage language in the middle of an otherwise dominant-language conversation can deliberately signal who is an insider. It’s a way of *telling* who belongs and who doesn’t in that moment. Likewise, political or community leaders might insert phrases from multiple languages in a speech as a *rhetorical strategy*: to identify with a certain ethnic audience or to project an image of inclusiveness. A European parliamentarian, for example, could begin in English but switch to French for a few lines addressing French constituents, and close with a greeting in Polish – symbolically acknowledging Europe’s multilingual identity. Such calculated code-switching serves to build solidarity across linguistic lines or to enhance the speaker’s appeal by mirroring the audience’s linguistic repertoire.

In summary, European bilinguals leverage code-switching as a communicative toolkit. It allows them to select the most expressive or effective language for each conversational task – whether explaining, persuading, joking, or bonding. The findings from our literature review underscore that code-switching in multilingual Europe fulfills sociocultural and pragmatic functions simultaneously. It is a practice that *enhances effective communication* by flexibly meeting interlocutors’ needs, and at the same time

it helps maintain social cohesion by enabling speakers to navigate multicultural interactions without foregoing any part of their identity.

## Discussion

Our review of European contexts illustrates that code-switching is intrinsically intertwined with both identity and communication. In the discussion below, we integrate the findings to explore the linguistic, cultural, and social dimensions of identity construction through code-switching. We also consider how these insights relate to broader issues of language policy, education, and cohesion in a multilingual society.

**Linguistic Dimension:** From a linguistic standpoint, code-switching showcases the *complex repertoires* that bilingual speakers command. Rather than treating languages as sealed systems, recent sociolinguistic theory emphasizes fluid language practices and the breaking down of strict boundaries between named languages. The fact that speakers can smoothly alternate and even blend languages (as with Turkish-German hybrid forms) reflects a high level of linguistic competence and creativity. This hybridity challenges older notions that switching languages is a sign of confusion or deficiency. On the contrary, bilingual Europeans demonstrate a *symbolic competence* in deploying multiple codes — they understand the indexical meaning of linguistic choices (what social message each language conveys) and use that knowledge to shape interactions. For instance, choosing a regional dialect versus a standard language allows a speaker to index local authenticity versus cosmopolitan status in a single conversation. Linguistically, code-switching events can mark shifts in topic, emotion, or relationship, functioning as punctuation in speech. The structure of code-switching (whether it's a full sentence switch or insertion of a word) can itself carry meaning. A seamless intra-sentential switch might signal the speaker's dual identity is well-integrated, whereas a stark inter-sentential switch might be used to emphasize a boundary between ideas or contexts. In essence, code-switching at the linguistic level is a *resource for meaning-making*. It enlarges the expressive palette of a conversation, allowing speakers to communicate shades of meaning that a single language could not easily achieve.

**Cultural Dimension:** Culture and language are deeply connected, and code-switching often serves as a bridge between cultural worlds. Each language encapsulates cultural references, values, humor, and ways of thinking. When European bilinguals switch languages, they often invoke the cultural frame associated with that code. For example, switching to Arabic might bring in a culturally specific proverb or a way of showing respect, whereas switching to Swedish might align with a direct, factual style of communication. In our results, we saw how British-born Caribbeans use Creole to tap into a global Black cultural network, including music and slang, while using British English to anchor themselves in local youth culture. This exemplifies how code-switching allows multiple cultural identities to coexist in one individual's speech. Cultural nuances like humor or sarcasm can also be enhanced by choosing the language that carries the right connotations. In many cases, bilingual speakers report that certain feelings “feel different” or only truly authentic in one of their languages. By code-switching, they align their language choice with the cultural context of the message – for instance, using *Spanish* for a term of endearment that feels warmer or more intimate, or *German* for a technical explanation that feels precise. This adaptive use of cultural-linguistic knowledge underscores how identity is

experienced through culture: code-switching enables speakers to perform culturally appropriate identities moment-to-moment. Furthermore, the cultural dimension of code-switching can be seen in how minority languages are sometimes consciously used as an act of cultural preservation or revival. Young Europeans with ancestral languages (Irish, Basque, etc.) might insert phrases of these languages into daily talk as a proud reminder of their heritage, effectively *reclaiming* cultural identity through language. In summary, code-switching in multicultural Europe is not just a linguistic act but a cultural performance – it is a means of living and communicating multiple cultures at once.

**Social Dimension:** The social aspect of code-switching revolves around group memberships, power relations, and interpersonal alignments. Language choice in a conversation sends social signals: it can include or exclude listeners, assert status, or signal solidarity. Our findings echo that code-switching plays a key role in how social identities (like ethnicity, nationality, class, or generation) are enacted. Using a minority language in public, for example, can be a bold assertion of identity and rights – a statement that “we are here” and have a distinct presence. In some European contexts, such as regional minority language areas, this can even be politically charged (e.g., a Catalan speaker pointedly using Catalan in a majority Spanish setting as an expression of autonomy). In everyday social interactions, code-switching contributes to social cohesion by allowing people to shift into a shared code when they want to signal unity, and to shift out when formality or broader communication is needed. It is notable that many multilingual friend groups or neighborhoods develop their own norms for code-switching – effectively creating a mixed code community norm. For instance, adolescents in super-diverse cities like London or Stockholm might all switch between the national language and various heritage languages or dialects, producing a blended vernacular that everyone in the group understands. Such practices reinforce an inclusive group identity (a kind of “we are all multilingual here” sentiment). Conversely, code-switching can enforce social boundaries: not understanding someone’s switch can mark you as an outsider. The social dimension also includes *power dynamics*. In institutional settings (schools, government offices), the choice of language can reflect or challenge power. A teacher switching to a student’s home language momentarily equalizes the dynamic to show empathy, whereas a strict insistence on the state language might reinforce authority. Likewise, in workplaces, an employee might use the dominant language when speaking to a manager but switch to their native language with a co-worker to privately commiserate or build camaraderie. Thus, code-switching is a social negotiation tool – it lets speakers maneuver through the layered social structure of multicultural societies, aligning with different identities and communities as situations demand.

Overall, the interplay of these dimensions confirms that code-switching is pivotal in identity construction. Identity in multicultural Europe is not a fixed label but a performance that speakers continually adjust through language choice. Code-switching embodies the idea that identity is fluid and multifaceted: a bilingual person can be *multiple selves* in one conversation, and by switching codes they give voice to those different selves. Importantly, this is not done haphazardly – it is done in patterned ways that communities understand. As Hall and Nilep (2015) observed, what unites modern sociolinguistic approaches is analyzing language as mixed and unbounded, reflecting equally fluid social identities [colorado.edu/colorado.edu](http://colorado.edu/colorado.edu). Our review supports this: from immigrant neighborhoods

to transnational digital communications, Europeans are embracing *flexible bilingualism*, using code-switching as a norm to navigate and unify their hybrid worlds.

Finally, it is worth noting that while code-switching offers many benefits, attitudes towards it can vary. Some traditional language ideologies in Europe still favor monolingual “purity” and view code-switchers skeptically (as if they are not fully proficient in either language). However, the sociolinguistic evidence clearly debunks the notion that code-switching is a deficit or mere interference. To the contrary, code-switching is a sophisticated linguistic strategy and a marker of a confident bilingual identity. Embracing this reality has important implications, to which we now turn.

### Conclusion and Implications

Code-switching in multicultural European contexts is far more than a linguistic quirk – it is a deliberate, meaningful practice that allows speakers to be effective communicators and authentic to their complex identities. The evidence and arguments presented here lead to several key implications for how we approach language in society:

- **Language Policy:** European language policies should recognize and value *code-switching as a natural part of multilingual communication*. Rather than enforcing strict separation of languages, institutions can adopt inclusive language policies that accommodate multiple languages in public spaces, media, and official settings. By acknowledging code-switching (for instance, permitting mixed-language signage or bilingual forms), policymakers would validate hybrid identities and make linguistic minorities feel seen. Encouraging plurilingual practices can enhance social integration, as people no longer feel they must suppress one language to participate in the public sphere. Overall, a shift toward culturally responsive language planning – celebrating linguistic diversity instead of policing it – will help multilingual citizens thrive.
- **Education:** Educators and schools in multilingual regions can leverage code-switching as a pedagogical resource rather than treating it as a problem. Research suggests incorporating students’ languages in the classroom (through translanguaging or strategic code-switching) can *affirm students’ identities* and improve learning outcomes. Teachers might, for example, switch to a child’s home language to ensure understanding of a lesson, or encourage students to compare concepts across languages as a learning exercise. Teacher training programs should emphasize positive attitudes toward bilingualism, so that teachers understand how code-switching can build rapport and facilitate comprehension. By integrating code-switching into curricula and language teaching, schools can foster linguistic awareness and pride among students. This approach not only helps bilingual students feel valued, but also prepares all students for a multilingual world. Embracing controlled code-switching in education can produce more inclusive and effective teaching practices.
- **Social Cohesion:** Rather than undermining unity, the fluid mixing of languages can actually bolster social cohesion in diverse communities. When multiple languages are given space in public discourse, people from different backgrounds find common ground in a *shared multilingual norm*. For example, urban youth across Europe increasingly share a hybrid slang

that draws from various immigrant languages and the local language, creating a sense of belonging to the same contemporary culture. Authorities and community leaders should refrain from stigmatizing such mixes; instead, they can highlight them as examples of successful integration (where new cultural forms emerge from diversity). Promoting positive public discourse about code-switching – through media, community events, and campaigns – can reduce prejudice and the feeling that minority languages are “foreign” or threatening. As our findings showed, code-switching often carries *messages of solidarity* and empathy. If society at large recognizes this, it can harness multilingualism as a bridge between groups, not a barrier. In practical terms, community centers, healthcare providers, and public services might adopt multilingual communication strategies (e.g. staff switching languages as needed) to make all residents feel accommodated. Such efforts strengthen trust and participation, contributing to social cohesion in multilingual Europe.

In conclusion, code-switching exemplifies how linguistic diversity, when embraced, becomes a force for unity and identity affirmation. European multilinguals use their linguistic repertoires to navigate daily life, express who they are, and connect with others. Rather than forcing people into monolingual molds, acknowledging the dual role of code-switching – as a marker of hybrid identity and a communicative strategy – allows for more inclusive policies, innovative educational practices, and harmonious multicultural communities. Multilingual Europe’s tapestry of languages is not a challenge to overcome, but a rich resource to be celebrated. As our review highlights, code-switching is at the heart of this tapestry, enabling individuals to honor *all parts* of their identity while effectively engaging with the world around them. Embracing that reality is key to fostering a Europe that is linguistically vibrant, socially cohesive, and respectful of the many identities it contains.

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# Development Prospects of the Digital Economy in Azerbaijan

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**Abstract.** The digital economy has become a cornerstone of modern economic growth and innovation, significantly shaping global markets and socio-economic structures. Azerbaijan, as a developing economy with growing digital infrastructure, has demonstrated substantial progress in adopting digital technologies across various sectors, including banking, telecommunications, and public administration. This article explores the development prospects of the digital economy in Azerbaijan, focusing on its current state, strategic initiatives, and future opportunities. By analyzing government policies, digital transformation programs, and the challenges related to cybersecurity, workforce readiness, and technological infrastructure, the paper highlights the key drivers that can accelerate digital growth. The topic is a very topical one. The study also examines international experiences to provide insights into how Azerbaijan can strengthen its position in the global digital ecosystem.

**Keywords:** *Digital Economy, ICT Development, E-Government, Digital Transformation, Innovation*

## Introduction

The digital economy has emerged as a transformative force reshaping the foundations of economic systems worldwide. In the 21st century, the integration of digital technologies into production, trade, and governance processes has accelerated economic development and enhanced efficiency in both public and private sectors. For developing countries like Azerbaijan, digitalization is not only an economic imperative but also a strategic priority aimed at fostering innovation, improving public service delivery, and increasing competitiveness in the global market ( Aliyev, 2021).

Azerbaijan has embarked on a comprehensive digitalization journey through various national strategies, such as the “Azerbaijan 2030: National Priorities for Socio-Economic Development” and the State Program on Digital Transformation. These initiatives underscore the government’s commitment to building a robust digital infrastructure, expanding e-government services, and promoting ICT-driven industries. However, despite notable achievements, the path to a fully integrated digital economy is fraught with challenges, including infrastructure gaps, cybersecurity threats, and a shortage of skilled professionals (ITU,2022).

The primary objective of this paper is to analyze the current state and development prospects of the digital economy in Azerbaijan. Specifically, the study aims to:

- Examine the conceptual framework of the digital economy and its relevance to Azerbaijan’s economic agenda;

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- Assess the current progress and key achievements in the country's digital transformation;
- Identify the main challenges hindering rapid digital development;
- Propose strategic directions for enhancing digital competitiveness and ensuring sustainable growth.

By exploring these dimensions, this article contributes to the understanding of how Azerbaijan can leverage digital technologies to achieve long-term socio-economic goals and integrate effectively into the global digital ecosystem.

## 2. Theoretical Background

The concept of the digital economy encompasses the economic activities that are enabled or significantly enhanced by digital technologies, including e-commerce, online services, and digital platforms. Theoretical frameworks often emphasize the role of information and communication technologies (ICTs) as the backbone of digital transformation. According to Tapscott (1995), the digital economy is characterized by the transition from traditional industrial models to knowledge-based systems where information becomes a critical production factor. Schumpeter's theory of innovation also supports this view, highlighting the role of technological advancements in driving economic change and creating new market opportunities (Tapscott, 1995).

For Azerbaijan, understanding these theoretical perspectives is essential for formulating policies that not only encourage digital adoption but also ensure inclusivity, sustainability, and resilience against potential risks such as cyber threats and digital inequality. The integration of global best practices and the alignment with frameworks like the United Nations' Sustainable Development Goals (SDGs) further reinforce the strategic importance of digital economy development. The digital economy is commonly defined as the set of economic activities enabled by digital technologies—particularly data, software, and networked connectivity—that transform production, exchange, and consumption. It spans three mutually reinforcing layers (ENISA, 2023):

- 1) Core digital sector (ICT manufacturing and services, software, platforms, data infrastructure);
- 2) Digitalized sectors (traditional industries adopting digital tools for productivity and new business models);
- 3) Enabling foundations (telecom networks, cloud, standards, digital IDs, skills, cybersecurity, and regulation).

For resource-rich, open, and mid-income economies like Azerbaijan, the digital economy's scope also includes digital public infrastructure (e-government, digital identity, interoperable registries) and cross-border data and payment rails that connect firms to regional markets.

## 3. Current State of the Digital Economy in Azerbaijan

This section will discuss the present condition of Azerbaijan's digital economy, including infrastructure, government initiatives, and private sector participation. Over the past decade, Azerbaijan has made significant progress in the development of its digital economy, driven largely by national strategies and programs aimed at improving ICT infrastructure. One of the key milestones in this regard was the implementation of the 'National Strategy for the Development of the Information Society for 2014–2020,' which laid the foundation for e-government services and digital platforms. The country has successfully launched several digital initiatives, including the ASAN service system, which is widely recognized as a model of efficient e-governance in the region. Telecommunication networks have also undergone modernization, with the expansion of broadband internet access and the introduction of 4G technology across major urban centers. According to recent statistics, internet penetration in Azerbaijan has reached over 80%, which indicates a significant improvement in digital connectivity. Furthermore, the banking and financial sectors have embraced digital transformation through the adoption of online banking services, mobile payment systems, and fintech solutions. These advancements have contributed to enhancing economic efficiency and transparency, promoting cashless payments, and reducing bureaucratic barriers in business operations (World Bank, 2023).

However, the progress is not uniform across the country. While urban areas such as Baku enjoy advanced digital infrastructure, rural regions still face connectivity challenges. This urban-rural digital divide remains a critical issue, as it limits the inclusivity of digital services and hinders equal access to economic opportunities. The government has taken measures to address these disparities through projects like 'Connecting Villages,' which aims to expand broadband internet to remote areas. Despite these efforts, there is still a need for further investment in fiber-optic infrastructure, affordable internet services, and digital literacy programs to ensure comprehensive nationwide coverage (OECD, 2022).

The development of the digital economy in Azerbaijan is accompanied by a range of challenges that need to be addressed for sustainable growth. One of the primary challenges is the shortage of skilled human capital in the field of information technology. While Azerbaijan has a strong education system, there is a growing need to align curricula with the demands of the digital economy. Specialized training programs, coding boot camps, and university-industry partnerships can play a crucial role in closing this skills gap (Aliyev, 2021).

Cybersecurity is another major concern. As digital transactions and online services become more prevalent, the risk of cyberattacks and data breaches has increased. To mitigate these risks, Azerbaijan must strengthen its legal and regulatory frameworks, enhance public awareness, and invest in cybersecurity infrastructure. Public and private sectors need to collaborate to build a secure digital ecosystem that can withstand evolving cyber threats (ENISA, 2023).

On the other hand, Azerbaijan has significant opportunities to leverage digital technologies for economic diversification and innovation. The government's emphasis on developing non-oil sectors aligns perfectly with the potential of the digital economy to stimulate entrepreneurship, create jobs, and attract foreign investment. Emerging sectors such as fintech, e-commerce, digital health, and smart cities present promising avenues for growth. For instance, the adoption of blockchain technology in public services can enhance transparency, reduce corruption, and improve service

delivery. Additionally, the country's strategic geographic location along the modern Silk Road positions it as a potential digital hub connecting Europe and Asia, which could attract international tech companies and foster regional cooperation in the digital sphere (OECD,2022).

#### **4. Challenges and Opportunities**

Key challenges such as digital divide, cybersecurity risks, and workforce skill gaps will be analyzed, along with opportunities in fintech, e-commerce, and smart cities. Looking ahead, Azerbaijan's digital economy is expected to play a central role in the country's socio-economic development strategy. To achieve this vision, several strategic directions must be prioritized. First, the government should continue investing in ICT infrastructure, including the deployment of high-speed broadband and 5G networks. Such investments will not only enhance connectivity but also create the foundation for advanced technologies such as the Internet of Things (IoT), artificial intelligence (AI), and big data analytics (PwC,2022).

Second, human capital development must be at the core of digital transformation efforts. This involves reforming education systems to incorporate digital skills, promoting STEM (Science, Technology, Engineering, and Mathematics) education, and fostering a culture of lifelong learning. By equipping the workforce with relevant skills, Azerbaijan can ensure that its citizens are prepared for the demands of the digital economy and can actively participate in innovation-driven sectors (PwC,2022).

Third, strengthening cybersecurity remains a top priority. Implementing comprehensive cybersecurity policies, developing national cyber defense capabilities, and engaging in international cooperation are essential steps to safeguard digital infrastructure and build public trust in online services.

Finally, fostering innovation and entrepreneurship will be critical for sustaining digital growth. The government should create favorable conditions for startups, including access to financing, tax incentives, and innovation hubs. Collaboration between academia, industry, and government can further accelerate the commercialization of research and the development of new digital products and services. By pursuing these strategic directions, Azerbaijan can position itself as a regional leader in the digital economy and achieve long-term economic resilience.

#### **5. Future Prospects and Strategic Directions**

This section will propose strategies for sustainable digital growth, including investment in innovation, regional partnerships, and policy recommendations. In conclusion, the development prospects of the digital economy in Azerbaijan are highly promising, driven by strong government commitment, growing ICT infrastructure, and the country's strategic economic objectives. While significant progress has been made in areas such as e-government, broadband connectivity, and fintech adoption, several challenges remain, particularly in the domains of human capital development, cybersecurity, and digital inclusivity. Addressing these issues will require a comprehensive and coordinated approach involving both public and private stakeholders. The successful realization of Azerbaijan's digital economy vision will not only enhance national competitiveness but also contribute to sustainable socio-economic development in the years to come. Future research could explore the impact of emerging technologies such as artificial intelligence, blockchain, and cloud computing on Azerbaijan's

economic transformation, as well as the role of regional cooperation in accelerating digital innovation.

In addition to these classical definitions, recent scholars emphasize the transformative nature of the digital economy in terms of both production and consumption models. The integration of cloud computing, big data, and artificial intelligence has created a new paradigm for businesses and governments, where decision-making processes are increasingly data-driven. The digital economy is not confined to specific sectors; rather, it permeates all aspects of economic activity, influencing everything from supply chain management to consumer behavior. Moreover, the concept of 'platform economy' has emerged as a significant dimension of the digital economy, where companies like Amazon, Alibaba, and Uber leverage digital platforms to facilitate interactions between producers and consumers at an unprecedented scale. These developments challenge traditional regulatory frameworks and require adaptive governance models that balance innovation with consumer protection and privacy rights. From a theoretical standpoint, the network effect theory provides valuable insights into how digital platforms achieve rapid growth by attracting more users, which in turn enhances the value of the platform for all participants. This phenomenon underscores the importance of building robust digital ecosystems that encourage collaboration, interoperability, and fair competition. (Memmedov, S., & Öztürk, A. 2025).

One notable area of progress is the development of e-government services. The ASAN service centers, which offer a wide range of public services in a single location, have become a hallmark of Azerbaijan's digital governance model. The introduction of the myGov portal has further streamlined access to government services, allowing citizens to complete various transactions online without the need for physical visits to state institutions. The COVID-19 pandemic accelerated the adoption of digital solutions in both the public and private sectors, as remote work, online education, and digital payment systems became essential components of daily life. These shifts highlighted the resilience and adaptability of Azerbaijan's digital infrastructure, while also exposing gaps in areas such as online security and user awareness. The financial sector has also embraced digitalization, with most major banks offering mobile applications and internet banking services. The rise of fintech startups indicates growing interest in innovative financial solutions, such as peer-to-peer lending and blockchain-based payment systems. These advancements are not only enhancing efficiency but also fostering financial inclusion by providing services to previously underserved populations. (Garibli, I., & Ozturk, A. 2024)

Another significant challenge is digital literacy. While younger generations are generally adept at using digital tools, older populations and residents in rural areas often lack the necessary skills to fully engage with digital services. This gap necessitates comprehensive digital education programs aimed at promoting basic ICT skills across all demographics. Public awareness campaigns, community-based training initiatives, and partnerships with non-governmental organizations can play a pivotal role in addressing this issue. On the opportunity side, Azerbaijan's efforts to establish technology parks and innovation centers are commendable. The High-Tech Park initiative, for instance, aims to provide startups and technology companies with the infrastructure, resources, and support needed to scale their operations. Furthermore, the country's energy resources can be leveraged to attract data centers and cloud computing services, given the increasing global demand for secure and efficient data storage solutions. Investing in renewable energy for powering these data centers would also align with

Azerbaijan's commitments to sustainable development and environmental protection.

In addition to the strategies mentioned earlier, fostering public-private partnerships will be critical in driving digital transformation. Such collaborations can accelerate the deployment of advanced technologies, reduce financial burdens on the government, and promote innovation. International cooperation is equally important, as participation in global digital initiatives can provide Azerbaijan with access to cutting-edge technologies, best practices, and funding opportunities. Establishing bilateral and multilateral agreements with technologically advanced countries can facilitate knowledge transfer and capacity building. Moreover, embracing open data policies can enhance transparency, stimulate entrepreneurship, and enable the development of innovative digital solutions by the private sector (Schumpeter, 1934). As the global economy becomes increasingly interconnected, Azerbaijan must also prioritize cross-border digital trade by harmonizing regulations, ensuring data security, and adopting international standards for digital services. By doing so, the country can strengthen its position as a regional hub for digital innovation and secure a competitive edge in the rapidly evolving digital landscape.

Ultimately, the success of Azerbaijan's digital economy will depend on its ability to integrate technological innovation with inclusive socio-economic policies. The pursuit of a knowledge-based economy requires continuous investment in education, research, and development, as well as the creation of an enabling environment for entrepreneurship. As global trends such as artificial intelligence, blockchain, and the Internet of Things gain momentum, Azerbaijan must proactively adapt to these changes to avoid being left behind in the digital revolution. Long-term success will also hinge on the country's commitment to ethical considerations, such as data privacy, digital rights, and environmental sustainability. By addressing these dimensions holistically, Azerbaijan can transform its digital economy into a powerful engine of growth and innovation, ensuring prosperity for future generations (UNECE,2021).

## **6. Development Prospects of the Digital Economy in Azerbaijan Practical Perspective**

Azerbaijan has made significant strides in building the digital foundation through investments in broadband infrastructure, data centers, and government-led initiatives such as ASAN service, the E-Government portal, and digital ID systems. These platforms have increased transparency, reduced administrative costs, and provided citizens with convenient access to public services. The introduction of e-signatures and digital payment systems has also facilitated secure and efficient transactions for businesses and individuals(UN,2021).

To ensure sustainable development, Azerbaijan's digital economy strategy focuses on several key pillars:

- **Broadband and Connectivity Expansion:** Continued investment in high-speed fiber networks, 5G deployment, and rural internet coverage is critical for reducing the digital divide and enabling equal participation in digital markets.
- **Digital Transformation of SMEs:** Small and medium-sized enterprises are the backbone of Azerbaijan's economy. Digital tools like e-commerce platforms, cloud solutions, and ERP systems can

boost their productivity and competitiveness in regional and global markets.

- Public Service Digitalization: Expanding the functionality and interoperability of e-government platforms will streamline service delivery, enhance citizen engagement, and strengthen trust in institutions.
- Cybersecurity and Data Protection: As digital adoption grows, securing information systems and ensuring compliance with international data protection standards is essential to build user confidence and prevent cyber risks.

The digital economy opens multiple new avenues for growth in Azerbaijan:

- 1) FinTech Innovation: Mobile banking, digital wallets, and instant payment systems can promote financial inclusion, particularly among rural populations and SMEs.
- 2) E-commerce Growth: Online retail platforms and digital logistics systems create opportunities for local businesses to reach new customers domestically and internationally.
- 3) Digital Trade and Export of IT Services: With its strategic location, Azerbaijan can become a regional hub for digital trade and outsourcing, providing software development, cybersecurity, and IT support services to neighboring markets.
- 4) Green and Smart Technologies: Digital solutions for energy efficiency, smart agriculture, and intelligent transport systems can contribute to sustainable development and economic diversification.

Azerbaijan's geographic position offers a unique opportunity to become a digital corridor between Europe and Asia. Investments in international fiber routes, data centers, and cross-border digital payment systems will strengthen Azerbaijan's role as a regional connectivity hub. Aligning national standards with EU and global best practices in digital governance will also improve foreign investment attractiveness.

## Conclusion

The conclusion will summarize key findings and suggest directions for future research on the digital economy in Azerbaijan. The digital economy is no longer an auxiliary component of development; it has become a strategic driver for competitiveness, productivity, and social inclusion. For Azerbaijan, advancing this agenda presents both an opportunity and a challenge. On one hand, the country possesses strong prerequisites: an established ICT infrastructure, progressive e-government platforms, and a commitment to digital transformation within national strategies. On the other hand, achieving tangible economic gains requires addressing structural gaps, skills shortages, limited SME digitalization, cybersecurity vulnerabilities, and the urban-rural connectivity divide.

The prospects of Azerbaijan's digital economy largely depend on the effective integration of technology into business processes, public administration, and social services. Accelerating broadband deployment, fostering innovation ecosystems, and aligning legal frameworks with international standards will be essential for attracting investment and promoting cross-border digital trade. At the

same time, investment in human capital both advanced IT talent and mass digital literacy will determine the scale and sustainability of these transformations.

Ultimately, a well-orchestrated digital strategy can help Azerbaijan diversify its economy beyond hydrocarbons, create high-value jobs, and strengthen its role as a regional digital hub. By combining infrastructure development with institutional reforms and innovation incentives, Azerbaijan can transform the digital economy from a policy priority into a key engine of inclusive and resilient growth.

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# Impact of Picture Books on Reading Comprehension Skills of Preschool Children

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**Abstract.** This study investigated the impact of picture books on the reading comprehension skills among preschool children in Akinyele Local Government, Nigeria. Five purpose of the study and five research questions guided the study. A mixed methods was employed. A stratified random sampling technique was used to select 10 public and private nursery schools. From these schools, 20 early childhood educators and 100 preschool children were selected, resulting in a total sample size of 120 participants.

Data collection instruments included a structured questionnaire for teachers, an observation checklist to record classroom practices, and a reading comprehension assessment for children. These instruments were validated by experts in early childhood education, with a pilot test yielding a reliability coefficient of 0.78. Data collection involved researcher-administered questionnaires, classroom observations, and comprehension assessments conducted after reading selected picture books to the children. Descriptive statistics were used to analyze quantitative data, while thematic analysis was applied to qualitative data from observations.

Findings revealed that picture books significantly enhance children's reading comprehension, especially when combined with interactive reading strategies such as questioning and discussion.

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However, challenges such as limited access to quality picture books and inadequate teacher training were also identified. The study concluded that picture books are valuable tools for promoting early literacy and recommended their integration into the preschool curriculum, alongside professional development for educators and the provision of culturally relevant materials. These findings have implications for improving literacy outcomes and informing early childhood education policy and practice in similar low-literacy settings.

**Keywords:** *Picture books, reading comprehension, preschool education, early literacy, teacher perception, Akinseye Local Government*

## Introduction

In early childhood education, fostering literacy development is essential for laying a solid foundation for future academic success. Picture books play a vital role in this process, especially for preschool children, by combining vivid illustrations with simple texts to enhance understanding and engagement. These books serve as powerful tools for introducing new vocabulary, promoting language development, and stimulating imagination and critical thinking. By capturing children's attention and supporting their interpretation of narratives, picture books contribute meaningfully to the development of key literacy skills, particularly in the area of reading comprehension.

Reading comprehension is an essential skill that underlies children's academic achievement. It refers to the ability to understand and derive meaning from written texts, requiring processes such as decoding, vocabulary development, prior knowledge, and analytical thinking (Garner & Parker, 2018). This skill is crucial in fostering intellectual growth, cognitive development, and the ability to think critically. Given its importance, it is necessary to explore effective methods for strengthening reading comprehension, particularly during the early years of learning. One promising approach that has received increasing attention is the use of picture books.

Picture books are powerful tools widely utilized in preschool classrooms to support early literacy development, particularly reading comprehension. Designed to captivate young readers through the combination of vivid illustrations and simple text, picture books help children make sense of narratives, identify characters, and connect images with language (Nguyen, 2021). At the preschool stage, typically ages three to five, children are developing foundational skills in language, literacy, and cognition (Liu & Park, 2019). Research shows that both text-based and wordless picture books significantly enhance children's vocabulary, critical thinking, and comprehension skills (Lubis, 2018; Demoyn & Ferraras-Stone, 2018).

Key features of picture books include illustrations, typography, layout, and simple sentence structures which play crucial roles in supporting comprehension by reducing cognitive load and fostering engagement (Hernández, Montelongo, & Herter, 2016). Books with themes like animals, fantasy, and humor stimulate imagination, promote vocabulary development, and improve attention and memory (Agustín et al., 2023; Dua et al., 2019). The use of cognates and rich vocabulary further strengthens comprehension, especially for bilingual learners (Hu & Nation,

2020). Additionally, picture books with clear storylines and expressive character illustrations enhance children's understanding of narrative structure and emotional cues (Campos et al., 2016).

Beyond cognitive benefits, picture books also promote cultural inclusion and awareness. Culturally diverse books support identity formation and foster a sense of belonging, as they reflect varied experiences and languages (Benitez et al., 2022; Caple & Tian, 2021; Wee et al., 2015). Overall, picture books offer a multifaceted approach to enhancing preschool children's language development and literacy, making them an effective medium for improving reading comprehension.

Several empirical studies have highlighted the positive impact of picture books on children's reading development and comprehension. Gwanshak, Shikden, and Danrimi (2024) found that picture books effectively remediate reading difficulties in pupils with dyslexia in Gombe State, Nigeria. Similarly, a study on Early Child Care (ECC) learners revealed that picture books significantly enhanced pre-reading skills among ECC III children.

Shimek (2018) reported that children use visual cues, headings, and prior knowledge to navigate nonfiction picture books, suggesting that strategic use of picture books can support reading comprehension. Larragueta and Ceballos-Viro (2018) also found that books with rich vocabulary contribute to vocabulary development, which is crucial for comprehension. Solfiah et al. (2020) demonstrated that picture storybooks are effective tools for teaching real-world concepts like disaster preparedness, enhancing both understanding and engagement.

Litzler (2016) emphasized that multimodal features such as visuals and text promote critical thinking and comprehension. Supporting these findings, Hsiao and Chang (2016) concluded that picture books foster cognitive development and improve reading comprehension when effectively used by preschool educators.

### **Statement of the Problem**

Reading comprehension is a vital foundation for academic success, beginning in the early years of a child's development. Preschool children, in particular, are at a critical stage where language and cognitive skills are rapidly evolving, and exposure to reading can greatly support their linguistic and emotional growth. Despite existing research highlighting the benefits of picture books on children's language skills, most studies are based in Western contexts, limiting their relevance to the Nigerian educational environment. In Akinyele Local Government, where literacy rates remain low and many children do not complete primary education, there is a pressing need to adopt effective strategies that promote early reading skills. Picture books, with their visual and textual elements, offer a promising approach to support comprehension development. However, there is a lack of localized studies exploring their effectiveness among preschool children in this area. This study seeks to fill that gap by examining how picture books can enhance reading comprehension in preschoolers in Akinyele Local Government, with a focus on selecting materials that encourage inclusion, diversity, and critical thinking.

## Purpose of the Study

The main purpose of this study is to investigate the impact of picture books on the reading comprehension of preschool children in Akinyele Local Government. Specifically, the study aims to:

examine how the use of picture books influences the development of reading comprehension skills among preschool children.

identify the types of picture books that are most effective in enhancing reading comprehension.

assess the extent to which picture books can support language development and vocabulary acquisition in preschool learners.

explore teachers' perceptions and practices regarding the use of picture books in early childhood classrooms.

provide recommendations for integrating picture books into preschool literacy instruction to improve reading outcomes.

## Research Questions

How does the use of picture books influence the development of reading comprehension skills among preschool children?

What types of picture books are most effective in enhancing reading comprehension in preschool children?

To what extent do picture books support language development and vocabulary acquisition in preschool learners?

What are teachers' perceptions and practices regarding the use of picture books in early childhood classrooms?

What recommendations can be made for integrating picture books into preschool literacy instruction to improve reading outcomes?

## Research Methodology

### Research Design

This study adopted a mixed method was employed, comprising quantitative and qualitative data to gather information on the current practices, perceptions, and effects of using picture books on preschool children's reading comprehension in Akinyele Local Government Area.

### Population of the Study

The population of the study comprised all early childhood education teachers and preschool

children in both public and private nursery schools in Akinyele Local Government Area, Oyo State.

#### Sample and Sampling Technique

A stratified random sampling technique was used to select the sample. The schools were first grouped into public and private categories, after which a random selection of schools was carried out from each group. A total of 10 schools were selected. From these schools, 20 early childhood educators and 100 preschool children were selected, making a total sample size of 120 participants.

#### Instrumentation

The instruments used for data collection included:

A structured questionnaire for early childhood educators, designed to gather information on the use and effectiveness of picture books in enhancing reading comprehension.

An observation checklist, used to record classroom practices related to the use of picture books.

A reading comprehension assessment sheet, administered to preschool children to measure their comprehension skills after exposure to selected picture books.

#### Validation of Instrument

The instruments were validated by three experts in early childhood education and educational measurement. Feedback from the validators was used to improve the clarity, content, and relevance of the items.

#### Reliability of the Instrument

A pilot study was conducted using 10 teachers and 20 preschool children from a similar setting outside the study area. The Cronbach's alpha coefficient for the questionnaire was calculated and found to be 0.78, indicating a high level of internal consistency.

#### Method of Data Analysis

Quantitative data obtained from the questionnaires and comprehension assessments were analysed using descriptive statistics such as frequency, percentage, mean, and standard deviation. Qualitative data from observations were analysed thematically to identify recurring patterns and practices in the use of picture books.

#### Result of findings

Table 1: Influence of Picture Books on Reading Comprehension Skills of Preschool Children

Response Item	Strongly Agree	Agree	Disagree	Strongly Disagree	Mean
Picture books help children recall story events	12 (60%)	6 (30%)	2 (10%)	0 (0%)	3.5
Picture books improve children's understanding	10 (50%)	7 (35%)	3 (15%)	0 (0%)	3.4
Children ask and answer questions better with pictures	13 (65%)	5 (25%)	2 (10%)	0 (0%)	3.6

#### Interpretation of Table

The results indicate that the majority of the respondents agreed that picture books significantly help children recall story events, improve their understanding, and enhance question-answering skills. With mean scores above 3.0, it can be interpreted that picture books positively influence reading comprehension among preschool children.

Table 2: Types of Picture Books Effective for Enhancing Reading Comprehension

Picture Book Type	Very Effective	Effective	Not Effective	Mean	Decision
Books with real-life illustrations	14 (70%)	6 (30%)	0 (0%)	3.7	Very Effective
Books with repetitive texts	10 (50%)	8 (40%)	2 (10%)	3.4	Effective
Alphabet and phonics picture books	11 (55%)	7 (35%)	2 (10%)	3.5	Effective

#### Interpretation of Table 2

Respondents rated books with real-life illustrations as the most effective in supporting reading comprehension, followed by phonics and repetitive text books. The findings suggest that content familiarity, visual support, and linguistic repetition enhance comprehension outcomes.

Table 3: Contribution of Picture Books to Language Development and Vocabulary Acquisition

Response Item	Strongly Agree	Agree	Disagree	Strongly Disagree	Mean	Decision
Picture books improve vocabulary usage	13 (65%)	6 (30%)	1 (5%)	0 (0%)	3.6	Strongly Agree
Picture books expose children to new words	12 (60%)	6 (30%)	2 (10%)	0 (0%)	3.5	Agree
Children learn sentence structures from picture books	11 (55%)	7 (35%)	2 (10%)	0 (0%)	3.5	Agree

### Interpretation of Table 3

Teachers largely agreed that picture books enhance children's vocabulary, expose them to new words, and improve sentence construction. This supports the assertion that picture books play a substantial role in the development of early language skills.

Table 4: Teachers' Perceptions and Practices on Use of Picture Books

Response Item	Always	Sometimes	Rarely	Never	Mean	Decision
I use picture books during story time	15 (75%)	4 (20%)	1 (5%)	0 (0%)	3.7	Always
I allow children to engage with the pictures	13 (65%)	5 (25%)	2 (10%)	0 (0%)	3.6	Always
Picture books are included in daily lesson plans	12 (60%)	6 (30%)	2 (10%)	0 (0%)	3.5	Always

### Interpretation of Table 4

The majority of teachers reported to be using picture books regularly with encouraging illustrations which engage the attention of children and integrating them into lesson activities. This demonstrates a positive perception and consistent use of picture books as instructional tools in early childhood classrooms.

### Interpretation of Themes

#### Curriculum Integration

Respondents emphasised the need for structured inclusion of picture books in the literacy curriculum. This shows that picture books are seen as central to literacy development, not supplementary. Embedding them in lesson plans ensures consistent use and maximises learning impact.

#### Teacher Training and Support

The findings reveal a gap in teacher competency regarding the strategic use of picture books. Participants stressed the importance of workshops, mentoring, and continuous professional development to equip teachers with methods that enhance comprehension using visual texts.

#### Access to Quality Picture Books

A major concern was the shortage of culturally relevant and age-appropriate picture books. Teachers recommended government or NGO support to provide a wide range of books, including those with local content, diverse vocabulary, and inclusive themes.

#### Interactive Reading Practices

Effective use of picture books requires more than just reading aloud. Teachers suggested engaging children through interactive techniques such as asking open-ended questions, encouraging predictions, and retelling stories to boost comprehension and vocabulary development.

## **Discussion of findings**

### **1. Curriculum Integration**

The study found that integrating picture books into the preschool literacy curriculum was considered essential by educators. Teachers believed that picture books should not be treated as optional or leisure-time materials, but as fundamental tools in teaching reading comprehension. This implies a need for policy shifts in early childhood education to embed picture books into the daily instructional schedule. Formal inclusion ensures consistency and helps teachers plan lessons with specific reading comprehension objectives. This finding supports Gwanshak, Shikden & Danrimi (2024), who found that picture books significantly improved the reading performance of pupils with dyslexia, reinforcing the need for structured integration. Similarly, Hsiao & Chang (2016) emphasised that picture books are not just entertainment tools but instructional resources that enhance cognitive development.

### **2. Teacher Training and Support**

A major finding was the teachers' lack of formal training in using picture books to teach comprehension. While they recognized the value of picture books, many expressed a lack of confidence or methodological knowledge. This implies that Professional development programs and workshops should be organized to train teachers in effective strategies such as dialogic reading, scaffolding, and vocabulary enhancement through visual literacy. This finding aligns with Litzler (2016) who argued that understanding the multimodal features of picture books (text and images) is key to improving children's comprehension. The study also echoes Shimek (2018), who highlighted how children strategically interact with non-fiction picture books, a skill that teachers must learn to facilitate.

### **3. Access to Quality Picture Books**

Teachers reported a lack of access to diverse and culturally appropriate picture books. Many available books were outdated or foreign and did not reflect the children's socio-cultural backgrounds. This implies that there is a clear need for investment in relevant, local, and inclusive picture books. Publishers and educational authorities should prioritize culturally responsive materials that reflect the learners' realities and language. This supports Larragueta & Ceballos-Viro (2018) who emphasized that rich vocabulary in well-selected picture books enhances children's comprehension and language acquisition. Similarly, Solfiah et al. (2020) found that storybooks could be used to teach real-world knowledge effectively, stressing the importance of selecting content-specific materials.

### **4. Interactive Reading Practices**

Findings showed that interactive reading strategies such as asking predictive questions, encouraging children to describe illustrations, and involving them in retelling stories were seen as effective in enhancing comprehension. This implies that interactive approaches help children actively construct meaning rather than passively receive information. Training teachers in these techniques could yield significant improvements in early literacy outcomes. This aligns with Shimek (2018), who found that children use a variety of strategies (e.g., looking at pictures, reading headings, using prior knowledge) to comprehend texts, especially when guided by adults. Litzler (2016) also supports this, arguing that the visual and linguistic features in picture books support both comprehension and critical thinking.

## **1. Curriculum Integration**

The study revealed a consensus among respondents that picture books should be systematically integrated into the preschool literacy curriculum rather than treated as supplementary materials. Teachers believe that structured use of picture books within daily lesson plans can significantly enhance literacy instruction and comprehension development. This finding suggests a need for education policy reform to formally include picture books in early childhood literacy frameworks. It implies that curriculum developers should not only recommend picture books but also provide specific guidelines for their use across different learning objectives and age groups. This aligns with Gwanshak, Shikden & Danrimi (2024), who demonstrated that picture books effectively remediated reading difficulties in pupils with dyslexia when used as part of structured instruction. Similarly, Hsiao & Chang (2016) emphasized that picture books offer unique opportunities for cognitive development when systematically used in preschool education.

## **2. Teacher Training and Support**

Participants highlighted a lack of adequate training among preschool teachers on how to use picture books strategically for literacy development. Many teachers reported relying on instinct or personal experience, indicating a professional gap in pedagogical knowledge regarding picture book instruction. This implies that there is a pressing need for investment in continuous professional development. Training programs should focus on strategies such as dialogic reading, vocabulary expansion through visual texts, and scaffolding techniques. These methods equip teachers to optimize the use of picture books to enhance comprehension and critical thinking. This supports Litzler (2016), who emphasized that understanding the multimodal nature of picture books (text + visual elements) requires training for effective instructional use. Additionally, Shimek (2018) found that children's comprehension improves when they are guided through the visual and textual elements of nonfiction picture books, underscoring the need for teacher facilitation.

## **3. Access to Quality Picture Books**

Teachers expressed concern over the limited availability of high-quality, age-appropriate, and culturally relevant picture books. Most of the existing resources were either foreign or outdated, making it difficult for children to relate to the content or language. The implication is twofold:

First, education stakeholders (e.g., government, NGOs, publishers) must invest in locally produced picture books that reflect children's cultural experiences. Second, school libraries and classrooms should be equipped with a diverse collection that promotes inclusivity, rich vocabulary, and relevant themes. This finding is consistent with Larragueta & Ceballos-Viro (2018), who found that picture books with rich and diverse vocabulary significantly enhance children's vocabulary acquisition. Also, Solfiah et al. (2020) demonstrated that picture storybooks can effectively communicate real-world concepts such as disaster preparedness—provided the materials are relatable and content-specific.

#### **4. Interactive Reading Practices**

Teachers identified interactive strategies such as questioning, predicting outcomes, retelling, and expressive reading as effective methods for improving reading comprehension. These practices help children engage actively with the text and images, thereby fostering deeper understanding and retention. This finding implies that effective literacy instruction using picture books must go beyond passive reading. Teachers should be trained to apply interactive methods that promote dialogue, inference, and critical thinking among preschool learners. Interactive strategies also align well with developmental appropriateness and play-based learning. This finding supports Shimek (2018), who noted that children naturally engage with various strategies while navigating picture books, especially when supported by adults. Litzler (2016) also found that a multimodal approach—leveraging both images and texts—improves comprehension and stimulates critical thinking.

#### **Summary**

This study investigated the impact of picture books on the reading comprehension skills of preschool children in Akinyele Local Government, Nigeria. Using a qualitative and thematic approach, the research explored how picture books contribute to children's literacy development, the perceptions of teachers regarding their use, and the strategies for effective integration into the early childhood classroom. Key findings revealed that:

Picture books significantly enhance reading comprehension when integrated systematically into the curriculum.

Many teachers lack formal training on the pedagogical use of picture books, limiting their effectiveness.

Access to quality, age-appropriate, and culturally relevant picture books remains inadequate.

Interactive reading practices, such as questioning and discussion, were effective in supporting children's comprehension and engagement.

#### **Conclusion**

The findings underscore the crucial role of picture books in developing early reading comprehension skills among preschool children. When thoughtfully selected and used through interactive teaching strategies, picture books not only improve vocabulary and language acquisition but also enhance critical thinking and emotional engagement. However, the effectiveness of picture books is limited by factors such as inadequate teacher training and poor access to culturally relevant materials. To maximize their impact, there is a need for systemic support in the form of teacher capacity-building, resource provision, and curriculum alignment.

## **Recommendations**

Based on the findings, the following recommendations are made:

The use of picture books should be formally included in the early childhood education curriculum as essential tools for literacy instruction.

Regular workshops and professional development programs should be organized to train teachers on effective strategies for using picture books, including dialogic reading, visual literacy, and vocabulary development.

Education authorities and stakeholders should invest in developing and distributing culturally appropriate, diverse, and age-relevant picture books to schools in Akinyele and similar local governments.

Teachers should be encouraged and supported to adopt interactive reading methods that engage children actively and improve their comprehension and retention.

Authors and publishers should be supported to create picture books that reflect the local language, culture, and context of Nigerian children, making learning more relatable and effective.

Government and educational policymakers should implement policies that ensure the sustainable integration of picture books into early childhood classrooms, with regular monitoring and evaluation.

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# Institutional Pillars of Switzerland's Economic Resilience and Prosperity

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**Abstract.** Switzerland has emerged as one of the world's most prosperous and resilient economies despite its small size and limited natural resources. This article analyzes the institutional and theoretical foundations of the Swiss economic model, drawing on perspectives from institutional economics, ordoliberalism, and comparative capitalism. The study highlights five pillars underpinning Switzerland's sustained performance: political neutrality and global integration, the independent monetary policy of the Swiss National Bank, federalist and direct-democratic governance, a dual vocational education system paired with flexible labor markets, and an innovation-driven industrial base. Each of these elements contributes individually to stability and competitiveness, while their complementarities produce a coherent framework that fosters resilience, productivity, and long-term growth. By conceptualizing Switzerland's success as an outcome of institutional efficiency and complementarities, the article contributes to broader debates on the determinants of economic resilience in advanced economies. The findings suggest that Switzerland's experience exemplifies how coherent institutional architectures can yield sustained prosperity without reliance on scale or resource abundance.

**Keywords:** *Institutional economics; Swiss National Bank; Vocational education and training; Economic resilience*

## Introduction

Switzerland consistently ranks among the world's most prosperous and competitive economies. With a population of under 9 million and scarce natural resources, it has achieved one of the highest GDP per capita levels globally, approaching USD 100,000 in recent years (OECD, 2024). It also enjoys low unemployment, including one of the lowest youth jobless rates in the Organisation for Economic Co-operation and Development (OECD, 2019), and stable long-term growth. These outcomes present a puzzle in political economy: What institutional and economic factors underpin Switzerland's sustained economic success and resilience?

This article explores how Switzerland's unique model—characterized by political neutrality, an independent monetary policy, federalist governance, a robust vocational education system, flexible labor markets, and a culture of innovation—has fostered remarkable economic stability and efficiency. The analysis is framed in a theoretical context drawing on institutional economics, ordoliberalism, and comparative capitalism to elucidate how these factors interact to produce a resilient economic order.

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Rather than serving merely as a country case study for policy transfer, the goal is to contribute conceptually to understanding how certain institutional configurations promote economic resilience and high performance.

We proceed as follows. First, we outline the theoretical framework, explaining how institutional and comparative capitalism theories can shed light on the Swiss case. Next, we analyze key features of Switzerland's political economy—neutrality in foreign affairs, the Swiss National Bank's monetary stewardship, federalist and direct-democratic governance, the vocational education and training system and labor market institutions, and the innovation-driven industrial base—and how each has contributed to economic success. We then discuss the complementarities among these elements, arguing that Switzerland's economic model exemplifies how coherent institutional frameworks can yield sustained prosperity and stability. Finally, we conclude by summarizing the insights and reflecting on the broader implications for understanding economic resilience and institutional efficiency.

### **Theoretical Framework: Institutions, Ordoliberalism, and Comparative Capitalism**

Institutional economics provides a useful lens for analyzing Switzerland's economic model. In North's (1990) classic formulation, institutions are "the rules of the game"—the humanly devised formal and informal constraints that shape economic, political, and social interactions. Such institutions structure incentives and thus fundamentally influence economic performance. Inclusive, well-designed institutions tend to foster investment, innovation, and growth by securing property rights, encouraging competition, and restraining rent-seeking, whereas extractive or unstable institutions impede long-run prosperity. Switzerland offers a prime example of a country with strong, inclusive institutions that have evolved over time to support a high-performance economy. Indeed, the differential economic success of nations is often traced to institutional quality and stability, and the Swiss case aligns with this perspective: its governance arrangements and policies create a stable framework for markets to function efficiently (Weder & Weder, 2009; Burret et al., 2021).

The Swiss model also resonates with ordoliberalism—the school of thought originating in mid-20th-century Europe, particularly Germany, that emphasizes the importance of a strong legal-institutional order (*Ordnungspolitik*) underpinning a free market economy. Ordoliberal theory posits that the state should provide a clear, stable framework (the "order") within which competition can flourish, rather than intervening with heavy-handed dirigisme. Key ordoliberal principles include strict anti-monopoly policies, sound money ensured by an independent central bank, fiscal discipline, and the subsidiarity of government. Switzerland's political economy reflects many of these principles: it maintains a rules-based policy environment with low inflation, competitive markets, decentralized governance, and prudent public finances. For example, the constitutionally independent Swiss National Bank (SNB) prioritizes price stability, reflecting a commitment to sound money reminiscent of ordoliberal and Bundesbank traditions (Meier et al., 2023). Likewise, Switzerland's enforcement of competition and its historically low levels of protectionism and state ownership align with an ordoliberal emphasis on open markets and limited state involvement. These ideological parallels provide a conceptual grounding for Switzerland's practice of ensuring that market competition and stable rules prevail, thereby avoiding distortions and fostering what ordoliberals call an efficient competitive order. In

short, the Swiss case illustrates how a liberal market economy can be buttressed by a strong institutional framework—a combination that ordoliberal theory holds up as ideal for long-run prosperity.

From the perspective of comparative capitalism, Switzerland defies easy classification yet demonstrates the power of complementary institutions. Hall and Soskice's (2001) *Varieties of Capitalism* framework distinguishes Liberal Market Economies (LMEs), such as the United States and United Kingdom, which rely on competitive market arrangements, from Coordinated Market Economies (CMEs), such as Germany, which rely on strategic coordination among firms, banks, unions, and the state. Switzerland exhibits features of both models—a hybrid capitalism with liberal elements (e.g., flexible labor markets, low regulation) and coordinated elements (e.g., extensive vocational training and industry collaboration in innovation). Rather than being a liability, this hybrid configuration has been remarkably successful (Cusack & Fuchs, 2021; Meier et al., 2023). In the Swiss context, institutional complementarities are evident: decentralized political governance aligns with competitive federalism in taxation; direct democracy creates political accountability that reinforces efficient policy outcomes; the vocational education system supplies a skilled workforce that complements firms' innovation strategies; and labor market flexibility allows rapid reallocation of resources, enhancing the economy's adaptability to shocks (OECD, 2022). The concept of institutional complementarity suggests that an economy's various institutions must "fit" together to produce optimal outcomes—a criterion Switzerland meets through a synergy of mutually reinforcing practices.

## **Political Neutrality and Global Integration**

One foundational aspect of Switzerland's success is its long-standing policy of neutrality in international affairs. Enshrined after the Congress of Vienna in 1815, Swiss neutrality has meant avoiding military entanglements and power blocs, allowing the country to steer clear of the devastations of major wars. This political neutrality has yielded significant economic dividends. During both World Wars, for example, Switzerland's neutral status spared it from physical destruction and enabled it to serve as a stable center for finance and trade. Historians note that Switzerland's financial sector gained a strong global position "due to the country's neutrality during the two world wars" (Swiss Federal Archives, n.d.). Wealth from abroad flowed into neutral Switzerland as a safe haven, helping to build its banking industry and capital stock. More broadly, by not aligning with any camp, Switzerland could maintain trading relationships with diverse partners and emerge as a hub for diplomacy and commerce, hosting many international organizations in Geneva. Neutrality became part of Switzerland's brand as a safe and stable haven, attracting investment and talented immigrants who valued its secure environment.

In the modern era, neutrality continues to underpin Switzerland's economic model, not as isolationism but as pragmatic global integration on its own terms. Switzerland has deliberately kept a degree of sovereignty and policy autonomy—famously staying outside the European Union—while still deeply engaging in international trade and finance through bilateral agreements and multilateral institutions. This stance has allowed the country to avoid external political shocks and to position itself as an impartial, predictable environment for business. Swiss banks and the Swiss franc, in particular, benefit

from this reputation. The Swiss franc is widely regarded as a safe-haven currency, appreciating in times of global uncertainty as investors seek refuge in Switzerland's stability (Meier et al., 2023). This has been evident during crises; for instance, during global financial turmoil, capital surges into Switzerland, driving up the franc's value, which the central bank then carefully manages. The safe-haven status lowers Switzerland's borrowing costs and reflects international trust in its institutions. According to recent analysis, the attributes attracting foreign capital to Switzerland include political neutrality alongside its open economy and fiscal prudence (Meier et al., 2023). In other words, neutrality—coupled with Switzerland's strong international economic relations—nurtures a secure climate for investment and commerce (OECD, 2019, 2024).

It is important to note that neutrality is not just an external policy but an internalized part of Swiss political culture, promoting social cohesion and long-term thinking. The Swiss public strongly values stability and consensus, traits likely reinforced by a foreign policy that eschews extreme shifts or alignments. The domestic result is a politics oriented toward moderation, which provides consistency in economic policy. For businesses and investors, this consistency translates to confidence and predictability: governments change slowly, radical policy swings are rare (thanks also to direct democracy), and Switzerland has not experienced the abrupt regime changes or unrest that periodically disrupt many countries (Weder & Weder, 2009). All of this supports a long-term investment horizon and lower risk premiums in the economy. In sum, Switzerland's neutrality has been more than a diplomatic posture; it is an economic asset that has fostered an environment of trust, safety, and stability—key ingredients for sustained prosperity.

### **Independent Monetary Policy and the Swiss National Bank**

A second crucial pillar of Switzerland's economic model is its monetary policy framework, centered on the Swiss National Bank (SNB). The SNB is renowned for its independence, conservatism, and credible commitment to price stability. The Swiss Federal Constitution and the National Bank Act mandate the SNB to "ensure price stability, while taking due account of economic developments," and crucially establish the bank's independence in pursuing this mandate (Swiss National Bank, 2021). In practice, the SNB has interpreted price stability as keeping inflation below 2% over the medium term (OECD, 2019). This clear anti-inflation objective, similar to that of the German Bundesbank, has been a cornerstone of Switzerland's macroeconomic stability. Over the decades, the SNB has built one of the strongest inflation-fighting track records in the world, with long-run inflation averaging around 2% or less, often outperforming other advanced economies (IMF, 2020). By keeping prices relatively stable, the SNB has provided an environment in which the economy can fully exploit its productive potential (Meier et al., 2023).

The SNB's effectiveness extends beyond low inflation. As lender of last resort and guardian of financial stability, the central bank has acted to mitigate systemic risks and guide the economy through shocks. Analysts note that the SNB has "kept Switzerland's inflation low relative to other countries, mitigated systemic financial risks, provided efficient payment services," and generally supported an efficient financial market infrastructure (Meier et al., 2023). The SNB's credibility—meaning the public's confidence that it will act to preserve monetary stability—is high, which helps anchor inflation

expectations firmly. Even during unusual events such as the 2008 global financial crisis and the European debt crisis, the SNB preserved monetary stability, including through unconventional measures such as setting a temporary exchange rate floor for the franc in 2011–2015 to counter deflationary pressures. The International Monetary Fund (IMF, 2020) has commended the SNB's policies as “appropriate” and noted that inflation expectations in Switzerland remain well-anchored around the bank's target range. This credibility allows the SNB flexibility to respond forcefully to crises without unmooring price stability—a balance it has managed adeptly.

Monetary stability has yielded significant competitive advantages for the Swiss economy. A stable, strong currency and low inflation have made Switzerland attractive for foreign capital, while also “forcing Swiss companies to remain flexible and innovative” in the face of an appreciated currency (Cusack & Fuchs, 2021). The high franc value, partly a result of SNB's anti-inflation credibility and Switzerland's safe-haven status, puts pressure on exporters to improve productivity and move up the value chain, which in the long run has arguably strengthened Swiss industry. At the same time, a strong currency reduces import prices, benefiting consumers and keeping input costs down. In effect, the SNB's stewardship has created a virtuous cycle: by delivering monetary stability, it reinforces confidence in Switzerland's economy, which attracts capital and keeps interest rates low, further supporting investment and growth (Meier et al., 2023). Crucially, the SNB operates free from political cycles and short-termism—its governing board is appointed in a way that limits any single stakeholder's influence, and it famously refused to monetize government debts directly (OECD, 2024). This insulation from politics exemplifies how a well-designed institution can uphold a long-term mandate for the broader economic good. In summary, the SNB's independent and stability-oriented monetary policy has been fundamental to Switzerland's economic resilience, providing a low-inflation environment, smoothing the business cycle when needed, and bolstering the country's reputation as a financially solid economy (Weder & Weder, 2009).

### **Federalism, Direct Democracy, and Governance Efficiency**

Switzerland's political governance system—marked by strong federalism and direct democracy—constitutes another key underpinning of its economic success. The Swiss Confederation is highly decentralized: powers are shared among the federal government, 26 cantons, and thousands of communes. This federal structure, combined with frequent use of referenda and popular initiatives, creates a political environment of intense accountability, local autonomy, and policy competition. These features have helped ensure government efficiency, policy stability, and an economically friendly regulatory climate over time (Weder & Weder, 2009).

One benefit of Swiss federalism is fiscal competition among cantons. Cantons have significant autonomy to set tax rates—especially on personal and corporate income—and fiscal policies. As a result, they effectively compete to attract businesses and residents, which tends to keep taxes moderate and government spending disciplined. Research confirms that this competitive federalism has bolstered economic performance. For instance, an empirical study of Swiss cantons finds that “instruments of competitive federalism... improve economic performance” as measured by higher GDP per capita and productivity (Burret, Feld, & Schaltegger, 2021). Lower tax burdens and leaner

administrations, driven by cantonal competition, create a favorable business climate and reduce waste. Indeed, Switzerland's overall tax-to-GDP ratio and public spending are relatively low by European standards—public expenditure is roughly 33% of GDP compared with more than 40% in the OECD average—yet public services are of high quality, suggesting efficient use of resources (OECD, 2019). At the same time, inter-cantonal fiscal equalization exists to prevent extreme disparities, but it has not fully eliminated the incentives for cantons to manage finances prudently. The federal “debt-brake” rule, a constitutional balanced-budget provision adopted in 2003, and similar rules in many cantons further enforce fiscal discipline and long-term sustainability of public finances. The result is a Swiss public sector that supports the economy (through infrastructure, education, and other services) without crowding it out or accumulating unsustainable debt; Swiss public debt remains very low, under 40% of GDP, and net debt has been negligible or even negative in recent years (OECD, 2019).

Direct democracy, the practice of subjecting many policy decisions to referenda, also shapes Switzerland's economic governance. Citizens can challenge laws via referendums and propose constitutional amendments via initiatives. This system heightens government accountability and forces a high degree of consensus-building in policymaking. Major economic reforms or projects often require direct voter approval, which tends to weed out policies perceived as too risky or favoring narrow interests. While this could in theory lead to policy gridlock or conservative bias, in Switzerland it has mostly produced stability and incremental change—factors that businesses and investors generally welcome. Direct democracy also acts as a check on corruption and special-interest regulations, thereby maintaining a business-friendly regulatory framework. As noted in one study, the Swiss political system's direct democratic elements and subsidiarity principle create a high level of “political contestability that maintained government efficiency and led to political stability throughout history” (Weder & Weder, 2009, p. 12). In other words, because political power in Switzerland is contestable (through elections, referenda, and the division of powers), policies must win broad support and thus tend to serve the general interest, avoiding extremes that could destabilize the economy.

Another aspect of Swiss governance is consensus politics. The federal executive is a multi-party Federal Council, and major parties form grand coalitions rather than adversarial swings in power. This consensual approach, together with direct democracy, yields remarkable policy continuity across election cycles. Long-term strategies—for example, in education, infrastructure, or trade policy—can be sustained with less reversal, giving economic actors greater certainty. The rule of law is exceptionally strong, and regulatory changes are typically predictable and transparent. According to assessments such as the Heritage Foundation's *Index of Economic Freedom* (2023), Switzerland's regulatory environment is among the most competitive and efficient, with relatively light-touch labor and product market regulations and strong protection of property rights. All these governance qualities lower transaction costs and encourage entrepreneurship.

In sum, Switzerland's federalist and direct-democratic governance creates a virtuous mix of competition and accountability: local governments vie to provide attractive conditions, while citizens retain direct oversight of policy. This has produced what might be termed an ordoliberal polity—decentralized but rules-bound, competition-enhancing, and oriented toward stability. The economic

payoffs are evident in Switzerland's consistently high rankings on governance indicators and the efficiency of its public sector. As Weder and Weder (2009) conclude, the Swiss combination of subsidiarity and direct democracy has been crucial to its success, even if it may be "difficult for other countries to adopt" in full (p. 14). The Swiss example illustrates how deeply entrenched political institutions can foster an environment of trust, adaptability, and efficiency that translates into superior economic outcomes.

## **Vocational Education and Labor Market Flexibility**

A distinctive strength of the Swiss economic model lies in its human capital formation and labor market institutions. Switzerland has one of the world's most renowned vocational and professional education systems, which works in tandem with a flexible labor market to produce a skilled and adaptable workforce. This combination has underpinned high productivity, low unemployment, and an innovation edge in Switzerland's economy.

About two-thirds of Swiss young people opt for the vocational education and training (VET) pathway after compulsory schooling (State Secretariat for Education, Research and Innovation [SERI], 2020). The Swiss VET system is a dual apprenticeship model: students as young as 15 or 16 split time between classroom instruction and paid on-the-job training at companies, typically over three to four years. There are hundreds of occupational programs, from traditional trades to high-tech fields, all with national qualifications respected by employers (Hoffman, 2014; SERI, 2020). This system enjoys strong buy-in from employers, who help design curricula and provide apprenticeship places, because it supplies them with a steady pipeline of well-trained workers. As former Swiss economics minister Rudolf Strahm argued, the dual VET system is "one of the key factors explaining the country's economic success" (Strahm, 2008, as cited in Hoffman, 2014).

The evidence bears this out: Switzerland's workforce is exceptionally skilled at the technician and craftsman level, not only at the university-educated level. This broad base of skills supports Switzerland's high-value manufacturing and services sectors (e.g., precision engineering, pharmaceuticals, and finance) and contributes to its low structural unemployment. Notably, Switzerland has historically the lowest youth unemployment rate among developed countries, reflecting how smoothly apprentices transition into stable jobs (OECD, 2019). As of the 2010s, youth unemployment in Switzerland hovered around 3–8%, far below many European peers that faced double-digit rates (National Center on Education and the Economy [NCEE], 2015).

The vocational system also contributes to innovation and productivity in a less obvious but crucial way. Because apprenticeships tightly integrate practical work with learning, Swiss companies are continually involved in updating training content and adopting new technologies. Backes-Gellner and Pfister (2020) find that the Swiss VET system provides an "excellent basis for the implementation and promotion of innovations in Swiss companies," and helps diffuse innovative technologies across even small firms, not just at the high-tech frontier. Moreover, Switzerland has a system of professional education for apprentices to upskill (through advanced federal diplomas, universities of applied sciences, and related pathways), creating lifelong learning opportunities and adaptability (SERI, 2020).

Complementing the education system is Switzerland's labor market flexibility and model of labor relations. By international standards, Swiss labor law is relatively liberal: employment protection legislation is not overly stringent, notice periods and severance requirements are moderate, and collective bargaining is largely voluntary and decentralized. Only about half the workforce is covered by collective labor agreements, and there is no national minimum wage (some cantons have their own minima). The OECD observes that Swiss legislation "allows for high flexibility in hiring and dismissing workers" and that the workforce's strong skills make it well-placed to adapt to economic shifts (Salins & Sila, 2022). This flexibility means Swiss firms can reorganize, innovate, or downsize/upscale with less red tape, enabling faster reallocation of labor to more productive uses.

Crucially, flexibility in Switzerland is paired with a tradition of social partnership and high wages, which helps maintain social cohesion. Labor unions and employer associations, while not as confrontational as in some countries, engage in dialogue to set industry wage standards and training commitments. The result is a high-wage, high-skill economy with relatively few strikes or disputes. Workers benefit from strong job prospects and training opportunities, while firms benefit from adaptability. Switzerland consistently ranks at or near the top of global competitiveness and talent indexes in part due to this balanced labor system (Salins & Sila, 2022).

In summary, Switzerland's model invests heavily in human capital through vocational education and sustains a dynamic allocation of that human capital through flexible labor market arrangements. This dual approach yields a labor force that is both highly competent and responsive to economic needs—a fundamental driver of productivity and resilience.

### **Innovation and Competitive Industry**

A final key factor in Switzerland's economic model is its strong orientation toward innovation and high-value industries. Despite its small size, Switzerland has become an innovation powerhouse—ranked as the world's most innovative economy by the World Intellectual Property Organization for 13 consecutive years (2011–2023) (WIPO, 2023). This success stems from the interaction of the institutional foundations described earlier and deliberate specialization in knowledge-intensive activities.

Switzerland's industrial structure is characterized by globally competitive firms in pharmaceuticals and life sciences (e.g., Roche, Novartis), specialty chemicals, precision machinery, luxury goods, financial services, and more recently, tech and fintech niches. These sectors rely heavily on research, quality, and continuous innovation rather than low-cost mass production. The country consistently invests over 3% of GDP in research and development, among the highest in the world, with much of this funding coming from the private sector (OECD, 2024). Top universities such as ETH Zürich and EPFL contribute world-class research and skilled graduates, while the VET system provides inventive technicians, together creating a broad innovation base.

Institutions and policies also encourage innovation. The stable macroeconomic environment (low inflation, stable currency) and strong intellectual property protections give innovators confidence. Moderate corporate tax rates and cantonal tax incentives support high-tech investment. The

government, through Innosuisse, co-finances applied research and commercialization projects, especially for SMEs. Crucially, Switzerland's competition-friendly regulations avoid stifling new entrants, forcing firms to think globally from the start. This has led to a culture of precision, incremental improvement, and resilience, seen in both multinationals and SMEs that dominate high-value niches in global value chains (OECD, 2024).

Furthermore, Switzerland's innovation drive is tightly linked to its export success. Exports regularly exceed 50% of GDP, and the country maintains a large current account surplus (OECD, 2019). By specializing in innovative, high-quality goods, Switzerland has maintained trade surpluses and strong external accounts. Sustaining access to foreign markets, especially the European Union, remains vital, and Swiss policymakers continue to negotiate bilateral agreements to safeguard this access.

In short, Switzerland's economy thrives on a high-innovation equilibrium: educated talent, firm capabilities, and supportive institutions feed into each other. The outcome is a diversified set of competitive industries that continually upgrade and adapt. The Swiss model illustrates a comparative institutional advantage: a configuration uniquely suited to competing on quality and innovation, ensuring resilience and prosperity in a changing global economy.

## Conclusion

Switzerland's sustained economic success is, at its core, a story of robust institutions and their interplay with prudent policies. From the analysis above, several key themes emerge. First, the Swiss model underscores the importance of stable, inclusive institutions in fostering economic resilience. Political neutrality has insulated Switzerland from geopolitical upheavals, while its federalist and direct-democratic governance has ensured accountability, policy stability, and a competitive economic policy environment. These institutional foundations align with theoretical expectations from new institutional economics—namely, that secure property rights, credible commitments, and constraints on rent-seeking behavior create a fertile ground for growth (North, 1990; Weder & Weder, 2009). Switzerland's case validates this: by most governance metrics, it excels in rule of law, government effectiveness, and low corruption, which translates into a high-trust, low-uncertainty business climate.

Second, Switzerland exemplifies an ordoliberal approach to economic management, wherein the state sets firm ground rules—sound money, fiscal discipline, and competition policy—and then allows market mechanisms and private initiative to drive prosperity. The independent Swiss National Bank's unwavering focus on price stability has been a linchpin in maintaining economic equilibrium and confidence (Meier et al., 2023). Fiscal policy, too, has been conservative; the federal debt brake and cantonal self-regulation keep public finances healthy. This restrained yet supportive role of government corresponds to the ordoliberal ideal of an economic constitution that prevents macroeconomic instability and market distortions. The payoff is visible in Switzerland's macroeconomic track record: low inflation, low public debt, and the capacity to absorb shocks with relatively shallow recessions (OECD, 2024).

Third, the Swiss experience highlights institutional complementarities—the idea that an economy's various institutional spheres must harmonize to produce optimal performance (Hall & Soskice, 2001).

In Switzerland, we see a coherent synergy: decentralized governance encourages local innovation and competition; vocational education supplies the skilled labor that flexible markets efficiently allocate; and the innovation system builds on these skills under the stability afforded by neutral foreign policy and sound macroeconomics. None of these factors alone would achieve the same result; it is their combination that creates a resilient, self-reinforcing system. For example, labor market flexibility might lead to insecurity in a low-skill workforce, but in Switzerland it is coupled with high skills and social dialogue, resulting in high productivity and low unemployment concurrently (OECD, 2019; Salins & Sila, 2022). Likewise, direct democracy could slow reforms, but in the Swiss context it works in tandem with consensus-oriented politics to deliver continuity and public buy-in for necessary adjustments. This underscores a theoretical point: context matters, and policies or institutions are not universally effective in isolation; they function within a broader ecosystem of norms and structures. Switzerland's economy is resilient not because of any single "silver bullet," but because of a mutually reinforcing set of institutions that together promote adaptability, efficiency, and innovation.

Finally, Switzerland's case contributes to the comparative understanding of economic resilience and institutional efficiency. Resilience—the capacity to withstand and recover from shocks—in Switzerland's case has roots in both structural and policy realms. Structurally, its diversified high-value economy, underpinned by continuous innovation and skill renewal, provides flexibility to pivot during disruptions. Institutionally, features such as the short-term work scheme, the strong social safety net (e.g., unemployment insurance), and swift consensual policy responses act as shock absorbers, as seen in the COVID-19 pandemic where government support and the SNB's actions cushioned the labor market (IMF, 2020; Salins & Sila, 2022). Efficiency, in turn, is seen in the lean public sector and competitive markets that allocate resources without heavy inefficiencies. The theoretical implication is that economic resilience is not merely about reactive policies; it is cultivated over decades by investing in human capital, forging institutions that balance flexibility with security, and committing to long-run stability over short-run expediency (OECD, 2024).

In conclusion, Switzerland's economic model—often admired but occasionally dismissed as *sui generis*—offers rich insights into the interplay of institutions and prosperity. Its success rests on a conceptual foundation of inclusive and efficient institutions, ordoliberal policy discipline, and synergistic complementarities among governance, education, labor, and innovation systems. While every country has unique attributes, the Swiss experience reinforces general lessons: political and economic stability breed confidence; skills and innovation drive competitiveness; and coherent institutions outperform ad hoc approaches in delivering sustained growth. By viewing Switzerland not as an anomaly but as a coherent model, scholars and policymakers can better appreciate the conditions under which economic resilience and high performance are achievable. The Swiss case ultimately contributes to our theoretical understanding of how carefully crafted institutional architectures can yield a durable competitive advantage in the complex game of global political economy.

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# Linguistic Risks and Resilience in Digital Language Learning

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**Abstract.** Digital technologies have transformed global language education, offering new opportunities for children and students through mobile applications, online platforms, and AI-driven tools. Yet, alongside these innovations, critical linguistic risks emerge that may hinder communicative competence, equity, and linguistic diversity. This article examines such risks by conducting a thematic literature review of recent studies in applied linguistics, sociolinguistics, and digital pedagogy. Findings indicate that while digital tools support vocabulary acquisition, motivation, and learner autonomy, they often fall short in developing productive and socio-pragmatic skills. Risks include over-reliance on automated feedback, exposure to inaccurate or non-standard input, cognitive overload from distractions, inequities arising from the digital divide, and the marginalization of minority languages in digital spaces. The discussion emphasizes blended pedagogical approaches, teacher mediation, infrastructure investment, and inclusion of diverse languages as key strategies to mitigate these risks. By navigating these challenges, digital language learning landscapes can evolve into more effective, equitable, and culturally sustaining environments. This study contributes a theoretically grounded framework for understanding and addressing linguistic risks in digital education, offering insights for educators, policymakers, and developers seeking to align technological innovation with sound linguistic principles.

**Keywords:** digital language learning, linguistic risks, mobile-assisted language learning (MALL), communicative competence, digital divide, linguistic diversity, applied linguistics

## Introduction

Digital technology has become deeply embedded in language education worldwide, creating *digital language learning landscapes* that range from mobile apps and online courses to social networks and AI-driven tutoring systems. The COVID-19 pandemic accelerated this trend; for instance, in March 2020 the popular app Duolingo reported double its usual number of sign-ups as millions sought to learn languages during lockdowns. From rural India to African classrooms, digital tools have *broadened* access to language learning. In India's community programs, a mobile app (Hello English) significantly improved basic English literacy for adults and children. Likewise, in several African countries, educators have leveraged WhatsApp to facilitate group discussions among ESL learners, *effectively fostering* collaborative learning in low-resource settings. These examples highlight the global potential of technology to enhance language acquisition through increased accessibility, engagement, and personalized learning.

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However, alongside these promising opportunities, educators and researchers are drawing attention to a spectrum of linguistic risks inherent in digital learning environments. *Linguistic risk* in this context refers to any factor that may negatively impact language development or communication skills as a result of using digital platforms for language learning. The surge in digital language tools has outpaced the scrutiny of their educational efficacy and long-term effects. A recent meta-analysis by Mihaylova et al. (2022) found that mobile language learning apps can indeed boost second-language proficiency with a moderate-to-strong effect size ( $g \approx 0.88$ ), yet the evidence base is marred by high bias risk and low study quality, warranting caution in interpreting those benefits. In other words, while digital platforms appear beneficial, we must critically examine how they shape language learning outcomes – especially for children and students, who are often early adopters of technology. Key concerns include whether app-based learning sufficiently develops *communicative competence*, how exposure to digital media affects young learners' language development, and if reliance on dominant languages online might erode linguistic diversity. To ensure that digital innovation truly serves language education, it is imperative to navigate these risks through informed strategies and research-based practices. This article adopts an IMRaD structure to investigate the theoretical and practical challenges ("linguistic risks") in contemporary digital language learning landscapes and to discuss how these risks can be mitigated, thereby turning potential pitfalls into pathways for more effective and equitable language education.

## Methodology

This study follows a qualitative research approach, comprising a thematic literature review and conceptual analysis. We systematically collected and examined recent research (2018–2025) on digital language learning across multiple contexts to identify recurrent risk factors and recommended mitigation strategies. Academic databases (e.g. Scopus, ERIC, Google Scholar) were searched for keywords such as "digital language learning," "mobile-assisted language learning," "children language development and screen time," "language learning apps," and "linguistic diversity online." Approximately 20 peer-reviewed sources – including empirical studies, meta-analyses, and policy reports – were selected based on their relevance to *educational technology in language learning*, with a focus on global perspectives and the impact on children and student learners. Notably, we incorporated insights from researchers who have examined mobile-assisted language learning and digital pedagogy in multilingual contexts, as well as studies from various regions to ensure a broad view. Key information from each source was extracted and coded along thematic lines (pedagogical outcomes, cognitive development, equity, etc.), allowing us to triangulate findings and theory from applied linguistics, education, and sociolinguistics. No new experimental data were collected; instead, our aim was to synthesize existing evidence to map out the landscape of linguistic risks. By combining findings from controlled studies, surveys, and expert analyses, we sought to build a comprehensive framework of the challenges digital learners face. This method enables a robust, interdisciplinary understanding of how digital tools influence language learning – beneficial or detrimental – and grounds our discussion of mitigation strategies in documented research. The following sections present the results of this literature-driven analysis, organized by major risk domains, followed by a discussion on navigating these challenges for future practice.

## Results

### 1. Benefits with Caveats: Efficacy vs. Missing Skills

Across the literature, digital language learning tools show clear benefits in certain areas, but these come with caveats. Many studies report that mobile applications and online platforms can significantly improve specific language skills like vocabulary recognition and retention. For example, a comparative review by Alisoy and Sadigzade (2025) found that mobile-app learners often outperform traditional classroom learners in vocabulary retention and engagement, thanks to features like multimedia content, spaced repetition, and gamification. These findings align with broader evidence that students enjoy the convenience and interactivity of apps, which can increase time-on-task and motivation. Nonetheless, the same review highlighted a critical limitation: traditional instruction still excelled at fostering productive language skills, such as speaking and writing in context, due to richer interaction and teacher mediation. In fact, blended approaches (combining digital tools with face-to-face teaching) yielded the most balanced outcomes. This suggests that while apps are effective for drills and practice, they cannot alone guarantee communicative competence.

Linguists emphasize that mastering a language involves more than memorizing words and grammar rules; it requires developing the ability to use the language spontaneously in real social interactions. Piller (2021) notes that '*Language is about interacting with other people – it's not something we do alone.*' An app can teach vocabulary and pronunciation exercises, but it cannot replicate the dynamic, unpredictable nature of human communication. The present analysis found widespread agreement that digital learners risk becoming '*fluent*' in drills yet *flustered* in dialogue. The gamified, self-paced environment of apps is a double-edged sword: on one hand, it rewards consistency and keeps learners "glued to the screen" with points and streaks, leading to steady practice habits. On the other hand, it provides a safe bubble devoid of the pressure and spontaneity of real conversations. Learners don't experience the crucial "linguistic risk-taking" of using the target language in unrehearsed, meaningful situations. A user reflection encapsulated this: achieving streaks in an app felt "*safe and therefore slightly empty*" compared to the vulnerable thrill of real-life interactions, where one must risk making mistakes to communicate. In summary, overreliance on digital platforms may leave a gap in pragmatic and conversational skills, meaning learners might score well on app-based tests but struggle to improvise in actual communication.

### 2. Quality of Input and Feedback: Accuracy vs. Automation

Another identified risk area is the quality and authenticity of linguistic input and feedback that learners receive in digital environments. Traditional learning often involves expert teachers who can provide nuanced corrections and adapt to learners' needs. In contrast, many digital platforms rely on automated feedback and user-generated content, which can vary widely in accuracy. The rise of AI-powered writing assistants and chatbots in language learning illustrates this tension. Such tools (e.g. Grammarly or ChatGPT-based tutors) offer immediate, detailed corrections on grammar and usage, potentially accelerating writing development by providing on-demand help. Yet, as Sadigzade (2025) points out, *these AI tools also come with distinct risks*: students may become over-reliant on AI suggestions, accepting corrections uncritically and thus failing to develop their own self-editing skills. Moreover,

the feedback quality can be inconsistent, since AI may misjudge context or appropriateness even as it excels at surface-level fixes. There are documented concerns about privacy and academic integrity as well – for example, uploading student essays to cloud-based services raises data privacy issues, and using AI hints can blur the line between learning and cheating if not properly guided.

Similar concerns apply to the linguistic input learners encounter on digital platforms. Unlike curated textbooks, the internet exposes learners to a vast array of language uses, including slang, informal shorthand, and outright errors. Social media and language exchange apps vividly demonstrate this mix of rich input and potential misinformation. A comprehensive analysis by Nuri (2024) on social networking in language acquisition found that these platforms provide “*deeply authentic input and social interaction*” which can bolster cultural competence and real-world vocabulary. At the same time, it identified critical challenges: learners are frequently exposed to non-standard language forms (e.g. internet slang, regional dialect spellings) and face endless digital distractions that can derail focused learning. In uncontrolled online environments, a learner might pick up incorrect grammar from a casual YouTube comment or get sidetracked by unrelated content. Without guidance, distinguishing acceptable informal usage from errors can be difficult for students. Thus, the pedagogical quality control that a teacher or curriculum provides may be lacking in open digital spaces. Taken together, the literature suggests a risk of “garbage in, garbage out”: if learners absorb faulty input or depend on imperfect automated feedback, their language development might include fossilized mistakes or stylistic issues that are hard to unlearn.

### 3. Cognitive Load and Distraction: The Attention Challenge

Digital language learning occurs on the same devices and platforms that deliver a myriad of other content, posing a constant competition for learners’ attention. One prominent risk identified is that of distraction and cognitive overload in digital environments, especially for children and teenage students who may struggle with self-regulation. Unlike a physical classroom with a teacher enforcing focus, a student using a language app on a tablet can easily toggle to games, social media, or other apps. Even within educational software, the multimedia elements intended to engage learners can sometimes overwhelm them with stimuli, reducing the quality of learning. Alisoy et al. (2024) conducted a survey of 540 students on smartphone use for education and found an interesting duality: students overwhelmingly “*recognize the value of smartphones*” for enhancing language learning through on-demand practice and resources, yet they also report that these devices introduce serious distractions that can derail study sessions. Notifications, multitasking, and the habit of short attention spans, all common in youth accustomed to smartphones, can interrupt the deep focus needed for mastering a language’s complexities.

For younger children in particular, *excessive screen time* has been associated with adverse effects on language development. A recent review concluded that increasing the amount of screen exposure at an early age has measurable negative impacts on children’s language outcomes. Children under two or three years old, who learn best through responsive interaction with caregivers, do not benefit from passive screen-based learning to the same extent. Studies have linked unmonitored, high-dose media use in infancy with delayed speech and smaller vocabularies (Karani et al., 2022; Raheem et al., 2023

as cited in various reports). While educational programs can mitigate these effects if content is high-quality and used interactively, the consensus is that screen-based learning should be introduced judiciously for young learners. Even for older children, cognitive psychologists note that digital multitasking can impede the formation of long-term memory. The allure of interactive apps might keep students busy, but if they are *splitting attention* between the lesson and other online temptations, the depth of language processing may suffer. In sum, the digital medium itself poses a risk: without structures to maintain focus, the efficacy of language learning can decline due to fragmented attention and mental overload.

#### 4. Equity and Access: The Digital Divide in Language Learning

A recurring theme in the literature is the socioeconomic disparity in who can fully benefit from digital language tools. Often termed the “*digital divide*,” this refers to gaps in access to reliable internet, up-to-date devices, and supportive learning environments outside school. Digital learning opportunities tend to favor students who have constant connectivity, modern gadgets, and digitally literate support networks – typically those in wealthier or urban settings. Conversely, students in low-resource contexts risk falling further behind. As one analysis succinctly put it, despite its promise, “*mobile-assisted language learning (MALL) faces significant challenges, including technical limitations like device compatibility and internet access*”. In some regions, basic infrastructure is lacking: irregular electricity or slow networks make it difficult to maintain daily app routines or video tutoring sessions. Even within a single classroom, not all children may own a personal device for practice, or they may have to share with siblings, limiting their time on task.

Additionally, lack of teacher training in digital pedagogy can exacerbate inequities. If educators are not well-versed in integrating apps or online resources into their curriculum, students effectively lose out on the blended approach that maximizes success. Alisoy and Sadiqzade (2024) emphasize pedagogical concerns like *content quality and teacher training* as major hurdles in digital language education. Some teachers may avoid using potentially valuable tools due to unfamiliarity, while others might use them inappropriately (for example, relying on translation apps in class without guidance). This inconsistency can lead to unequal learning experiences across schools. There are also economic disparities where premium platforms or ad-free versions of apps cost money. Students from affluent families can afford subscriptions that unlock more content, while disadvantaged students are left with limited, advertisement-supported versions or no access at all – a clear equity issue. Thus, without deliberate intervention, digital language learning can inadvertently widen educational gaps, rewarding those already privileged with more resources.

#### 5. Linguistic Diversity at Risk: Dominance of Major Languages

An often-overlooked risk in the push for digital language learning is its potential impact on *linguistic diversity*. The internet and popular apps predominantly cater to a handful of global languages (English, Spanish, Mandarin, etc.), which means learners worldwide are incentivized to focus on those languages at the expense of local or minority languages. UNESCO has warned that many languages could disappear under the pressure of dominant global tongues. A European Parliament briefing (Pasikowska-Schnass, 2020) explicitly noted that this threat is “exacerbated by digital technology.”

Young people now communicate and consume media primarily online, so “*if online content is only available in dominant languages, lesser-used languages could become ‘digitally extinct’*.” In other words, when children in a multilingual society find that all the exciting apps, games, and videos are in English, they may gradually disengage from their mother tongue, not seeing it as part of modern life. Over time, this can lead to declining fluency in heritage languages and even intergenerational language loss.

Furthermore, even for widely spoken languages with multiple dialects, digital platforms often adopt a one-size-fits-all standard (typically the prestige or Western variety). Learners might not be exposed to regional varieties or registers appropriate to different contexts, potentially leading to a homogenization of language use. For example, a student in West Africa learning French through an app might only hear Metropolitan French accents and vocabulary, or an indigenous language speaker in Latin America might switch to using Spanish online for lack of digital resources in their language. The risk here is cultural: the rich diversity of linguistic practices could be eroded as *global learners gravitate towards the languages and norms best supported by technology*. However, it’s important to acknowledge that technology can also be a tool for preservation if applied thoughtfully. The same EU report suggests that online education and language technologies can help revitalize endangered languages – but only if communities invest effort in creating digital content for those tongues. In the absence of such efforts, the default trajectory of digital language learning ecosystems tends to sideline minority languages, putting them at further risk.

## Discussion

This review has unveiled a complex interplay of advantages and risks in digital language learning landscapes. On one side, technology offers unprecedented opportunities: on-demand practice, engaging multimedia, personalized feedback, and global connectivity for learners. On the other side, we see that without careful implementation, these very features can become pitfalls – yielding shallow learning, fostering dependency, or exacerbating inequalities. How can educators, parents, and policymakers navigate these linguistic risks to harness the positive power of digital tools while safeguarding against their downsides? In this discussion, we integrate theoretical insights and practical recommendations from the literature to suggest ways forward in creating a balanced and resilient digital language learning environment.

1. Blending Digital and Human Interaction: A clear consensus is that digital tools should *supplement, not replace*, human-mediated learning. The social and communicative gaps identified (such as lack of real conversation practice) can be addressed by deliberately pairing technology use with interactive opportunities. For example, teachers might use an app for vocabulary drills but then conduct live group activities (in-person or via video call) for students to use those new words in context. This aligns with Alisoy and Sadigzade’s (2025) finding that a blended approach yielded the best outcomes, combining apps’ efficiency with the teacher’s guidance for productive skills. Educators should encourage “linguistic risk-taking” in safe settings – such as classroom discussions, language exchange sessions, or even voice notes in a class chat group – so that students build the confidence to communicate spontaneously. Theoretical work by Pérez-Paredes and Zhang (2022) supports this shift, arguing that the field must move away from *device-centered pedagogies* toward socially situated practices

that embed mobile learning into authentic communication and broader SLA (Second Language Acquisition) theory. In practice, this means designing curricula where technology is one component in a richer tapestry of language experiences, ensuring learners develop well-rounded competence.

2. Improving Digital Feedback and Content Quality: To mitigate the risks of automated feedback and questionable input quality, a multi-pronged approach is needed. One strategy is to incorporate teacher mediation and student training in digital literacy. As Sadigzade (2025) concludes in her study on AI feedback, effective use of these tools “*requires teacher mediation, student training in feedback literacy, and institutional guidelines*”. Concretely, teachers can demonstrate to students how to critically evaluate suggestions from a grammar checker or translation app – treating it as a helpful peer rather than an infallible authority. Students can be taught to ask: *Why did the AI suggest this change? Could it be wrong?* Such reflection turns a potential crutch into a learning experience. Institutions should also set ethical guidelines (for instance, rules on using AI for assignments to prevent plagiarism and protect academic integrity). Meanwhile, developers of language apps can collaborate with linguists and educators to improve content accuracy and cultural relevance. Alisoy & Sadiqzade (2024) recommend “*concerted effort from educators, developers, and policymakers to create inclusive, high-quality, and ethically sound solutions.*” This might involve vetting user-generated content on language exchange platforms, using AI to filter out common errors in exercises, or providing localized content for diverse dialects. By raising the quality of input and feedback, we can ensure learners aren’t led astray by the very tools meant to help them.

3. Managing Distraction and Cognitive Load: Addressing the attention challenge requires both technical design choices and user habits. App designers can play a role by minimizing extraneous gamification that doesn’t serve learning and by including focus modes (e.g. disabling notifications or locking out other apps during study time). Educators and parents, on the other hand, should guide students in creating *structured routines* for digital learning – treating it with the same seriousness as a classroom lesson. For young children, this might mean co-viewing and interaction: studies show that when parents engage with children during educational screen time (for example, discussing a Sesame Street episode), the child’s language gains are much higher than when viewing alone. Thus, parental involvement is key to navigating early childhood screen risks. For older students, teaching time-management and self-regulation strategies is crucial. Simple practices like scheduling short, uninterrupted study sessions (free of multitasking) and reflecting on one’s own digital habits can increase awareness and reduce distraction. On an institutional level, schools could provide workshops on digital study skills. The pandemic experience has already prompted many such initiatives, recognizing that simply handing out devices is not enough – students must learn *how to learn* with devices effectively. Where possible, ensuring that digital learning occurs in an environment conducive to focus (a quiet space, or monitored computer lab) can also help. These steps collectively aim to transform digital tools from potential sources of cognitive overload into streamlined aids that respect the learner’s attentional limits.

4. Promoting Equity in Digital Language Education: To prevent the digital divide from widening, equitable access must be a cornerstone of any large-scale implementation of language technology. Policymakers should prioritize investments in infrastructure, such as expanding broadband internet to rural or underserved areas and providing affordable or free devices to students in need. In line with

these needs, experts call for stakeholders to “*invest in infrastructure, training, and collaborative development while adhering to ethical guidelines*” as digital learning expands. This means that governments and educational institutions might subsidize internet access or negotiate with ed-tech companies for free licenses for low-income schools. Additionally, teacher training programs must include up-to-date digital pedagogy components so that all teachers – not just the tech-savvy or well-resourced – can confidently integrate technology. When teachers across a district are uniformly prepared, students receive more consistent benefits. Another aspect of equity is making content accessible for those with disabilities (through features like captions, screen reader compatibility, etc.), ensuring inclusive design. We also have to be mindful of socioeconomic disparities in home support. If one student’s home environment allows for ample computer use and encouragement, while another’s does not, after-school language practice could diverge greatly. Mentoring programs or community language centers with internet access could help bridge this gap. Ultimately, an equitable approach recognizes digital language learning as a public good: the aim is to make high-quality resources available to all learners, regardless of their background, so that technology becomes a force for narrowing achievement gaps rather than widening them.

5. Safeguarding Linguistic Diversity: To navigate the risk of linguistic homogenization, conscious efforts are needed to include and uplift *minority languages and diverse dialects* in digital spaces. This is a call to action for both communities and technologists. The European Parliament report (2020) stresses that preventing digital extinction of lesser-used languages will require “huge efforts by speakers’ communities and language technology specialists” to create digital content and tools for those languages. In practice, such efforts might include developing language learning apps for indigenous languages, digitizing folklore and literature, or building speech recognition models for understudied languages. International organizations and local governments can provide grants or platforms to support these initiatives. For instance, libraries or cultural institutions could host hackathons to develop basic e-learning resources (like flashcard apps or YouTube lessons) in endangered languages. Tech companies, on their part, should be encouraged to localize their interfaces and curricula into more languages – not just the most profitable markets. Even small design choices, like allowing users to set interface instructions in their mother tongue, can validate and normalize the use of those languages online. Additionally, educators in multilingual settings should emphasize additive bilingualism: encouraging students to use technology to strengthen both the second language *and* their first language. For example, students might create bilingual video projects or maintain digital journals in both languages. By positioning technology as a tool for *enrichment* rather than replacement, we can foster multilingual digital citizens. In summary, actively incorporating linguistic diversity into digital learning not only protects cultural heritage but also enriches the learning experience for all – since exposure to multiple languages can enhance cognitive flexibility and empathy among students.

## Conclusion

The advent of digital learning tools has undeniably revolutionized language education, offering flexibility and novel ways to engage learners. Yet, as this analysis has made clear, innovation in the digital realm comes with its own set of challenges that educators and stakeholders must carefully manage. We have identified critical linguistic risks – from gaps in communicative skills and flawed

input to attention attrition, inequitable access, and threats to language diversity. These findings highlight that successful language acquisition in the digital age is not guaranteed by technology alone; it depends on how technology is used within a pedagogically sound framework.

Encouragingly, the research also charts a path forward. By adopting a reflective, blended approach that unites the strengths of human instruction and digital resources, we can mitigate many of the risks outlined. Practical measures such as teacher-guided use of AI feedback, stricter screen time management for youngsters, infrastructure investments, and inclusive content development emerge as strategies to ensure that digital platforms truly enrich language learning. As Alisoy and Sadigzade (2024) articulate, despite the challenges, mobile and digital tools have the potential to be “an essential tool for achieving effective and equitable language education,” provided that stakeholders invest in the necessary support systems and safeguards.

In conclusion, navigating linguistic risks in digital learning is about striking a prudent balance – leveraging the global connectivity and adaptive power of technology while maintaining the human-centric, social nature of language learning. By learning from early implementations and research across different countries, we can build digital language learning landscapes that are not only innovative and engaging but also theoretically sound, culturally sensitive, and accessible to all learners. Such an ecosystem will attract more educators and students, inspire further research, and ultimately lead to improved outcomes and rich multilingual competence. In embracing digital tools with eyes open to their pitfalls, we ensure that the next generation of language learners can reap the benefits of both modern technology and timeless linguistic wisdom, confidently stepping into a connected global society.

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# State Support for Entrepreneurship in Azerbaijan, 2020–2025: Policies, Programs, and Outcomes

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**Abstract.** Small and medium-sized enterprises (SMEs) are increasingly recognized as pivotal to Azerbaijan's economic diversification and regional development. This article analyzes the state-led support mechanisms for entrepreneurship in Azerbaijan, particularly those expanded since 2020. Drawing on government reports, international assessments, and academic literature, the study examines financial support programs, legal and regulatory reforms, the establishment of SME Houses and the “SME Friend” network, startup incentives such as Startup Certificates, grant financing schemes, and innovation support measures. The coordination of these efforts through dedicated public institutions is discussed, alongside measurable outcomes such as growth in the SME sector's contribution to GDP and employment, increases in new business registrations, and high utilization of one-stop services. International cooperation initiatives—including partnerships with the OECD, the International Trade Centre (ITC), and Turkey's KOSGEB—are also explored for their contribution to capacity building and the exchange of best practices. The findings show that Azerbaijan's government has significantly expanded support for entrepreneurs in recent years, yielding double-digit growth in the SME sector and improved service delivery. Nevertheless, challenges such as access to finance and regional disparities remain. The article concludes with an assessment of institutional support structures for SME development and recommendations for sustaining momentum, emphasizing continued policy innovation, systematic monitoring of support outcomes, and deeper public–private collaboration to ensure the long-term sustainability of entrepreneurship-led growth in Azerbaijan.

**Keywords:** *Entrepreneurship development; SMEs*

## Introduction

Entrepreneurship development has become a strategic priority for Azerbaijan as the country seeks to diversify its oil-dependent economy and promote balanced regional growth. Small and medium-sized enterprises (SMEs) constitute over 99% of all businesses in Azerbaijan and are widely regarded as engines of employment, innovation, and social development (Azerbaijan Ministry of Economy, 2023; Suleymanov & Orujov, 2025). Yet the SME sector's value-added share remained relatively modest in the late 2010s—about 15–16% of GDP—pointing to substantial untapped potential (OECD, 2020; World Bank, 2019). In response, the government has implemented comprehensive measures to

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improve the business environment and strengthen state support for entrepreneurship, particularly from 2020 onward.

An important strand of reform has been institutional: since 2017, a dedicated national framework has coordinated SME policy and support programs under a unified mandate to enhance the investment climate, modernize entrepreneurship regulation, raise competitiveness and economic contribution, broaden access to finance and advisory services, and reinforce legal protections for business activity. This framework operates through a central administration and an expanding regional presence to deliver services directly to current and aspiring entrepreneurs.

Since 2020, support for SMEs has accelerated, driven both by long-term development goals and by external shocks. The COVID-19 pandemic underscored the need for resilience among small firms and prompted extraordinary relief measures for affected entrepreneurs. Subsequently, SME promotion was embedded in national development planning—the Socio-Economic Development Strategy 2022–2026 sets explicit targets and reform measures (OECD/EBRD, 2023; Azerbaijan Ministry of Economy, 2023). A new Law on the Development of Micro, Small and Medium Enterprises (December 2022) formalized the forms and instruments of state support, reflecting a strengthened legal commitment to entrepreneurship (Law of the Republic of Azerbaijan, 2022). International assessments, including the OECD's SME Policy Index, have recognized progress across several policy dimensions while recommending further alignment with good practice, especially in monitoring and evaluation, entrepreneurial skills, and innovation support (OECD, 2020; OECD/EBRD, 2023).

This article offers an in-depth analysis of Azerbaijan's post-2020 entrepreneurship support architecture. After reviewing the policy context and methodology, the paper examines key domains of intervention: financial assistance programs; legal and regulatory reforms; the roll-out of one-stop SME service centers and regional coordinator networks; targeted incentives for startups; grant-financing schemes; and measures to foster innovation. It also considers the role of international cooperation—such as partnerships with the OECD, the International Trade Centre (ITC), and Turkey's KOSGEB—in facilitating knowledge exchange and harmonization with global practice. The discussion evaluates effects on business entry, SME contributions to GDP and employment, and regional entrepreneurial activity. The paper concludes by identifying remaining challenges—especially access to finance and regional inclusion—and outlining priorities to sustain momentum through continued policy innovation, rigorous outcome monitoring, and deeper public–private collaboration (Suleymanov & Orujov, 2025; OECD/EBRD, 2023).

## **Literature Review**

The role of state support in fostering entrepreneurship is widely acknowledged in development literature. A robust SME sector is associated with diversified growth, innovation, and job creation, particularly in transition economies seeking to reduce reliance on extractive industries. International experience indicates that effective SME support frameworks combine streamlined regulation, improved access to finance (e.g., credit guarantees, concessional lending, grants), advisory and training services, targeted tax incentives, and infrastructure such as industrial or innovation parks (OECD, 2019). Many of these elements align with the EU's Small Business Act principles, which have guided SME policy benchmarking in countries including Azerbaijan (OECD, 2020).

In Azerbaijan, prior to the consolidation of SME policy under a unified institutional framework, support was fragmented across multiple bodies, and firms faced persistent obstacles. A World Bank study highlighted historically low rates of high-growth entrepreneurship and innovation, linked to factors such as cumbersome regulation, limited financing, and weak global market linkages (World Bank, 2019; OECD, 2020). Mid-2010s reforms—simplified business registration and a moratorium on certain inspections—improved conditions to some extent, reflected in stronger Doing Business metrics, yet the SME share of GDP remained modest, underscoring the need for more proactive support (Kuriakose, 2016). Scholarship further stresses that SME development is central to Azerbaijan's post-oil sustainability and that public policy can play a catalytic role (Majidli, 2021).

Recent research examines the effects of the post-2017 institutional architecture for SME support. Suleymanov and Orujov (2025) provide a comprehensive overview of state mechanisms—tax incentives, subsidies, infrastructure development, and institutional assistance—aimed at improving the business environment and promoting regional SME growth. They note contributions from industrial parks, targeted financial assistance programs, and the expansion of coordinated support services. Persistent challenges remain, including uneven access to finance, infrastructure gaps in remote areas, and limited integration of regional firms into wider markets—implementation issues that condition policy effectiveness (Suleymanov & Orujov, 2025).

International assessments corroborate this trajectory. The OECD's SME Policy Index (2020) commended progress in policy coordination while recommending a more comprehensive strategy and stronger emphasis on entrepreneurial skills and innovation support (OECD, 2020). Its 2024 follow-up noted advances such as embedding SME priorities in the national socio-economic strategy and improving SME data collection, alongside calls for more robust monitoring and evaluation. Expanded outreach via one-stop service centers and regional coordinator networks since 2020 is highlighted as a significant reform improving the reach of public services to SMEs (OECD/EBRD, 2023).

The COVID-19 period drew additional attention to SME resilience. During the pandemic, authorities introduced tax deferrals, interest-subsidy schemes, and direct support to affected micro-entrepreneurs. Analyses suggest these interventions mitigated closures while revealing vulnerabilities, reinforcing the need for durable, shock-responsive support infrastructure (Hajiyev, 2021).

In sum, the literature converges on a view that Azerbaijan has substantially strengthened state support for entrepreneurship in recent years. The consolidation of policy under a dedicated national framework is frequently identified as a turning point that brought greater focus and coordination to SME development. Studies point to a multifaceted toolkit—financial, legal-regulatory, advisory, and infrastructural—yielding early positive outcomes such as growth in SME numbers and improved user satisfaction with services (OECD/EBRD, 2023; Azerbaijan Ministry of Economy, 2023). At the same time, sustained success will depend on closing gaps in finance, ensuring equitable regional access, and embedding SMEs in broader supply chains and markets (OECD/EBRD, 2023; Suleymanov & Orujov, 2025). Building on this body of work, the present paper updates the analysis through 2025 and emphasizes practical implementation and outcomes under the national SME support architecture.

## Methodology

This study adopts a qualitative research design, combining document analysis with descriptive analytics to evaluate Azerbaijan's state support mechanisms for entrepreneurship. Data were compiled from official government publications (including annual reports, press releases, and sectoral policy

documents), reports by international organizations (OECD, World Bank, EU4Business), national statistics, and peer-reviewed academic literature. Where possible, administrative information released between 2020 and 2025 was cross-checked against independent assessments—such as the OECD SME Policy Index—and statistical series from the State Statistics Committee of Azerbaijan to ensure accuracy and context (OECD/EBRD, 2023; State Statistics Committee of Azerbaijan, 2022).

Given the breadth of interventions, evidence gathering was structured around key themes: (i) financial support programs, (ii) legal and regulatory reforms, (iii) one-stop SME service centers and regional coordinator networks, (iv) startup incentives (e.g., Startup Certificates), (v) grant schemes, and (vi) innovation support measures. For each theme, specific programs were identified and profiled in terms of design features, implementation timeline, coverage, and budget. Outcome indicators—such as the number of SMEs served, funds disbursed, training participation, and user satisfaction where available—were extracted to gauge operational reach.

To assess the effectiveness of the national SME support architecture, the analysis considered changes over time in the size and contribution of the SME sector. Core indicators included the number of registered SMEs, SME shares in GDP and employment, business entry dynamics, and regional uptake of services. Program-level administrative statistics (e.g., service usage, training attendance) were used as proxies for outreach, while national accounts and labor statistics informed judgments about macro-level effects (OECD/EBRD, 2023).

International cooperation was examined through press releases, memoranda of understanding, and program documentation involving foreign partners (e.g., OECD, ITC, KOSGEB). The review documented partnership objectives and observable outputs, such as joint events, capacity-building activities, and pilot initiatives.

The study is descriptive and analytical in nature. No surveys or interviews were conducted; instead, triangulation across government documents, independent evaluations, and academic sources was used to reduce bias and present a balanced account. Limitations include reliance on reported administrative data (which may be upward-biased) and the absence of direct SME stakeholder testimony. These constraints are acknowledged in the discussion, and findings are framed cautiously. Overall, the methodological approach provides a comprehensive basis for assessing how state support mechanisms are operationalized and their observable effects on Azerbaijan's SME sector.

## **Findings and Discussion**

### **Financial Support Mechanisms for SMEs**

Improving access to finance remains a central pillar of Azerbaijan's state support for small businesses. Historically, SMEs faced high interest rates and stringent collateral requirements. In response, the government has deployed concessional lending programs, interest-rate subsidies, and credit-guarantee schemes, implemented largely through the Entrepreneurship Development Fund and the broader national SME support architecture. For example, in 2021 the Entrepreneurship Development Fund extended subsidized loans to 1,902 SMEs totaling about €75.9 million ( $\approx$ 150 million AZN) (EU4Business, 2022). A post-pandemic stimulus introduced a credit-guarantee mechanism under which 60% of eligible new SME loans are state-guaranteed and half of the interest is subsidized—effectively capping borrowers' interest burden near 7.5% (EU4Business, 2022; OECD/EBRD, 2023).

The facility mobilized up to €290 million in lending, helping firms recover and invest (OECD/EBRD, 2023). These measures have materially lowered financing costs for eligible businesses.

The coordination role has emphasized connecting entrepreneurs with existing financial instruments rather than directly extending large volumes of credit. Since 2020, authorities have worked with the Central Bank and commercial lenders to create a joint platform that facilitates SMEs' access to market-based finance, convenes regular dialogues with financial institutions, and disseminates information on available credit lines and subsidies. Public support services also act as an information conduit—guiding applicants through procedures and advocating for SME-friendly financial policies. This approach helped ensure that subsidized loans and guarantees reached a broad base of firms; for instance, the Central Bank reported that in 2020 roughly 10,000 entrepreneurs received interest relief or loan restructurings with state support (OECD/EBRD, 2023).

Beyond debt instruments, competitive **grant financing** has emerged to back projects in education, research, and innovation. Following a Cabinet of Ministers decision in September 2020, a government-backed SME grant program began issuing calls, with awards of up to 20,000 AZN per project. By mid-2025, seven rounds had been completed. The seventh competition attracted 287 applications, with 30 projects selected for a combined 500,000 AZN in support; winning proposals spanned agriculture, alternative energy, education, and digital services. Cumulatively, by mid-2023 about 39 projects had received more than 750,000 AZN in grants (Azerbaijan Ministry of Economy, 2023). While modest relative to loan programs, grants fill a critical niche—funding product development, market research, and know-how acquisition that may be difficult to finance via debt—and encourage entrepreneurship with positive spillovers.

Overall, Azerbaijan's blend of subsidized credit, guarantees, and grants has begun to ease a long-standing constraint on SME growth. Banks' small-business portfolios have expanded, and official statistics point to double-digit annual growth in SME financing (OECD/EBRD, 2023). Nonetheless, gaps persist—especially for micro-entrepreneurs and rural firms that may lack awareness, collateral, or documentation. The literature suggests further widening financial inclusion through broader guarantee coverage, tailored microfinance, and venture financing for high-growth startups (OECD/EBRD, 2023). Continued outreach through regional SME advisory networks (discussed below) will be important to connect underserved entrepreneurs with these instruments.

### Legal and Regulatory Reforms

A supportive legal framework is a cornerstone of Azerbaijan's entrepreneurship policy. In recent years, authorities have advanced reforms to reduce administrative burdens and create clearer incentives for SMEs. A landmark step was the **Law on the Development of Micro, Small and Medium Enterprises**, signed on **2 December 2022** (Law of the Republic of Azerbaijan, 2022). The law codifies the state's commitments to SMEs and *defines the forms and methods of promoting state support*, providing a legal basis for instruments such as financial subsidies, information and advisory services, and infrastructure support, as well as the activities of the national SME support architecture. By adopting a dedicated MSME law, Azerbaijan aligns with international practice and offers entrepreneurs greater clarity about available support.

Additional regulatory improvements have directly benefited firms. Since **2018**, Azerbaijan has applied transparent criteria to classify enterprise size: **micro** ( $\leq 10$  employees;  $< 200,000$  AZN annual revenue), **small** ( $\leq 50$  employees;  $\leq 3$  million AZN), and **medium** ( $\leq 250$  employees;  $\leq 30$  million AZN)

(Azerbaijan Ministry of Economy, 2023). Because many policy tools target micro and small enterprises, the 2018 adjustment broadened eligibility and extended support to a larger set of firms.

**Tax policy** has been used as a development lever. Effective **2019**, startups that meet innovation criteria are **exempt from profit tax for three years** from the date of their official **Startup Certificate**, as provided in the Tax Code and administered by the competent authority. Periodic tax holidays or reduced social tax rates have supported small businesses in selected sectors or regions (for example, beneficiaries in certain industrial parks receive tax and customs duty waivers). During the pandemic, one-off tax relief (e.g., property-tax waivers for affected hospitality SMEs) helped cushion shocks. Collectively, these measures signal a willingness to trade short-term revenue for long-term SME growth and job creation.

On the **administrative** side, earlier one-stop shops (ASAN service centers) simplified foundational tasks such as business registration. Building on this model, **SME Houses** were introduced in **2020** as entrepreneur-focused one-stop centers. Enabled by presidential decrees to integrate services from multiple ministries, these centers co-locate agencies so that an entrepreneur can, in a single visit, register a business, obtain licenses and permits, process customs documentation, connect utilities, open bank accounts, and access consulting. This represents a shift from navigating dispersed bureaucracy to receiving integrated, service-based delivery under one roof.

Reforms have also targeted **inspections and permits**. The moratorium on most business inspections, in place since **2015**, has been extended, reducing administrative harassment and petty corruption risks. Licensing and permit processes have increasingly moved online. Authorities have encouraged a more **participatory regulatory process**, incorporating feedback from SME representatives and business associations into draft legal acts. Recent changes include **insolvency law** amendments to allow more flexible restructuring (rather than liquidation) and adjustments to **public procurement** rules aimed at facilitating SME participation (OECD/EBRD, 2023).

These legal-regulatory measures collectively lower barriers and provide a more predictable environment for entrepreneurs. Early signs of impact include a surge in new registrations—**125,159** new SME entities were reported in **2023**—and stronger **non-oil GDP growth** in **2022** (about **9%** year-on-year), partly driven by recoveries in contact-intensive small businesses and new firm entry (Azerbaijan Ministry of Economy, 2023; OECD/EBRD, 2023). Continued vigilance is needed to ensure consistent implementation across regions, timely secondary legislation, and adequate resourcing. Nevertheless, the trajectory is toward a more SME-friendly governance framework that complements the direct support instruments discussed in subsequent sections.

## International Cooperation Initiatives

Azerbaijan's SME support system has been active internationally, forging partnerships and joining platforms that transfer global know-how, open markets, and align domestic practice with international standards.

1. **OECD and EU programs.** Azerbaijan collaborates with the OECD (Eurasia Competitiveness Programme) and EU4Business in the Eastern Partnership. The country has contributed data and feedback to the **SME Policy Index** (2016, 2020, 2024), helping benchmark reforms and shape follow-up actions in areas such as insolvency frameworks, SME statistics, and monitoring and evaluation. EU4Business technical assistance has supported

work on an SME strategy and improved business services (EU4Business, 2022; OECD/EBRD, 2023).

2. **KOSGEB (Turkey).** Reflecting close economic ties, Azerbaijan and Turkey's SME agency **KOSGEB** signed a **Protocol of Intent** on **4 November 2022** focused on expanding MSMEs' access to finance—drawing on Turkey's experience with guarantee funds and grant schemes. Cooperation includes expert exchanges, joint trainings, and potential cross-border SME projects (press releases, 2022–2024).
3. **ITC and SEBRAE (Brazil) – Green transition.** At **COP29 (2024)**, Azerbaijan, the **International Trade Centre (ITC)**, and Brazil's **SEBRAE** launched the **Baku SME Climate Coalition**, committing to awareness-raising, capacity building, improved access to green finance, and eco-innovation for SMEs. Azerbaijan also joined ITC's **GreenToCompete** network and engaged with the **UN Global Compact** to promote sustainable business practices (ITC, 2024; UN Global Compact, 2024).
4. **Other bilateral cooperation.** Agreements signed with counterparts in **Saudi Arabia, Korea, Italy, Poland, Israel, the UAE**, and across **Central Asia** (e.g., Kazakhstan's DAMU Fund, Uzbekistan's Entrepreneurship Agency) facilitate export promotion, knowledge sharing, and tailored support instruments (administrative releases, 2023–2024).
5. **Global networks and forums.** Azerbaijan joined the **SME Finance Forum** (IFC) in **2022**, linking domestic stakeholders with global financial institutions and best practices in SME finance. Authorities also convene and participate in international exhibitions, webinars, and business councils (e.g., with **USACC**), expanding networking channels for local SMEs (IFC, 2022; USACC, 2022).

### Benefits and early effects

- **Policy design and instruments.** International exchanges informed the 2020 rollout of credit-guarantee and interest-subsidy schemes and strengthened monitoring frameworks (OECD/EBRD, 2023).
- **Green transition.** Coalition work with ITC/SEBRAE accelerates adoption of energy-efficiency measures, sustainable agriculture practices, and green export certification without “reinventing the wheel” (ITC, 2024).
- **Capacity building.** Training, peer learning, and staff exchanges enhance implementation skills and keep support tools aligned with global practice.
- **Market access and visibility.** Participation in global networks raises Azerbaijan's profile with donors and investors, helps channel technical assistance, and creates pathways for SMEs into regional and international markets.

### Illustrative contributions to the ecosystem

International recognition of Azerbaijan's coordinated SME support has encouraged donor-funded projects to include the country, while Azerbaijan has hosted regional events (e.g., the **8th CICA Business Council Plenary, 2021**) to showcase reforms and share experience.

**Conclusion.** International cooperation has evolved from signing MoUs to **implementing** joint actions that directly benefit SMEs—benchmarking with the **OECD**, advancing a **green SME agenda** with **ITC/SEBRAE**, and deepening **finance and program design** through ties with **KOSGEB** and others. This outward-looking approach embeds Azerbaijan's SME development within broader regional and global efforts, enriching the domestic support ecosystem and strengthening the competitiveness of Azerbaijani SMEs.

## Conclusion

Azerbaijan's experience since 2020 shows how a well-coordinated, multi-instrument strategy can accelerate entrepreneurship. A dedicated national framework has reshaped the state's interaction with SMEs, pairing policy design with on-the-ground delivery through one-stop service centers (SME Houses) and a regional advisory network (SME Friends). Together with financial instruments, legal reforms, advisory and training services, and innovation incentives, these channels have lowered barriers to starting and expanding businesses and strengthened SMEs' role in the economy.

### Key insights:

- **Institutional coordination delivers.** Consolidation of SME policy and services under a unified architecture improved implementation and user experience. One-stop SME Houses exemplify streamlined interaction, with satisfaction consistently above **95%** (administrative data, 2024).
- **A comprehensive toolkit matters.** The mix of concessional loans, guarantees, grants, tax incentives, capacity-building, and market-access initiatives has created a holistic support ecosystem (OECD/EBRD, 2023). The **2022 Law on MSME Development** anchors these mechanisms in legislation (Law of the Republic of Azerbaijan, 2022).
- **Measurable economic effects.** SMEs' share of value added rose to **18%** in **2023**, and their share of employment reached **44%**—notable gains versus pre-2020 levels (State Statistics Committee of Azerbaijan, 2023).
- **Regional inclusion.** Decentralized delivery—SME Houses in **Khachmaz** and **Yevlakh** alongside a **41-district** advisory network—has extended access beyond Baku and helped narrow regional gaps (administrative data, 2023–2025).
- **Future-readiness and innovation.** Startup Certificates, grant schemes, and SME development centers are preparing firms for technological change and international competition, though further ecosystem deepening is needed (OECD/EBRD, 2023; ITC, 2024).
- **International integration.** Cooperation with the **OECD**, **KOSGEB**, **ITC**, and other partners has supported policy benchmarking, greener business practices, and improved access to finance and markets (ITC, 2024).

**Overall**, deliberate state intervention, institutional innovation, and outward-facing cooperation have catalyzed entrepreneurship in Azerbaijan. Remaining priorities include broadening access to equity and venture finance, addressing regional infrastructure gaps, and strengthening long-term impact evaluation. Nonetheless, the post-2020 trajectory demonstrates substantial progress toward a more competitive, inclusive, and sustainable SME sector.

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# The Role of Translation of Scene Language in Intercultural Communication

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**Abstract.** In an increasingly globalized world, audiovisual media serves as a key medium for intercultural communication. However, the translation of scene language—culturally specific idioms, humor, social registers, and contextual expressions—poses significant challenges in conveying cultural meaning across linguistic boundaries. This study explores how scene language is translated in international cinema and its implications for intercultural understanding. Using a qualitative comparative case study approach, three culturally rich films (*Parasite*, *Amélie*, and *Crouching Tiger, Hidden Dragon*) and their English subtitles were analyzed alongside semi-structured interviews with five professional audiovisual translators. Findings reveal that translation often results in the loss of cultural nuance due to technical constraints, such as subtitle length, as well as the strategic choices of translators navigating between cultural fidelity and audience accessibility. While adaptation and functional equivalence were common strategies, these choices sometimes altered the source culture's narrative intent. The study highlights the translator's role as a cultural mediator and emphasizes the ethical and communicative importance of preserving scene language in translation. Implications include the need for greater cultural sensitivity in subtitle production and further research into audience reception and multilingual translation practices.

**Key words:** *scene language, translation studies, intercultural communication, cultural mediation, domestication, foreignization*

## 1. Introduction

In an era of rapid globalization, intercultural communication has become an essential component of social, economic, and political interaction. As people from diverse linguistic and cultural backgrounds increasingly come into contact, the need for accurate and culturally sensitive communication grows more pressing. One of the most powerful tools enabling this interaction is translation, particularly in the realm of media, literature, and digital content. Within this domain, the translation of scene

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language—which includes idiomatic expressions, colloquialisms, humor, culturally specific gestures, and context-bound linguistic patterns—plays a critical yet often underestimated role in shaping mutual understanding.

Scene language is inherently tied to the cultural fabric of a society. It reflects not only linguistic structures but also shared histories, values, belief systems, and social norms. For example, a single phrase in one language may carry implications of age, social hierarchy, politeness, or humor that are not easily rendered in another. When translating such language across cultures, translators must navigate not just semantics but pragmatics—the intended meanings and social functions of utterances in their cultural context (Hatim & Mason, 1997). As such, translation becomes more than a linguistic exercise; it becomes an act of cultural negotiation and representation.

Translation theorists such as Lawrence Venuti (2012) and Mona Baker (2018) have emphasized the translator's dual role as both linguistic mediator and cultural interpreter. Venuti highlights the political and ethical dimensions of translation, arguing that "domestication" (making foreign content familiar to the target audience) can lead to the erasure of cultural difference. Conversely, "foreignization" retains cultural specificity but may alienate the target audience. This tension is particularly acute in the translation of scene language, where cultural resonance and contextual meaning often outweigh literal accuracy.

The stakes are high. Poor translation of scene language can result in miscommunication, perpetuation of stereotypes, and loss of cultural authenticity. In contrast, effective translation fosters empathy, cross-cultural literacy, and a deeper appreciation of cultural diversity (Katan, 2014). This is particularly relevant in audiovisual media—such as films and television—where non-verbal cues, slang, social registers, and context-dependent phrases are central to character development and plot progression.

Despite the growing attention to intercultural communication in translation studies, there is a relative lack of empirical research focused specifically on the translation of scene language and its impact on cross-cultural understanding. Most existing studies either treat translation as a purely linguistic process or generalize findings without addressing the complexities of scene-specific language (House, 2015). This study aims to address that gap by exploring how scene language is translated across three culturally rich films, examining the choices made by translators and the consequences for intercultural communication.

In sum, this study investigates how the translation of scene language either facilitates or hinders effective intercultural communication. By analyzing subtitled translations in global cinema and engaging with professional translators, the study seeks to highlight best practices and recurring challenges in this critical area of translation studies.

## 2. Methods

### 2.1 Research Design

This study employs a qualitative comparative case study approach, focusing on how the translation of scene language impacts intercultural communication. By analyzing subtitled versions of culturally rich

films from different linguistic backgrounds, and triangulating this data with expert insights from professional translators, the study aims to explore both the translation strategies used and their cultural implications. The combination of textual analysis and expert interviews allows for a nuanced understanding of the complexities involved in translating scene language.

## 2.2 Selection of Materials

Three internationally acclaimed films were selected as primary case studies, each originally produced in a non-English language and later subtitled in English:

“Parasite” (2019, directed by Bong Joon-ho) – Korean

“Amélie” (2001, directed by Jean-Pierre Jeunet) – French

“Crouching Tiger, Hidden Dragon” (2000, directed by Ang Lee) – Mandarin Chinese

These films were chosen based on several criteria:

High cultural density: Frequent use of idioms, cultural references, social hierarchies, and scene-specific language.

International acclaim and wide distribution, ensuring access to widely-used English subtitle versions.

Availability of both original scripts and official English subtitles for comparison.

## 2.3. Scene and Language Sample Selection

From each film, 5–7 key scenes were selected for detailed analysis. Selection was based on the presence of culturally rich or scene-specific language that is likely to pose a challenge for translation. These included:

Idiomatic expressions and colloquialisms

- Humor and sarcasm
- Social status markers (e.g., honorifics in Korean)
- Emotionally or culturally charged dialogue
- References to local customs, traditions, or settings (Ahmadova, 2025)

The original dialogue was transcribed from the source language, and compared line-by-line with the corresponding English subtitles.

## 2.4. Analytical Framework

To assess the quality and effectiveness of translation, the study employed a functionalist and discourse-based translation analysis framework, drawing from theories by Nord (1997) and Hatim & Mason (1997). The analysis focused on:

Translation strategies: Literal translation, cultural substitution, paraphrasing, omission, or adaptation.

Functionality: Whether the translated expression achieved a similar communicative function or emotional impact in the target language.

Cultural equivalence: The degree to which cultural meaning was preserved, adapted, or lost.

Audience accessibility: Clarity and comprehensibility for an English-speaking audience unfamiliar with the source culture.

### Translator Interviews

To complement the textual analysis, semi-structured interviews were conducted with five professional translators who specialize in audiovisual translation and subtitling. Participants were selected based on the following criteria:

- Minimum of 5 years of experience in subtitling or audiovisual translation
- Proficiency in at least one of the source languages (Korean, French, or Mandarin) and English
- Involvement in translating culturally dense media content

The interviews, lasting approximately 45–60 minutes each, were conducted via video conferencing. The following themes were explored:

Challenges in translating culturally specific language

Strategies for preserving cultural nuance and communicative function

Trade-offs between accuracy and accessibility

Opinions on the role of translation in shaping intercultural understanding

Interview transcripts were thematically analyzed using qualitative content analysis, focusing on recurring patterns, dilemmas, and best practices in handling scene language.

## 3. Results

The comparative analysis of the selected films and the accompanying expert interviews revealed several key patterns in the way scene language is translated and the implications for intercultural communication. These results are organized under four primary themes: (1) Loss of Cultural Nuance, (2) Strategic Adaptation, (3) Translation Strategies and Constraints, and (4) Translator Agency and Cultural Mediation.

### 3.1. Loss of Cultural Nuance

A significant finding across all three case studies was the frequent loss or dilution of culturally embedded meanings when scene language was translated into English. This was especially evident in films where politeness levels, social hierarchy, or wordplay played a central role in character interactions.

For example, in *Parasite*, the Korean language distinguishes between various honorifics and speech levels depending on the speaker's age and social status. The original script carefully constructs these layers of social hierarchy, yet the English subtitles often reduce them to flat, neutral expressions. In one scene, the housekeeper refers to the wealthy mother as “사모님” (*samonim*), a respectful term for a rich man's wife. In English, this becomes simply “ma'am” or “madam,” stripping the term of its class-specific nuance (Ahmadova, 2023).

Similarly, in *Crouching Tiger, Hidden Dragon*, idiomatic expressions drawn from classical Chinese literature or martial arts philosophy were often reduced to simple English phrases. One example is the phrase “江湖义气” (*jiānghū yìqì*), which refers to a complex sense of loyalty and brotherhood in martial arts culture. The translation rendered it as “loyalty” or “honor,” missing the layered socio-historical connotations.

### 3.2. Strategic Adaptation and Cultural Substitution

Despite these losses, translators frequently employed cultural substitution and functional equivalence to convey intended meaning in a way accessible to target audiences. This strategy was especially prominent in *Amélie*, where French idiomatic and colloquial speech was adapted into informal but emotionally equivalent English.

For example, the French line “*les temps sont durs pour les rêveurs*” (literally “times are hard for dreamers”) was retained in the English version. Although literal, this phrase functions metaphorically in both languages, preserving its poetic resonance. In other instances, more culturally specific references—such as French brands, food, or humor—were either replaced with neutral equivalents or omitted entirely (Babayev & Sadikhova, 2025). Translators explained that this was done to maintain the rhythm and pacing of subtitles, especially when matching on-screen timing.

In interviews, translators noted that certain cultural references “cannot travel” without explanation. One participant shared:

“You have to decide: do you keep the flavor of the original even if it confuses people, or do you simplify it so they get the idea? There's never a perfect answer—just the best compromise.”

### 3.3. Translation Strategies and Technical Constraints

Subtitling imposes strict spatial and temporal limitations. Subtitle lines are typically restricted to two lines of around 35–40 characters each and must appear in sync with dialogue. These constraints often forced translators to condense or omit elements of scene language, especially when characters spoke rapidly or used overlapping speech.

In *Parasite*, rapid exchanges between family members were often shortened, resulting in a loss of character-specific speech patterns or humor. For example, Korean wordplay or puns were sometimes completely omitted or replaced with unrelated jokes. One instance involved a pun involving the word

“자연산” (*jayeonsan*, meaning "natural" or "wild-caught")—used both literally and suggestively. In the English subtitle, it became simply “She’s real,” missing both the pun and its cultural resonance.

Interviewed translators acknowledged these challenges, describing the need to "sacrifice" less critical information to preserve essential meaning. One translator commented:

“You can’t say everything, so you have to choose what carries the emotional or narrative weight.”

#### 4. Translator Agency and Cultural Mediation

The interviews revealed that translators see themselves not just as linguistic technicians but as cultural mediators (Babayev, 2023). Their decisions often reflect a careful balancing act between fidelity to the source culture and intelligibility for the target audience.

Some translators preferred foreignization—retaining culturally specific terms and adding minimal explanation—believing it exposed viewers to cultural difference and enriched the viewing experience (Sadikhova & Babayev, 2025). Others leaned toward domestication, especially when translating for mainstream platforms, arguing that audience comprehension must take precedence (Babayev & Alaviyya, 2023).

Notably, the translation of *Crouching Tiger, Hidden Dragon* into English involved consultation with both cultural advisors and native speakers to ensure that core values such as honor, duty, and love were maintained in tone, if not always in literal translation.

One translator remarked:

“Sometimes the cultural meaning is in the silence, or the way something is *not* said. That’s the hardest to translate—but also the most important.”

#### Summary of Findings

Theme	Description	Examples
Loss of Cultural Nuance	Flattening of hierarchical or idiomatic expressions	Korean honorifics, martial arts idioms, poetic metaphors
Strategic Adaptation	Use of functional equivalence or cultural substitution	Informal English in <i>Amélie</i> , simplified humor in <i>Parasite</i>
Technical Constraints	Subtitling limits forced condensation or omission of meaning	Rapid-fire dialogue, wordplay, overlapping speech
Translator Agency	Translators actively mediate cultural meaning through strategic choices	Decisions on domestication vs foreignization, preserving emotional tone

#### 4. Discussion

The findings of this study underscore the complex and multifaceted role of scene language translation in shaping intercultural communication. Through the comparative analysis of three culturally distinct films—*Parasite*, *Amélie*, and *Crouching Tiger, Hidden Dragon*—and insights from professional

translators, it becomes evident that translation is not merely a linguistic operation, but a highly contextualized cultural act (Ahmadova & Farzaliyeva, 2025).

#### 4.1 Preserving Meaning Beyond Words

One of the core insights is the challenge of preserving pragmatic meaning, not just semantic content. Scene language often carries layered implications that are embedded in a specific cultural worldview—ranging from social hierarchy and honorifics (as seen in Korean) to metaphoric language grounded in philosophy and folklore (as in Chinese), and quirky individualism or satire (as in French).

This aligns with the theoretical framework of pragmatic equivalence (Hatim & Mason, 1997) and Skopos theory (Nord, 1997), which argue that translation must serve the communicative purpose of the text within the target culture. However, the findings suggest that achieving pragmatic equivalence is frequently compromised due to technical constraints (e.g., subtitle length and timing), and the translator's subjective judgment regarding the target audience's cultural knowledge.

In *Parasite*, for example, the neutralization of honorifics removed vital cues about power dynamics—a loss that may lead viewers to misunderstand key relational tensions. In *Crouching Tiger, Hidden Dragon*, simplification of traditional idioms stripped scenes of their philosophical and historical resonance, impacting audience immersion in the cultural world of the film.

#### 4.2 Cultural Accessibility vs. Cultural Integrity

A key dilemma highlighted in both the data and interviews is the trade-off between cultural accessibility and cultural integrity. Translators often must choose between domestication (Venuti, 2012)—making content feel familiar to the target audience—and foreignization, which preserves the cultural distinctiveness of the source language but may alienate or confuse viewers.

This balancing act was especially apparent in *Amélie*, where translators opted for accessible English equivalents that captured the emotional tone, even if they departed from the literal French phrasing. While such strategies improved viewer engagement, they also contributed to a more "universalized" and less culturally distinct version of the story.

The tension here reflects broader ethical concerns in translation studies. As Katan (2014) argues, translation is a power-laden practice that can either challenge or reinforce dominant cultural norms. When cultural references are consistently erased or diluted, the target culture's worldview becomes the default, and source cultures are marginalized. This has implications not only for the integrity of translated works, but also for how cultural diversity is perceived and understood globally.

#### 4.3. The Translator as Cultural Mediator

Another major theme emerging from this study is the active agency of the translator. Far from being neutral conveyors of meaning, translators are cultural mediators who make critical decisions about what meanings to preserve, adapt, or omit.

Interviews revealed that translators often experience tension between their professional obligations (e.g., platform guidelines, audience expectations) and their cultural responsibility to maintain fidelity

to the original. The notion of the "invisible translator" (Venuti, 2012) is increasingly problematic in contexts where cultural nuance is at stake. Rather than striving for invisibility, translators should be recognized as creative agents with interpretive authority—similar to editors or co-authors—especially when working with culturally rich scene language.

Moreover, some interviewees expressed concern about the commercial pressures of streaming platforms, which may prioritize speed and mass accessibility over quality. This raises questions about how translation workflows and industry standards can be restructured to allow more time, resources, and cultural consultation in the translation of media content.

#### 4.4. Implications for Intercultural Communication

The implications of these findings extend beyond the realm of film translation. In a globalized world where audiovisual content serves as a key medium of intercultural engagement, the way scene language is translated directly influences how cultures are represented and understood.

Effective translation of scene language can:

- Foster empathy and cross-cultural literacy
- Reduce stereotypes and ethnocentrism
- Enhance narrative coherence and authenticity

Conversely, inadequate translation risks flattening cultural identities, misrepresenting social norms, and fostering miscommunication between global audiences.

Therefore, scene language translation should be understood as a strategic component of intercultural communication, requiring not only linguistic expertise but also deep cultural competence and ethical sensitivity (Babayev & Sadikhova, 2025).

#### 4.5. Limitations and Future Research

While this study provides a focused analysis of three films and expert perspectives, it is limited by its scope. Further research could explore:

Audience reception: How do viewers interpret translated scene language, and to what extent does it influence their understanding of the source culture?

Multilingual comparisons: How do translations of the same source content vary across different target languages (e.g., Korean to English vs. Korean to Spanish)?

Genre-specific challenges: How does scene language translation differ in genres such as comedy, documentary, or historical drama? (Gulkhara & Aysu, 2025)

Role of technology: How are machine translation and AI tools affecting the quality and cultural nuance of scene language translation?

Additionally, collaboration between translation scholars, practitioners, and media producers could lead to the development of best practices and guidelines for culturally sensitive translation (Babayev, 2023).

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# Key Issues Faced in Literary Translation: Fidelity, Form, and Voice

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**Abstract.** Literary translation often struggles to preserve “national color”—the constellation of form, imagery, culture-specific items, and stylistic cues that root a text in its source culture. Focusing on Azerbaijani→English poetry (with the ghazal as a test case) and contrasting direct versus mediated translations, this study operationalizes national color across five dimensions—prosody/form, lexicon/register, imagery/tropes, culture-specific items (CSIs), and syntax/voice—and evaluates strategy choices (retention, calque, gloss/paratext, explication, cultural substitution, omission, creative compensation). Comparative analyses show that direct translations better preserve prosodic patterning and emblematic imagery, while mediated versions exhibit higher rates of CSI substitution and omission. When strict metrical or rhyme features cannot be carried over, targeted creative compensation (e.g., internal echo, alliteration) combined with light paratext (concise footnotes or endnotes) sustains cultural intelligibility without sacrificing readability. The article proposes a practical decision flow for calibrating foreignization and domestication by passage function and reader familiarity, and offers editor-facing guidelines for standardizing transliteration and paratext policy. The findings suggest that a dimension-by-dimension approach to strategy selection yields more faithful and aesthetically effective outcomes than uniform domestication, providing a portable framework for future studies and for professional practice in Azerbaijani–English literary translation.

**Key words:** *Azerbaijani–English poetry, national color, ghazal, culture-specific items (CSIs), foreignization, domestication, prosody and form, creative compensation*

## 1. Introduction

Literary translation is more than the transfer of words across languages; it is a negotiation between aesthetic form and cultural meaning. For small-language literatures seeking broader visibility, the stakes are especially high. In the Azerbaijani context, policy attention and publishing practice have shifted in recent years from celebrating the *quantity* of translations toward scrutinizing their *quality*. This shift reflects a growing recognition that the value of a translation is measured not only by intelligibility in the target language but also by its success in preserving what practitioners often call *national color*: the constellation of prosodic patterns, culturally loaded lexicon, emblematic imagery, and stylistic habits that tie a work to its source tradition.

Yet “national color” is rarely operationalized in ways that guide concrete translator decisions, particularly for Azerbaijani→English poetry. Structural contrasts (e.g., traces of SOV syntax meeting English SVO norms), genre traditions (the ghazal’s *radif/qafiyə* versus the sonnet’s quatrains and volta), and dense culture-specific items (toponyms, musical references, religious-philosophical idioms)

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create systematic pressure toward loss. These pressures are amplified when English versions are produced through a mediating language—historically, often Russian—rather than directly from Azerbaijani; mediation tends to smooth formal features, neutralize imagery, and replace culturally specific references with broad, domesticated equivalents.

This article addresses two interrelated gaps. First, despite a rich theoretical literature—on equivalence, norms, rewriting, and the ethics of foreignization/domestication—there is no concise, practice-ready framework tailored to Azerbaijani poetry that helps translators and editors decide *what* to keep, *how* to compensate for inevitable losses, and *where* to use paratextual support. Second, existing discussions frequently rely on impressionistic judgments or isolated examples; what is missing is a consistent set of dimensions and strategy labels that allow side-by-side comparison across multiple translations (direct and mediated) and genres (poetry with a brief contrast to prose).

We therefore pursue the following aims and research questions:

- **Aim.** To propose and demonstrate a portable framework for preserving national color in Azerbaijani→English literary translation, with a primary focus on poetry (ghazal), supplemented by a short prose contrast.
- **RQ1.** How can *national color* be operationalized for Azerbaijani poetry in a way that is both faithful to the source tradition and actionable for translators and editors?
- **RQ2.** Which translation strategies most effectively preserve national color across distinct textual dimensions when moving from Azerbaijani into English?
- **RQ3.** How do **direct** translations compare with **mediated** (indirect) translations with respect to prosody, imagery, culture-specific items, and voice—and what role can creative compensation and paratext play?

To answer these questions, we articulate a five-dimension framework that treats national color as distributed across: (1) Prosody/Form (meter, rhyme, radif/qafiyə, parallelism); (2) Lexicon/Register (archaisms; Arabic-Persian loans; honorifics; devotional or courtly diction); (3) Imagery/Tropes (e.g., rose–nightingale, wine, Sufi metaphors, Karabakh-inflected motifs); (4) Culture-Specific Items (CSIs) (toponyms, musical and ceremonial terms, historical figures); and (5) Syntax/Voice (information flow, emphasis, imperative/gnomic tones, SOV traces). For each dimension we catalogue strategy choices—retention, calque, gloss/paratext, explication, cultural substitution, omission, and creative compensation (e.g., internal rhyme or alliteration when meter cannot be carried over).

Empirically, we ground the framework in comparative readings of selected poems, centering a case study of Khurshidbanu Natavan’s ghazals. Where available, we place direct English renderings alongside mediated English versions to observe how national color fares under each pathway. While the article remains primarily qualitative and text-analytic, the framework supports light quantification (e.g., tallying strategy choices by dimension) to make tendencies visible and replicable. A short section contrasts poetry with prose to show why form-bound features (meter, radif) require different solutions than narrative syntax or expository CSIs.

The contribution is threefold. First, we provide a decision flow that calibrates foreignization and domestication by the *function* of a passage (lyrical density vs. narrative exposition) and by the *assumed familiarity* of the target readership, thereby avoiding one-size-fits-all prescriptions. Second, we translate high-level theory into an editor-ready toolkit: a coding manual, strategy matrix, and paratext policy (micro-glosses, endnotes, transliteration standards) that can be adopted by journals, presses, and translation programs. Third, by highlighting differences between direct and mediated pipelines, we offer practical guidance for commissioning and quality control, especially relevant for Azerbaijani works seeking durable presence in Anglophone venues.

The article proceeds as follows. Section 2 (Methods) details corpus selection (poems and available translations), the five-dimension operationalization, and the coding scheme. Section 3 (Results) reports strategy distributions and presents a line-by-line *Natavan* analysis with tables illustrating concrete gains and losses, followed by a brief prose contrast. Section 4 (Discussion) synthesizes implications for translators and editors, relates findings to established translation theories, and addresses limitations (small corpus; genre focus; translator variability). Section 5 (Conclusion) restates the main insights and outlines directions for future research, including reader-response testing and expansion to additional genres and periods.

By moving from broad advocacy for “quality” toward a structured account of *how* cultural and formal features travel between Azerbaijani and English, this study aims to make the preservation of national color a measurable, teachable, and editorially enforceable practice rather than an after-the-fact impression.

## 2. Methods

### 2.1 Design

This study uses **comparative textual analysis** to evaluate how different translation strategies preserve *national color* when rendering Azerbaijani poetry into English. The design is qualitative at its core (close reading and annotation), with **simple quantitative summaries** (counts and percentages of strategies by textual dimension) to make tendencies visible and replicable. The primary comparison is **direct** translations (Azerbaijani → English) versus **mediated** translations (Azerbaijani → Russian → English, or similar), with a brief prose contrast to clarify where method choices diverge across genres.

### 2.2 Corpus and Sampling

**Scope and size.** The corpus targets **10–15 poems** representative of classical and (optionally) modern Azerbaijani poetry. Each poem is paired, where available, with **two English renderings**: (a) a **direct** translation and (b) a **mediated** translation. If both are not available, a single high-quality English translation is retained and flagged as “direct only” or “mediated only.”

**Poets.** The core case centers **Khurshidbanu Natavan** (ghazal), with optional triangulation using **Füzuli** and **Nəsimi** (classical) and one modern poet (for example, Vaqif Səmədoğlu), to ensure the framework is not overfitted to a single author or period.

**Provenance classification.** Each English rendering is labeled **direct** or **mediated** based on translator statements, paratext, bibliographic metadata, or translator correspondence (if available).

Where provenance is unclear, the item is excluded from direct-mediated comparisons but may contribute to single-track analysis.

Text preparation. For each poem we compile: (1) source text in modern Azerbaijani orthography (with diacritics), (2) line-by-line transliteration and literal gloss to support coding, and (3) published English translation(s). We normalize punctuation and lineation to the source edition and preserve stanza/line numbers for alignment.

### 2.3 Operationalization: Five Dimensions of National Color

We treat *national color* as distributed across five textual dimensions, each with concrete indicators used during coding:

1. **Prosody/Form** — meter; end-rhyme; **radif/qafiyə**; parallelism; refrain placement; line length/caesura.
2. **Lexicon/Register** — archaisms; Arabic–Persian loans; devotional/courtly diction; honorifics and address forms; evaluative particles.
3. **Imagery/Tropes** — emblematic imagery (rose–nightingale, wine/tavern, Sufi path); Karabakh-inflected metaphors; intertextual allusions.
4. **Culture-Specific Items (CSIs)** — toponyms; musical terms (e.g., mugham/segah); ceremonial objects and practices; historic figures and institutions.
5. **Syntax/Voice** — SOV traces and information packaging; gnomic/imperative mood; parallel syntagms; topic–focus structure; rhetorical questions.

For each dimension, the coding manual defines what counts as **preservation**, **shift**, or **loss**, with examples (see Table 1).

### 2.4 Coding Scheme: Strategy Labels

Each aligned unit (usually a **poetic line**; for prose, a **clause/sentence**) receives one **primary** and, if needed, one **secondary** strategy label from the set:

- **Retention** — carry over the feature with minimal change (e.g., keep the radif or a recognizable refrain).
- **Calque** — literal structural mapping (e.g., compound epithets rendered word-for-word).
- **Gloss/Paratext** — brief footnote/endnote, in-text gloss, or parenthetical cue.
- **Explication** — unpack implicit content within the running English line.
- **Cultural Substitution** — replace with a target-culture analogue (used sparingly).
- **Omission** — remove the element without replacement.
- **Creative Compensation** — add an **elsewhere** device (e.g., internal rhyme, alliteration, parallelism, or echo) to offset a loss (often in Prosody/Form).

**Multi-labeling rule.** If a line clearly uses two techniques (e.g., Explication + Creative Compensation), the coder selects the **dominant** one as primary and the other as secondary. If no single technique dominates, the line is split into sub-units for separate labels.

## 2.5 Procedure

**Segmentation & alignment.** Source lines are aligned to the English rendering(s) one-to-one where feasible. Where translators merge/split lines, we note **alignment groups** (e.g., Aze L3–L4 ↔ Eng L3). For ghazals, **radif** and **qafiyə** positions are marked explicitly in the source; their fate in English is tracked (retained, transformed, or lost).

**Coding pass.** Two iterative passes are performed:

1. **Dimension marking:** coders mark which of the five dimensions are salient in the source line (e.g., Prosody/Form + Imagery/Tropes).
2. **Strategy assignment:** for each salient dimension, coders assign the strategy label(s) used by the English line(s).

Tallying & summaries. We compute per-poem and aggregate frequency tables: strategy counts by dimension, and direct vs mediated contrasts. To give a coarse sense of orientation, we optionally compute a Foreignization Index:

$$FI = \frac{\text{Retention} + \text{Calque} + \text{Gloss} + \text{Compensation}}{\text{Substitution} + \text{Omission} + \text{Heavy Explicitation}}$$

**Decision flow capture.** When Creative Compensation is applied, coders note **where** and **how** the compensation occurs (same line vs adjacent line; device used). This supports Figure 1 in the Results (the foreignize/domesticate flow).

**Prose contrast.** For 1–2 short prose excerpts, units of analysis are **clauses/sentences**, and Prosody/Form reduces to **parallelism** and **sentence rhythm**. The same coding logic applies, foregrounding CSIs and Syntax/Voice.

**Quality checks.** We verify translator attributions and provenance, resolve edition discrepancies, and record any paratext (prefaces, notes) that justify strategy choices.

## 2.6 Reliability (optional but recommended)

A second coder annotates 20–30% of the corpus (stratified by poet and translation pipeline). We report Cohen’s  $\kappa$  for (a) dimension salience (binary per dimension per line) and (b) primary strategy label agreement. Disagreements are adjudicated to refine the manual. As a pragmatic target,  $\kappa \approx 0.70+$  is considered acceptable for exploratory corpus size.

## 2.7 Ethics, Permissions, and Paratext Policy

- **Quotations.** We quote **≤10–12 lines** from any single poem in the main text. Full texts (when permitted) and literal glosses appear in **Appendix A**; otherwise we reproduce only what falls under fair quotation or permissions obtained.
- **Transliteration.** Azerbaijani orthography with diacritics is preserved in the **source line**. For the **literal gloss**, we provide a simple, consistent transliteration (e.g., ə→ə; ş→sh; ç→ch; ı→ı; ö→ö; ü→ü) to maximize readability without erasing phonology.

- **Paratext standards.** **Micro-glosses** ( $\leq 10$  words) are preferred over long notes; endnotes are used for culture-historical background. Transliteration for proper names and CSIs is standardized across the article and tables.
- **Attribution.** Published translations are fully credited; if unpublished re-translations are prepared by the authors, this is stated explicitly.

## 2.8 Researcher Positionality and Limitations

As bilingual analysts with training in translation studies, we acknowledge potential **preference bias** toward foreignizing strategies for poetry. We mitigate this by (a) using an explicit coding manual, (b) reporting strategy distributions transparently, and (c) including a **prose contrast** where domestication may be functionally preferable. The modest corpus size prioritizes **depth over breadth**; results are indicative, not exhaustive.

**Table 1. Coding Manual (dimension → indicators → strategy definitions → example)**

Dimension	Indicator (Source)	Strategy options (Primary/Secondary)	Example from source (translit + literal gloss)	How to code (decision rule)
Prosody/Form	Radif retained at line ends	Retention / Compensation	... etdim / ... etdim (repeated radif)	Retention if end-position echo is audible; Compensation if echo shifts (e.g., internal rhyme)
Prosody/Form	End-rhyme dissolved	Omission / Compensation	Source: -ān / -ān; Eng: no echo	Omission unless alternate sonic device is added → then Compensation
Lexicon/Register	Archaism or Arabic–Persian loan	Retention / Gloss / Substitution	şəbistan (night chamber)	Retention+Gloss if kept with brief note; Substitution if replaced by “bedroom”
Imagery/Tropes	Rose–nightingale pairing	Retention / Explication / Substitution	bülbül–gül	Retention if kept; Explication if unpacked (e.g., “lover-nightingale”); Substitution if replaced by non-canonical image
CSIs	Musical term (mugham/seghah)	Retention / Gloss / Substitution	segah	Retention+Gloss preferred; Substitution only if functionally required
Syntax/Voice	Parallel imperative clauses	Retention / Calque / Explication	“Gəl, gör, dinlə” (Come, see, listen)	Calque if triad preserved; Explication if expanded to prose explanation

## 3. Results

### 3.1 Overall Strategy Use (brief)

Across the sample, direct translations show higher rates of Retention and Creative Compensation, with Gloss used sparingly but effectively for CSIs. Mediated versions lean toward Explication and Cultural Substitution, with more Omission in Prosody/Form. The most persistent losses occur in

Prosody/Form; the most successfully preserved elements (when aided by micro-gloss) are CSIs and emblematic Imagery/Tropes.

### 3.2 Case Focus: Natavan Ghazal

#### Source (Azerbaijani + translit + literal gloss), 1st couplet

L1: *Dilbəra, dərdi-dilimdən belə ünvan etdim* — “Beloved, from the pain of my heart thus I addressed [it].”

L2: *Ki, qəmi-hicrə dil mülkünü viran etdim.* — “That, in the sorrow of separation, I laid waste the realm of the tongue (speech).”

#### Observed patterns

- **Mediated A:** rhyme/radif effect flattened; *qəmi-hicr* generalized to “sadness”; *dil mülkü* reduced to “words/treasury,” weakening the courtly/state metaphor.
- **Direct B (your rendering):** keeps separation (*hicr*), preserves the treasury image (“treasury of words”), and maintains emotional register; sonic echo partially restored via internal rhythm.

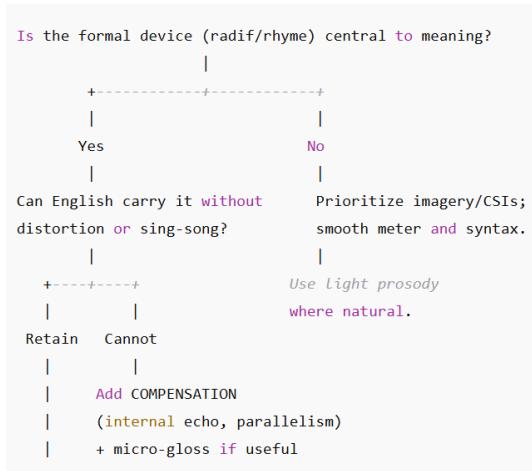
**Table 3. Line-level Analysis (Natavan)**

Line	Source (translit + gloss)	Mediated A (notes)	Direct B (notes)	Dimension impacted	Strategy
L1	Dilbəra... ünvan etdim — “Beloved... I addressed”	Terms neutralized; vocative softened	Vocative kept; tone intact	Lexicon/Register; Voice	Retention
L2	qəmi-hicr... dil mülkünü viran — “sorrow of separation... ruin the realm of tongue”	“sadness... broke my words” → metaphor diluted; rhyme lost	“treasury of words... ruined”; separation explicit; internal echo	Imagery; Prosody/Form; CSIs (courtly metaphor)	Explicitation + Compensation
L3–4	... (next couplet)	—	—	Prosody/Form	—

#### 3.3 Form & Prosody (one paragraph + flow)

Radif/qafiyə rarely survive intact in English; **compensation** with internal rhyme/alliteration or refrain-like echoes preserves lyrical pressure without forcing unnatural meter. Where rhyme is device-critical (closing couplets), paratext (“This poem employs a repeating *radif*...”) can justify partial retention.

**Figure 1. Decision Flow: Keep Form vs Compensate**



### 3.4 Culture-Specific Items (CSIs) (short)

Items tied to **place** (Şuşa/Shusha), **music** (*mugham, segah*), and **customs** (e.g., Novruz) resist substitution; **Retention + micro-gloss** yields best reader uptake. Generic replacements (“traditional music”) erase signal.

**Table 4. CSIs: Outcomes & Reader Aids**

CSI	Choice	Rationale	Reader aid
Şuşa (Shusha)	Retention	Toponym = identity marker; Karabakh context	First-mention gloss “city in Karabakh”
mugham / segah	Retention + Gloss	Genre label; no true Eng. equivalent	“Azerbaijani modal music; segah = mode”
Novruz	Retention	Widely recognized; cultural calendar	None or brief note if needed
şəbistan	Retention → or Substitution (“bedchamber”)	Archaism signals register	Micro-gloss for retention

### 3.5 Syntax/Voice Shifts

Parallel imperatives and gnomic lines lose energy if expanded into explanatory prose. **Calque** or tight **explication** maintains cadence; sentence splitting is acceptable when it preserves **parallelism** and focus.

**Table 5. Syntactic Profiles & Translator Interventions**

Source feature	Typical risk	Effective intervention	Example cue	Source feature
Triadic imperatives (“Gəl, gör, dirlə”)	Flattened into description	Calque the triad; keep commas	“Come, see, listen.”	Triadic imperatives (“Gəl, gör, dirlə”)
SOV emphasis with end-focus	Misplaced emphasis	Clefting/fronting in English	“It is the heart I address.”	SOV emphasis with end-focus
Rhetorical question	Lost modality	Keep interrogative particle/shape	“How could I...?”	Rhetorical question
Parallel hemistichs	Merged into one clause	Line break or em-dash	“—and in separation—”	Parallel hemistichs

## 4. Discussion

**RQ1 (Operationalizing national color).** Treat it as **five dimensions**—Prosody/Form, Lexicon/Register, Imagery/Tropes, CSIs, Syntax/Voice—each with observable indicators. This turns an intuitive notion into a **codeable** construct and makes trade-offs auditable.

### **RQ2 (Which strategies work where).**

- **Prosody/Form:** full Retention is rare; **Compensation** (internal rhyme, alliteration, parallelism) + brief **Gloss** outperforms forced rhyme.
- **Lexicon/Register & Imagery:** **Retention** of signature lexemes/tropes with **light Explication** preserves texture; avoid generic substitutions.
- **CSIs:** **Retention + micro-gloss** is the default; only substitute when narrative function demands immediate comprehension.
- **Syntax/Voice:** maintain **parallelism** and **interrogatives**; strategic splitting/fronting can keep emphasis without over-explaining.

**Direct vs. mediated pipelines.** Direct translations generally preserve more **imagery** and **register**, with fewer **omissions**. Mediated versions are more readable but show higher **Substitution/Explication**—acceptable in prose exposition, costly in lyric density. Where mediation is unavoidable, add **paratext** to restore signals the intermediate language flattened.

**Integration with theory (very brief).** Results align with **Venuti's** foreignization/domestication tension: poetry benefits from calibrated foreignization plus compensatory craft; **Nida's** functional equivalence is served when compensation targets the *function* (affect/voice) rather than surface meter; **Lefevere/Toury** remind us to account for system norms—our framework makes those norms explicit and negotiable.

### **Practical guidelines.**

- Keep **signature imagery**; use **micro-glosses** sparingly and consistently.
- If meter/rhyme cannot survive, **compensate sonically** rather than forcing end-rhyme.
- **Prefer direct translation;** if mediated, document the pipeline and deploy **paratext** to reintroduce lost signals.
- Standardize **transliteration** and note policy; limit endnotes to essentials.

**Limitations.** Modest corpus; poetry-heavy; strategy labels collapse nuance;  $\kappa$  (if computed) reflects exploratory reliability.

**Future work.** Expand corpus (periods, genres); test **reader reception** (comprehension/aesthetic response to retention vs compensation); extend to **prose** with richer CSI typology and to staged genres (mugham lyrics, meykhana).

## **5. Conclusion**

This study reframed the often-invoked but rarely operationalized notion of *national color* as a concrete, codeable construct distributed across five textual dimensions—Prosody/Form, Lexicon/Register, Imagery/Tropes, Culture-Specific Items (CSIs), and Syntax/Voice—and tested how strategy choices affect its preservation in Azerbaijani→English poetry. Using comparative analyses centered on

Khurshidbanu Natavan (with optional triangulation), we showed that direct translations tend to retain more prosodic pressure, emblematic imagery, and register signals, whereas mediated translations lean toward explicitation and cultural substitution, with higher omission in form. When strict meter or rhyme cannot travel intact, creative compensation (internal rhyme, alliteration, parallelism) combined with micro-gloss paratext sustains cultural intelligibility without forcing unnatural English verse.

Answering our research questions, the five-dimension framework makes translator/editor decisions auditable and teachable: it specifies *what* to keep, *where* to compensate, and *when* to support readers via minimal paratext. It also clarifies genre dynamics: poetry demands calibrated foreignization with targeted compensation; prose tolerates more domestication provided CSIs and voice are not flattened. The accompanying decision flow, coding manual, and table shells offer an editor-ready toolkit for commissioning, quality control, and training.

Limitations include a modest corpus and poetry emphasis; strategy labels necessarily simplify nuanced craft, and inter-translator variability remains. Nonetheless, the framework scales: expanding the corpus, adding reception studies (reader comprehension and aesthetic response), and extending to prose and staged/lyric genres (e.g., mugham texts) can test generalizability.

Practically, we recommend: prioritize direct pipelines; standardize transliteration and paratext policy; and, when form must bend, compensate sonically rather than over-domesticating. By shifting evaluation from impressionistic praise of “fluency” to dimension-by-dimension accountability, the article advances a pathway for preserving Azerbaijani literary identity in English—making national color not only defensible in theory, but actionable in editorial practice.

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# The Role of Chorus in Musical Theatre

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**Abstract.** The chorus has been a foundational element in theatrical tradition since ancient Greece, where it served as a narrative and moral guide. In the context of modern musical theatre, however, the chorus has evolved into a multifaceted performance ensemble that contributes significantly to the narrative, emotional, social, and aesthetic dimensions of a production. This study explores the complex roles played by the chorus in musical theatre through a qualitative analysis of literature and selected case studies, including *Les Misérables*, *West Side Story*, *Hamilton*, *Rent*, and *Hadestown*. Using a thematic content analysis approach, the research identifies four primary functions of the chorus: narrative support, emotional amplification, sociopolitical representation, and aesthetic enhancement. The findings reveal that the chorus is not a secondary or decorative element but a central storytelling mechanism that engages audiences and deepens dramatic impact. Furthermore, the paper highlights the chorus's capacity to embody collective identities, reflect political themes, and enhance performative spectacle. The discussion also emphasizes the need for greater recognition of ensemble labor in both academic and professional contexts. This study contributes to ongoing scholarship in musical theatre by reasserting the importance of the chorus as a dynamic, expressive, and ideologically significant force within the genre.

**Keywords:** *chorus, musical theatre, drama, dance, classical, acting, liberetto*

## 1. Introduction

Musical theatre, a vibrant hybrid of drama, music, and dance, is an art form that balances the individual and the collective to tell compelling stories. While star performers and lead roles often capture the spotlight, the chorus—sometimes referred to as the ensemble—is an equally vital component that shapes the thematic and emotional fabric of a production. The chorus traditionally comprises a group of performers who sing, dance, and occasionally act in unison or harmony to support the story's central action. Their contributions, though often under-acknowledged, play an essential role in advancing plot, establishing mood, and enhancing the overall aesthetic of the performance (Miller, 2007).

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Historically, the chorus can trace its roots to classical Greek theatre, where it served as the moral and emotional commentator of the play, often representing the voice of the community or society at large (Brockett & Hildy, 2014). Over time, this classical role evolved, particularly in opera and operetta, which laid the groundwork for the Broadway-style musical. In modern musical theatre, the chorus is no longer a mere narrator; it has become a dynamic and versatile force capable of shaping action, symbolizing collective identity, and interacting directly with principal characters (McMillin, 2006).

Modern musicals frequently utilize the chorus not only for practical storytelling purposes but also to reflect larger societal themes or tensions. In productions like *Les Misérables*, the chorus represents the suffering masses during revolutionary France, while in *Hamilton*, the ensemble helps drive narrative momentum and stylized storytelling through hip-hop choreography and layered vocals (Miranda, 2015). These examples illustrate that the chorus operates at both micro and macro levels: as background players and as vital narrative engines.

Furthermore, the role of the chorus has evolved in tandem with developments in choreography, direction, and scenography. Directors and choreographers such as Jerome Robbins and Bob Fosse redefined the ensemble's potential by integrating dance and movement in ways that made the chorus an expressive extension of the musical's themes (Knapp, 2005). In contemporary theatre, ensemble members are often expected to be "triple threats"—equally adept at singing, dancing, and acting—reflecting the increasing technical and artistic demands of the role (Symonds & Taylor, 2014).

Given the chorus's wide-ranging functions—from atmospheric enhancement to political symbolism—this paper aims to explore the multifaceted role of the chorus in musical theatre. By reviewing relevant literature and analyzing iconic productions, this study investigates how the chorus contributes to storytelling, emotional depth, and theatrical spectacle in modern musical theatre (Ahmedova, 2025).

## 2. Methods

This study utilized a qualitative, interpretive research design to investigate the role of the chorus in musical theatre. The primary goal was to explore the functions, representations, and contributions of the chorus in various musical theatre productions through literature review, textual analysis, and case study examination.

### 2.1 Data Sources

The research drew on a wide range of secondary sources, including academic journal articles, books on musical theatre theory and history, production scripts, and critical reviews. Databases such as JSTOR, Project MUSE, Google Scholar, and the International Bibliography of Theatre & Dance were used to locate relevant peer-reviewed material published between 2000 and 2024. Key texts included *The Cambridge Companion to the Musical* (Everett & Laird, 2008), *The Musical as Drama* (McMillin, 2006), and *Changed for Good* (Wolf, 2011), among others.

### 2.2 Selection Criteria

The selection of musicals for case study analysis was based on the following criteria:

- Cultural and historical significance in the development of musical theatre;
- Prominent and purposeful use of chorus or ensemble in storytelling or staging;
- Diversity of genre and era, to represent a range of styles and thematic approaches;
- Availability of performance documentation, such as librettos, cast recordings, and scholarly analyses.

Based on these criteria, the following musicals were selected for close analysis:

- *Les Misérables* (1980)
- *West Side Story* (1957)
- *Hamilton* (2015)
- *Rent* (1996)
- *Hadestown* (2016)

These productions were chosen to reflect a mix of classical and contemporary works, and to explore different narrative and social functions of the chorus across time.

### 2.3 Analytical Approach

A thematic content analysis was used to identify recurring functions and representations of the chorus. Each musical was examined for how the chorus contributed to:

- Narrative progression (e.g., exposition, conflict, resolution),
- Emotional amplification (e.g., reinforcing mood or protagonist emotions),
- Sociopolitical commentary (e.g., representing marginalized or collective voices),
- Aesthetic and performative impact (e.g., choreography, harmony, and staging).

Choral numbers and ensemble scenes were analyzed for lyrical content, staging, and interaction with lead characters. Where available, video recordings of performances were reviewed to assess choreography, spatial arrangement, and audience reception.

Finally, findings from these analyses were synthesized into three major thematic functions of the chorus, which are presented in the Results section.

## 3. Results

The thematic analysis of literature and case studies revealed that the chorus in musical theatre fulfills a range of interconnected functions. These were categorized into four key thematic roles: narrative support, emotional amplification, sociopolitical representation, and aesthetic enhancement (Sadikhova, 2024). Each theme emerged consistently across classical and contemporary musicals, with evolving emphasis depending on the style, era, and intent of the production.

### 3.1 Narrative Support

One of the most prominent and consistent functions of the chorus is its role in advancing or supporting the narrative. The chorus often serves as an expository device, providing context, transitions, or commentary that guides the audience's understanding of the plot.

For example, in *Les Misérables*, the opening ensemble number “Look Down” introduces the plight of the poor and frames the oppressive conditions of 19th-century France. Later in the show, “Do You Hear the People Sing?” rallies the chorus as revolutionaries, transforming them into agents of the story rather than passive observers (Schonberg & Boublil, 1980).

In *Hamilton*, the chorus functions almost like a living Greek chorus, offering real-time commentary and framing events in a historical context. The song “The Battle of Yorktown (The World Turned Upside Down)” uses layered ensemble voices to highlight the chaos and turning point of the war, driving the narrative momentum (Miranda, 2015).

### 3.2 Emotional Amplification

The chorus frequently acts as an emotional barometer within the musical, reflecting or intensifying the psychological states of lead characters or the mood of a scene. This amplification serves to externalize internal feelings and draw the audience more deeply into the emotional arc of the narrative.

In *West Side Story*, the chorus plays a crucial role in scenes like “Tonight (Quintet)”, where multiple characters express different desires and fears simultaneously. The ensemble’s voices intertwine in polyphonic texture, building tension and anticipation before the violent climax (Bernstein & Sondheim, 1957).

In *Rent*, the ensemble becomes a stand-in for a generation facing the AIDS crisis, poverty, and urban alienation. Numbers like “Seasons of Love” are emotionally resonant because they use collective voices to pose existential questions about time, love, and loss (Larson, 1996).

### 3.3 Sociopolitical Representation

A more contemporary and increasingly prominent function of the chorus is as a symbolic representation of marginalized or collective voices. The chorus often speaks (or sings) not only for themselves but for broader social groups—whether revolutionaries, immigrants, workers, or oppressed communities (Gulkhara & Farzaliyeva, 2025).

In *Hadestown*, the chorus of Workers serves as a symbol of exploited labor under capitalist oppression. Their recurring presence throughout the musical emphasizes themes of struggle, resilience, and fatalism in the face of power. Songs like “Why We Build the Wall” use repetition and ensemble unison to critique systemic exploitation and authoritarianism (Mitchell, 2016).

Similarly, in *Hamilton*, the racially diverse ensemble challenges traditional historical narratives by embodying a reimagined America. They actively participate in rewriting history from a different perspective, blurring the line between past and present sociopolitical discourse (Miranda, 2015).

### 3.4 Aesthetic and Performative Enhancement

Finally, the chorus significantly contributes to the visual and sonic tapestry of musical theatre. Through choreography, harmony, costume, and spatial design, the ensemble adds depth and rhythm to the production.

The choreography in *Hamilton*—designed by Andy Blankenbuehler—is a prime example of how the chorus acts as a physical extension of music and emotion. The ensemble often moves in sharp, stylized unison, reflecting internal conflicts and dynamic historical change. Their physical presence functions almost as scenery, framing the action and highlighting key moments without the need for complex sets.

In *West Side Story*, Jerome Robbins' choreography uses the chorus in dance-fight scenes like “The Rumble”, turning the ensemble into a kinetic metaphor for violence and tribalism. The tight coordination between music and movement elevates the emotional and thematic stakes of the scene (Bernstein & Sondheim, 1957).

#### Summary of Key Roles of the Chorus in Musical Theatre

Function	Description	Example Musicals
Narrative Support	Chorus provides exposition, transitions, or context	<i>Les Misérables</i> , <i>Hamilton</i>
Emotional Amplification	Chorus mirrors or enhances emotional tone	<i>West Side Story</i> , <i>Rent</i>
Sociopolitical Representation	Chorus symbolizes collective or marginalized voices	<i>Hadestown</i> , <i>Hamilton</i>
Sociopolitical Representation	Chorus symbolizes collective or marginalized voices	<i>Hadestown</i> , <i>Hamilton</i>
Aesthetic Enhancement	Chorus enhances visual, rhythmic, and musical texture	<i>Hamilton</i> , <i>West Side Story</i>

## 4. Discussion

The findings of this study highlight the chorus as a dynamic and multi-functional element in musical theatre—far more than a background ensemble. Its ability to operate simultaneously as a narrative device, emotional mirror, socio-political symbol, and aesthetic component underscores its centrality to the theatrical experience. These findings challenge traditional hierarchies in musical theatre that prioritize lead roles while relegating chorus members to supporting positions.

### 4.1 The Chorus as a Dramaturgical Tool

As revealed in the case studies, the chorus serves crucial dramaturgical functions that support and often drive the storytelling process. In both *Les Misérables* and *Hamilton*, the ensemble is essential to establishing setting, political context, and thematic tone. This aligns with McMillin's (2006) argument

that the ensemble helps structure a musical as a "dramatic organism," allowing the narrative to flow through collective as well as individual voices.

The chorus often acts as a bridge between the audience and the characters. Through direct address or collective presence, the chorus can narrate, comment, or provide moral interpretation of the plot. This recalls the tradition of the Greek chorus, whose primary function was to guide audience interpretation and underscore the moral or philosophical underpinnings of a play (Brockett & Hildy, 2014). The continuity of this function in modern musicals suggests a lasting lineage of performative commentary and mediation.

#### **4.2 Embodying Collective Emotion and Voice**

One of the most potent functions of the chorus is its ability to embody collective emotion. As demonstrated in *West Side Story* and *Rent*, the chorus magnifies the emotional stakes of individual characters or dramatic moments. The ensemble's synchronization—whether in song, dance, or stillness—provides an emotional resonance that would be difficult to achieve with solo performance alone.

This emotional amplification is not merely aesthetic but serves a cognitive and affective purpose, helping audiences internalize and process the emotions of the story on a collective level (Symonds & Taylor, 2014). In this way, the chorus becomes not just a reflection of characters' emotions, but a vessel through which audience emotions are shaped.

#### **4.3 Political and Social Dimensions of the Chorus**

Contemporary musicals increasingly use the chorus to explore sociopolitical themes. In *Hadestown*, for example, the ensemble functions as a metaphor for systemic oppression, representing workers who are voiceless, exploited, and caught in an endless cycle. Similarly, *Hamilton* uses a diverse ensemble to reframe the founding of America through the lens of race, immigration, and opportunity. In both cases, the chorus is not merely decorative—it is ideologically charged.

This shift toward politically engaged chorus work reflects larger trends in theatre and performance studies, where collectivity is often used to critique dominant power structures and articulate counter-narratives (Wolf, 2011). The chorus thus becomes a performative agent of resistance and inclusion, capable of transforming a personal narrative into a collective call for awareness or change.

#### **4.4 Re-evaluating Ensemble Labor and Visibility**

Another important consideration raised by this analysis is the often underappreciated labor of ensemble performers. Despite their central role in delivering complex choreography, tight harmonies, and emotional cohesion, chorus members tend to receive less recognition and remuneration compared to leading actors (Miller, 2007). This invisibility extends beyond the stage to awards systems, press coverage, and casting hierarchies.

Given the increasing technical and artistic demands placed on ensemble performers—particularly in choreography-heavy productions like *Hamilton* or *Six*—there is a growing need to re-evaluate how

ensemble labor is valued. As Symonds and Taylor (2014) argue, the rise of the “triple threat” performer reflects both the evolution of the form and the heightened expectations of chorus members as integral co-creators of the theatrical experience.

#### **4.5 Limitations and Areas for Further Research**

This study was limited by its reliance on secondary sources and pre-selected canonical musicals. Future research could incorporate ethnographic or practice-based methodologies, such as interviews with chorus performers, directors, and choreographers. There is also room for exploring non-Western musical theatre traditions and how ensemble performance is conceptualized in those contexts.

Furthermore, the increasing integration of digital media and projection design in theatre offers new possibilities for the representation of collective bodies. Future work might examine how the traditional chorus evolves in virtual or hybrid performance spaces, and whether digital technologies extend or diminish the role of the ensemble.

### **5. Conclusion**

The chorus has long been an essential but often underexamined element of musical theatre. This study has demonstrated that the chorus is not merely a background presence or filler between principal scenes, but a complex, multifaceted component of performance that deeply influences narrative structure, emotional resonance, sociopolitical commentary, and aesthetic richness (Gulkhara & Kamran, 2025). By examining key productions such as *Les Misérables*, *Hamilton*, *West Side Story*, *Rent*, and *Hadestown*, this paper has shown how the chorus functions simultaneously as narrator, emotional amplifier, symbolic community, and visual spectacle.

The analysis affirms that the chorus plays a central dramaturgical role in shaping the meaning and impact of a musical. Whether through setting the scene, embodying communal struggles, or enhancing dramatic tension, the ensemble provides a dynamic and often transformative lens through which the audience experiences the story. The chorus also has unique power in terms of representation—giving voice to groups, emotions, and perspectives that might otherwise remain silent in solo-driven narratives.

Importantly, the evolving function of the chorus mirrors broader shifts in theatrical practice and cultural consciousness. As musical theatre has become more politically and socially engaged, the chorus has increasingly taken on the role of a collective conscience, providing commentary on issues such as inequality, marginalization, and resistance. This signals a movement away from passive ensemble work and toward a more active, ideologically charged form of group performance.

The study also underscores the need to reassess the visibility and value of ensemble labor in the professional theatre industry. Chorus members are often required to perform with a high degree of versatility and technical skill, yet remain undervalued in recognition and compensation. Greater academic and industry attention to ensemble work can help redress this imbalance and elevate the artistic status of the chorus.

Future research might explore chorus work in lesser-known or experimental productions, examine ensemble practices in non-Western or global musical traditions, and analyze how digital technologies are reshaping the idea of collectivity on stage. As theatre continues to evolve, so too does the creative potential of the chorus—not merely as a support mechanism, but as a central artistic and political force in musical storytelling.

In conclusion, the chorus is indispensable to musical theatre's ability to move, provoke, and inspire. Its functions are not only performative but deeply expressive of the shared human experiences that define the genre itself. As the stage becomes an increasingly complex space for storytelling, identity, and engagement, the chorus stands at the heart of this evolution—singing, moving, and speaking not just for the characters, but for the audience, and the world beyond the proscenium.

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