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Contents

The Symbolism of Time in the Flying Carpet and the Wind Horse: Chaos-Cosmos Transitions in Nakhchivan Folklore

[1] Ayten Ceferova

Abstract. This article examines how two recurring motifs—the flying carpet and the wind horse—encode distinct temporal logics in Nakhchivan/Azerbaijani folklore. Through close readings of tales and beliefs (e.g., "Prince Bendali," the Solomon carpet legend, Koroghlu cycles, Yel Baba verses, "The Forty-Bud Lady"), it shows that the flying carpet suspends profane duration by enabling instantaneous ascent into sacred, cosmic space, whereas the wind horse accelerates and safeguards passage through a liminal interval toward order. This chaos-to-cosmos movement structures plot, regulates the hero's trials, and marks the hosting texts as sacral. The carpet functions primarily as a cosmological device activated by magical word or talisman; the horse acts as a sentient companion whose vigilance, color symbolism, and ritual associations (horseshoe luck, winged-birth lore) guide and protect. Juxtaposing these "cosmic vehicles" clarifies how folklore models time not only as measure but as power that can be collapsed, stretched, or ethically mediated—offering a compact framework for regional analysis and teaching.

Keywords: *sacred time; flying carpet; wind horse; Nakhchivan folklore*

1. INTRODUCTION

Magical transport motifs in Turkic and broader Eurasian storytelling often do more than move heroes across space—they recalibrate narrative time. In Nakhchivan/Azerbaijani folklore, two such motifs—the **flying carpet** and the **wind horse**—govern the shift from chaos to cosmos by either suspending duration (instant ascent) or accelerating, guarded passage through a liminal interval. Read as "cosmic vehicles," these images help explain why the hosting texts feel sacral: they operate within consecrated time/space, reorder plot sequence, and ethically orient the hero's trials (Kujundžić, 2012; Xudaverdiyeva, 2023; Heydarova, 2023; Saleh, 2025).

Problem and aim. While carpets and horses have been catalogued as folkloric means of transport, less attention has been paid to their distinct *temporal* profiles and to how those profiles structure sacred narrative time in regional corpora. This study argues that the flying carpet functions as an atemporal device that collapses profane time into an instant of cosmic entry, whereas the wind horse sustains a

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narrated, hyper-quick interval in which guidance, vigilance, and loyalty protect the hero until order is reached (Kujundžić, 2012; Xudaverdiyeva, 2023).

Key terms (operational).

- *Sacred time:* non-ordinary, consecrated temporality that cancels or condenses duration and authorizes passage into the cosmic realm.

- *Liminal time/space:* the transitional zone where trials occur and identity is tested prior to entry into order.

- *Cosmos:* the realm of order opposed to chaos; the narrative telos of successful passage.

Research questions.

1. How do the flying carpet and wind horse differentially configure sacred, liminal, and profane time in Nakhchivan tales?

2. What narrative functions (bypass vs. escorted traversal; tool vs. ally) correlate with those temporal logics?

3. How do local beliefs and ritual residues (e.g., horseshoe luck, color lore, wind/"Yel" associations) reinforce the motifs' time-bearing roles (Heydarova, 2023; Xudaverdiyeva, 2023)?

Corpus and method. The analysis draws only on examples already indicated in the source text: "Prince Bendali," the speaking-carpet vignette, the Nakhchivan legend of Solomon's carpet, Koroghlu's horseshoe leap, the Yel Baba verse, and "The Forty-Bud Lady." Methodologically, it combines motif analysis with close reading to trace how each image activates sacred time, manages the liminal interval, and resolves into cosmos, with selective comparative framing from studies of transport symbolism and children's-literature semiotics where relevant (Kujundžić, 2012; Fang, 1996; Williams, 1976).

Contribution. By specifying *how time works* in each motif, the article offers a compact framework—collapse vs. protected acceleration—for interpreting regional narratives and for teaching the temporal poetics of Azerbaijani folklore.

2. MATERIALS & SCOPE

Corpus. The analysis is limited to the Nakhchivan/Azerbaijani materials indicated in your text: (i) the *flying carpet* episodes from "Prince Bendali," the speaking-carpet vignette, and the legend of Solomon's carpet; (ii) the *wind horse* complex in Koroghlu tradition (the "horseshoe stone" leap), the Yel Baba verse, and "The Forty-Bud Lady." These are treated as the primary data, supported by regional compilations you already cite (e.g., *Azerbaijani Fairy Tales* 2005; *Azerbaijani Folklore Anthology* 1994;

Nakhchivan Folklore 2011) and interpreted in light of relevant scholarship provided in your reference list (e.g., Kujundžić, 2012; Xudaverdiyeva, 2023; Heydarova, 2023; Williams, 1976; Fang, 1996).

Rationale for selection. The set furnishes parallel, culturally coherent instances of two "cosmic vehicles" within one regional tradition, enabling a controlled comparison of their temporal logics (instantaneous ascent vs. accelerated, protected passage) without importing extraneous corpora (Kujundžić, 2012; Xudaverdiyeva, 2023).

Method. Motif-centered close reading with a focus on *temporal operations*: (1) activation (talisman/word vs. sentient ally), (2) interval management (abolition vs. acceleration), (3) spatial register (air/wind), and (4) obstacle logic (bypass vs. guided traversal). Interpretive moves are grounded in internal textual evidence, with brief comparative cues from transport symbolism and iconographic dictionaries strictly for clarification (Fang, 1996; Williams, 1976; Heydarova, 2023).

Scope & limits. The study does not claim exhaustiveness for Turkic or Slavic traditions; color/omen attributions for horses are noted as locally variable. Bibliographic harmonization (e.g., duplicate entries for Fang, 1996; Kujundžić, 2012) will be resolved at final formatting.

3. KEY TERMS & MINI-FRAMEWORK

Sacred time. A consecrated temporality that suspends or condenses ordinary duration and authorizes passage into the realm of order (*cosmos*). In the corpus, sacred time is accessed by magical activation (word, talisman, ritual object) and is legible in narrative shortcuts that "skip" interval (cf. epic-time discussions in Xudaverdiyeva, 2023; symbolism overviews in Williams, 1976; didactic/iconic functions of images in Fang, 1996).
Liminal time/space. The transitional zone where trials, guidance, and testing occur before entry into order; time is not abolished here but *managed* (accelerated, safeguarded).
Cosmos vs. chaos. *Cosmos* is ordered, ethically validated space-time; *chaos* is undifferentiated or hostile space-time from which the hero departs.
Cosmic vehicles (operational label). Motifs that *carry* the hero by re-timing the plot: the **flying carpet** performs *instantaneous entry* (abolition of interval), while the **wind horse** performs *protected acceleration* across the threshold.
Schema. Chaos → *(instantaneous leap via carpet)* → Cosmos; **or** Chaos → *(accelerated, guarded passage via horse)* → Cosmos.
This minimal framework is sufficient to read the Nakhchivan materials without importing external theory and aligns with transport-motif work (Kujundžić, 2012) and regional semiotics (Heydarova, 2023; Xudaverdiyeva, 2023).

4. FLYING CARPET: INSTANTANEOUS TRANSITION INTO SACRED TIME

Function as transport beyond profane duration. In "Prince Bendali," the carpet "swiftly arrived at the dragon's place," collapsing journey-time into a sacred instant. The narrative does not *describe* travel; it *effects* arrival—evidence of time's abolition at the plot level.

Cosmological activation. The speaking-carpet vignette ("Carpet, tell us a story… and the carpet began to speak") shows that the object's efficacy depends on a performative word/talismanic trigger. Such activation marks entrance into consecrated time/space (Fang, 1996 on word–image addressability; Heydarova, 2023 on encoded meanings in carpets).

Freedom and elevation. The escape "from the land of the divs" stages vertical release from hostile space; the carpet's altitude symbolizes a move into ordered perspective—another sign of sacred time's precedence over ordinary sequence (Williams, 1976 on ascent symbolism).

Interdependence of cosmic instruments. In the Solomon legend, the carpet's stasis after loss of the ring clarifies authorization logic: without the rightful seal, cosmic movement ceases. Time reverts to the transitional zone until authorization returns.

Time takeaway. The flying carpet does not *speed up* time; it *suspends* it. By abolishing interval, it installs the hero directly inside cosmic order, marking the hosting text as sacral through instantaneous re-timing (see also transport clustering in Kujundžić, 2012).

5. WIND HORSE: GUIDED, ACCELERATED PASSAGE THROUGH THE LIMINAL ZONE

5.1 Mythic profile and function.

In the examined corpus, the wind horse concentrates fire/light energy and active agency. It is not a passive vehicle but a sentient ally that warns, counsels, and protects. Local color attributions (white/black = luck, red = war, gray = famine) and variant forms (e.g., the three-legged steed) signal its role as a bearer of fate and a marker of the extraordinary rather than ordinary animal life.

5.2 Wind cult and aerial register.

The horse's affinity with *yel* (wind) positions it within an aerial, cosmological stratum. The Yel Baba verse—"with wings on its sides"—makes explicit what belief often implies: horses are **born winged**, and though the wings are said to be lost at birth or at the fall to earth, their memory persists as supernatural speed and lift. This wind linkage explains the horse's capacity to traverse perilous thresholds without collapsing narrative sequence.

5.3 Case study A: Koroghlu's Horseshoe Stone.

Qırat's bird-like leap over a ravine dramatizes threshold crossing as a **kept interval**: time is not erased but compressed. The deep print left on stone functions like a time-stamp and a covenantal sign—evidence that the passage occurred under sanctioned speed and vigilance.

5.4 Case study B: *The Forty-Bud Lady.*

The bond begins in a dream—already a limen between worlds—where the horse speaks and pledges guidance. Through castle trials, it detects danger, resists seduction by chaotic forces, and escorts the hero to order. The hero's reciprocation (e.g., wiping the horse's sweat with a silk handkerchief) codes the relationship as ethical: protection is sustained by care and loyalty.

5.5 Ritual ecology and omens.

Beyond tale-space, custom sustains the motif's guardian status: horseshoe luck, Nowruz-night omens (a horse chewing cud as favor), placing newborns on a horse's back, votive offerings near equine figures, and attributions of heightened vision and hearing. These practices extend the horse's **liminal guardianship** from narrative to lived ritual.

5.6 Temporal logic—time takeaway.

Unlike the flying carpet's **abolition of interval**, the wind horse preserves narrative time but **accelerates and safeguards** it. Passage through the transitional zone is swift, counseled, and ethically toned; arrival at cosmos occurs *just in time*, not *all at once*. In this way, the wind horse scripts a mode of sacred temporality where speed is inseparable from vigilance, reciprocity, and right relation (cf. Xudaverdiyeva, 2023; Heydarova, 2023; Kujundžić, 2012).

6. COMPARATIVE SYNTHESIS

6.1 Overview. Read side by side, the **flying carpet** and the **wind horse** function as complementary "cosmic vehicles" that *re-time* the hero's movement from chaos to cosmos. The carpet's logic is **abolition of interval** (instantaneous entry into sacred space), whereas the horse's logic is **protected acceleration** (fast, guided traversal of a liminal interval). This pairing clarifies not just *where* the hero goes but *how time behaves* while getting there (Kujundžić, 2012; Xudaverdiyeva, 2023; Heydarova, 2023).

6.2 Temporal mechanics.

- **Carpet:** time collapses to a punctual instant—journey-time is narratively skipped; arrival itself testifies to sacred authorization.

- **Horse:** time remains sequential but is compressed and safeguarded; the plot retains trial, counsel, and recognition scenes that ethicize speed.

6.3 Agentivity and ethical economy.

- **Carpet as device.** Activation depends on a performative word or talisman (e.g., Solomon's ring). The ethic lies in rightful authorization: when the seal is lost, motion ceases.

- **Horse as ally.** A sentient companion with counsel and omen-sensitivity (dream pact, warnings, reciprocated care). Speed is inseparable from loyalty and vigilance—an ethical

relation, not merely a function (cf. horse-color/omen complexes in regional lore; Xudaverdiyeva, 2023).

6.4 Spatial register and elementality.

- **Carpet:** vertical lift, sky perspective, and the cosmological "above" mark its domain; carpets themselves encode cosmograms and sacred layouts (Heydarova, 2023).

- **Horse:** aerial affinities via *Yel* (wind) and wing-memory beliefs; Koroghlu's "bird-like" leap inscribes wind/air onto stone, materializing a threshold crossed.

6.5 Obstacle logic.

- **Carpet (bypass).** Obstacles are largely *cancelled* by instant translation; the drama relocates to authorization (who may speak/command?) rather than to overcoming terrain.

- **Horse (negotiation).** Obstacles are *engaged* at speed: detection, evasion, endurance, and moral steadiness in a guided interval.

6.6 Ritual and cultural residues.

Horseshoe luck, Nowruz-night omens, and votive practices extend the horse's protective timing into lived ritual; the carpet's symbolic grammars (ornament as encoded meaning) extend sacred mapping into household and civic space (Fang, 1996; Williams, 1976; Heydarova, 2023).

6.7 Narrative payoffs.

- **Carpet:** produces the feeling of the *miraculous now*—cosmos entered "all at once," with narrative emphasis on consecration and rightful command.

- **Horse:** produces the feeling of *kept time*—cosmos reached "just in time," with emphasis on character, covenant, and tested fidelity.

6.8 Teaching/analytical utility.

This dyad lets readers track *two* sacred timings in one regional corpus: (1) instant consecration; (2) escorted, ethical passage. In classroom or comparative work, the pair models how motifs regulate duration and authorization simultaneously (Kujundžić, 2012; Fang, 1996).

6.9 Compact comparison

Axis	Flying carpet	Wind horse
Temporal operation	**Abolishes interval** (instant entry)	**Compresses interval** (guided, accelerated)

Axis	Flying carpet	Wind horse
Agentivity	Magical **device** (word/talisman)	Sentient **ally** (counsel/loyalty)
Obstacle logic	**Bypass** via translation	**Negotiation** at speed
Spatial register	Vertical, cosmological "above"; cosmogram links	Wind/air affinity; threshold leaps
Ethical focus	Authorization/legitimacy (seal, right to command)	Covenant/reciprocity (care, vigilance)
Narrative feel	Miraculous **now**	Kept **just-in-time**

6.10 Time takeaway. The carpet **suspends** profane time to open sacred space; the horse **safeguards** profane time until it becomes sacred. Together they script a two-mode choreography of salvation—*abolition of interval* and *protection of interval*—within Nakhchivan folklore's chaos→cosmos arc (Xudaverdiyeva, 2023; Heydarova, 2023; Kujundžić, 2012).

7. DISCUSSION: NARRATIVE MECHANICS OF TIME

7.1 Time as authorization. In both motifs, movement into or through sacred space-time is never neutral; it is *authorized*. The flying carpet requires a rightful trigger (performative word/talisman), dramatized in the Solomon episode where the loss of the ring suspends motion—time "switches off" until legitimacy is restored. Read alongside regional reflections on rulership and legitimation, authorization here functions like a cosmological sovereignty that enables time to flow in sacral mode (cf. Mustafayev, 2007).

7.2 Word–image activation. The speaking-carpet vignette illustrates how address ("Carpet, tell us a story…") activates a non-ordinary temporality: the image (carpet) responds to the word. This dovetails with insights on the instructional/performative roles of images in children's narratives (Fang, 1996) and with studies of encoded visual grammars in carpets (Heydarova, 2023). In short, *icon + utterance* is a switch that converts profane duration into sacred passage.

7.3 Device vs. companion: ethics of tempo. The carpet is a **device**—its ethics center on rightful command. The horse is a **companion**—its ethics hinge on covenant (care, loyalty, vigilance). Consequently, the carpet's tempo is an *instantaneous ellipsis* (arrival replaces journey), while the horse's tempo is a *compressed continuum* (journey retained, guarded, and morally toned). This aligns with epic-time analyses of Azerbaijani tales where liminal episodes test character within accelerated yet sequential time (Xudaverdiyeva, 2023).

7.4 Aerial semiotics in a wider field. Both motifs partake of an aerial register (sky/wind). The horse's wind link (*Yel*; Yel Baba verse) and wing-memory beliefs map it to air; the carpet's vertical lift stages ascension. Comparative aerial symbols—such as the kite as an uplifted, guiding sign—suggest a broader nineteenth–twentieth century discourse of elevation and control over perspective (Van Riet, 2012), while cross-cultural symbolics confirm ascent as an index of sacralization (Williams, 1976).

7.5 Chthonic contrast and thresholding. Sacred ascent gains clarity against its opposite: the chthonic/depth sphere. Work on time/space in Azerbaijani fairy tales highlights how underworld or "below" zones structure the need for guided transition (Khudaverdiyeva, n.d.). In this dialectic, the wind horse appears as a threshold specialist (bridging perilous in-betweens), while the carpet functions as a direct "above" operator.

7.6 Plot grammar of duration. Formally, the carpet performs **narrative ellipsis** (journey-time is omitted; arrival is foregrounded). The horse performs **narrative montage** (a rapid sequence of warned/averted obstacles). These distinct grammars explain why the carpet clusters with scenes of authorization and consecration, whereas the horse clusters with counsel, omen-reading, and loyal reciprocity.

7.7 Regional and comparative implications. The coexistence of device and companion within one corpus clarifies transport symbolism catalogued for Slavic and Eurasian traditions (Kujundžić, 2012): rather than a generic "magic ride," traditions differentiate *how time is handled*. The Nakhchivan materials make this differentiation especially legible.

7.8 Pedagogical and multicultural valences. Because both motifs externalize time as a manipulable force, they are effective for teaching temporal poetics and for transmitting values (guidance, loyalty, rightful authority) in children's reading contexts (Ismayilova, 2023). Their recurrence across communities also supports discussions of shared symbolic capital and multicultural bridges in folklore education (Saleh, 2025).

7.9 Limitations and prospects. Color symbolism for horses varies locally; aerial/ascensional readings for carpets intersect with multiple ornamental codes (Heydarova, 2023) and deserve item-level analysis. Future work could map *micro-tempo* (sentence-level pacing) to *macro-tempo* (episode sequencing) and compare additional aerial conveyances (e.g., kites, birds) to test whether "abolition vs. protected acceleration" holds across broader corpora.

CONCLUSION

This study has shown that the flying carpet and the wind horse encode two distinct temporal logics that guide the hero from chaos to cosmos in Nakhchivan/Azerbaijani folklore. The flying carpet operates by abolishing interval—an instantaneous, authorized entry into sacred space that foregrounds consecration and legitimacy (as in the Solomon episode and speaking-carpet vignette). The wind horse, by contrast, provides protected acceleration—a sentient guide that preserves narrated sequence while compressing it, ethically toning the passage through counsel, vigilance, and reciprocal care (Koroghlu's leap, dream-covenant in *The Forty-Bud Lady*, Yel Baba's winged steed). Placed together, these motifs reveal a two-mode choreography of salvation: one opens sacred time at once; the other keeps time safely until it becomes sacred. This clarification helps explain the sacral feel of the hosting texts, refines motif indexing beyond the generic "magic transport," and supplies a compact teaching framework for temporal poetics in regional folklore. While color/omen assignments and ornamental codes vary locally, the core distinction—instant consecration versus escorted, ethical passage—remains stable

across the examined corpus. Future work can map sentence-level pacing to episode design and test the dyad against adjacent aerial conveyances to gauge its wider comparative reach.

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The Influence of Stress and Burnout on The Efficiency of Special Education Teachers in Kwara State School For Special Needs

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Abstract. Teaching is a profession that comes with a lot of mental and physical stressors which usually determine the effectiveness of teachers especially special education teachers. This study investigated the influence of stress and burnout on the efficiency of special education teachers in Kwara state School for Special needs. Descriptive survey research design was used, two specific purposes and two hypotheses guided the study. Stratified random sampling was used to select 20 teachers from the school. A self-structured questionnaire was used to elicit responses from the respondents, the instrument was validated by experts in the field of special education. To ascertain the reliability of the instrument, the instrument was pilot tested and Cronbach's Alpha was used to test the reliability coefficient which yielded 0.70. The data collected was analyzed using descriptive statistics to summarize means and standard deviations, and inferential statistics, including Pearson's correlation coefficient, to test the hypotheses and examine the relationships between stress, burnout and teacher efficiency. The results indicated that stress has a moderate but noticeable impact on various aspects of job efficiency, including lesson planning, productivity, classroom management, and communication and burnout significantly impacts teachers' effectiveness, enthusiasm, creativity, and overall job satisfaction. Based on the findings, it was recommended that

Keywords: *Stress and Burnout, Special Education Teachers, Teacher Efficiency*

Introduction

Teaching as a profession is a service to the humanity; this service comes in form of mental and physical work which is usually rendered in the classrooms to learners at different level of education by teachers. Teachers are qualified personnel that are trained to render teaching services in form of verbal and practical. Teachers are trained to teach different categories of students, some are trained to teach regular learners while some are trained to teach special needs students. Those teachers that are trained

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to teach learners with special needs in primary schools or secondary schools are referred to special education teachers.

Federal Republic of Nigeria (FRN, 2013), defined special education teachers to be well trained personnel who teach learners with physical or mental disabilities, both young or adults and those with learning difficulties or other special needs. This means that special education teachers are those who impart knowledge to learners with high incidences and low incidences. These specially trained teachers are trained specifically to adapt the conventional educational curriculum; to teach learners with special needs in a classroom based on the learners' peculiarities. These teachers team up with other professionals to provide comprehensive support to learners, teach life skills, social skills and self-care, adapt teaching methods and materials to accommodate learners' styles and abilities and work closely with parents of learners with special needs for successful education programmes (Sokanu,2023). These enormous responsibilities on special education teachers make experience physical and mental stress.

Stress is an exhaustion of both physical and mental strength of individuals. It is the strain that accompany demanding circumstances. American Psychological Association (APA). (2021) defined stress as a feeling of emotional and physical tension, which usually culminates into frustration, anger, and nervousness. Platoni (2015) explained that stress is a condition or feeling experienced by individuals when demands of work exceed personal and social resources such individual can cope with. Patti (2021) averred that stress has always been present in the workplace; job stress makes workers more prone to error, poor work performance, mental health issues, burnout and conflict in the workplace. This indicates that stress is a state of mind and bodily reactions to organizational demands at workplace which make individual suffer from physical and psychological hypertension resulted from factors that cannot be handled and exceeds human ability to cope with. Stress is a strain to abilities of workers and health which its prolong leads to burnout for workers.

Burnout is an exhaustion experienced by individuals as a result of continuous mental and physical strains. Melinda, Segal and Robinson (2023) defined burnout to be a state of emotional, physical and mental exhaustion caused by excessive and prolonged stress. Iwan, et al (2019) posited that burnout is a prolong stress factors which result to emotional exhaustion, depersonalization and reduced personal accomplishment of workers. These researchers also asserted that job burnout cause frequent job changes, turnovers, and reduced work performance quality, increased accidents, increased work absence and decreased job satisfaction. Eun-Young and Mikyung (2020) explained that teachers are vulnerable to burnout and this manifest in the physical and psychological health, work performance of teachers, the way teachers interact with students and also undermine students' motivation. Various researches revealed that degree of burnout among regular school teachers in Africa was estimated to between 10% and 30%, in western countries and in European countries, the degree of burnout among teachers was estimated to be between about 10–40%, while in Asian countries it was estimated between 50–70%. It was also revealed that two-thirds of new teachers leave their job within 4 years and over half of the teachers leave within 7 years, 20–30% of beginning teachers leave the career in the first 3 years. This degree of burnout was considered to be prominent among private regular school teachers than public regular school teachers (Iwan, et al 2019). This means that stress and burnout are detrimental to the health, job satisfaction and efficiency of workers at different workplaces.

This study is tailored towards organizational theory which postulated that burnout is a consequence of organizational and work stressors combined with inadequate individual coping strategies. Within this theory, there are two alternative models to explain the relationships between the dimensions of burnout. Burnout starts because of the existence of organizational stressors or risk factors, such as work overload or role ambiguity, and before which some individuals show as a coping strategy a decrease in their organizational commitment, which is very similar to cynicism and depersonalization. Subsequently, the person will experience low personal fulfillment at work and emotional exhaustion, which triggers burnout syndrome. Thus, depersonalization would be the first phase of burnout, followed by a feeling of low self-fulfillment and, finally, emotional exhaustion. The alternative proposal is that put forward by Cox et al. For these authors, the emotional exhaustion caused by enduring work stressors is the initial dimension of this syndrome (Golembiewski, Munzenrider, Carter,1983). This theory is related to this study because special education teachers are exposed to organization stressors which these personnels cannot manage thereby leading to burnout which in turn affect teachers' efficiency when discharging duties. This study intends to investigate the influence stress and burnout on the efficiency of special education teachers in Kwara state school for special needs, Kwara state.

Statement of the Problem

Individuals across various professions strive to be effective and productive in their roles. However, stress and burnout can significantly undermine their abilities, health, and overall job performance. Special education teachers, who often face high workloads and extensive responsibilities, are particularly vulnerable to psychological and physical stress, which can impede their effectiveness in delivering quality education.

While numerous studies have examined the causes and general effects of stress and burnout among special education teachers, there is a notable lack of research focusing on how these factors specifically influence the efficiency of special education teachers in performing their duties. This study aims to address this gap by investigating the impact of stress and burnout on the job efficiency of special education teachers at Kwara State School for Special Needs in Kwara State. By exploring this under-researched area, the study seeks to provide insights into how stress and burnout affect the performance of these educators and offer recommendations for improving their work conditions and overall efficiency.

Purpose of the study

The study investigated the influence of stress and burnout on the efficiency of special education teachers in Kwara state school for special needs. Specifically, the study aims to:

1. find the relationship between stress and teachers' efficiency
2. examine the relationship between burnout and teachers' efficiency

Hypotheses

There is no significant relationship between stress and teachers' efficiency

There is no significant relationship between burnout and teachers' efficiency

Research Methodology

This study employed a descriptive survey research design to examine the influence of stress and burnout on job efficiency and student achievement among special education teachers at Kwara State School for Special Needs. The design was both descriptive and correlational, aiming to assess the relationships between stress, burnout, and teacher efficiency.

The target population for this study encompassed all special education teachers at Kwara State School for Special Needs. This population included teachers working within the special education department of the school. To obtain a representative sample, 20 teachers were selected. Stratified random sampling was utilized to ensure that various categories of teachers, such as those categorized by years of experience. Data collection involved using a self-structured questionnaire designed for teachers. This instrument measured stress levels using the Perceived Stress Scale (PSS), burnout levels with the Maslach Burnout Inventory (MBI), and job efficiency through a Job Efficiency Rating Scale developed specifically for this study. To ensure the validity of these instruments, experts in special education for content and face validity. Reliability was measured through Cronbach's Alpha, which yielded 0.70.

The procedure for data collection involved distributing questionnaires to teachers during scheduled professional development sessions with permission from school authorities. The data were analyzed using descriptive statistics to summarize means and standard deviations, and inferential statistics, including Pearson's correlation coefficient, to test the hypotheses and examine the relationships between stress, burnout and teacher efficiency.

RESULTS

Descriptive Statistics

Stress and Job Efficiency

Table 1: Descriptive Statistics for Stress-Related Items

Item	Mean	Standard Deviation
1. Stress affects my ability to prepare effective lesson plans.	3.00	0.79
2. I am less productive due to stress and anxiety.	2.80	0.85
3. Stress impacts my ability to manage student behavior.	2.90	0.80
4. I am less able to adapt to changes in the classroom due to stress.	2.85	0.88
5. Stress affects my ability to communicate effectively with parents and colleagues.	2.95	0.82

Item	Mean	Standard Deviation
6. I am less able to meet deadlines and complete tasks due to stress.	2.75	0.87
7. Stress impacts my ability to develop and implement individualized education plans (IEPs).	3.10	0.77
8. I am less able to maintain accurate records and documentation due to stress.	2.90	0.83
9. Stress contributes to a lack of enthusiasm for my job.	2.80	0.86
10. I often feel emotionally drained after work.	3.05	0.79

Interpretation:

The mean scores for stress-related items range from 2.75 to 3.10, indicating a moderate level of agreement among respondents about the impact of stress on their job efficiency.

Item 1 (Mean = 3.00) suggests that stress moderately affects the ability to prepare effective lesson plans.

Item 2 (Mean = 2.80) indicates that stress and anxiety lead to slightly reduced productivity.

Item 3 (Mean = 2.90) shows that stress impacts classroom management to a moderate extent.

Item 4 (Mean = 2.85) reveals that adapting to changes due to stress is moderately challenging.

Item 5 (Mean = 2.95) implies that stress has a noticeable effect on communication with parents and colleagues.

Item 6 (Mean = 2.75) reflects that meeting deadlines and completing tasks are somewhat affected by stress.

Item 7 (Mean = 3.10) indicates that stress impacts the development and implementation of IEPs moderately.

Item 8 (Mean = 2.90) shows that maintaining accurate records is somewhat challenging due to stress.

Item 9 (Mean = 2.80) reflects that stress contributes to a lack of enthusiasm for the job to a moderate degree.

Item 10 (Mean = 3.05) reveals that teachers often feel emotionally drained after work, with moderate agreement.

Overall, these responses suggest that stress has a moderate but noticeable impact on various aspects of job efficiency, including lesson planning, productivity, classroom management, and communication.

Burnout and Job Efficiency

Table 2: Descriptive Statistics for Burnout-Related Items

Item	Mean	Standard Deviation
11. I feel emotionally exhausted, which affects my ability to teach effectively.	2.95	0.84
12. Burnout has reduced my enthusiasm and motivation for teaching.	3.05	0.80
13. I feel cynical and detached from my students and colleagues.	2.85	0.90
14. Burnout has reduced my ability to be creative and innovative in my teaching practices.	2.90	0.85
15. I feel ineffective and unsuccessful in my role as a special education teacher.	2.75	0.88
16. Burnout has led to a decrease in my productivity and efficiency.	2.85	0.87
17. I lack the energy and resources to manage my classroom effectively.	3.00	0.81
18. Burnout has negatively impacted my relationships with students, colleagues, and parents.	2.90	0.83
19. I often feel inadequate in my role as a special education teacher.	2.80	0.89
20. I feel physically exhausted at the end of the day.	3.10	0.76

Interpretation:

The mean scores for burnout-related items range from 2.75 to 3.10, reflecting a moderate level of agreement regarding the impact of burnout on job efficiency.

Item 11 (Mean = 2.95) suggests moderate emotional exhaustion affects teaching effectiveness.

Item 12 (Mean = 3.05) indicates a noticeable reduction in enthusiasm and motivation due to burnout.

Item 13 (Mean = 2.85) reflects a moderate level of cynicism and detachment from students and colleagues.

Item 14 (Mean = 2.90) shows that burnout moderately reduces creativity and innovation in teaching.

Item 15 (Mean = 2.75) implies a sense of ineffectiveness and failure in the role of a teacher due to burnout.

Item 16 (Mean = 2.85) reveals a moderate decrease in productivity and efficiency as a result of burnout.

Item 17 (Mean = 3.00) indicates that lack of energy and resources to manage the classroom is a moderate concern.

Item 18 (Mean = 2.90) shows that burnout negatively affects relationships with students, colleagues, and parents to a moderate extent.

Item 19 (Mean = 2.80) reflects feelings of inadequacy in the role of a teacher due to burnout.

Item 20 (Mean = 3.10) suggests that physical exhaustion at the end of the day is a moderate issue.

These results indicate that burnout significantly impacts teachers' effectiveness, enthusiasm, creativity, and overall job satisfaction.

Job Efficiency

Table 3: Descriptive Statistics for Job Efficiency Items

Item	Mean	Standard Deviation
21. I am able to manage my classroom effectively.	3.05	0.78
22. I am able to adapt my teaching methods to meet the needs of my students.	3.10	0.80
23. I am able to develop and implement effective individualized education plans (IEPs).	3.00	0.82
24. I am able to maintain accurate and up-to-date records and documentation.	3.05	0.77
25. I am able to communicate effectively with parents and colleagues.	3.10	0.79
26. I am able to prioritize tasks and manage my time effectively.	3.00	0.81
27. I am able to provide individualized support to my students.	3.10	0.80
28. I am able to stay current with new developments and research in special education.	3.00	0.82

Item	Mean	Standard Deviation
29. I am able to meet my job expectations.	3.05	0.78
30. I am satisfied with my overall job performance.	3.10	0.79

Interpretation:

The mean scores for job efficiency items range from 3.00 to 3.10, indicating a generally positive perception of job performance among teachers.

Item 21 (Mean = 3.05) shows that teachers moderately feel they manage their classrooms effectively.

Item 22 (Mean = 3.10) suggests that teachers are able to adapt their teaching methods to meet student needs effectively.

Item 23 (Mean = 3.00) reflects that developing and implementing IEPs is a moderate strength.

Item 24 (Mean = 3.05) indicates that maintaining accurate records is generally well-managed.

Item 25 (Mean = 3.10) shows that communication with parents and colleagues is effective.

Item 26 (Mean = 3.00) suggests that prioritizing tasks and managing time is performed moderately well.

Item 27 (Mean = 3.10) reflects that providing individualized support to students is a moderate strength.

Item 28 (Mean = 3.00) indicates that staying current with new developments is a moderate strength.

Item 29 (Mean = 3.05) suggests that teachers feel they meet job expectations well.

Item 30 (Mean = 3.10) reflects overall satisfaction with job performance.

These results indicate that while teachers generally perceive their job efficiency positively, there is variability in how well they feel they perform different aspects of their roles.

Inferential Statistics

Table 4.4: Pearson Correlation Coefficients

Relationship	Correlation Coefficient (r)	p-value
Stress and Job Efficiency	-0.45	0.03
Burnout and Job Efficiency	-0.55	0.01

Interpretation:

Stress and Job Efficiency:

The correlation coefficient of -0.45 indicates a moderate negative relationship between stress and job efficiency. This means that higher levels of stress are associated with lower job efficiency. The p-value of 0.03 suggests that this finding is statistically significant, confirming that stress has a meaningful impact on job performance.

Burnout and Job Efficiency:

The correlation coefficient of -0.55 reflects a moderate to strong negative relationship between burnout and job efficiency. This indicates that higher levels of burnout are associated with lower job efficiency. The p-value of 0.01 confirms that this relationship is statistically significant, underscoring the substantial impact of burnout on job performance.

Summary

The data analysis reveals significant negative relationships between both stress and burnout with job efficiency among special education teachers. Stress and burnout are shown to impair various aspects of job performance, including classroom management, productivity, and overall effectiveness. These findings highlight the need for targeted interventions to address stress and burnout to improve job efficiency and overall well-being of special education teachers.

Discussion of Findings

Stress and Job Efficiency

The finding revealed a moderate negative relationship between stress and job efficiency among special education teachers ($r = -0.45$, $p = 0.03$). This suggests that higher levels of stress are associated with lower job efficiency. The negative impact of stress on job efficiency is well-documented in recent studies. For instance, **Shen, M., & Zhang, Q. (2020)** found that stress significantly impairs teachers' productivity and their ability to manage classroom dynamics effectively. This finding aligns with the study by **Yuan, L., & Wang, J. (2017)**, which reported that stress affects teachers' performance and their ability to engage effectively in their roles.

This implies that the findings underscore the need for targeted stress management interventions. Schools should implement comprehensive programs that include stress-reducing strategies, professional development on stress management, and access to mental health resources.

Burnout and Job Efficiency

This finding revealed a moderate to strong negative relationship between burnout and job efficiency ($r = -0.55$, $p = 0.01$). This indicates that higher levels of burnout are associated with lower job efficiency. Burnout's detrimental impact on job efficiency is well-supported in recent research. **Guglielmi, R. S., & Tatrow, K. (2018)** identified burnout as a significant factor affecting teachers' job performance and their overall effectiveness in the classroom. Similarly, **Kim, L. E., & Lee, J.**

(2019) highlighted that burnout leads to reduced enthusiasm and productivity, corroborating the findings of this study. **This implies** Addressing burnout is crucial for improving job efficiency. Institutions should implement strategies such as workload reduction, enhanced professional support, and initiatives aimed at improving work conditions to mitigate burnout.

Summary

This study investigated the influence of stress and burnout on the job efficiency of special education teachers at Kwara State School for Special Needs in Kwara State. The primary objectives were to determine the relationship between stress and job efficiency, as well as burnout and job efficiency.

The research employed a questionnaire designed to capture data on stress, burnout, and job efficiency, and analyzed the data using descriptive and inferential statistics. The findings revealed the following:

Stress and Job Efficiency: A moderate negative correlation ($r = -0.45$, $p = 0.03$) was observed between stress and job efficiency. This indicates that higher levels of stress are associated with reduced job efficiency among special education teachers.

Burnout and Job Efficiency: A moderate to strong negative correlation ($r = -0.55$, $p = 0.01$) was found between burnout and job efficiency. This suggests that higher levels of burnout significantly impair job efficiency.

These findings highlight that both stress and burnout are detrimental to the job performance of special education teachers, impacting various aspects of their effectiveness in the classroom.

 Conclusions

Based on the findings, the following conclusions can be drawn:

Stress has a significant negative effect on the job efficiency of special education teachers. Teachers experiencing high levels of stress are likely to face challenges in lesson planning, classroom management, and overall productivity.

Burnout also negatively affects job efficiency, with a stronger correlation compared to stress. Teachers suffering from burnout are more likely to experience emotional exhaustion, decreased motivation, and reduced productivity.

These conclusions underscore the need for addressing stress and burnout to enhance the efficiency of special education teachers.

Recommendations

Based on the study's findings, the following recommendations are proposed:

Schools should introduce stress management workshops and provide resources such as counseling services to help teachers manage stress effectively.

Professional development programmes should include strategies for coping with and reducing stress in the workplace.

Institutions should consider reducing teacher workload and enhancing support systems to prevent burnout.

Schools should support teachers in maintaining a healthy work-life balance by offering flexible schedules and promoting self-care practices.

Schools should implement regular assessments of teachers' stress and burnout levels to identify issues early and address them proactively.

Schools should evaluate the effectiveness of stress and burnout interventions and make necessary adjustments based on feedback and outcomes.

School administrators should create a collaborative and supportive work environment that can improve teachers' morale and job efficiency.

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Mechanism for Regulating Business Relations

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Abstract. In a market economy, the socio-economic development of the country largely depends on the functioning of effectively functioning business relations. Stimulation of entities operating in the business sphere is the basis for their development. In this regard, the tax system plays an exceptional role. The serious changes in the tax system in recent years are also related to the scientific view of what is happening. This gives reason to say that research in the field of taxation lags behind practice to some extent and is not influential enough to influence the formation of policy in this area. Such a situation in the field of tax studies is associated with the historical features of the formation of the tax system. The dynamics of the tax system lags behind the experience of developed countries. In the early years of the formation of a market economy, direct tax relations between the economy and the budget were replaced by irregular distribution of profits, and indirect taxes became an element of the planned distribution of prices. The business environment is related to the external environment in which the modern tax system operates. Therefore, it is impossible to get a complete picture in this area without touching on the issues of the interaction of the tax system with the business environment. Therefore, the interaction of the tax system with the business environment is not only relevant, but also complex and important from both theoretical and methodological points of view.

Keywords: *competition, budget, income, investment, organization, production*

Introduction

In the conditions of a market economy, business entities perform important tasks aimed at eliminating differences in various areas of activity in the economy of any country, creating jobs, and reducing unemployment. Business areas are characterized by flexibility, dynamism, and quick adaptation to changes, taking into account the regional characteristics of the market. It must be admitted that at the current stage of development of our country, the level of business activity of local businesses lags behind its level in foreign countries in terms of the following factors (Salimova, 2014):

• formation of a competitive environment;

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• attraction of economically active population to business and corresponding increase in income;

• increase in local budget revenues;

• increase in economic potential.

At the same time, business plays an important social role:

• meeting the needs of the population at the local level;

• increasing the number of jobs;

• reducing unemployment;

• implementing creative activities of employees.

Factors that hinder business development include:

• reduced investment in business;

• poor development of cooperation between large and small organizations on various schemes;

• significant tax burden on business.

At the current stage of development of our country, the level of entrepreneurial activity lags behind that of foreign countries. This is due to a number of reasons (Velichko, Lavrova, Kravchenko 2016):

• strong competition in the market, the introduction of innovative technologies is practically inaccessible to small business entities;

• difficulties in obtaining loans and other sources of finance, since most business entities do not have a credit history and property that can act as collateral;

• lack of sufficient state financial support;

• problems in the microfinance system;

• limited application of typical leasing schemes in the business sphere.

Methodology

Assessment of the current situation that determines the business activity of a business can be carried out on the basis of SWOT analysis: strengths; weaknesses; opportunities; threats.

External and internal environmental factors allow to strengthen the business activity of most business entities. Based on the analysis of various possible combinations of strengths and weaknesses, taking into account possible threats and opportunities, it is possible to identify the problems they face: lack of financial resources, low level of financial stability, insufficient provision of personal working capital, significant tax burden, difficulties in obtaining state support (Sakkaraeva, Abdurashitov 2024).

The following measures have a positive effect on the development of business entities:

• providing financial support to businesses;

• organizing events aimed at increasing the share of purchases of goods, works, and services from business entities of certain types of legal entities;

• implementing marketing support for businesses;

• implementing property support for businesses;

• ensuring interaction with state bodies, local authorities, other bodies and organizations;

• organizing and monitoring support events for most business entities;

• implementing information support for businesses.

The following issues can seriously affect the increase in business activity:

• formation of a favorable environment for business activity (stimulation of the creation and development of small science-intensive enterprises, small forms in the scientific and technical field);

• development of science and formation of a national innovation system (including on the basis of providing conditions for the active involvement of intellectual activity objects in civil circulation; development of a state support system);

• involvement of young people in innovation activity.

Access to external financing for these business entities is of great importance for business development. In this regard, the production and innovation activities of business entities require the necessary financial resources. A stimulating factor in business development is state support for entrepreneurship through the creation of regional small business support centers on the basis of existing structures to provide a wide range of services, including security, financial, information and other services (Pinkovetskaya, 2015).

Results

In terms of creating efficiency, financial, credit and investment mechanisms based on the optimal combination of state support, investment resources of private capital and own savings of small organizations, primarily for self-financing, are necessary issues. Municipal business support funds can provide preferential loans, interest-free loans, short-term loans, act as collateral, guarantor, and guarantor in order to develop competition and saturate the commodity market (Churkina, Sukhova 2016).

Business stimulation also includes the construction and development of technoparks, a kind of business incubator, where all the necessary conditions for business development are created. Financial and credit support to a business entity can be carried out in the following directions (Mirzazada, 2025):

• encouraging banks and other financial institutions to lend to small organizations by exempting funds allocated for business development from taxes and providing state guarantees for loan repayment;

• activating conditions for the creation of non-state guarantee and insurance companies that will serve business entities.

Tax incentives may include lowering tax rates. Tax incentives for small organizations developing on the basis of innovative technologies, as well as tax incentives for the renewal of fixed assets of the organization, can increase the business activity of small business entities by directing the released funds to other investment projects. Many factors affect the business activity of business entities. As a result of the study, it was determined that internal factors that negatively affect the business activity of business entities include low property status, lack of financial resources, instability of the capital structure, and insufficient provision of working capital. At the same time, factors limiting business activity are unstable (Guseva, Kudryashova, 2013).

Despite a number of measures implemented at the state level to stimulate business entities, the business activities of business entities are developing slowly due to the insufficient level of an efficient financing, lending and taxation system (Amrahov, Huseinov, 2015).

State programs do not cover many types of activities of business entities. Credit programs have significant shortcomings: the lack of a flexible approach to the needs of potential customers - small organizations, preference for short- and medium-term lending. Inconsistent measures to support business in the tax sphere lead to a slowdown in its development (Amrahov, Mahmudov, Aliyev, Hajiyeva, 2022).

Business entities can apply special tax regimes in the form of both a general taxation regime and a simplified taxation system. The Tax Code provides for the establishment of a simplified system of preferential tax rates for individual entrepreneurs who are registered for the first time and are engaged in entrepreneurial activities in the production, social or scientific sphere. Regardless of the form of business organization, business entities can be under the general taxation regime or apply special tax regimes, adhering to the principle of the same approach to taxation of business entities (Mirzazadeh, Zeynalli, 2024).

The Tax Code does not clearly define the general taxation regime, but according to the meaning of its application, the general taxation regime provides for the calculation and payment of corporate profit tax and corporate property tax for organizations, and personal income tax for individual entrepreneurs. Special tax regimes may provide for a special procedure for determining taxation elements, as well as exemption from the obligation to pay certain taxes and payments (Amrahov, 2014).

Thus, the composition of taxes paid by a taxpayer may act as a conditional sign of the application or non-application of a special tax regime. Regardless of the form of business organization, it is possible to apply the same principle of approach to taxation of business entities to newly created organizations operating in the field of industrial, social, scientific and consumer services (Udalov, 2018).

Discussion

Studies show that the modern tax system, being the most important mechanism for regulating the economy, in some cases does not fully correspond to the conditions of market relations. It is complex and confusing both in terms of calculating and documenting taxes, filing reports, and computerizing them. Numerous exemptions on types of taxes for different groups of tax subjects, additions, changes and amendments to the legislation complicate the processing of huge flows of tax information, complicate the process of collecting and storing data, and require an increase in staff (Amrahov, Narimanov, Hajiyeva, Mirzazadeh, Ismayilova, Osmanova, 2025).

A large number of regulatory structures, an increase in the costs of their maintenance, the purchase and maintenance of equipment make the tax system uneconomical. Along with the low level of social responsibility, a large tax burden is the main motive for business entities to refrain from paying taxes and fees. The concentration of the main amounts of tax payments in the budget and extra-budgetary funds, the redistribution of the budget and tax system do not encourage authorities to pursue an active economic policy aimed at development (Amrahov, Rahimli, Mirzazadeh, Ibrahimli, Valizadeh, 2023).

A number of problematic issues can be highlighted in the tax system:

- reassessment of the role of income tax, which can be evaded, knowing the features of taxation, the conditions and mechanism of its calculation and payment;

- maintaining targeted allocations to extra-budgetary funds, the formation of funds, as well as budgets, is carried out at the expense of certain types of taxes and non-tax revenues, and their formation is carried out, in principle, from the same funds;

- reducing the role of property tax on individuals and legal entities;

- high sanctions for tax violations;

- a large number of taxes and fees - although many taxes are similar in their purpose and can be grouped according to similar criteria or ultimately replaced by a single tax on income, a tax rate is set that will not reduce taxes and payments;

- the simultaneous collection of several types of taxes from one tax object;

- the unreasonableness of sufficiently high tax rates on individual types of taxes and payments;

- unsystematic changes, additions, introduction or abolition of new types of taxes and payments characterize taxation.

An unstable system that makes budgets unpredictable has a negative impact on investment in the economy and, as a result, on the development of the socio-economic sector and the stability of society. The instability of tax legislation has a negative impact on the motivation of potential investors, especially foreign investors. In addition, there is a discrepancy between tax and other types of legislation. In this regard, the norms established in tax legislation have an unconditional priority over the norms that touch on tax issues in other civil legislative acts (Amrahov, Mirzazadeh, Taghiyev, Muradov, Hamidov, Karimova, 2023).

The large number of taxes collected, the complex methodology for determining the tax base, the presence of numerous privileges require not only the cost of accounting labor at enterprises, but also an increasing number of tax authorities, additional costs for computerizing their activities. In addition, complex and constantly changing tax legislation creates a certain form of discrimination against the rights of taxpayers, since the application of various sanctions for violation of tax legislation does not take into account the intention of a specific violation of the law (i.e., it makes no distinction).

It is also important to pay attention to a number of issues in the tax system (Amrahov, Mirzazadeh, Guliyeva, Gazanfarova, 2024):

- the state does not provide a favorable tax regime for individuals, especially investors, to invest in the economy;

- does not exempt capital invested in production and reinvested profits from taxation;

- stimulates tax subjects to move away from the tax burden, which leads to a decrease in social payments and replenishment of extra-budgetary funds;

- since the incomes of the majority of the population are low, the middle class of taxpayers is not formed, which leads to the transfer of taxes to the production sector and does not contribute to its development;

- illegal and unequal distribution of the tax burden between individual tax subjects who are subject to the law and those who evade taxes;

- the system of monthly and quarterly payment of taxes and fees for most types of payments leads to the "laundering" of their own working capital of enterprises, especially small ones, and hinders their development;

- the inconsistency, complexity and confusion of numerous instructions and explanations of tax and customs services complicate the work of financial and accounting services of enterprises;

- the lack of methods, programs and algorithms for calculating taxes complicates the processes of automating the planning, collection, processing and storage of tax information;

- the lack of a clearly defined tax policy at all levels of state bodies, the lack of complete and sufficient consideration of tax reform and tax legislation lead to problems in the objective planning of tax revenues at all levels of the budget system.

A number of provisions of the legislation contradict the methodology for determining the tax base applied in countries with developed market economies. The main differences are as follows (Yashin, 2012):

- incomplete attribution of interest payments on bank loans, as well as attribution of business trips, hospitality and some other expenses to the cost of production within the limits established by the state;

- use of depreciation rates limited by the state and not corresponding to the economic life of fixed assets (i.e. taking into account not only physical, but also moral depreciation), which does not allow for timely restoration of fixed assets;

- failure to take into account the inflation factor when valuing inventories and fixed assets for calculating taxable profit;

- lack of a basic concept according to which the profit earned during the entire period of existence of a legal entity is subject to taxation, which allows for compensation of losses not only from the profits of subsequent, but also from previous years.

Particular attention should be paid to the problem of tax administration. The government is considering a draft law that provides for precise regulation of the powers and actions of tax authorities, including the procedure for conducting all types of tax audits, pre-trial resolution of tax disputes, the requirement for documents, and the establishment of a maximum period for conducting audits. The adoption of such a law would be in the interests of economic development and reducing operating costs for all economic entities, since the predictability of tax authorities' actions significantly affects the formation of business risks in the field of economic activity.

One of the main problems of reforms in the domestic tax system is its lack of complexity, its failure to take into account the specifics of the economy. When changes are made to tax legislation, the expected results in other areas of the economy are not predictable. The shortcomings inherent in the modern tax system with the development of market relations lead to a mismatch between the changes taking place in society and the state, tax subjects' failure to pay or reduce tax payments, late payments or evasion of payments. All this requires continuous improvements in the tax system (Amrakhov, 2022).

Conclusion

Tax regulation acts as a key component of the success of a business entity's financial activities. Its main purpose includes issues such as using tax breaks and advantages, minimizing tax payments by legal methods based on the correct selection of tax regimes and objects of taxation, and literacy in the formation and use of accounting policy elements. The ideal model of tax regulation highlights the following features (Amrakhov, Karimov, Karimova, 2022):

• the tax regulation mechanism should be strictly linked to the strategic goals of the country's development and adapted to them;

• the tax regulation mechanism should be transparent and strictly regulated;

• in tax regulation, special attention should be paid to the financial and economic analysis of its efficiency.

The conducted research allows us to draw the following conclusions and propose a number of measures to improve the tax system. Compared to the traditional system, the use of a simplified tax system is the most profitable system, which was revealed on the basis of a comparison of tax rates and

the amount of taxes paid under different taxation regimes (Robetino, Kohtamäki, Federico, 2021). The cost criteria for calculating the amount of tax on the property of organizations using various depreciation methods and the application of a simplified tax system, in our opinion, will significantly reduce the tax burden on domestic business, thereby contributing to its development and strengthening the financial position in domestic markets (Amrahov, 2015).

Research on the determination of the regulatory role of the tax system in the business sphere and the study of its features, as well as the development of tax relations, allows us to summarize the following conclusions:

- the study of taxation based on determining the composition, functions and objectives of the tax system is supplemented with modern theoretical approaches. The place of the tax system in the state financial system is clarified. The functional characteristics and properties of the subsystems of the tax system are determined. The necessity of studying the tax mechanism as the main direction of tax reforms is substantiated;

- on the basis of systematized scientific ideas about the tax mechanism, the essence of the tax mechanism is determined from the point of view of studying the interaction of the tax system with the external environment. The importance and role of the business environment in relation to the tax system are revealed. A proposition is formulated about the complex and multifaceted interaction of the tax system and the business environment. The essence, levels and forms of this interaction are revealed;

- a methodology for studying taxation costs is determined based on the generalization of the experience of foreign countries. A study of the effectiveness of tax administration costs was conducted based on a comparison of the additional costs incurred and changes in the level of tax collection. Methodologies for measuring and assessing tax costs were generalized;

- the characteristics of tax evasion were explained and substantiated. The methodology for measuring tax evasion using assessments was used. The characteristics of tax evasion were revealed depending on the type of activity, income level and other characteristics of the taxpayer;

- the efficiency indicators of the work of tax authorities are specified. On their basis, the work of the authorities is assessed. New indicators for assessing efficiency are substantiated. The nature of the influence of various groups of factors on the dynamics of the efficiency of the work of tax authorities is revealed. The necessity of forming a rational structure of tax authorities, changing the methods of working with taxpayers and solving personnel issues to improve the quality of their work is substantiated;

- the classification of the business environment from the point of view of taxation and depending on the characteristics and external signs of the internal structure of business entities is generalized in two directions. Current trends in the development of the structure of taxpayers are revealed. The influence of various characteristics of taxpayers on the functioning of the tax system is revealed;

- the possibilities of the existing tax collection system for tax control over the activities of taxpayers with different classification characteristics are identified. Differences in legal regulation and tax control strategies for different segments of taxpayers are substantiated. Taking into account the identified discrepancies between the tax system and the characteristics of the external and internal structure of business entities, directions for the transformation of the tax system are proposed.

The transformation of the tax system in accordance with modern trends in the development of the business environment is scientifically justified. These can be summarized as follows:

- it is necessary to scientifically understand the essence of the tax system as a whole, including various links of tax relations and the system of tax authorities. It is possible to distinguish three subsystems as components of the tax system: tax law, taxes and tax collection;

- the tax mechanism is given as a set of ways of organizing the interaction of the tax system with the external environment;

- the content of the interaction between the tax system and the business environment at two levels is disclosed: the first level is the collection of taxes; the second level is the interdependent change of the characteristics of the tax system and the business environment;

- the justified division of the business environment in terms of the impact of its characteristics on the tax system is distinguished on two grounds: organizational structure, including the form and complexity of the organization; constituent structure, taking into account the scale of taxpayers' activities;

- the impact of the characteristics of the business environment on the tax system is proven. The impact of the organizational structure, industry characteristics, demographic characteristics and the scale of taxpayers' activities on the functioning of the tax system is revealed;

- a position is formed on the organizational problems of the tax system, expressed in the discrepancy between the characteristics of the tax system and modern trends in the development of the business environment.

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De l'alpha à la communication: une méthodologie pour enseigner le français aux novices

[1] Ali Allahverdiyev

Résumé

Cette étude présente une méthodologie mixte pour l'enseignement du français langue étrangère (FLE) à des apprenants débutants absolus en contexte universitaire non francophone. Inspirée par l'approche communicative et la perspective actionnelle, tout en intégrant un enseignement explicite de la grammaire, cette méthodologie vise à guider les étudiants « de l'alpha à la communication » – c'est-à-dire des toutes premières notions de langue jusqu'à la capacité à interagir dans des situations réelles de communication. Après un rappel du cadre théorique et des évolutions méthodologiques en didactique des langues, nous décrivons la mise en œuvre de cette approche dans une classe universitaire de débutants complets (niveau A0/A1). Des données empiriques recueillies (tests de progression linguistique, observations en classe et questionnaires) indiquent une progression rapide vers le niveau A1 du CECR, une amélioration notable des compétences orales et écrites, ainsi qu'une motivation élevée des apprenants. Nous analysons également les défis rencontrés – notamment la gestion de la grammaire et de la langue maternelle en classe, ou la confiance des apprenants à l'oral – et les solutions apportées. Les résultats confirment l'efficacité de l'approche mixte : les étudiants ayant bénéficié de ce dispositif obtiennent des performances supérieures à celles d'un groupe témoin suivant une méthode traditionnelle, en particulier à l'oral. Nous discutons enfin des implications didactiques de ces conclusions, qui encouragent une démarche éclectique et équilibrée dans l'enseignement du FLE aux novices, articulant interaction communicative, tâches actionnelles signifiantes et acquisition guidée des structures du français.

Mots-clés: FLE, débutants absolus, approche communicative, perspective actionnelle, grammaire explicite, méthodologie éclectique, motivation

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From Alphabet to Communication: A Methodology for Teaching French to Novice Learners

Abstract: This study presents a mixed methodology for teaching French as a Foreign Language (FFL) to absolute beginners in non-Francophone university contexts. Inspired by the communicative and action-oriented approaches, while integrating explicit grammar instruction, this method aims to guide students "from alphabet to communication" — that is, from the very first linguistic notions to the ability to interact in real communicative situations. After outlining the theoretical framework and methodological developments in language teaching, the study describes the implementation of this approach in a university class of complete beginners (A0/A1 level). Empirical data collected (language progression tests, classroom observations, and questionnaires) indicate a rapid progression toward A1 level according to the CEFR, notable improvement in oral and written skills, and high learner motivation. The paper also analyzes key challenges — such as managing grammar, first-language interference, and oral confidence — and the solutions adopted. The findings confirm the effectiveness of the mixed approach: students who followed this methodology achieved higher performance than those taught with traditional methods, particularly in oral interaction. The discussion emphasizes the pedagogical value of a balanced, eclectic approach combining communicative interaction, meaningful action-based tasks, and guided acquisition of French linguistic structures.

Keywords: *FFL, absolute beginners, communicative approach, action-oriented approach, explicit grammar, eclectic methodology, learner motivation*

INTRODUCTION

Enseigner le français à des débutants absolus – c'est-à-dire des apprenants n'ayant aucune connaissance préalable de cette langue – représente un défi particulier, notamment en contexte universitaire et non francophone. Ces apprenants adultes, souvent déjà engagés dans des études supérieures dans leur langue maternelle ou en anglais, se retrouvent « à l'alpha » en français : il leur faut assimiler un nouvel alphabet (ou au moins de nouvelles correspondances phonographétiques), une prononciation inhabituelle, et des bases lexicales et grammaticales entièrement nouvelles. Le défi est double : motiver ces étudiants adultes, dont le besoin communicatif en français est généralement immédiat (pour leurs études ou futures carrières), tout en leur fournissant des outils linguistiques solides pour qu'ils puissent s'exprimer de manière compréhensible et correcte.

Les méthodes d'enseignement des langues ont considérablement évolué au fil du temps, passant d'approches centrées sur la grammaire et la traduction à des approches mettant l'accent sur la communication et l'action (Bourguignon, 2006; Puren, 2006). En didactique du FLE, l'approche communicative a dominé à partir des années 1970-1980, visant à développer chez l'apprenant une compétence de communication — notion de *communicative competence* introduite par Hymes et formalisée par Canale et Swain (1980) — en privilégiant l'usage de la langue en situation plutôt que la simple maîtrise de règles abstraites. Cette approche a révolutionné l'enseignement des langues en intégrant la société dans la salle de classe et en simulant des actes de parole authentiques (Littlewood, 1981; Savignon, 1997).Toutefois, elle a également fait l'objet de critiques, notamment du fait de la nature artificielle de certaines activités et du risque de passer à côté de la précision linguistique. En effet, les premiers modèles communicatifs mettaient surtout l'accent sur l'oral (souvent via des

dialogues simulés) et sur la fluidité de l'expression, en reléguant la grammaire explicite au second plan. Des observateurs ont noté que ces activités pouvaient rester stéréotypées et déconnectées de tâches sociales réelles, ce qui a suscité des doutes quant à la portée de la compétence de communication développée ainsi.

Dans les années 2000, le Cadre européen commun de référence pour les langues (CECR) a introduit une nouvelle perspective dite actionnelle (Conseil de l'Europe, 2001). Cette perspective s'inscrit dans le prolongement de l'approche communicative, tout en la dépassant sur certains points (Bourguignon, 2006). Le Cadre européen commun de référence pour les langues (CECR) considère l'apprenant comme un acteur social évoluant dans un contexte donné, accomplissant des tâches variées – pas seulement langagières – pour atteindre des objectifs concrets (Conseil de l'Europe, 2001). Autrement dit, l'apprentissage d'une langue est envisagé comme une préparation à une utilisation active de celle-ci pour communiquer et agir dans la société (Piccardo & North, 2019; Savignon, 1997). La « perspective actionnelle » rapproche ainsi l'enseignement des langues d'une logique de projet : plutôt que de simplement *faire semblant* de communiquer en classe, on implique l'apprenant dans des actions authentiques (projets, scénarios, résolution de problèmes, collaboration avec autrui) qui donnent tout leur sens aux activités langagières. Christian Puren (2006) souligne à cet égard un changement de paradigme : on passe d'une idéologie strictement communicative à une idéologie de l'action, reflet de l'évolution générale de nos sociétés valorisant les compétences de collaboration et de réalisation de projets (Puren, 2006 ; Conseil de l'Europe, 2018). Par exemple, dans un cadre communicatif classique, on pouvait demander à un étudiant de *se présenter* lors d'une simulation en classe ; dans un cadre actionnel, on intégrera cette présentation dans la réalisation d'une tâche sociale *plus large (par ex. organiser une rencontre d'échange international*), où *se présenter* n'est plus qu'un moyen parmi d'autres au service d'un objectif concret : *faire connaissance.*

En parallèle de ces évolutions axées sur la communication et l'action, la question de la grammaire a traversé des hauts et des bas. Longtemps au cœur de l'enseignement traditionnel, la grammaire explicite a été reléguée au second plan voire mise en disgrâce pendant l'essor des méthodes audio-orales et communicatives, qui prônaient une acquisition plus implicite des structures. Cependant, de récentes études en didactique et en acquisition des langues ont réhabilité l'importance d'un enseignement formel et conscient de la grammaire, y compris dans un contexte communicatif (Norris & Ortega, 2000; Spada & Tomita, 2010). Dans la classe de FLE actuelle, « la grammaire rôde, qu'on le veuille ou non, autour de la classe de langue » (Cuq, 1996, p.5, cité par Albarri, 2021) – en d'autres termes, qu'elle soit traitée explicitement ou non, elle est omniprésente dans le processus d'apprentissage. De fait, une large part des efforts d'un apprenant en langue étrangère porte sur l'acquisition de la grammaire (Haddad, 2021). La question n'est donc plus *faut-il enseigner la grammaire ?* – sa nécessité ne fait plus débat – mais *comment l'enseigner au mieux*, notamment dans le cadre des approches communicative et actionnelle (Haddad, 2021). Des auteurs tels que Houayda Albarri (2021) constatent un retour en force de la composante grammaticale dans la classe de FLE après une période de relative mise à l'écart. Ce renouveau s'explique par les attentes de nombreux apprenants, en particulier adultes, qui expriment le besoin de comprendre le fonctionnement de la langue pour se l'approprier. En effet, les apprenants adultes – souvent plus réflexifs – réclament des explications et éprouvent le désir de savoir, ce qui implique d'éclairer le *pourquoi* et le *comment* des structures linguistiques (Porquier & Besse, 1991, p.98, cité par Albarri, 2021). Fournir des règles explicites et des exercices grammaticaux structurés peut ainsi avoir un effet sécurisant pour certains apprenants, en

réduisant leur anxiété face à la langue étrangère et en compensant leurs difficultés (Albarri, 2021). Parallèlement, d'autres apprenants apprécient une démarche plus inductive où ils doivent inférer eux-mêmes la règle à partir d'exemples – démarche que 18% des étudiants d'une enquête en Jordanie ont déclarée préférer. La majorité (82%) de ces étudiants penchent toutefois pour une démarche déductive où la règle est expliquée par l'enseignant. Ces chiffres illustrent la nécessité de trouver un équilibre didactique : intégrer la grammaire de façon explicite, sans pour autant retomber dans un enseignement exclusivement magistral et décontextualisé, et en laissant une place à la découverte guidée pour stimuler la réflexion des apprenants.

Face à ces constats, de plus en plus de didacticiens et de praticiens plaident pour une approche mixte ou éclectique dans l'enseignement des langues (Brown, 2007; Kumaravadivelu, 2006). Dans le domaine du FLE, Christian Puren parlait dès la fin des années 1990 d'une « nouvelle vague éclectique » émergente, où différentes approches se complètent mutuellement au lieu de s'exclure (Puren, 1997, cité par Guimard, 2025). Des travaux plus récents confirment cette tendance : par exemple, une enquête auprès d'enseignants de FLE débutant a montré que tous introduisent la grammaire en contexte communicatif, et que la plupart amènent les apprenants à formuler eux-mêmes les règles (démarche inductive guidée), tout en recourant à une variété d'outils ludiques et numériques pour l'entraînement (jeux, quiz en ligne, etc.) (Guimard, 2025). Ces pratiques traduisent un souci d'articuler les avantages des approches communicatives (sens, interaction, motivation) avec ceux d'un enseignement structuré (clarification des règles, progression graduée). Claire Bourguignon (2006) a formalisé cette vision intégrative en la qualifiant d'« approche communic-actionnelle », soulignant qu'il s'agit d'une véritable rupture épistémologique : au lieu d'opposer communication et forme, cette approche considère l'apprentissage dans sa globalité, en reliant étroitement communication et action sociale tout en intégrant les savoirs linguistiques nécessaires. Dans cette perspective, l'objectif est de faire passer les apprenants de l'« ère communicative » à l'« ère communic-active » (Bourguignon, 2006), en combinant le meilleur de chaque méthode pour répondre aux besoins concrets des apprenants d'aujourd'hui.

L'objectif de cet article est de proposer et d'évaluer une méthodologie inspirée de cette approche mixte pour l'enseignement du FLE à des étudiants universitaires novices. Après avoir exposé le cadre théorique et les fondements de notre démarche (section *Cadre théorique*), nous décrirons la mise en œuvre pratique de la méthodologie dans une classe réelle de niveau A0/A1 (section *Méthodologie*). Nous présenterons ensuite les résultats observés en termes d'efficacité sur les apprentissages et d'impact sur la motivation des apprenants, ainsi que les défis rencontrés (section *Résultats*). Enfin, nous discuterons ces résultats au regard des questions plus larges de l'enseignement du FLE aux débutants et des approches combinées (*Discussion*), avant de conclure sur les implications et pistes futures (*Conclusion*).

CADRE THÉORIQUE

L'approche méthodologique proposée s'appuie sur trois piliers théoriques: (1) l'approche communicative, (2) la perspective actionnelle, et (3) l'intégration d'un enseignement explicite de la grammaire. Nous synthétisons ci-dessous les principes clés de chacun, ainsi que les résultats de recherches soutenant leur complémentarité.

(1) Approche communicative – Apparue dans le prolongement des travaux en linguistique appliquée des années 1970, l'approche communicative (souvent appelée *méthode communicative*) place au centre de l'enseignement la notion de communication et la création de situations signifiantes d'usage de la langue. Plutôt que de faire mémoriser des listes de mots ou des règles de grammaire in situ, l'enseignant crée des activités où la langue est utilisée pour échanger du sens : dialogues, jeux de rôle, résolutions de problèmes, etc. (Littlewood, 1981). Cette approche repose sur l'idée que pour apprendre à communiquer, il faut… communiquer, même de manière simplifiée. Selon Richards & Rodgers (2014), l'objectif fondamental est le développement de la compétence de communication de l'apprenant, c'est-à-dire sa capacité à exprimer et interpréter du sens dans diverses situations sociales, en mobilisant à la fois des compétences linguistiques, sociolinguistiques et pragmatiques (voir aussi Canale & Swain, 1980). Concrètement, une classe communicative favorise l'interaction élève-élève et élève-enseignant dans la langue cible, l'utilisation de documents authentiques, l'accomplissement de tâches ayant un but communicatif réel (par exemple, se renseigner, convaincre, négocier un planning). L'évaluation y est souvent basée sur la capacité à réaliser des fonctions (inviter, se présenter, décrire, etc.) plutôt que sur la simple restitution de connaissances grammaticales.

De nombreuses études ont documenté les bénéfices de l'approche communicative en termes de motivation et d'engagement. Les apprenants la jugent souvent plus stimulante, car ils voient un usage concret à ce qu'ils apprennent et développent un sentiment d'accomplissement communicatif lorsqu'ils parviennent à échanger des informations ou des opinions en langue cible (Savignon, 1997). En outre, cette approche améliore généralement la fluidité (fluency) de l'expression orale : en étant encouragés à parler sans craindre l'erreur à chaque phrase, les élèves gagnent en aisance. Cependant, les analyses ont également mis en lumière certaines limites. D'une part, un enseignement purement communicatif peut conduire à une fossilisation d'erreurs si la correction des formes est négligée – les apprenants risquent de communiquer avec une grammaire approximative, suffisamment intelligible mais non idiomatique. D'autre part, comme évoqué en introduction, les premières pratiques communicatives tendaient à simplifier la réalité sociale : on enseignait des *actes de parole* isolés (demander poliment quelque chose, refuser une invitation, etc.) de façon très conventionnelle, hors contexte authentique. Ceci a suscité des critiques quant au décalage entre la langue de la classe et la langue telle qu'utilisée dans la vraie vie. La réponse à ces critiques a été double : (a) intégrer de plus en plus de documents authentiques même aux niveaux débutants (textes, vidéos, littérature simplifiée) pour ancrer les apprentissages dans le réel[25], et (b) faire évoluer le modèle vers une perspective plus large, celle de l'approche par les tâches puis de la perspective actionnelle, où communiquer n'est plus une fin en soi mais le moyen d'agir et d'atteindre un objectif concret.

(2) Perspective actionnelle – Introduite officiellement par le CECR (Conseil de l'Europe, 2001), la perspective actionnelle (ou *approche actionnelle*) considère l'apprenant non plus seulement comme un utilisateur/communicateur, mais comme un acteur social évoluant dans des environnements multiples. Il s'agit de l'amener à accomplir des tâches variées en langue cible, tâches qui font appel à ses ressources cognitives, affectives et volitives autant que langagières. Le CECR (2001) définit en ces termes son orientation: « La perspective privilégiée est de type actionnel en ce qu'elle considère avant tout l'usager et l'apprenant d'une langue comme des acteurs sociaux ayant à accomplir des tâches (qui ne sont pas seulement langagières) dans des circonstances et un environnement donnés… » (Conseil

de l'Europe, 2001, p.15). Autrement dit, parler une langue, c'est toujours *faire quelque chose* : planifier une activité, négocier un achat, convaincre un public, coopérer à un projet, etc. Cette approche est largement influencée par les théories de l'apprentissage par l'action (*learning by doing*) et du socioconstructivisme (Vygotski), ainsi que par les méthodologies de type approche par les tâches en didactique anglo-saxonne (Task-Based Language Teaching, voir Ellis, 2003).

Concrètement, dans une classe actionnelle de FLE, l'enseignant propose des scénarios ou projets qui nécessitent l'usage du français pour être menés à bien. Par exemple, les apprenants pourront avoir à organiser un événement (une sortie, un voyage d'étude, une fête), à créer un journal ou un blog de classe, à simuler un débat public, etc., en mobilisant progressivement les ressources linguistiques vues en cours. L'accent est mis sur la coopération entre apprenants (travaux de groupe, projets communs) et sur la réutilisation spiralée des acquis dans des contextes variés, plutôt que sur une progression linéaire de notions grammaticales cloisonnées. Une conséquence de cette approche est de redéfinir le rôle de l'enseignant : il devient un facilitateur et un guide, laissant davantage d'autonomie aux étudiants qui prennent en charge une partie de leur apprentissage (gestion de projet, recherche d'informations, etc.). Cette responsabilisation rejoint l'objectif de former des apprenants capables d'apprendre à apprendre et de continuer à progresser en dehors de la classe, compétence cruciale notamment pour les universitaires.

Plusieurs études ont souligné les bénéfices pédagogiques d'une perspective actionnelle, notamment en termes de motivation. Le fait de donner aux étudiants des tâches signifiantes et concrètes à accomplir tend à augmenter leur engagement, car ils voient l'utilité immédiate de ce qu'ils apprennent (Thibert, 2010). Préparer, par exemple, une présentation sur la culture de leur pays en français pour un public francophone, ou réaliser une enquête terrain auprès de locuteurs natifs, sont des activités qui donnent du sens à l'apprentissage et stimulent le désir de réussir la communication. On note également que cette approche développe des compétences transversales précieuses : travailler en équipe, résoudre des problèmes, s'adapter à des situations nouvelles – compétences en phase avec le concept d'« orientation projet » mentionné par Puren (2006) comme caractéristique de l'idéologie actuelle de l'action. Sur le plan des acquis linguistiques, la perspective actionnelle offre un cadre propice à la réutilisation contextualisée de la grammaire et du lexique : en effet, au lieu d'apprendre une règle puis de l'abandonner pour passer à la suivante, l'apprenant est amené, via les tâches, à constamment mobiliser et consolider les structures vues précédemment, ce qui favorise un apprentissage à long terme. Toutefois, la réussite de cette approche dépend de certaines conditions : elle requiert un minimum d'encadrement et de préparation par l'enseignant pour éviter que l'apprenant ne se sente perdu ou submergé par la complexité de la tâche. Il est souvent nécessaire de scinder les tâches en sous-tâches, de fournir des supports linguistiques (lexique, tournures utiles) et d'assurer un suivi formatif pendant le déroulement. En outre, un danger serait de négliger complètement la forme linguistique sous prétexte de se concentrer sur l'action : or, comme le rappelle le CECR (2001), les actes de parole ne prennent pleinement sens que replacés dans des actions en contexte social – mais cela n'implique pas d'ignorer la qualité linguistique de ces actes. Au contraire, le CECR (2018, volume complémentaire) encourage une approche équilibrée, intégrant les composantes linguistiques (grammaire, vocabulaire, phonologie) comme moyens au service de l'action réussie. La perspective actionnelle n'exclut donc pas l'enseignement formel, elle l'oriente différemment : la grammaire n'est plus enseignée « pour elle-

même », de façon déconnectée, mais en lien étroit avec les besoins des tâches à accomplir. Par exemple, on abordera le passé composé et l'imparfait non pas seulement comme deux temps à mémoriser, mais parce qu'une tâche (raconter une expérience passée dans un blog) le nécessite – l'attention aux formes surgit alors de la nécessité de la tâche. On retrouve ici la notion de *focus on form* (Long, 1991), où l'enseignant attire brièvement l'attention sur une structure pendant une activité communicative, au moment opportun.

(3) Intégration de la grammaire explicite – Compte tenu de ce qui précède, notre approche méthodologique considère que l'enseignement explicite de la grammaire n'est pas antinomique avec les approches communicative et actionnelle, bien au contraire : il en est un complément indispensable pour atteindre une compétence de communication complète, incluant la correction linguistique. Les recherches en acquisition des langues ont largement démontré que l'instruction explicite des structures – qu'elle soit déductive (règle fournie puis exercices) ou inductive (découverte guidée de la règle) – accélère et renforce l'apprentissage, en particulier chez les apprenants adultes (Norris & Ortega, 2000). Un métalangage grammatical adapté permet aux étudiants de mieux conceptualiser la langue et de corriger leurs erreurs plus efficacement. Spada & Tomita (2010) ont montré que l'efficacité de l'enseignement explicite se vérifie tant pour des aspects grammaticaux simples que complexes, surtout lorsqu'il est accompagné d'occasions de pratique communicative. Autrement dit, la combinaison d'explications claires suivies de mise en pratique interactive favorise une acquisition plus approfondie que la simple exposition implicite.

En didactique du FLE, plusieurs études de terrain confirment la plus-value d'un dosage réfléchi de grammaire explicite dans un cours à dominante communicative. Par exemple, une expérimentation menée dans une université (Mohamed, 2018, voir infra) a comparé deux groupes de débutants : l'un suivant une approche communicative/actionnelle avec enseignement grammatical intégré, l'autre suivant une méthode plus traditionnelle centrée sur la grammaire-transposition. Les résultats ont mis en évidence que le groupe ayant bénéficié d'un enseignement grammatical contextualisé et explicite a obtenu des performances significativement meilleures à l'oral ($p < 0,01$) que le groupe témoin[36]. En particulier, lors d'un test de production orale en fin de module, ces étudiants formulaient des énoncés plus complexes et plus corrects, signe qu'ils avaient pu appliquer les règles apprises activement. D'autres recherches soulignent que l'absence totale de focus sur la forme peut conduire les apprenants à développer une interlangue approximative difficile à rectifier par la suite (Lightbown & Spada, 2013). C'est pourquoi Haddad (2021) affirme que la grammaire, qu'elle soit introduite implicitement via les activités ou explicitement par des leçons dédiées, doit être considérée comme partie intégrante du parcours d'apprentissage. Reste à déterminer comment l'enseigner au mieux : de manière déductive (approche traditionnelle) ou inductive, et à quel moment l'insérer dans la séquence pédagogique pour ne pas casser la dynamique communicative. Les méthodologies actuelles tendent vers des solutions hybrides : par exemple, on peut proposer une activité de découverte communicative (texte, dialogue, tâche) où une structure nouvelle apparaît, puis exploiter cette activité pour faire émerger la règle (phase de systématisation) et enfin consolider par quelques exercices d'application. C'est le principe des approches de type « PPP » (Presentation–Practice–Production) revisitées dans une optique communicative.

En synthèse, le cadre théorique de notre méthodologie repose sur l'idée que communication, action et connaissances explicites ne sont pas trois composantes contradictoires, mais bien les trois faces indissociables d'un apprentissage réussi chez le public des débutants adultes. Cette position s'inscrit dans le courant du « post-méthode », qui préconise une approche pragmatique et éclairée des méthodes d'enseignement (Brown, 2007; Kumaravadivelu, 2006). Plutôt que de suivre dogmatiquement une méthode unique, l'enseignant du post-méthode puise dans divers principes adaptés à son contexte et à son public. Notre démarche se veut ainsi éclectique au sens noble : elle combine les principes de mise en situation communicative, de tâches signifiantes et de structuration grammaticale, afin d'optimiser l'apprentissage du français chez des apprenants sans base initiale. Comme le résume un mémoire récent, « la méthode traditionnelle, l'approche communicative et l'approche actionnelle sont des éléments qui se complètent mutuellement dans l'apprentissage de la langue » pour aboutir à un enseignement efficace au XXIe siècle. C'est cette complémentarité que nous avons cherché à mettre en œuvre et que nous décrivons ci-dessous.

MÉTHODOLOGIE

Contexte et participants

L'étude a été menée au sein du Centre de Langues de l'Université X (un établissement universitaire situé dans un pays non francophone, où la langue d'enseignement principale est autre que le français). Les participants étaient 28 étudiants de première année universitaire (âgés de 18 à 21 ans, dont 18 femmes et 10 hommes), inscrits à un cours semestriel de français niveau "alpha" (débutant complet, correspondant au niveau A1.1 du CECR). Aucun des apprenants n'avait étudié le français auparavant et, pour la plupart, le français n'est pas une langue présente dans leur environnement quotidien. La majorité parlait l'anglais comme langue seconde (outre leur langue maternelle, variable selon les individus), et tous maîtrisaient l'alphabet latin, ce qui a permis de ne pas avoir à enseigner la littératie de base. Néanmoins, le français étant une langue opaque pour eux (peu de similarités lexicales avec leur L1 dans la plupart des cas), ils étaient véritablement *novices* vis-à-vis du système linguistique français.

Il s'agit donc d'un public adulte jeune, lettré, plurilingue (au moins L1 + anglais) mais grand débutant en français. Ce profil correspond au public cible de nombreux cours de FLE universitaires à travers le monde, où des étudiants commencent une nouvelle langue en parallèle de leurs études disciplinaires. Les enjeux pour ces apprenants sont à la fois académiques (valider le cours de langue, éventuellement préparer une mobilité en France ou un échange) et personnels/professionnels (acquérir une compétence linguistique valorisable). Lors d'un questionnaire initial, ils ont exprimé des motivations variées : certains apprenaient le français par intérêt culturel ou pour la littérature, d'autres dans une optique professionnelle (ex. tourisme, diplomatie), d'autres enfin par simple curiosité intellectuelle ou pour remplir une exigence de programme. Tous cependant partageaient une légère appréhension à l'idée d'apprendre une langue réputée « difficile » et particulièrement exigeante sur le plan grammatical. Cette anxiété initiale quant à la grammaire française a d'ailleurs été notée : interrogés sur ce qui les inquiétait le plus, 64% ont cité « la grammaire » en premier, loin devant la prononciation (21%) ou le lexique (15%). Ceci conforte l'idée qu'il était crucial d'aborder la grammaire de manière rassurante et constructive dans notre méthodologie, afin de ne pas démotiver ces débutants.

Dispositif pédagogique

Le cours s'est déroulé sur 12 semaines (un semestre), à raison de 4 heures de cours par semaine (total = 48 heures). Ce volume horaire relativement modeste devait conduire les étudiants vers le niveau A1 du CECR (utilisateur élémentaire, niveau « découverte »). Pour atteindre cet objectif ambitieux dans le temps imparti, nous avons conçu un programme pédagogique intégré, fondé sur l'enchaînement cohérent de modules communicatifs, de tâches actionnelles et de leçons de grammaire.

Chaque semaine était construite autour d'une unité thématique (par exemple : se présenter, la vie étudiante, la ville, la famille, les loisirs, etc.), qui servait de fil conducteur aux activités. En début de semaine, une séquence communicative introductive mettait les étudiants en situation de découvrir du lexique et des structures nouvelles à travers des documents et activités : dialogues, textes courts, vidéos simples ou infographies. Par exemple, pour le thème « se présenter / faire connaissance », nous avons utilisé des courtes vidéos de jeunes francophones se présentant, ainsi que des profils fictifs sur un réseau social d'étudiants. Les étudiants devaient extraire des informations (compréhension orale/écrite) et reformuler celles-ci – une activité visant l'objectif communicatif « demander/donner des informations personnelles ». Cette phase correspond à la *mise en situation* (approche communicative classique).

Ensuite, une phase de structuration était consacrée à la grammaire et aux points linguistiques clés émergés lors de l'activité initiale. Dans le cas de « se présenter », cela incluait par exemple : les pronoms sujets et le verbe *être* au présent, la structure de la phrase interrogative (Inversion ou *Est-ce que*), les adjectifs de nationalité (et l'accord masculin/féminin). Au lieu de présenter ces notions de manière abstraite dès le début, nous avons exploité les documents vus : par exemple, extraire des phrases telles que « Je suis canadien / Elle est canadienne » pour faire observer la règle d'accord de genre en français. La démarche suivait une progression inductive guidée : nous posions des questions orientées (« Observez ces deux phrases : *il est allemand / elle est allemande*. Que remarquez-vous quand le sujet change de masculin à féminin ? ») afin d'amener les apprenants à formuler la règle (ici, « on ajoute -e à l'adjectif de nationalité au féminin »). Quand cela était nécessaire ou plus efficace, nous n'avons pas hésité à utiliser une démarche déductive directe : par exemple, pour les pronoms sujets et la conjugaison de *être*, une explication claire accompagnée d'un tableau récapitulatif a été fournie, suivie d'exercices d'application immédiate. L'important était de toujours relier ces points grammaticaux aux besoins communicationnels : ainsi, les étudiants comprenaient qu'apprendre *je suis / tu es / il est…* leur permettrait de se présenter, ou que connaître l'accord des adjectifs les aiderait à parler de leur nationalité, de leur identité, etc. Chaque point de grammaire était pratiqué via de courts exercices variés (QCM, phrase à compléter, reformulation guidée), souvent réalisés en binôme pour garder un aspect interactif même dans la pratique formelle. Nous avons aussi eu recours à des jeux (par exemple, un bingo des pronoms où l'enseignant dit une phrase à la 3e personne et l'élève doit la reformuler à la 1re personne, etc., sous forme ludique).

La troisième composante était la tâche actionnelle hebdomadaire. Il s'agissait d'une activité plus longue et complexe à réaliser en groupe, mobilisant les acquis de la semaine dans une situation « réelle » ou simulant la réalité. Par exemple, après le module « se présenter / présenter quelqu'un », la tâche finale a consisté à organiser une rencontre interculturelle fictive : chaque étudiant devait se présenter

oralement à la classe en jouant le rôle d'un nouvel étudiant étranger arrivé à l'université, puis tenir une courte conversation avec un autre « nouvel étudiant » pour faire connaissance (échange de vrais/faux noms, nationalités, domaines d'étude, centres d'intérêts, etc.). Cette tâche faisait appel aux structures apprises (présent de *être*, adjectifs, formules de présentation, questions avec *Comment / D'où / Quoi*, etc.) dans une situation proche d'une interaction authentique. Les autres tâches tout au long du semestre incluaient, par exemple : réaliser un mini-guide touristique de la ville (après le module sur la ville et l'orientation, impliquant l'impératif et le vocabulaire des lieux) ; simuler une petite annonce et un appel téléphonique pour logement (après le module sur le logement, pratiquant les descriptions avec *il y a*, les adjectifs, les nombres) ; organiser une sortie de classe (module sur les loisirs, pratiquant le futur proche, l'expression de goûts avec *aimer/préférer*). Ces tâches étaient présentées comme des *projets* à accomplir en équipe de 3 à 4, sur une durée d'environ 1 heure en fin de semaine, suivis d'une restitution (présentation orale, affichage, jeu de rôles joué devant la classe). L'enseignant jouait un rôle d'animateur pendant ces séances: il circulait, apportait du vocabulaire manquant, répondait aux questions grammaticales surgissant en cours de route (focus on form opportuniste), et veillait à ce que chacun participe. Notons que nous avons autorisé, surtout lors des premières tâches, un usage ponctuel de la langue maternelle ou de l'anglais *entre apprenants* pour clarifier la consigne ou négocier l'organisation – sans quoi le risque était que la tâche échoue faute de compréhension. L'objectif n'était pas de les forcer à tout faire en français avec un niveau débutant minimal, mais de les amener à produire le maximum de français possible au moment de la réalisation finale. Cette flexibilité s'inscrit dans la reconnaissance de la compétence plurilingue des apprenants (Conseil de l'Europe, 2018) : exploiter les langues qu'ils connaissent déjà pour faciliter l'apprentissage du français, au lieu de les proscrire absolument. Cela s'est avéré bénéfique pour maintenir l'autonomie et la fluidité des échanges pendant le travail de groupe, sans nuire à l'apprentissage du français – car lors des présentations finales ou des interactions ciblées, eux-mêmes tenaient à utiliser le plus de français possible.

Enfin, en complément des cours en présentiel, les étudiants devaient réaliser de courtes activités à domicile chaque semaine : exercices en ligne (via la plateforme Moodle de l'université, incluant des quiz autocorrectifs de grammaire et de vocabulaire), courtes rédactions guidées (5-6 phrases sur un thème, par exemple « se présenter par email ») et visionnages de vidéos simples (du type *Français avec sous-titres* sur YouTube) suivis de questions de compréhension. Le taux de réalisation de ces travaux à domicile a été d'environ 50% en moyenne – en effet, la moitié des apprenants avouent ne faire les exercices qu'« occasionnellement ». Ce chiffre, cohérent avec celui rapporté par Nawafleh et al. (2021) pour des étudiants jordaniens (50% d'exercices non faits), reflète le manque de temps ou de motivation en dehors des cours. Nous avons tenté d'y remédier en valorisant systématiquement ces efforts (feedback personnalisé, points bonus pour l'évaluation continue afin d'inciter à faire les devoirs).

COLLECTE DE DONNÉES

Pour évaluer l'efficacité de notre approche et documenter la progression des apprenants, nous avons recueilli plusieurs types de données au fil du semestre :

- Évaluations diagnostique, formative et sommative : Dès la première séance, un test diagnostique très simple a été passé, confirmant le niveau 0 des étudiants (il comportait quelques questions de compréhension de mots transparents et une tentative de se présenter

en 2 phrases – la plupart n'ont pu qu'écrire leur nom). En fin de module 6 (mi-parcours), nous avons administré un test intermédiaire évaluant les compétences travaillées (compréhension orale/écrite, expression écrite, vocabulaire et grammaire des premières unités). En fin de semestre, un examen final a mesuré l'atteinte du niveau A1 à travers des épreuves alignées sur le format DELF A1 (compréhension orale, compréhension écrite, production écrite, production orale en interaction). Ces évaluations fournissent des données quantitatives sur la progression linguistique de la classe.

- Observation de classe et journal de bord de l'enseignant : L'enseignant-chercheur a tenu un journal de bord hebdomadaire notant les activités réalisées, le temps consacré à chaque phase, les réactions des étudiants, les difficultés rencontrées en classe, et tout incident critique (moments de blocage, questions posées, etc.). De plus, deux séances ont été observées par un collègue enseignant (spécialiste FLE) qui a pris des notes sur le déroulement de la tâche actionnelle et le degré de participation des apprenants. Ces observations qualitatives permettent d'évaluer l'engagement des apprenants et d'identifier les défis pédagogiques observés en temps réel (par ex. un point de grammaire mal compris, un manque de vocabulaire freinant une activité, etc.).

- Questionnaires et entretiens auprès des apprenants : En fin de semestre, les étudiants ont rempli un questionnaire de satisfaction et de retour réflexif (anonyme), comportant des questions fermées (échelles de Likert) et ouvertes. Ils y ont évalué divers aspects: leur sentiment de progression en compréhension et en expression, la clarté des explications grammaticales, l'utilité perçue des tâches communicatives, la part de travail jugée personnelle vs. en groupe, etc. Des entretiens de groupe (focus groups) ont également été menés avec des volontaires (2 groupes de 4 étudiants) pour approfondir certains points du questionnaire et recueillir des suggestions. Ces données offrent le point de vue subjectif des apprenants sur l'approche suivie.

- Comparaison avec un groupe témoin (indirecte): Idéalement, un véritable dispositif expérimental aurait impliqué un groupe témoin suivant une méthode différente. Faute de pouvoir constituer un tel groupe en parallèle, nous avons comparé nos résultats à ceux d'une cohorte précédente de débutants de la même université, qui avaient suivi un cours FLE avec une approche plus classique (mélange de méthode audio-orale et grammaticale traditionnelle). Les données d'examens finals de cette cohorte 2024 (obtenues avec l'accord de l'enseignant précédent) ont servi de point de repère. Bien que la comparaison ne soit qu'indicative (les contextes et promotions diffèrent légèrement), elle permet de situer nos résultats dans un cadre plus large.

Les données ainsi collectées ont été analysées quantitativement (notes, taux de réussite, etc.) et qualitativement (analyse de contenu des questionnaires et entretiens, synthèse des observations). Nous présentons dans la section suivante les principaux résultats issus de cette analyse, en mettant l'accent

sur les indicateurs de progression linguistique et sur les retours concernant l'approche méthodologique.

RÉSULTATS

Progression linguistique des apprenants

Au terme des 12 semaines, la majorité des étudiants ont atteint le niveau A1 attendu, et certains l'ont même dépassé sur certaines compétences. Les résultats à l'examen final montrent une moyenne générale de 78/100, avec une répartition équilibrée entre compréhension et expression. Plus précisément, 25 étudiants sur 28 (89%) ont obtenu une note ≥ 50% à chaque épreuve, satisfaisant ainsi les critères de réussite de niveau A1. Parmi eux, 10 étudiants (36% du groupe) ont obtenu des scores supérieurs à 85/100 à l'examen final, ce qui suggère qu'ils frôlent déjà le niveau A2 dans certains domaines (notamment en compréhension écrite pour ceux-ci). À titre de comparaison, la cohorte précédente (méthode traditionnelle) avait une moyenne générale de 70/100 et seulement 20% d'étudiants au-dessus de 85. Sans surinterpréter cette différence, on observe une tendance positive en faveur de notre approche, notamment pour les meilleurs éléments qui semblent avoir pu progresser plus vite.

En compréhension orale, l'amélioration est particulièrement notable: au test intermédiaire (mi-parcours), la moyenne en compréhension orale était de 12/20, alors qu'au final elle atteint 16/20. Les étudiants comprennent globalement des annonces et dialogues simples du quotidien (type niveau A1 du DELF: annonces de gare, conversations téléphoniques très simples, etc.). Plusieurs étudiants ont commenté dans le questionnaire final qu'au début « les francophones parlaient trop vite » et qu'ils étaient découragés, mais qu'à force d'écouter en cours (via les vidéos, dialogues, etc.), ils ont eu le sentiment de *« débloquer [leur] oreille »*. Cette progression subjective se reflète dans les notes. En compréhension écrite, l'évolution va de 14/20 à 17/20 en moyenne – ce bon score final s'explique par la relative facilité des textes A1 (courts messages, affiches, formulaires) et sans doute par le fait que la plupart des étudiants maîtrisaient déjà l'alphabet latin et des cognats via l'anglais.

Du côté de l'expression, les progrès bien que réels restent plus modestes en apparence : en expression écrite, la moyenne passe de 11/20 (production mi-parcours d'un paragraphe sur soi) à 14/20 (rédaction finale d'une courte carte postale et d'un email simple). À l'oral, lors des évaluations formatives, nous avons noté une augmentation du nombre de phrases et de la confiance. Par exemple, dans la tâche initiale de présentation (semaine 1), beaucoup peinaient à formuler plus de 2 phrases (« Bonjour, je m'appelle X, je suis de … » avec de longues hésitations). Lors de la *tâche finale* d'interaction (semaine 12), où ils devaient discuter en binôme d'un projet de sortie, la plupart ont pu tenir une conversation de 3 minutes en enchaînant les tours de parole, formulant ~8-10 phrases chacun, malgré des erreurs. L'évaluation orale finale (conversation avec l'examinateur sur des thèmes simples) a donné une moyenne de 15/25. C'est le domaine où les notes sont restées les plus basses, ce qui confirme que l'expression orale est la compétence la plus difficile à développer pour des débutants – constat aligné avec celui de Nawafleh et al. (2021) qui relevaient le faible niveau à l'oral chez leurs apprenants et la persistance de difficultés d'expression. Néanmoins, il y a eu une progression indéniable : on partait de quasi-zéro, et en fin de parcours tous les étudiants pouvaient survivre communicativement dans des

situations A1 (se présenter, poser des questions simples, décrire très basiquement leur environnement). Notons que le sentiment de compétence orale exprimé par les étudiants est un peu inférieur à celui de compétence écrite: 58% se disent « confiants » dans leur capacité à converser en français basique, contre 75% confiants pour écrire un petit message. Cela rejoint des observations fréquentes en FLE: l'écrit, plus réfléchi, semble plus maîtrisable au débutant, tandis que l'oral en temps réel reste un défi.

En ce qui concerne la grammaire et la vocabulaire, nous avons administré un quiz de 30 questions en fin de formation couvrant les points clés du programme (conjugaison présent, futur proche, passé composé initial; adjectifs, articles, prépositions de base). La moyenne à ce quiz a été de 25/30 (83%). Les erreurs se concentraient sur quelques difficultés : la distinction *tu/vous* (quelques confusions, sans doute par interférence de l'anglais qui a un seul « you »), les accords au féminin pluriel (certains oublis de marque), et l'usage des articles partitifs (beaucoup ont du mal avec *du/de la*). Globalement, cependant, les étudiants ont acquis les fondamentaux grammaticaux du niveau A1 de manière satisfaisante. Le fait que plus de 80% des étudiants aient correctement répondu aux questions sur la formation du passé composé (auxiliaire avoir + participe passé régulier) ou sur la place de l'adjectif en français (majoritairement après le nom, sauf exceptions) indique que l'enseignement explicite de ces règles a été efficace. Ces acquis grammaticaux se sont aussi vus dans les productions: par exemple, dans les rédactions finales, 85% des phrases étaient correctement formulées *syntaxiquement* (ordre sujet-verbe-compléments sans trop d'oubli) – bien sûr avec du vocabulaire très simple – et environ 70% des accords essentiels étaient respectés (accord sujet-verbe, singulier-pluriel). Les principales erreurs restantes relevaient de confusions attendues à ce niveau (ex : *mon frère est 15 ans* au lieu de *a 15 ans* ; *je vais au cinéma hier* mélangeant futur proche et passé). On note aussi que l'orthographe française, difficile, pose encore problème : un tiers des étudiants n'ont pas acquis l'orthographe des liaisons (ils écrivent par ex. *il et allé* au lieu de *il est allé*, reproduisant la prononciation). Une attention plus poussée sur la dimension orthographique sera une piste d'amélioration.

En résumé, les objectifs linguistiques de niveau A1 ont été atteints par la quasi-totalité des participants en un semestre. La progression a été particulièrement forte en compréhension (grâce à l'exposition continue) et très honorable en expression compte tenu du point de départ nul. Comparativement à un enseignement plus traditionnel, nos étudiants semblent avoir développé une compétence sans doute plus équilibrée : ils n'ont pas sacrifié la grammaire (leurs scores aux questions formelles sont bons) tout en gagnant en aisance communicative. Cette double réussite se reflète dans le commentaire d'un examinateur externe qui a participé à l'évaluation orale finale: *« Ces débutants parlent avec envie et ne restent pas bloqués, même s'ils cherchent leurs mots; et en même temps ils construisent des phrases simples mais correctes grammaticalement, c'est prometteur. »*

EFFICACITÉ DE L'APPROCHE MIXTE (COMPARAISONS ET RETOURS)

Bien qu'il ne s'agisse pas d'une expérience strictement contrôlée, plusieurs indicateurs suggèrent que l'approche mixte communicative-actionnelle-grammaticale a eu un impact positif sur les apprentissages:

- Performance orale supérieure : Comme mentionné, nos étudiants ont réalisé de meilleurs scores à l'oral que ceux de la cohorte précédente plus axée grammaire (moyenne production

orale +4 points). De plus, en se comparant à un petit groupe témoin externe (données Mohamed, 2018), on constate que le fait d'intégrer l'approche *communic'actionnelle* améliore significativement la compétence de parler. Mohamed (2018) rapporte que son groupe expérimental (méthode communic'actionnelle) a surclassé le groupe témoin (méthode traditionnelle) lors du test oral final, avec une différence statistiquement significative en faveur du groupe actionnel. Nos résultats vont dans le même sens : les apprenants exposés dès le début à parler en interaction (même de façon imparfaite) ont acquis plus de confiance et de fluidité que ce qu'on observe souvent chez des débutants formés de manière plus passive. Ils n'ont pas peur de s'exprimer, et cela est un gain qualitatif majeur.

- Maîtrise grammaticale satisfaisante : Contrairement à une idée reçue selon laquelle privilégier la communication se ferait au détriment de la grammaire, nos apprenants ont acquis une base grammaticale solide pour leur niveau. 82% d'entre eux estiment que les explications grammaticales en classe ont été "claires et utiles" (questionnaire) et se disent capables de "continuer à apprendre de nouvelles règles par [eux]-mêmes si on [leur] donne des exemples". Ce sentiment d'auto-efficacité en grammaire est important car il indique que la composante explicite n'a pas été vécue comme un pensum, mais bien comme un outil au service de leur expression. Fait intéressant, un étudiant a écrit : *« Au début je redoutais la grammaire française, mais avec les tableaux et les exercices, j'ai compris que c'est logique. Maintenant j'aime bien quand on voit un point de grammaire car je sais à quoi il sert.»* Ce retournement d'attitude est un résultat en soi. Sur le plan des acquis mesurés, nous avons déjà mentionné les scores élevés au quiz grammatical final (83% de réussite moyenne). À titre de comparaison, le groupe précédent (enseignement plus traditionnel) avait obtenu une moyenne d'environ 88% sur un test purement grammatical en fin de semestre. Légèrement en deçà, nos 83% montrent que l'écart est minime et que nous avons presque égalé l'efficacité d'un enseignement focalisé sur la grammaire, tout en offrant davantage de pratique communicative. On peut considérer cela comme la validation du pari initial: oui, il est possible d'enseigner la grammaire de manière explicite *et* contextualisée, sans compromettre l'accent mis sur la communication.

- Motivation et participation accrues : Les tâches actionnelles proposées chaque semaine ont globalement suscité un fort engagement des étudiants. Lors des observations de classe, l'enseignant note en moyenne que ~80% des étudiants participaient activement aux travaux de groupe, seuls quelques-uns restant plus en retrait (typiquement les plus timides ou peu confiants en leurs moyens linguistiques). Au questionnaire, 90% des apprenants ont répondu "oui" à la question *« Les projets/tâches réalisés en cours vous ont-ils aidé à apprendre le français? »*, et 85% ont trouvé ces activités "motivantes" ou "très motivantes". Plusieurs ont apprécié le fait de *« faire quelque chose de concret avec le français dès le début »* plutôt que d'attendre de maîtriser parfaitement la langue pour l'utiliser. Un commentaire représentatif : *« J'ai aimé devoir parler avec mes camarades, même si on faisait des fautes, on apprenait ensemble et on se motivait. »* La dimension coopérative de l'apprentissage a été soulignée comme un point fort. On peut ainsi affirmer que l'approche mixte a eu un effet positif sur la motivation intrinsèque des apprenants, en rendant le cours plus dynamique et en donnant du sens immédiat aux efforts fournis. Ce

constat répond aux défis relevés dans la littérature : par exemple Nawafleh et al. (2021) insistaient sur la nécessité de recourir à des activités dynamiques pour impliquer et motiver les apprenants, face à la baisse de motivation constatée chez leurs étudiants en FLE. Nos résultats confirment que l'adoption d'activités interactives et signifiantes permet de maintenir l'intérêt des débutants sur la durée du semestre.

- Autonomie et confiance : À la fin du cours, nous avons demandé aux étudiants s'ils se sentaient prêts à utiliser le français hors de la classe. 70% ont répondu favorablement (dont certains avec prudence, par ex *« Oui, pour des choses simples»*). C'est un taux encourageant pour des débutants de quelques mois. Il témoigne d'un certain degré de confiance communicative acquis. Certes, ils restent conscients de leurs limites, mais l'approche les a habitués à *oser* prendre la parole. De plus, l'introduction de notions de plurilinguisme (comme l'autorisation de recourir à l'anglais en soutien ponctuel, ou de faire des parallèles avec leur L1 sur des mots transparents) a contribué à développer leur autonomie d'apprentissage. Par exemple, un étudiant note: *« J'ai compris comment continuer à apprendre en écoutant des chansons françaises, en comparant avec les traductions. »* – démarche encouragée pendant le cours via une petite activité sur une chanson bilingue. Ce genre de transfert de stratégies montre qu'ils n'attendent pas passivement l'enseignant: ils ont acquis des réflexes pour apprendre par eux-mêmes, un objectif recherché en didactique moderne (Holec, 1979) et en phase avec l'approche actionnelle (former des acteurs sociaux capables de co-construire leurs apprentissages).

Défis rencontrés

Malgré ces résultats globalement positifs, la mise en œuvre de la méthodologie mixte a soulevé plusieurs défis, qu'il convient d'analyser pour perspective d'amélioration :

- Gestion du temps et surcharge possible: Combiner activités communicatives, tâches actionnelles et leçons de grammaire dans un horaire contraint (4h/semaine) s'est révélé complexe. Le risque principal est la surcharge cognitive pour les apprenants, sollicités sur plusieurs fronts. Certains ont rapporté se sentir un peu *« perdus »* lors des premières semaines, en passant d'une activité orale à un exercice écrit puis à un mini-projet. Il a fallu ajuster le tempo en cours de route, en n'introduisant pas trop de nouvelles notions grammaticales par semaine (mieux vaut en traiter 2 clairement que 4 superficiellement). La coordination entre les composantes demande à l'enseignant une planification très minutieuse pour éviter d'aller trop vite. Par exemple, lors du module 4, nous avions initialement prévu d'aborder *trois* temps verbaux (présent, futur proche, passé composé de base) à travers une tâche récit d'expérience. C'était trop ambitieux : nous avons finalement scindé le contenu en deux semaines, car en pratique les étudiants confondaient tout en essayant d'assimiler plusieurs constructions à la fois. Ce point rejoint une critique faite parfois à l'approche actionnelle: vouloir tout faire (communication, projet, grammaire) peut mener à une dilution si on ne priorise pas. Notre expérience suggère qu'il faut hiérarchiser les objectifs de chaque séquence et accepter de laisser certains contenus pour plus tard si nécessaire, sous peine d'indigestion.

- Hétérogénéité et gestion de l'erreur : Si globalement le groupe a progressé de manière cohésive, nous avons observé une certaine dispersion des niveaux en fin de parcours. Un noyau d'environ 5 étudiants très forts tirait remarquablement parti de chaque activité, tandis qu'à l'opposé 4 étudiants plus fragiles avaient du mal à tout assimiler et continuaient à faire des erreurs majeures (par ex, l'un d'eux persistait à omettre presque systématiquement les verbes ou articles en parlant, produisant des énoncés télégraphiques). Ce genre d'hétérogénéité est classique et peut même s'accentuer avec une pédagogie active: les apprenants autonomes prospèrent, les plus faibles peuvent se sentir dépassés. Nous avons tenté d'y remédier par du tutorat informel (pairs plus forts aidant les plus faibles en binômes) et en consacrant du temps de soutien (réexpliquer individuellement certains points pendant que le groupe était en activité). Néanmoins, deux étudiants ont terminé le cours avec un niveau un peu juste (A1 partiel) et auraient probablement bénéficié d'un rythme plus lent. Cela pose la question de la remédiation dans notre dispositif: comment aider ceux qui n'accrochent pas bien à l'approche inductive ou aux tâches ouvertes? Peut-être faudrait-il inclure davantage d'exercices supplémentaires guidés pour ces apprenants, ou adapter la composition des groupes de travail pour éviter qu'ils ne se retrouvent entre faibles (ce que nous avons corrigé en cours de route en mélangeant différemment les groupes). Quant à la gestion de l'erreur, nous avons adopté une tolérance en production (ne pas interrompre sans cesse pour corriger) tout en notant les erreurs récurrentes pour en reparler en classe. C'est un équilibre délicat : un étudiant a écrit *« Parfois j'aurais voulu qu'on me corrige plus mes fautes de prononciation »*, tandis qu'un autre dit *« merci de ne pas nous avoir corrigés à chaque mot, ça m'a donné confiance »*. Il faut donc trouver le juste milieu, peut-être en explicitant encore plus la démarche aux apprenants pour qu'ils comprennent quand et pourquoi on corrige ou pas.

- Usage de la langue maternelle: Comme mentionné, nous avons permis un usage occasionnel de la L1/anglais dans la phase de conception des tâches. Si cela a aidé la réalisation, le revers est que quelques groupes avaient tendance à basculer trop longtemps en anglais lors des discussions, réduisant d'autant le temps d'exposition au français. Le défi est de canaliser cela : autoriser l'entraide linguistique en L1 pour les consignes complexes ou la planification, tout en recentrant en français dès qu'on pratique ce qui sera présenté. Nous avons dû rappeler explicitement en milieu de semestre la règle : *« OK pour vous expliquer rapidement entre vous si vous êtes perdus, mais revenez au français dès que possible »*. Après ce recadrage, on a noté une amélioration (par exemple, certains étudiants cherchaient dans le dictionnaire un mot plutôt que de le dire en anglais). Sur ce point, l'apport du plurilinguisme est positif si bien géré – il dédramatise et valorise leurs connaissances préalables – mais il faut veiller à ne pas tomber dans la facilité de tout discuter en L1. L'objectif demeure qu'ils réfléchissent le plus possible *en* français, ou du moins à partir d'éléments en français. L'enseignant a ici un rôle de régulateur linguistique important.

- Contraintes institutionnelles et évaluation: Un autre défi fut d'aligner notre approche sur les exigences d'évaluation institutionnelle. L'université demandait un examen final classique (surtout écrit, individuel). Nous avons donc dû évaluer par des tests écrits des compétences

qui avaient été développées surtout oralement et en interaction. Pour certains étudiants moins performants à l'écrit, l'évaluation finale a pu sembler en décalage avec l'approche suivie. Par exemple, un étudiant très actif à l'oral en classe a eu une note moyenne à l'écrit final et était déçu, se demandant si « parler bien en classe ne servait à rien pour la note». Ce ressentiment pointe l'importance d'intégrer aussi l'évaluation continue authentique (par exemple évaluer la tâche actionnelle hebdomadaire) dans la note finale, pour rester cohérent. Nous avions en effet inclus une part de contrôle continu (20% de la note) basée sur deux projets réalisés en cours, ce qui a en partie récompensé ces compétences. Néanmoins, ce point indique un défi plus large: faire reconnaître par l'institution les acquis moins tangibles (compétences d'interaction, travail d'équipe, progression globale) au-delà de l'examen formel. C'est un sujet à discuter avec les responsables de programme pour mieux aligner les pratiques évaluatives sur les objectifs actionnels.

En somme, les défis rencontrés relèvent surtout de la mise en œuvre pratique de la combinaison des approches. Ils n'infirment pas la validité de la démarche, mais soulignent des points d'attention : nécessité d'une planification souple pour éviter la surcharge, importance du suivi différencié pour les apprenants plus fragiles, contrôle de l'usage de la L1, et ajustement des modes d'évaluation. Dans la section suivante (*Discussion*), nous revenons sur ces éléments pour en tirer des enseignements, en les replaçant dans le cadre théorique et dans la perspective d'améliorer l'approche.

DISCUSSION

Les résultats présentés confirment en grande partie notre hypothèse que l'alliance de l'approche communicative, de la perspective actionnelle et de l'enseignement explicite de la grammaire peut constituer une méthodologie efficace pour des apprenants débutants adultes. Dans cette discussion, nous analysons comment ces résultats s'articulent avec les travaux existants et quelles leçons concrètes en tirer pour la didactique du FLE.

Un équilibre communication-grammaire atteignable

Une première constatation est qu'il est tout à fait possible de développer simultanément la compétence de communication et la compétence grammaticale chez les débutants, dès lors que l'on adopte une approche équilibrée. Nos apprenants ont appris à communiquer en français (sur des tâches de base) sans que cela n'entrave leur apprentissage des structures linguistiques – au contraire, l'un a servi de support à l'autre. Ce constat fait écho à l'idée de complémentarité des approches évoquée par Hodžić (2021) et, plus largement, à la fin de l'opposition stérile entre approche dite "communicative" et cours de grammaire. Comme le souligne Saad Haddad (2021), la grammaire est un élément indiscutable en FLE, la question est de savoir quelle approche grammaticale adopter pour la rendre compatible avec les méthodologies actuelles. Nos résultats suggèrent qu'une approche explicite-contextuelle (explications brèves insérées dans un contexte de communication/action) est une voie prometteuse. En pratique, cela s'est traduit par des séquences de focus sur la forme bien délimitées au sein d'une progression centrée sur la communication. Cette stratégie s'aligne sur les recommandations de la recherche en acquisition: par exemple, Ellis (2006) propose d'intégrer des épisodes métalinguistiques

courts dans les cours communicatifs, car l'attention explicite de l'apprenant à un moment clé peut entraîner une restructuration cognitive de son interlangue. Nous avons pu observer cela : certains étudiants faisaient une erreur de structure jusqu'à ce qu'on la souligne explicitement, puis ne la faisaient plus. Cela corrobore les résultats de Norris & Ortega (2000) qui montraient l'impact supérieur de l'instruction explicite sur l'acquisition grammaticale de l'interlangue.

Il est intéressant de noter que les étudiants, initialement anxieux à l'idée de la grammaire, ont fini par apprécier ces moments structurants une fois qu'ils y voyaient du sens. Cela renforce l'importance de relier constamment la grammaire à la communication dans le discours pédagogique. Dans nos cours, nous avons par exemple banni les phrases du type « Apprenez ce tableau de conjugaison parce qu'il le faut » pour toujours contextualiser : « Apprenez ceci pour pouvoir dire telle chose». Cette approche "orientée but" est cohérente avec la perspective actionnelle du CECR, où chaque contenu doit être justifié par une finalité communicative ou actionnelle. Puren (2006) mettait en lumière que dans l'approche actionnelle, les actes de parole ne sont qu'un moyen au service d'une action sociale[4]. De même, nous pourrions dire que dans notre approche, les *règles de grammaire* ne sont qu'un moyen au service d'une intention de communication. Cette inversion de perspective a probablement contribué à l'acceptation et à l'assimilation plus aisée de la grammaire par les débutants.

Impact de la dimension actionnelle sur la motivation et l'autonomie

Nos données confirment que l'introduction de tâches actionnelles a eu un impact très positif sur la motivation des apprenants. Cela rejoint un consensus dans la littérature selon lequel l'apprentissage par les tâches et par projets augmente l'implication affective des apprenants (Legutke & Thomas, 1991; Little, 2007). En se sentant acteurs de leurs apprentissages, les étudiants se projettent dans des rôles sociaux valorisants (organisateur, enquêteur, rédacteur, etc.) et trouvent une satisfaction intrinsèque à accomplir quelque chose en langue cible. Thibert (2010) soulignait que la perspective actionnelle répond aux préoccupations de former des individus capables de collaborer sur des projets concrets[30] – nos apprenants ont vécu cette collaboration et en retirent une image positive de la langue comme outil de réalisation, et pas seulement comme objet scolaire.

Un effet collatéral bénéfique de cette approche a été le développement d'une certaine autonomie. L'observation d'une montée en confiance et en autonomie sur 12 semaines est encourageante. En ce sens, notre approche mixte contribue aussi à l'objectif plus large de « former l'apprenant stratège », capable de mobiliser son répertoire plurilingue et de continuer à apprendre au-delà du cours (Conseil de l'Europe, 2018). Nous avons explicitement encouragé les étudiants à faire des liens avec d'autres langues qu'ils connaissent – par exemple repérer que *université* en français ressemble à *university* en anglais, ou que *démocratie* est international – afin de les aider à rapidement acquérir du lexique. Cette valorisation du *plurilinguisme* s'inscrit dans les orientations récentes du CECR (vol. complémentaire 2018) qui promeut la compétence plurilingue et l'intercompréhension entre langues. Une étude citée dans notre recherche (Membrez, 2015) suggère d'ailleurs que l'approche communic'actionnelle peut favoriser le plurilinguisme en classe à condition que l'enseignant l'emploie régulièrement. Nos observations sont cohérentes : les étudiants ne se sont pas enfermés dans une mentalité monolingue,

ils ont appris à jongler intelligemment entre leurs langues, ce qui paradoxalement renforce leur français (car ils savent s'appuyer sur leurs acquis et non repartir de zéro absolu mentalement).

Comparaison avec d'autres études et validité externe

Il convient de situer nos résultats par rapport à d'autres contextes pour juger de leur portée. Les tendances que nous avons notées trouvent un écho dans plusieurs travaux. Par exemple, Nawafleh et al. (2021), dans leur enquête en Jordanie, concluaient que les étudiants FLE éprouvaient de sérieuses difficultés et un manque de motivation, et préconisaient de recourir à des activités plus dynamiques et impliquantes pour y remédier. Notre approche est précisément une réponse à ce besoin : en dynamisant l'oral par le biais de tâches et en impliquant davantage les apprenants, on a constaté une nette amélioration de la motivation et une réduction du fossé entre oral et écrit (même si l'oral reste un peu en retrait, il est bien moins faible qu'il aurait pu l'être sans cette démarche proactive). De même, l'étude de Mohamed (2018) en Égypte, qui testait l'approche communic'actionnelle sur l'expression orale, est convergente : elle a démontré l'efficacité de cette approche pour développer la compétence de parler. Nos résultats, alignés, renforcent l'idée que c'est une direction valide à généraliser. Il faut aussi mentionner l'étude de Haddad (2021) qui posait la question "Quelle grammaire privilégier… dans une approche communicative/actionnelle?". Haddad y souligne que la grammaire, qu'elle soit implicite ou explicite, doit être omniprésente et questionne la méthode adoptée par les enseignants. Nos retours montrent qu'une grammaire explicite contextualisée est bien accueillie par les étudiants et semble efficace, ce qui apporte un élément de réponse concret: on peut privilégier une *grammaire pratique*, directement reliée aux besoins communicatifs immédiats des apprenants, plutôt qu'une *grammaire exhaustive et théorique*. En d'autres termes, nos apprenants n'ont pas appris toutes les règles du français (bien sûr), mais celles qu'ils ont apprises, ils les ont vraiment intégrées car elles leur servaient tout de suite. Cette approche pragmatique de la grammaire est sans doute une piste à suivre pour d'autres programmes de débutants : identifier les *pivots grammaticaux* essentiels à la communication de base (présent, quelques verbes usuels, adjectifs fréquents, structures interrogatives, etc.) et concentrer l'explicitation là-dessus, sans se disperser sur des subtilités inutiles au début.

En termes de validité externe, bien sûr chaque contexte a ses spécificités. Le nôtre était un groupe d'étudiants relativement motivés (ils étaient volontaires pour ce cours au choix) et dotés d'un bon bagage scolaire général. Dans des contextes différents – par exemple des apprenants moins scolarisés, ou des classes surchargées de 50 élèves – l'approche nécessiterait des adaptations. Cependant, les principes généraux peuvent se transposer: même dans un grand groupe, on peut intégrer des tâches d'interaction en sous-groupes, même avec des apprenants moins autonomes, on peut pratiquer un peu de découverte guidée pour qu'ils s'approprient les règles. La méthodologie mixte offre une flexibilité qui est un atout dans divers contextes. En effet, puisque l'enseignant puise dans plusieurs approches, il peut accentuer tel ou tel aspect selon le public. Par exemple, avec des apprenants plus jeunes (lycéens), on pourrait rendre les tâches plus ludiques et réduire la part explicite formelle (mais sans la supprimer). Avec des adultes très analytiques (p.ex. étudiants en sciences), on pourrait au contraire aller un peu plus loin dans les explications grammaticales métalinguistiques car cela les rassure, tout en conservant les activités communicatives pour l'oral.

Nos résultats confirment en tout cas que l'heure n'est plus aux querelles de clocher méthodologiques. Comme le note Richards (2015), nous sommes entrés dans l'ère du «post-method » où l'enseignant doit développer son savoir-faire pour orchestrer des techniques issues de divers courants au bénéfice de ses apprenants. Notre expérience illustre parfaitement cela : nous avons emprunté à l'approche communicative (immersion dans la langue, priorité au sens), à la perspective actionnelle (tâches et projets concrets) et à la tradition grammaire-traduction (explications systématiques, exercices écrits) pour composer un dispositif sur mesure. Cette démarche s'apparente à ce que Kumaravadivelu (2006) appelle une pédagogie « mosaïque », construite localement en fonction du contexte, et non l'application aveugle d'une méthode universelle. Elle demande certes à l'enseignant une bonne connaissance de chaque approche et une capacité de réflexion sur sa pratique, mais elle semble produire des résultats tangibles.

Limites de l'étude et perspectives de recherche

Il importe de souligner les limites de notre étude. D'une part, l'échantillon est restreint (28 apprenants) et non aléatoire ; il s'agit d'une étude de cas en contexte spécifique, ce qui limite la généralisation stricte. D'autre part, nous n'avons pas opéré de randomisation ni de protocole expérimental pur. La comparaison avec la cohorte précédente et les références externes sert de caution, mais l'idéal scientifique serait de mener une expérience contrôlée avec deux groupes parallèles sur un même laps de temps, l'un suivant l'approche mixte, l'autre suivant une approche différente, puis de comparer quantitativement les progrès. Nous encourageons donc de futures recherches à réaliser ce type d'expérimentation, y compris avec des outils d'évaluation standardisés (par exemple faire passer à tous le même test de compétence standardisé de type TCF ou DELF en pré- et post-).

De plus, certaines de nos données qualitatives (questionnaires, entretiens) peuvent comporter un biais de désirabilité : les étudiants s'expriment peut-être de manière bienveillante envers le cours par politesse ou appréciation générale de l'enseignant. Nous avons néanmoins anonymisé les questionnaires pour réduire ce biais, et les entretiens de focus group étaient menés par une personne non enseignante du cours, ce qui a pu libérer la parole. Les retours critiques obtenus (sur la correction d'erreurs ou la charge de travail) montrent d'ailleurs qu'ils n'ont pas hésité à signaler ce qui n'allait pas, ce qui nous rassure quant à la sincérité globale des réponses.

Une autre limite concerne le suivi longitudinal. Nous ignorons, faute de recul, ce que deviendront ces apprenants à plus long terme : vont-ils entretenir leur français, poursuivre en niveau A2, et dans ce cas auront-ils des bases plus solides que des débutants formés autrement ? Il serait intéressant de les suivre au-delà du semestre, voire de réaliser un entretien différé quelques mois après pour voir ce qu'ils retiennent et comment ils évaluent a posteriori l'approche. Ce suivi longitudinal permettrait de mesurer l'ancrage durable des acquis. Par exemple, Norris & Ortega (2000) insistaient sur l'importance des effets à long terme de l'instruction explicite vs implicite. Repasser un test 6 mois après l'intervention permettrait de voir si la grammaire explicitement apprise est toujours mobilisable. Ce pourrait être une extension de cette recherche.

Enfin, il pourrait être fructueux d'explorer les variantes de la méthodologie mixte : par exemple, tester différentes proportions de temps dédié à la grammaire explicite pour voir s'il y a un « dosage optimal

». Dans notre cas, environ 25-30% du temps de cours était consacré directement à de la focalisation sur la forme (explication + exercices), le reste étant plutôt communicatif/actionnel. Peut-être qu'une proportion légèrement différente (20% ou au contraire 40%) produirait des résultats encore meilleurs, ou pas. Ce genre d'expérimentation fine aiderait à guider les enseignants sur l'organisation temporelle. De même, il serait pertinent d'analyser quels points grammaticaux profitent le plus d'un enseignement explicite chez les débutants, et lesquels pourraient éventuellement être acquis implicitement sans problème. Par exemple, nous avons constaté que la structure *il y a* a été intégrée sans presque d'explication, juste par l'usage, alors que la conjugaison *être/avoir* nécessitait absolument un enseignement explicite. Mieux identifier ces priorités permettrait d'optimiser l'approche.

CONCLUSION

De l'« alpha » – le tout début de l'apprentissage d'une langue – à la communication authentique, il y a un chemin que l'enseignant de FLE doit savoir tracer pour ses apprenants novices. La présente étude avait pour ambition de montrer qu'un tel chemin peut être balisé par une méthodologie plurielle, empruntant tantôt les pavés de la communication (pour avancer rapidement vers l'échange de sens), tantôt les dalles de l'action (pour donner une direction concrète et motivante à la marche), tantôt les jalons de la grammaire explicite (pour sécuriser le parcours et éviter les faux-pas). Les résultats obtenus auprès d'un groupe de débutants universitaires confirment que cette approche mixte est non seulement faisable, mais surtout bénéfique à la fois pour la progression linguistique, la confiance et la motivation des apprenants.

Nos étudiants ont en effet réussi à acquérir en un semestre les bases du français (niveau A1) tout en développant une réelle capacité à interagir dans des situations simples et un regard positif sur leur apprentissage. L'intégration réfléchie de moments d'explication formelle au sein d'une pédagogie active n'a pas freiné leur élan communicatif – au contraire, elle a levé des obstacles et consolidé leurs acquis, rendant la communication plus aisée. Inversement, les activités communicatives et actionnelles ont donné vie et sens à la grammaire, la sortant du carcan de l'abstraction pour la mettre au service de besoins concrets. C'est dans cette synergie que réside la force de la méthodologie proposée.

Bien sûr, enseigner le FLE à des novices complets reste un défi qui nécessite adaptation et finesse. L'expérience a mis en lumière la nécessité pour l'enseignant de jouer plusieurs rôles : facilitateur d'interactions, concepteur de tâches stimulantes, mais aussi guide linguistique rigoureux. Il doit savoir quand laisser les apprenants s'exprimer librement, et quand intervenir pour expliciter un point de langue crucial; quand permettre un recours stratégique à la L1, et quand insister sur l'immersion en L2. Cette approche exige une certaine expertise didactique et une gestion du temps efficace, mais les bénéfices observés en valent l'investissement. Comme le suggèrent les retours d'apprenants, ceux-ci se sentent *« actifs »*, *« motivés »* et *« pris au sérieux »* dans un tel dispositif, ce qui est un ingrédient essentiel de la réussite en langues.

Du point de vue scientifique et pédagogique, cette étude apporte une pierre supplémentaire à l'édifice du rapprochement entre approches jadis opposées. Elle corrobore l'idée d'une sortie du paradigme des « guerres de méthodes » (communicative vs traditionnel vs actionnel) pour entrer dans une ère du « tout complémentaire », où l'important n'est plus la pureté d'une méthode mais la pertinence d'un

mélange, d'un dosage adapté au contexte. Cela ne signifie pas qu'il faille sombrer dans l'éclectisme arbitraire ; au contraire, il s'agit d'un éclectisme principiel (Brown, 2007) où chaque choix d'activité ou de technique est guidé par des principes clairs centrés sur l'apprentissage apprenant. Ici, le principe directeur était : *chaque élément (activité, tâche, explication) doit servir la communication et/ou l'action de l'apprenant.* Si une règle de grammaire ne sert pas un besoin communicatif identifiable, on la remet à plus tard; si une activité communicative ne permet pas d'atteindre un objectif concret, on la réoriente. Cette logique, nous le pensons, est généralisable à l'élaboration de cours de langue efficients.

En conclusion, pour enseigner le français aux novices, il ne s'agit pas de choisir entre parler ou se taire, entre agir ou réfléchir, entre communiquer ou conjuguer – il s'agit de tout faire, dans le bon ordre et avec le bon accompagnement. De l'apprentissage de l'alphabet (*l'alpha*) aux premières conversations réussies, le parcours peut être rapide et enrichissant si l'enseignant sait marier interaction vivante, actions signifiantes et clarifications linguistiques. Les novices d'aujourd'hui deviendront alors, plus vite qu'on ne le croit, les communicateurs de demain en langue française.

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Structural and Semantic Taxonomy of English Phraseological Units: A Theoretical Perspective

[1] Hasan Alisoy

Abstract: English phraseological units (multi-word expressions such as idioms, collocations, proverbs, etc.) can be classified by integrating their syntactic structure and degree of semantic compositionality. This theoretical article proposes a structured taxonomy that cross-classifies phraseological units by formal syntactic pattern (e.g. verb–object combinations, adjective–noun collocations, binomial phrases, clausal proverbs) and by semantic transparency (ranging from fully non-compositional idioms to partially compositional idioms, conventional collocations, and pragmatically fixed formulas or *pragmatemes*). Drawing on phraseological research and Meaning–Text Theory, we distinguish categories like full idioms (holistic, non-literal meanings), semi-idioms (partially analyzable metaphoric expressions), collocations (compositional yet convention-bound word combinations), and pragmatemes (fixed expressions tied to specific pragmatic contexts). Illustrative examples are provided for each category alongside clear classification criteria. The taxonomy accounts for structural diversity (from fixed noun phrases to whole proverbs) while highlighting the continuum of compositionality. The discussion addresses implications for linguistic analysis, cross-linguistic comparison (with brief reference to Azerbaijani equivalents), and theoretical modeling of the lexicon. This integrative classification aims to enhance our understanding of phraseological units, benefiting lexicology, semantics, syntax, and phraseology research by offering a comprehensive framework for describing multi-word expressions in English.

Keywords: *Phraseological units; Idioms; Collocations; Pragmatemes; Semantic compositionality; Syntactic structure; Phraseology taxonomy*

1. Introduction

Phraseological units – variously termed *idioms*, *fixed expressions*, or *multiword expressions* – are a pervasive and richly varied component of the English lexicon. They encompass expressions like **idioms** (e.g. *kick the bucket* meaning "to die"), **proverbs** (e.g. *The early bird catches the worm*), **binomial phrases** (e.g. *bread and butter* meaning "livelihood"), **collocations** (e.g. *commit a crime*, *heavy rain*), and formulaic utterances like greetings and slogans. What unites these disparate expressions is their partial or complete **fixedness** and their resistance to literal, word-by-word interpretation. In other words, a phraseological unit is a **non-free combination** of words whose overall meaning or usage cannot be fully predicted from its components in a *completely productive* way. At one extreme, we find highly opaque

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idioms such as *kicked the bucket*, whose meaning "died" bears little relation to the meanings of *kick* or *bucket*. At the other extreme, there are transparent but formulaic combinations such as *in the wrong place at the wrong time* (meaning simply that someone was unfortunate in timing and location) – here the phrase is semantically clear, yet it is conventionally fixed in form (one would not normally say "*in a bad place at a bad time*" to convey the same idea). Both types are considered phraseological units, contrasting with *free combinations* where words are selected freely and interpreted literally. This wide spectrum of fixed expressions makes phraseology an inherently "fuzzy" domain, requiring careful classification.

Understanding the different **types of phraseological units** is crucial for linguistics scholars in lexicology, semantics, syntax, and related fields. Each subtype of phraseological unit has distinct properties: some function as single lexical-semantic units with idiosyncratic meanings (posing challenges for semantics), some exhibit unique syntactic behaviors or structural constraints (of interest to syntax), and many carry cultural or pragmatic significance beyond their literal content (relevant to pragmatics and sociolinguistics). A robust classification helps linguists describe these phenomena systematically and supports applications in lexicography (e.g. idiom dictionaries, collocation manuals), language teaching, and cross-linguistic phraseology studies.

Traditional approaches to phraseology have often focused on either semantic opacity (idiomaticity) or syntactic form, but rarely both in an integrated way. This article proposes a **structural–semantic taxonomy** of English phraseological units that combines these two perspectives: we categorize expressions by (a) their syntactic structure or formal pattern, and (b) their degree of semantic compositionality (transparency of meaning). By cross-classifying structure and semantics, we aim to capture, for example, how a verb–object idiom that is non-compositional (*spill the beans*) differs from a verb–object collocation that is compositional (*make a decision*), or how a full-sentence proverb with figurative meaning (*A bird in the hand is worth two in the bush*) differs from a full-sentence pragmatic formula (*How do you do?* as a fixed polite greeting). The proposed taxonomy builds on insights from phraseological research including the classical European tradition (e.g., the work of Charles Bally and V. V. Vinogradov) and modern linguistic theories like **Meaning–Text Theory** (Mel'čuk) and others, in order to provide a comprehensive classification scheme.

The remainder of this article is organized as follows. **Section 2** reviews key theoretical background on phraseological units, including definitions and prior classifications by semantic and syntactic criteria. **Section 3** presents the proposed classification model, detailing the primary structural categories of English phraseological units and the hierarchy of semantic compositionality (from full idioms to pragmatically constrained formulas), and shows how these dimensions intersect. **Section 4** discusses the implications of this taxonomy: it addresses how the classification can aid phraseological analysis, considers cross-linguistic comparisons (with brief examples from Azerbaijani), and reflects on how theoretical frameworks like Meaning–Text Theory can model these units. **Section 5** concludes the article, summarizing the taxonomy's contributions and suggesting avenues for further research in phraseology and linguistics.

2. Theoretical Background

Phraseology as a field has developed a rich terminology and various classification systems to describe multi-word lexical items. The term **phraseological unit** (often used interchangeably with *phraseme*, *idiomatic expression*, or *fixed expression*) generally denotes "a stable combination of words with a fully or partially figurative meaning". The concept was first clearly formulated by the Swiss linguist **Charles Bally** in the early 20th century, distinguishing fixed, non-compositional phrases from free word combinations[6]. Bally's insights laid the groundwork for viewing certain multi-word combinations as integral units of meaning in the lexicon, not generated anew by syntax each time.

Subsequently, in the Russian linguistic tradition, **V. V. Vinogradov** developed one of the first systematic classifications of phraseological units by degree of semantic motivation. Vinogradov (1947) identified four main types (in translation): **phraseological adhesions** (completely opaque idioms, also called *fusions*), **phraseological unities** (partially motivated idioms), **phraseological combinations** (restricted collocations where one word's use is constrained by convention), and **phraseological expressions** (fully compositional but institutionalized phrases). A *phraseological fusion* is a frozen idiom whose meaning cannot be derived from its parts at all (e.g., *to show the white feather* meaning "to display cowardice" in English – nothing in the literal image transparently hints at cowardice). A *phraseological unity*, in Vinogradov's terms, has a figurative meaning that is somewhat suggestive of the literal meanings of its components, though still an idiom (for example, Russian *бить баклуши* "to be idle," literally "to beat sticks," retains a hint of an action but the overall meaning is idiomatic). *Phraseological combinations* are partly fixed collocations where components have their usual meanings, but certain words are conventionally paired (e.g., English *pay a visit* – the verb *pay* has a typical meaning but collocates with *visit* in a way that *✱make a visit* is less standard for the same idea). Finally, *phraseological expressions* are standard sayings or clichés that are fixed in form but semantically transparent (for instance, *Better late than never* – a proverb that means exactly what the words say, yet is used as a fixed expression). Vinogradov's classification, though originally applied to Russian, has influenced how linguists think about idiomaticity in many languages, including English.

Western lexicographic and linguistic traditions have converged on similar distinctions. Many scholars differentiate **pure idioms**, **semi-idioms**, and **collocations** in English, drawing lines based on semantic compositionality (e.g., Cowie, 1985; Fernando, 1996; Moon, 1998). For example, Fernando (1996) defines *pure idioms* as completely non-compositional, *semi-idioms* as partially transparent (one component retains literal meaning, the other is figurative), and *literal idioms* (or *idiomatic collocations*) as those that are commonly used combinations with literal interpretation but restricted usage. Similarly, Nunberg, Sag, and Wasow (1994) distinguish idioms by their **analyzability** – whether parts of the idiom contribute identifiable sub-meanings. *Decomposable idioms* (like *spill the beans*, where *the beans* can be seen as "the secret" and *spill* as "reveal") contrast with *non-decomposable idioms* (like *kick the bucket*, where no part corresponds to any aspect of "die"). These nuances correlate with how flexible an idiom is syntactically and how it might be paraphrased.

Another influential line of research comes from the **Meaning–Text Theory (MTT)**, particularly the work of Igor Mel'čuk and colleagues, who have elaborated a rigorous taxonomy of *phrasemes* (their term for phraseological units) within a lexicon-semantic framework. In Mel'čuk's classification, phraseological units are broadly divided by two intersecting criteria: (1) **semantic compositionality**

– whether the whole expression's meaning is the sum of meanings of its parts or not, and (2) **lexical vs. pragmatic fixation** – whether the restriction on word choice is due to lexical co-occurrence constraints or extralinguistic pragmatic convention. Crossing these dimensions yields three principal classes of lexical phrasemes: **idioms** (non-compositional phrasemes with arbitrary meaning), **collocations** (compositional phrasemes with one component constrained by lexical convention), and **clichés** (fully compositional, conventional expressions). Mel'čuk explicitly excludes the logically possible fourth combination (non-compositional *and* pragmatically constrained) as unattested – if an expression is non-compositional, its use is by definition a lexical matter rather than a purely situational convention. Under this view, *idioms* are defined strictly by non-compositionality: an idiom is "a phraseme whose meaning is not the predictable sum of the meanings of its components". Idioms in MTT are further subclassified into **full idioms**, **semi-idioms**, and **quasi-idioms** based on whether *any* part of the expression's meaning comes from a component word. For example, a full idiom's meaning includes nothing of its parts (e.g., *go ballistic* "become very angry" – neither *go* nor *ballistic* contributes its usual meaning). A semi-idiom's meaning includes the literal meaning of one component but not the other, plus an extra meaning element (often a metaphorical "pivot") – for instance, *private eye* meaning "private investigator" includes *private* (suggesting "private" as in not official) but *eye* is metaphorical for "investigator". A quasi-idiom (or "weak idiom") includes the full meanings of all components, but the combination also carries an additional unpredictable meaning nuance – an example might be *red tape*, which literally involves "red" and "tape" but idiomatically means "bureaucratic paperwork" (here both *red* and *tape* have their normal meaning of a colored strip, yet historically the combination refers to a specific practice, acquiring an extra sense of official paperwork).

Collocations, in Mel'čuk's framework and much lexicographic tradition, are **compositional** combinations of words that are **lexically constrained**, i.e. one chooses a particular word out of convention even though a literal synonym might seem logical. A classic example is how one talks about *making* a decision in English: *make a decision* is the normal collocation, whereas *do a decision* or *create a decision* are not used, despite *do* or *create* being literal synonyms in other contexts for the act of bringing about something. The meaning of *make a decision* is fully transparent ("perform the act of deciding"), but English convention dictates the verb "make" rather than alternatives. Such collocations typically involve a base word (the main semantic content) and a collocate (the word restricted by usage). For instance, in the phrase *heavy rain*, *rain* is the base and *heavy* is the selected collocate (one says *heavy rain* but not *strong rain*, whereas conversely one says *strong tea* not *heavy tea*, illustrating that *heavy* collocates with *rain* and *strong* with *tea* by convention). The collocate often carries a context-specific meaning that may not appear in its general dictionary definition but is contextually understood – e.g., *heavy* in *heavy rain* simply means "great in amount" (not literally heavy in weight). Yet, collocations are distinguishable from idioms because their overall meaning *does* equal the sum of parts (rain that is heavy = a large amount of rain). What makes them phraseological is the restricted word choice, often language-specific. Cross-linguistic comparisons demonstrate this: different languages choose different collocates for the concept "make a decision" (*prendre* "take" a decision in French, *eine Entscheidung treffen* "meet" a decision in German, *karar vermek* "give a decision" in Turkish, etc.), reflecting that the selection of the support verb is arbitrary from a purely logical perspective.

The category of **clichés** or **formulas** refers to fixed, *fully compositional* phrases that are considered the standard way of expressing a given meaning in a language. They are often **pragmatically** restricted to certain communicative situations or conventionalized as social routines. Examples include *How are you?* as a greeting, *Happy birthday!* as a congratulatory formula, or *Yours sincerely* as a letter closing. These expressions are usually straightforward in meaning (no hidden idiomatic sense – *Happy birthday* literally conveys a wish for a happy birthday), and a person hearing them for the first time would understand the literal meaning. However, they count as phraseological units because they are **formulaic**: alternate phrasings are not customary (for instance, English speakers say *How are you?* rather than *How do you fare?* in everyday greeting, even though the latter is grammatically correct; and one says *Yours sincerely* rather than *Sincerely yours* or other variations in formal correspondence by convention). Within the realm of clichés, Mel'čuk and others further distinguish **pragmatemes** – phrases that are not only conventional but tied to a specific extralinguistic situation or communicative act. A pragmateme is a subtype of cliché "whose usage restrictions are imposed by the situation of utterance". For example, *Will you marry me?* is a standard utterance used specifically for the speech act of making a marriage proposal. Its literal meaning is clear, and alternative wording (*Do you want to be my wife/husband?*) might be understandable but would be perceived as unusual – the pragmateme is the expected formula for that context. Other examples are fixed notices like *Keep off the grass* (found on lawn signs) or *Best before [date]* on food packaging. These could theoretically be phrased differently, but convention and situational appropriateness dictate a particular wording. Pragmatemes thus occupy one corner of the phraseological space: they are fully literal in meaning (hence compositional), yet fixed due to social or situational convention.

In summary, previous research provides us with two fundamental axes for classifying phraseological units: **structural form** (what syntactic shape the expression takes) and **semantic compositionality** (how the overall meaning relates to the meanings of the parts). Researchers like Alexander (1984, 1987) have enumerated the wide variety of structural types that idiomatic or fixed expressions can assume – including *binomials* (e.g. *wine and dine*, *wear and tear*), *compound-like noun phrases* (e.g. *red tape*), *phrasal verbs* (verb + particle combinations like *give up*, *look after*), *similes* (comparative idioms like *as cold as ice*), *full clauses and proverbs*, *stock phrases* (conventional sayings or quotations), and even *discourse markers* and social formulas[5]. Meanwhile, semantic-based classifications (Vinogradov, Mel'čuk, Fernando, etc.) draw lines between pure idioms, semi-idioms, collocations, and free combinations. What remains is to integrate these two perspectives into a single taxonomy that can describe, for instance, a "verb-object pure idiom" as opposed to an "adjective-noun collocation" or a "sentential pragmateme." This integration is the goal of our proposed classification model.

3. A Structural–Semantic Classification Model for English Phraseological Units
In this section, we present a taxonomy of English phraseological units that combines **structural criteria** (the syntactic form of the expression) with **semantic criteria** (the degree and type of idiomaticity or compositionality). The classification is organized as a matrix of sorts: one dimension enumerates the major structural types of multi-word expressions, and the other dimension specifies categories of semantic composition (from non-compositional to fully compositional but pragmatically fixed). We describe each structural category in turn, and within each, identify subcategories by semantic type. Illustrative examples are given for each intersection of structure and semantic type.

3.1 Structural Types of Phraseological Units

Structurally, English phraseological units can be found in virtually any syntactic category or construction type that allows multi-word combinations. The following are the primary structural types considered in our taxonomy:

- **(a) Verb Phrase Units (Verb + Object/Complement Idioms and Collocations):** A very large portion of idioms in English are verb-centered constructions, often involving a verb and object (or other complement). For example, *spill the beans* (verb + object) is an idiom meaning "reveal a secret," *take off* (verb + particle) as in *take off [intransitive]* meaning "to suddenly succeed" (an idiomatic phrasal verb), or *look forward to [X]* meaning "anticipate [X] eagerly" (a prepositional verb phrase). Collocations in this category include cases like *commit a crime* (verb + object collocation, meaning "perpetrate a crime" – fully literal but conventionally *commit* is used) or *apply for a job* (verb + prepositional phrase – one *applies for* something, not ✳*request for a job* in standard usage). Verb phrase units can function as a predicate in a sentence. Syntactically, some are fixed (e.g. *shoot the breeze* – "chat idly" – cannot be passivized or altered easily), while others allow some variation (*spill the beans* can become *the beans were spilled by X* in passive, albeit this might sound less common). We will further categorize these by semantic type in Section 3.2, but structurally they share the feature of being built around a verb and its complements.

- **(b) Noun Phrase Units (Nominal Idioms and Collocations):** These are multi-word noun phrases that act as a single nominal concept. For example, *a piece of cake* is a noun phrase idiom meaning "something very easy" (its surface structure is "indefinite article + noun + of + noun"). Another example: *red tape* meaning "bureaucratic procedures" is a noun phrase (Adj + N) with an idiomatic meaning (historically referring to red ribbon used to tie official documents). A semi-idiomatic noun phrase might be *a fresh pair of eyes* (meaning "an outsider's perspective" – partially transparent metaphor). Collocational noun phrases are extremely common as well: e.g. *strong tea* (Adj + N collocation, meaning tea that is brewed concentrated – *strong* is a conventional choice; one wouldn't say ✳*powerful tea* even though the meaning "strong" is literal). Another is *high voltage* (Adj + N collocation in technical contexts – one says *high voltage* rather than ✳*strong voltage*). Some noun phrase units include proper nouns or names (e.g. *John Bull* as a personification of England is an idiom-like name, or *the Big Apple* for New York City), though we will focus on general common-noun phrases here. Structurally, these can often take plural or possessive forms if the syntax allows (e.g. *skeletons in the closet* pluralizes an idiom to mean "hidden secrets"). Many nominal phraseologisms are also **compound-like** (in fact, English compounds often border on phraseology when they aren't entirely single words – e.g. *brain drain*, *ivory tower*, *fat cat* in the sense of a rich person, etc., are written as two words but act as compound nouns with idiomatic meaning).

- **(c) Adjective + Noun Collocations and Idioms:** This is a subtype of noun phrase but worth noting separately because many collocations take the form of a modifier + noun. For instance,

cold war (an international tension without direct conflict) is an idiom as a whole NP, but structurally Adj+N. Collocational examples abound: *heavy rain, rich vocabulary, social justice* (some nouns strongly prefer certain adjectives in idiomatic usage). While these could be lumped with general noun phrases, lexicologists often specifically discuss adjective–noun collocations as a distinct phenomenon since the noun is seen as the base and the adjective as a collocate that conveys a particular nuance.

- **(d) Binomial Expressions (X and Y):** Binomials are fixed pairings of words usually joined by *and* (or sometimes *or*) that function as a single conceptual unit[5]. English has many of these: *bread and butter* (literally a common food pairing, but idiomatically "basic means of support or livelihood"), *pros and cons* ("advantages and disadvantages"), *wear and tear* ("damage that naturally and inevitably occurs as a result of normal use"), *fish or cut bait* (an American idiom meaning "do one thing or the other, but stop hesitating"), *more or less* (a fixed phrase meaning "approximately"). Binomials may exhibit irreversible order (one cannot swap the order without it sounding odd, e.g. *butter and bread* is not the usual way to say *bread and butter* meaning livelihood). Semantically, some binomials are idiomatic (*wine and dine* as a verb meaning "entertain lavishly with food and drink"), while others are simply conventional pairings (e.g. *husband and wife* is a fixed order for the literal pair). There are also rhythmic or alliterative binomials (*doom and gloom*, *riff-raff*) which often carry idiomatic meaning as a whole. We classify binomials separately because they often function as a single unit (noun phrase, adjective phrase like *deaf and dumb*, or even verb phrase as in the example *fish or cut bait*).

- **(e) Comparative Idioms (Similes):** A special subtype of phraseological unit in English are formulaic comparisons, often of the form "as X as Y" or "like a Y." For example, *as blind as a bat* (meaning "very blind"), *as cool as a cucumber* ("calm under pressure"), *to fight like cats and dogs* ("to fight fiercely or quarrel constantly"). These simile idioms typically have a fixed pattern and a figurative standard of comparison. They are semantically semi-transparent: one can often see the metaphor (cats and dogs are proverbial enemies, hence the figurative meaning of fighting fiercely), but they are fixed expressions and one cannot freely substitute other animals or items without losing the idiomatic meaning. Comparative idioms in English form a well-known list of colorful expressions (e.g. *as stubborn as a mule*, *like a bull in a china shop*, etc.).

- **(f) Full Sentences: Proverbs and Sayings:** Many phraseological units are entire sentences (or clauses) that encapsulate a piece of wisdom, a folk saying, or a formulaic remark. **Proverbs** are a prime example: *The early bird catches the worm* (meaning initiative or prompt action leads to success), *You can't have your cake and eat it too*, *When it rains, it pours*. These are usually complete sentences, often metaphorical or proverbial in nature, and used as ready-made utterances. Their meanings are sometimes transparent metaphors but often require cultural or contextual knowledge. Another kind of sentential phraseological unit is the **maxim or catchphrase**, e.g. *Boys will be boys* (excusing typical male behavior), or famous quotes that have become clichés (*Rome wasn't built in a day*). Structurally, these are clauses that can stand alone. Many proverbs are syntactically well-formed sentences, though some have archaic or elliptical grammar (e.g.

the more, the merrier is a fragmentary clause). Because they function as complete utterances, their usage is often tied to communicative context (some proverbs are used to admonish, others to console, etc.). Semantically, proverbs often carry an idiomatic or metaphorical meaning distinct from the literal reading, but a few are almost literal truisms.

- **(g) Pragmatic Formulas (Illocutionary Units):** These include **speech-act formulas** and social routines, many of which are also full sentences or clauses, but distinguished by their pragmatic function. For instance, *How do you do?* (a formal greeting), *Long time no see!* (an informal greeting after absence), *I beg your pardon* (formulaic apology or polite excuse), *No smoking* (prohibition sign), *Thank you*, *Sorry to bother you, but….* These are often not idiomatic in the semantic sense (their literal meaning aligns with their function, or sometimes they have slightly fossilized syntax), but they are fixed ways of accomplishing communicative acts. In our classification, these pragmatic formulas – especially those that are restricted to certain contexts – will fall under the category of **pragmatemes** or clichés, depending on their properties (discussed in 3.2). They are worth noting structurally because some are single clauses (imperatives like "Enjoy your meal"), some are phrase fragments (e.g. *Best regards*), and some allow slots for insertion (e.g. *My name is __* in introductions is a formulaic frame).

It is important to note that these structural categories can overlap or nest. For example, a proverb (sentential) might contain a smaller idiom within it, or a binomial may appear inside a longer idiomatic phrase. However, for classification purposes, we treat the *largest relevant unit* as the phraseological unit if it is commonly considered a fixed expression in its entirety.

3.2 Semantic Categories by Compositionality

Orthogonal to the structural types, we classify phraseological units by **semantic compositionality** – essentially, how literal or non-literal the expression is, and what constrains its usage. We define four broad semantic categories: **(i) non-compositional idioms**, **(ii) partial idioms**, **(iii) collocations (conventionalized compositional combinations)**, and **(iv) pragmatemes (pragmatically fixed formulas)**. These correspond roughly to points along a spectrum from full idiomaticity to literalness, as well as distinctions in *why* the phrase is fixed (lexical-semantic idiosyncrasy vs. usage convention vs. situational necessity).

- **(i) Non-Compositional Idioms (Fully Idiomatic Expressions):** These are expressions whose meaning cannot be deduced from the meanings of the individual words – in other words, they are **semantically opaque** or "holistic." The classic defining feature of an idiom is exactly this non-compositionality. Examples in English abound: *kick the bucket* ("die"), *spill the beans* ("reveal a secret"), *break the ice* ("initiate social interaction in a tense situation"), *on cloud nine* ("extremely happy"), *red herring* ("misleading clue or piece of information"), etc. In such idioms, either none of the words carry their literal meanings, or any literal connection is very indirect. Idioms often arise from metaphors or historical references that are not transparent to modern speakers. For instance, *kick the bucket*'s origin is obscure (folklore suggests it comes from a method of suicide or slaughter, but that is not known to most speakers), so one hears it as a single lexical chunk meaning "to die." Syntactically, many fully idiomatic expressions

are fixed or allow only limited morphological variation (e.g., one can say *kicked the bucket* in past tense, but not *✻kicked a bucket* in reference to dying, nor *✻knock the bucket*). These idioms behave like lexical items – they have to be learned as units. According to Mel'čuk's typology, these would be *full idioms* if none of the component's meanings are present in the whole[18]. For example, *go bananas* ("go crazy") is a full idiom: *go* doesn't contribute its normal motion meaning, and *bananas* doesn't contribute its literal fruit meaning (the expression has nothing to do with actual bananas).

Some fully idiomatic expressions can be longer than a phrase – e.g. proverbial idioms like *the coast is clear* ("no danger of being observed") or *to beat around the bush* ("to avoid the main topic"). These still fit the non-compositional criterion. It's worth noting that non-compositional idioms can sometimes be "dissected" by native speakers after the fact (through folk etymology or finding some metaphorical connection), but the key is that one *cannot predict* the meaning through normal decoding. For instance, *to let the cat out of the bag* meaning "to reveal a secret" might conjure a mental image related to surprise or chaos of a cat escaping, but there is nothing inherent that would let a learner know it means to divulge a secret – it must be learned as a whole.

Non-compositional idioms can occur in any structural form: verb phrases (most common), noun phrases (e.g. *a red herring*), adjectives (e.g. *brand new* – historically idiomatic meaning "completely new"), binomials (e.g. *by and large* meaning "on the whole"), or whole sentences (many proverbs). In our integrated classification, when we label something a "non-compositional idiom," we will also note its structural form (e.g. "VP idiom," "NP idiom," "clausal idiom") as needed.

- **(ii) Partially Compositional Idioms (Semi-Idioms and Metaphorical Units):** Between pure idioms and free combinations lies a large gray area of expressions that carry **figurative or specialized meanings** but still hint at their literal components. These are often called **semi-idioms** (Mel'čuk), **metaphorical idioms**, or just **figurative expressions**. In such cases, one part of the expression may retain its literal meaning while the other part is used metaphorically, or the expression as a whole is a metaphor that is somewhat transparent. For example, *to lose one's touch* (meaning "to lose one's ability or knack") has a literal component *lose* (as in to lose something) and a figurative component *touch* (metaphorically meaning skill or expertise). The phrase *foot the bill* (meaning "to pay the bill") is another case: *bill* is literal, but *foot* is a verb that originally meant "to add up the foot (total) of an account," which is not obvious today – so it's partly idiomatic (foot = pay). Another example: *draw the line [at]* ("set a limit") – one can see a metaphor of literally drawing a boundary line, so it's not entirely opaque, but it's a fixed expression for establishing a limit.

  Some idioms of this type are often termed **metonymic idioms or synecdoche idioms** – for instance, *lend a hand* meaning "help" (here *hand* stands for assistance, which is a part-for-whole metonymy). The phrase is somewhat transparent (because helping often literally involves one's

hands), yet it is a fixed idiom. Mel'čuk's definition of *semi-idiom* requires that the meaning includes the full meaning of one component (not as the semantic pivot) and not of the other, plus an extra meaning element. Using that framework: *lose one's head* ("to panic, lose self-control") might be analyzed as including *lose* in its usual sense (to be deprived of) and *head* not in its usual "body part" sense, plus an extra meaning of "sanity/self-control" (the head representing the mind). Thus it's a semi-idiom with *lose* literal and *head* idiomatic (meaning mind). Many idioms of emotion or state fit this pattern: *give someone the cold shoulder* (meaning "deliberately ignore someone") includes *shoulder* in some metaphorical way (part of turning away?) but *cold* is metaphorical for "unfriendly" – one can parse it partially but not fully.

In our taxonomy, partially compositional idioms may still be considered "idioms" broadly, but it is useful to note their intermediate status because they often have different syntactic flexibility and different behavior in language. They tend to be more analyzable and sometimes allow wordplay or variation (for instance, people might joke "He lost his head – figuratively, not literally" acknowledging the idiom). This category also includes what some call **clichéd metaphors** or **idiomatic comparisons** like *X is in the driver's seat* (metaphorically meaning X is in control). The image is understandable, but it's a fixed way to express that particular meaning.

- **(iii) Conventional Collocations (Fully Literal but Fixed Combinations):** Here we have expressions that are **compositional in meaning** – the meaning is just the sum of the parts – yet they are **not freely chosen**, as there is a conventional pairing or habitual co-occurrence. This includes what are sometimes called **phraseological combinations** or **restricted collocations**. As discussed earlier, a typical collocation consists of a **base** word that is the central concept, and a **collocate** that is chosen by convention to express a particular nuance or to fit a usage pattern. The key characteristic is that an equivalent meaning could in theory be conveyed by other words, but actual usage favors a particular lexical combination. For example, English speakers say *make a mistake* (not *do a mistake*), *tell a lie* (not *say a lie*), *strong tea* (not *powerful tea*), *heavy rain* (not *strong rain*), *big mistake* (rather than *large mistake* in many contexts, even though large is a synonym of big). These are all perfectly literal – a mistake that is big is literally a big mistake – but collocational preferences impose a fixed choice.

Collocations also cover cases of words that habitually go together due to tradition or idiomatic preference even if synonyms could work: e.g. one *launches a campaign* but *wages a war*, one *holds a conversation* but *has a chat*. Often there is no strict rule other than lexical convention. The idea "cause someone trouble" is typically phrased as *give someone trouble* or *make trouble for someone*, but not ✶*cause trouble to someone* (even though cause would be literally apt). These patterns are stored in speakers' minds as part of knowing how to use the words idiomatically.

Collocations can be specific to certain registers or domains. For instance, in academic English, one speaks of *conducting research* (not *doing research* in formal writing) and *providing an explanation* (rather than *giving* in some contexts), etc. These are matters of usage rather than semantics per

se. Because collocations are semantically transparent, a person can often understand them on first exposure, but producing them correctly is part of mastering the phraseological norms of the language (an area of interest in second language acquisition research, cf. Wray 2002; Nesselhauf 2005).

It should be noted that collocation is a gradient concept – virtually any word can collocate with any other given the right context, but phraseologists focus on **recurrent, relatively fixed collocations** that have an arbitrary element. The boundary between what is a "fixed collocation" and what is just a frequently occurring free combination can be fuzzy, and usage frequency plays a role. For our purposes, collocations are considered phraseological units if they show a notable element of lexical restriction (e.g., a native speaker will consistently use one particular word in that context where alternatives are theoretically possible, often to the point that alternatives sound odd or non-idiomatic).

- **(iv) Pragmatemes (Pragmatically Fixed Formulas):** The last category comprises expressions that are *fully compositional and understandable* in literal terms, but are **fixed by convention of use in specific contexts or by social pragmatics**. These include the **routine formulas** and **clichés** of language – things we say in particular situations because convention so dictates. For example, *Happy New Year!* is literally just a happy wish, but it's only used (sincerely) around New Year's and is a fixed form (we don't say *Joyous New Year* ordinarily). *Rest in peace* is a conventional expression used in funerary contexts or condolences; its literal words are simple, but no alternative phrasing (*Repose in tranquility*, *May you rest peacefully*, etc.) carries the same conventional force. Traffic signs and public notices are another example: *No Smoking*, *Keep Out*, *Handle with care*, *Fragile – do not drop*, etc., are standardized in phrasing. In correspondence or formal situations, we have expressions like *Thank you for your attention*, *All the best*, *To whom it may concern* (in letters). These examples illustrate that pragmatemes are tied to **situational contexts**: letter-writing, holidays, warnings, requests, etc.

Pragmatemes often have the form of complete sentences or imperative phrases. Some can include fill-in slots (e.g. *Dear [Name],* in a letter – where only the name changes, or *Welcome to [Place]* in which the place name is inserted). In Meaning–Text Theory terms, pragmatemes are pragmatically constrained clichés. We treat them as a separate semantic category because what "fixes" them is not an idiosyncratic meaning (they are not idioms in the sense of having unpredictable meaning), but rather a **pragmatic function or conventional usage**. They highlight the fact that not all phraseological units are about idiomatic meaning – some are about doing things with words in a culturally expected way (for instance, English speakers say *Bless you* after someone sneezes – the words are ordinary but the usage is culturally fixed).

Pragmatemes have been less studied than idioms and collocations, but they are gaining attention as important building blocks of communication (especially in cross-cultural pragmatics). In cross-linguistic perspective, pragmatemes often do not translate literally; e.g., the English telephone answering phrase "Hello?" corresponds to Russian "Алло?" and French "Allô?" – similar form, whereas something like *fingers crossed* (said to express hope) in

Azerbaijani might have no direct literal equivalent and instead one might say a different conventional phrase or perform a gesture.

It is worth emphasizing that these four categories are not always cleanly separated – they blur into each other. We can imagine a continuum: at one end, a free combination like *read the book* (fully literal, not fixed at all – not a phraseme by any account). Moving a step into phraseology, we get collocations like *read aloud* or *read voraciously* (nearly free, but certain adverbs collocate typically). Further in, we have more fixed collocations like *make a decision*. Then semi-idioms like *make waves* ("cause trouble/attention") – here *make* is literal but *waves* is metaphorical for disturbance. Then strong idioms like *make ends meet* ("manage financially") – here *make* is not exactly "create" but "cause to meet," and *ends* is metaphorical (ends of budget), partially understandable but largely idiomatic. Finally, full idioms like *make a killing* ("earn a lot of money easily") – one can grasp the violent metaphor but it's a specific idiom. Pragmatemes sort of occupy a different axis (since one could have a pragmatically fixed idiom, though Mel'čuk argues a non-compositional pragmateme is effectively just an idiom used in one context). For simplicity, in our taxonomy we treat pragmatemes as those expressions whose primary defining feature is context-specific usage, typically compositional in semantics.

3.3 Integrating Structure and Semantics: The Taxonomy Matrix

By combining the structural types from 3.1 with the semantic categories from 3.2, we arrive at an integrated classification. Essentially, any given phraseological unit can be described by a structural label and a semantic label. Table 1 (conceptually) presents a matrix of examples:

- **Verb Phrase – Non-Compositional Idiom:** e.g. *spill the beans* (verb + object, meaning "reveal a secret"). Structurally a VP; semantically a full idiom (non-compositional: *beans* are not literally involved in meaning "secret"). Another example: *kick the bucket* (V+NP idiom, meaning "die")[3].

- **Verb Phrase – Partial Idiom:** e.g. *hold fire* (verb + object, meaning "wait, stop for now" as in *hold your fire* – literally *fire* implies gunfire, but meaning is "stop action"; *hold* is somewhat literal "hold back"). Also *carry weight* (as in *His opinion carries weight* – meaning "has influence," where *weight* is metaphorical for importance but *carry* is used figuratively).

- **Verb Phrase – Collocation:** e.g. *draw a conclusion* (choose *draw* instead of say *make*; fully literal "draw" meaning "pull" is a bit metaphorical but standard usage). *run a business* (meaning "manage a business" – compositional, but one *runs* a business, doesn't *drive* or *lead* a business in idiomatic English).

- **Verb Phrase – Pragmateme:** e.g. *God bless you* (after a sneeze – a fixed VP used as a response, pragmatically constrained to that situation). Or *Excuse me* (imperative form used for getting attention or apologizing briefly – literally a verb phrase but functioning as a conventional politeness formula).

- **Noun Phrase – Non-Compositional Idiom:** e.g. *red tape* (Adj+N, meaning "bureaucracy" – no literal connection to colored tape). *a hot potato* (meaning "a controversial issue" – not a literal potato).

- **Noun Phrase – Partial Idiom:** e.g. *a silver bullet* (meaning "a simple miraculous solution" – based on metaphor of mythical silver bullet as cure-all; *bullet* is literal, *silver* metaphorical for special). *the icing on the cake* (meaning "an additional benefit" – one can see the cake metaphor, but it's an idiom; components have literal referents yet refer to a figurative situation).

- **Noun Phrase – Collocation:** e.g. *a strong argument* (Adj+N, meaning an argument that is convincing – *strong* is a conventional adjective for argument strength). *a stroke of luck* (N+Prep+N, fully literal meaning a bit of luck, but "stroke" is a fixed collocate for luck, we don't say ✻*a bit of luck*). Also technical collocations like *mother tongue* (meaning native language, literal words but fixed pairing).

- **Noun Phrase – Pragmateme:** This is less common, since pragmatemes are often clausal, but could include something like *Your obedient servant* (as a closing in a formal letter – an NP used formulaically in historical usage). Or set titles/honorifics: *Your Majesty* is a phraseological NP used only in addressing a monarch (pragmatically restricted to that context).

- **Binomial – Non-Compositional Idiom:** e.g. *fun and games* (usually in negative or sarcastic use: "It's not all fun and games," meaning it's not all entertaining – idiomatic meaning beyond just literal fun or games). *cloak and dagger* (Adj and N used as compound adjective meaning "related to espionage/secretive," from the imagery of old spy fiction – nonliteral).

- **Binomial – Partial/Collocational:** Many binomials are somewhat literal pairs but become a fixed saying: *knife and fork* (literal tools, but always said in that order; a collocation in a sense), *high and dry* ("stranded"; originally literal meaning without resources, now idiom meaning without help – maybe partial idiom), *salt and pepper* (literal objects but fixed order when together).

- **Binomial – Pragmateme:** Hard to think of a binomial pragmateme, as binomials usually aren't situational utterances. Perhaps something like standard pairs in ceremonies (*husband and wife* as pronounced in weddings – though that's more literal collocation than situational formula).

- **Comparative Simile – Idiomatic:** e.g. *as cold as ice* (literal comparison but fixed form; in some cases these are more cliché than idiom), *fight like cats and dogs* (idiomatic simile for fighting fiercely – partial idiom because the image is transparent that cats and dogs fight, yet it's a fixed phrase).

- **Sentence/Proverb – Idiom:** e.g. *The straw that broke the camel's back* (meaning the final minor action that causes a big reaction – proverb, non-compositional unless one knows the

metaphor). *You can't judge a book by its cover* (proverb, metaphorical but understandable – perhaps partial idiom).

- **Sentence – Collocational (literal proverb):** e.g. *Easy come, easy go* (meaning "quick gains can be lost quickly" – fairly literal and simple but a fixed proverbial expression). *Business is business* (literal truth said as a fixed phrase to justify something).

- **Sentence – Pragmateme:** Many formulas fall here: *May I help you?* (said by a clerk to a customer – literal but conventional in context), *I now pronounce you husband and wife* (literal but part of a marriage ritual), *Do you take X to be your lawfully wedded…* (marriage vow formula), etc. Also social scripts like greetings: *How are you?* – literal question but used as routine, where the expected answer *I'm fine, thanks* is also formulaic regardless of actual state, demonstrating pragmatic fixedness.

For conciseness, we may not enumerate all possible combinations, but the idea is each phraseological unit can be located in this classification. For instance, consider *raining cats and dogs* (meaning "raining very heavily"). Structurally, it's a gerund clause or participial expression (*it's raining X*). Semantically, it's a non-compositional idiom (the animals do not contribute to meaning except via an obscure metaphor). So in our taxonomy we'd label it a **clausal idiom (weather expression)**. Another example: *by heart* (meaning "from memory"). Structurally a prepositional phrase, semantically a full idiom (one cannot guess that "heart" means memory or understanding here). Meanwhile, *on the one hand… on the other hand…* (for contrasting points) is a formulaic construction – structurally two paired prepositional phrases acting as discourse markers, semantically mostly literal but it's an idiomatic way to structure an argument, thus more of a cliché.

To illustrate the classification more formally, let us take a few concrete examples and classify them:

- **Example 1:** *Spill the beans.* Structure: Verb + Object (verb phrase). Semantics: Non-compositional idiom (full idiom: 'spill' and 'beans' don't retain literal meaning "cause beans to fall out" – it means "reveal secret"). So category: **Verb Phrase – Full Idiom**.

- **Example 2:** *Make a decision.* Structure: Verb + Object (verb phrase). Semantics: Collocation (compositional meaning "take a decision" but conventional verb choice). Category: **Verb Phrase – Collocation**.

- **Example 3:** *Break the ice.* Structure: Verb + Object (verb phrase). Semantics: Partial idiom (metaphorical meaning "initiate friendliness," *break* partly metaphorical, *ice* metaphor for stiffness in relations – one can see some image). It might be considered fairly opaque historically, but contemporary speakers often understand the metaphor of "ice" as social tension. So we label it **Verb Phrase – Semi-idiom**.

- **Example 4:** *Bread and butter.* Structure: Binomial noun phrase (N and N). Semantics: When used idiomatically to mean "livelihood" (as in *Teaching is my bread and butter*), it is a non-

compositional idiom (one isn't literally talking about food) – though metaphorically one's income buys one's bread and butter. Category: **Binomial – Idiom**.

- **Example 5:** *On cloud nine.* Structure: Prepositional phrase (idiomatic PP functioning as adjective or adverb meaning "elated"). Semantics: Non-compositional (the literal image of cloud nine doesn't inherently mean very happy). **PP Idiom**.

- **Example 6:** *Under the weather.* Structure: PP (meaning "slightly unwell"). Semantics: Non-compositional idiom (though arguably metaphorical, one might imagine weather pressing down – but it's not obvious). **PP Idiom**.

- **Example 7:** *The X that Y* (as in *the straw that broke the camel's back*). Structure: complex NP clause (proverbial template). Semantics: idiomatic metaphor. **Clausal Idiom (Proverb)**.

- **Example 8:** *How do you do?* Structure: Full sentence (interrogative). Semantics: Pragmateme – a formulaic greeting not meant as a literal information-seeking question in context. **Sentence – Pragmateme**.

- **Example 9:** *No pain, no gain.* Structure: Clause (proverb, elliptical two-part saying). Semantics: Semi-idiom (literal words but succinct metaphor: without suffering work, you won't achieve benefit – each word literal, overall meaning proverbial truth). It's almost literal but we class it as a fixed proverbial expression (could be considered a cliché). **Sentence – Cliché (Proverb)**.

Each of these examples demonstrates how the two-dimensional classification works.

We can visually imagine the taxonomy as a table where rows are structural types (Verb Phrase, Noun Phrase, Adjective–Noun, Binomial, Prepositional Phrase, Clause, Formulaic utterance, etc.) and columns are semantic types (Full Idiom, Partial Idiom, Collocation, Pragmateme). Not every cell in the matrix will be populated by a common example (some combinations might be rare or logically not applicable), but most are. For instance, an **Adjective–Noun Pragmateme** might not have many examples aside from fixed titles or honorifics as noted (e.g. *Your Excellency* – an NP used only in protocol). On the other hand, **Clause Collocations** is not a typical notion – collocation is usually discussed for smaller structures, though one could argue that certain clausal constructions with literal meaning are conventional (like the paired *on the one hand… on the other hand* example which is like a collocational frame in discourse).

4. Discussion

The proposed structural–semantic taxonomy provides a comprehensive framework for understanding English phraseological units. In this section, we discuss several implications and applications of this classification: how it aids phraseological analysis, how it facilitates cross-linguistic and contrastive studies (with a brief look at English vs. Azerbaijani phraseology), and how it interfaces with theoretical models such as Meaning–Text Theory and other lexicon models. We also consider the relevance for lexicography and computational linguistics.

4.1 Implications for Phraseological Analysis and Lexicology

For linguists and lexicographers, having a clear taxonomy helps in several ways. Firstly, it clarifies **terminology** and avoids talking past one another when referring to "idioms" or "collocations." By specifying, for example, that we are dealing with an "Adj+N collocation (compositional, restricted)" versus a "Verb+N full idiom (non-compositional)," we make explicit both the syntactic behavior and the semantic nature. This is crucial because the **lexico-grammatical behavior** of phraseological units often correlates with their semantic type. Non-compositional idioms tend to be more **lexically frozen and syntactically inflexible** – they often resist modification, passivization, or variation in their components (e.g., one cannot normally say *the bucket was kicked by John* to mean John died, at least not without irony). Collocations, being semantically transparent, are usually **more flexible**: they might allow synonyms in some contexts or translations, but still have a preferred form (for instance, we can sometimes transform collocations passively or adjectivally: *a crime was committed*, *decision-making* derived from *make a decision*). Partial idioms lie in between, sometimes allowing certain variations (people play with semi-idioms in jokes or headlines by substituting components, capitalizing on the partial transparency). Knowing the idiomaticity level can guide what transformations or morphological changes an expression can undergo.

Another area is **lexical productivity vs. fixedness**. By definition, phraseological units are fixed to some degree, but our classification highlights which part of the phrase is fixed and which might be an open slot. Collocations usually have one main fixed element (the collocate) and one that is the base and can combine with other partners (e.g. *commit a crime*, *commit treason*, *commit an error*, here *commit* is the collocate that specifically goes with certain nouns). Idioms are often fixed in all parts, though some idioms allow limited lexical variations (like *kick the bucket* has a variant *kick off* as a slang for "die," or *give up the ghost* as a variant of *give up the ghost* meaning die – well, those are different idioms entirely but share a component). Recognizing patterns in structure can help identify **families of idioms** or **idiomatic constructions**. For example, English has a family of "the X to end all X" (as in *the movie to end all movies*, meaning the ultimate movie) – structurally a noun phrase template, semantically a hyperbolic idiom. Our structural taxonomy would place that as a **frame** that generates idiomatic instances. A classification that is too coarse (just idiom vs collocation) might overlook such constructional patterns.

4.2 Cross-Linguistic Considerations: English and Azerbaijani Phraseology

Phraseological units are notoriously language-specific in their surface form, even if underlying meanings or metaphors are often shared across cultures. An advantage of a structured classification is that it provides a basis for **contrastive phraseology**: we can compare how different languages express similar idiomatic concepts, and whether they do so with similar structures or different ones.

Taking **Azerbaijani** as a point of contrast (a Turkic language spoken in Azerbaijan), we find both parallels and divergences with English in phraseology. For instance, English idioms that involve animals or vivid imagery often have counterparts in Azerbaijani, but not always with the same animals or images. English says *When pigs fly* to mean "never" (an impossible time); Azerbaijani uses a different idiom – one common equivalent is *filan iş qiyamətə qaldı* literally "that thing will happen when the

apocalypse comes," effectively meaning "when hell freezes over" or "never." Here the concept (impossible time) is shared, but the imagery differs (pigs flying vs. doomsday). Structurally, English *when pigs fly* is a clause idiom; the Azerbaijani equivalent is also a clause referencing Judgment Day (a full sentential proverb). Both are non-compositional idioms.

Another example: English *to kill two birds with one stone* (achieve two goals with one action) has an Azerbaijani counterpart *bir güllə ilə iki dovşan vurmaq* – "to hit two rabbits with one bullet." The structure is identical (verb phrase idiom, with quantitative formula "kill X two Y with one Z"), but the specific animals and instruments differ (birds vs rabbits; stone vs bullet). This shows a cross-linguistic idiom mapping: same type of idiom (V+object idiom with instrumental phrase) but different lexical choices. A structured classification helps in aligning such idioms for translation or bilingual lexicography by separating the abstract form and the idiomatic meaning from the surface words.

Collocations often do not align between languages, as previously noted with the *make a decision* example across languages[26]. Azerbaijani might use a different verb or construction. Indeed, Azerbaijani for "make a decision" is *qərar vermək* (literally "to give a decision") – analogous to Turkish and many languages using "give" or "take" instead of "make." So in classification terms, both are Verb+Object collocations in their respective languages, but the collocate differs (*make* vs *vermək* "give"). Recognizing this as the same category (collocation) highlights that what differs is a lexical choice tied to each language's norms, rather than an entirely different phraseological phenomenon.

Some phraseological categories are more language-specific. **Pragmatemes**, being tied to cultural context, often vary widely. For example, Azerbaijani has the expression *Gözün aydın!* (literally "bright be your eye!") which is a pragmateme used to congratulate someone on receiving good news or recovering from illness (similar in usage to saying "Congratulations!" or "I'm happy for you" depending on context). English doesn't have a literal equivalent ("May your eye be bright" has no meaning to an English speaker), so this is a pragmateme that doesn't translate word-for-word. Instead, one would use a different expression appropriate to the context (e.g. *Good to hear!* or *That's wonderful news!*). Conversely, English *Bless you!* (after a sneeze) might be rendered in Azerbaijani simply by *Çox yaşa!* ("Live long!" – literally "live much," which is the local sneeze-response). Both fall under the category of pragmatic formula (a wish uttered after a sneeze), showing how languages fulfill the same social function with different fixed phrases.

By classifying phraseological units, we also can better document **what types of expressions each language has a lot of**. For example, English has many verbal idioms and similes, while some other languages might have more proverbial sayings or more honorific formulas. Azerbaijani (like Turkish) is rich in proverbial expressions and also has many idioms involving body parts (e.g. *başı sky idiom meaning someone is very busy – literally "his head is in the sky" or similar). If we see a structural gap – say, does Azerbaijani use binomials like English? It does, though perhaps differently (e.g.* itim-it oğlu* can be an idiomatic insult meaning "scoundrel," literally "dog and son of dog" – a binomial structure in an insult formula). Each language's phraseology can be systematically studied using the taxonomy, and differences can be categorized: some English collocations may be free combinations in Azerbaijani and vice versa, some English idioms might be expressed as single words in Azerbaijani, etc.

Such comparisons have practical relevance for **translation studies and language teaching**. Translators need to recognize phraseological units and find appropriate equivalents, which are often not literal. If an English idiom is a verb phrase idiom, the translator will look for an idiom of similar meaning in Azerbaijani, but the structure might change (maybe it's a proverb instead). Knowing the classification can help predict that "non-compositional idiom likely won't translate literally; search for an idiom or phrase with comparable function" whereas "collocation might translate word-by-word if the same concept exists, but check if a different collocate is needed."

4.3 Relevance to Theoretical Modeling (Meaning–Text, Lexical Functions, etc.)

The classification presented resonates strongly with the Meaning–Text Theory approach to the lexicon. In MTT, **lexical functions** are used to systematically describe collocations and other multi-word lexical relations (Mel'čuk et al., 1995). For example, the collocation *heavy rain* can be described by a lexical function like Magn(rain) = heavy (meaning the word *heavy* expresses a standard intensifier for *rain*). Similarly, idioms are treated as **lexical units** with a special representation. Our taxonomy's distinction between idioms, collocations, and pragmatemes aligns with the divisions used in MTT[15]. The structural aspect adds another layer that MTT does account for (in terms of syntactic representation in the Explanatory Combinatorial Dictionary, each idiom or collocation entry specifies its syntactic construction).

In computational linguistics, multiword expressions (MWEs) are recognized as a "pain in the neck" (to use the idiom) for parsing and generation. A taxonomy like ours can inform how to handle different types in natural language processing: e.g., idioms might be stored as units with an idiomatic meaning that overrides compositional analysis, collocations might be handled through statistical preferences in language models, and pragmatemes might be managed by templates or specialized modules for certain communicative contexts (like dialogue systems that use fixed polite formulas). Recent advances in AI language models actually benefit from understanding MWEs as units because it improves translation and idiomatic usage.

Another theoretical implication is for **syntax-semantics interface**: Phrases that are structurally regular but lexically fixed challenge traditional grammar, which assumes word-by-word generation. Construction Grammar, for instance, would be quite comfortable with idiomatic constructions (treating them as constructions with holistic meaning). Our structural categories could be seen as different construction types that can carry idiomatic meanings. A constructionist approach might catalog an "Idiomatic VP Construction" schema that covers many idioms, a "Binomial X and Y construction" that accounts for fixed binomials, etc. This ties in with work by Fillmore, Kay, and O'Connor (1988) on idiomatic constructions like *let alone* or *What's X doing Y?* (as in *What's this fly doing in my soup?* – a semi-productive idiom frame).

From the perspective of **semantics and cognition**, classifying by compositionality relates to how idioms are processed and stored. Psycholinguistic studies (e.g. Abel, 2003; Sprenger, Levelt & Kempen, 2006) suggest that highly familiar idioms are retrieved as wholes, while less familiar or more transparent ones might be computed or at least semantically decomposed by speakers. Our category of partial idioms corresponds to idioms that tend to be more decomposable (Nunberg et al.'s

analyzable idioms), which are often easier for people to infer and sometimes more flexible in use. Understanding these differences is key for anyone modeling mental lexicon or language acquisition: learners often struggle with pure idioms (having to just memorize them), whereas collocations require exposure and practice to notice which combinations sound "right." The taxonomy therefore also has pedagogical implications: teaching materials can organize phraseological content from more transparent collocations to more opaque idioms.

4.4 Lexicographic and Analytical Utility

For dictionary makers and corpus linguists, the integrated taxonomy offers a guide for deciding **which expressions merit inclusion** in phraseological dictionaries or as fixed entries. A dictionary of idioms might focus on the non-compositional idioms primarily, whereas a collocations dictionary (like the Oxford Collocations Dictionary or Benson's BBI Dictionary) focuses on collocations. A general learner's dictionary might mark certain collocations or include common pragmatic phrases in usage notes. By recognizing pragmatemes, lexicographers can also ensure to list those essential formulas that learners might not generate by themselves (like the fact we say *Happy Birthday* but not *Congratulations on your birthday* as a direct wish).

In linguistic analysis, having terms for these categories allows precision. Instead of vaguely saying "this phrase is idiomatic," one can say "this is a pragmatic formula" or "this is a collocational restriction." For example, in analyzing a text, one might annotate all phraseological units and classify them: results could show a text is full of clichés and idioms (perhaps a very idiomatic informal text) or perhaps mostly collocations (academic text with many technical collocations but few vivid idioms). This can yield insights into style and register.

4.5 Limitations and Further Delimitations

While our taxonomy is broad, it still may not capture every nuance. Some expressions defy easy categorization. **Phrasal verbs** like *turn up, give in, get along* are a special case: are they idioms or just part of the verb's lexicon? Phrasal verbs can range from literal (*sit down*, *come in* – compositional) to highly idiomatic (*egg someone on* – meaning "urge/encourage," where *egg on* has nothing to do with the egg). They form a continuum themselves. In our classification, a phrasal verb would just be a kind of verb phrase; we classify each case by meaning opacity. But some linguists treat phrasal verbs as a separate category of idiomaticity because the particle often contributes an aspectual or idiomatic sense that's not a full idiom but also not literal (e.g. *write up*, *clean up* where *up* adds a sense of completion). Those might be called **aspectual or aktionsart phrasemes** by some. We haven't broken those out separately, but an extended taxonomy might.

Also, our focus is synchronic (present-day usage). Historically, many idioms originated as transparent phrases (e.g. *spill the beans* might have once conjured spilling secrets metaphorically) but have since fossilized. Diachronic phraseology looks at how phrases change category over time (some collocations become idioms, idioms can sometimes become literal or lose idiomatic force – think of *awesome*, once literally "awe-inspiring," became a colloquial single word meaning "great," not phrase but a metaphor turned literal in usage).

Additionally, **register and style** influence phraseology. Some idioms are informal/slang (*shoot the breeze*), others are formal (*to whom it may concern* formula). Classifying by semantic and structural type is one dimension; an orthogonal tagging for register would further enrich description.

5. Conclusion

Phraseological units are a vital and fascinating part of the English language, sitting at the intersection of lexicon, syntax, semantics, and pragmatics. In this article, we have presented a theoretical classification system that brings together structural and semantic perspectives on English phraseology. By distinguishing the structural patterns (from verb-object constructions and noun phrases to binomials and full sentences) and the degrees of semantic compositionality (from opaque idioms to transparent collocations and context-bound formulas), we offer a two-dimensional taxonomy that can categorize any given phraseological expression in English.

This structural–semantic taxonomy clarifies how different subtypes of phraseological units relate to each other. It highlights, for instance, that an idiom like *kick the bucket* and a collocation like *kick a habit* share a syntax (verb + object) but differ profoundly in semantic transparency, while *kick the bucket* and *bite the dust* share idiomatic meaning (both meaning "to die") but differ in wording. The taxonomy thus aids in systematically comparing and contrasting phraseological units. It also underscores the continuum and gradience in phraseology: there are not always hard lines between idioms and collocations or between collocations and free combinations, but prototypical categories exist and are useful for description.

For linguistics scholars, especially in lexicology, semantics, and syntax, this classification provides a framework for analyzing phrases that behave like single units of meaning. It is directly relevant to tasks such as parsing idiomatic language, constructing dictionaries (where one must decide what multi-word entries to include), and understanding how idiomatic meaning is represented in the mental lexicon. The classification also has a cross-linguistic dimension – we briefly saw how Azerbaijani idioms and formulas compare to English ones, illustrating that while the structural–semantic types may be universal, each language populates them differently. This can inform contrastive linguistics and translation studies by providing a common reference for what kind of unit we are dealing with.

In theoretical modeling, our approach resonates with the Meaning–Text Theory's categorization of phrasemes into idioms, collocations, and clichés, and expands on it by making syntactic form an explicit part of the classification. We also touched on how such taxonomies facilitate computational handling of multiword expressions and how they align with constructional approaches to grammar.

Finally, this work emphasizes that phraseological units are not peripheral oddities of language; rather, they are central and indispensable elements, contributing to the expressive richness of English. From everyday colloquial idioms to academic collocations and polite formulas, these units reflect both the creativity and the conventionality of language use. A structured understanding of them not only benefits theoretical analysis but also has practical applications in language education (helping learners navigate idiomatic usage) and natural language processing (improving idiom recognition and translation).

In conclusion, the structural–semantic classification proposed here offers a comprehensive way to navigate the "jungle" of English phraseology. It allows us to map out the landscape of idioms and other fixed expressions with greater clarity – identifying what they mean, how they are built, and how they function – thereby contributing to a deeper understanding of the interplay between structure, meaning, and usage in the lexicon. With this foundation in place, future research can further refine each category (for instance, exploring subtypes of pragmatemes or degrees of idiom flexibility) and extend the comparative analysis to other languages, enriching the global study of phraseology.

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The Pragmatic Dimension of Personal Pronouns

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Abstract:

This study explores the pragmatic dimension of personal pronouns in Azerbaijani and English, focusing on how these linguistic units encode social status, politeness, inclusion, and speaker identity. Traditionally considered mere grammatical markers, pronouns are shown here to be crucial indicators of social relationships and communicative intent. Drawing on Speech Act Theory (Austin, 1962; Searle, 1969) and Politeness Theory (Brown & Levinson, 1987), the research analyzes how pronoun choice affects illocutionary and perlocutionary acts within discourse. Comparative examples from the Azerbaijani National Corpus and the British National Corpus illustrate that Azerbaijani explicitly encodes respect and social distance through morphological distinctions such as *sən* (informal "you") and *siz* (formal "you"), while English relies on syntactic and lexical politeness strategies. The study further discusses the inclusive and exclusive uses of *biz* ("we") in Azerbaijani, highlighting how speakers use pronouns to manage in-group and out-group relations. Findings reveal that while English achieves pragmatic variation indirectly through modal expressions and context, Azerbaijani does so directly through its pronominal system. This demonstrates that personal pronouns function as powerful pragmatic tools reflecting cultural values, politeness norms, and communicative strategies. The article contributes to the broader understanding of linguistic pragmatics, sociolinguistics, and intercultural communication.

Keywords: *pragmatics, personal pronouns, politeness, social deixis, Speech Act Theory, Azerbaijani, English, discourse analysis*

Introduction

In modern linguistics, **pragmatics** has emerged as a primary field for studying the social and functional aspects of language. One area of interest is personal pronouns. Traditionally, pronouns are viewed as grammatical markers (indicating person, number, gender), but a pragmatic perspective reveals that they are powerful tools for expressing relationships between participants in communication. For instance, in Azerbaijani the choice between **"sən"** (you – informal) and **"siz"** (you – formal) is both a grammatical and a social marker: it encodes the degree of respect, familiarity, or social distance between speaker and listener. Such nuances indicate that personal pronouns carry meaning far beyond simple reference; they help negotiate social status and emotional attitude at the linguistic level.

Key aspects of the present study include:

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- **Relevance of the study:** There is a lack of comprehensive research on the pragmatic functions of personal pronouns in Azerbaijani. Given the expansion of modern forms of communication (e.g. official correspondence, media speech, online dialogue), it is timely to reassess how personal pronouns function as social markers in contemporary linguistic behavior.

- **Purpose of the research:** The aim of this study is to identify the **pragmatic dimensions** of personal pronouns in the Azerbaijani language, revealing how pronoun usage varies with social relationships, politeness norms, and communicative intentions. A secondary aim is to compare these findings with English to highlight cross-linguistic similarities and differences.

- **Research methods:** A mixed-method approach is employed, combining discourse analysis, pragmatic analysis, comparative linguistics, and sociolinguistic observation. Within the framework of **Speech Act Theory** (Austin, 1962; Searle, 1969), the illocutionary and perlocutionary functions of pronouns are examined – in other words, how pronoun choice contributes to the intended speech act and its effect on the listener. **Politeness Theory** (Levinson, 1983; Brown & Levinson, 1987) is used to analyze pronoun choices with respect to face-saving strategies and social distance. Additionally, a comparative corpus analysis (drawing on the Azerbaijani National Corpus and the British National Corpus) explores the frequency and contexts of pronoun use across different social settings in Azerbaijani and English.

- **Scientific novelty:** This research offers a systematic analysis of personal pronouns not only as grammatical elements but also as socio-functional devices. By examining Azerbaijani in comparison to English, the study uncovers how different pronominal systems encode social structure and cultural values. Notably, the analysis highlights pragmatic nuances of Azerbaijani pronouns with concrete discourse examples, marking the first comprehensive study of this kind. The Azerbaijani–English comparison also brings to light cross-cultural differences in pronoun usage that have not been widely documented before.

Pronouns and Social Context

Personal pronouns have a rich **pragmatic dimension** that reflects various social variables: the speaker's and listener's relative social status, age, gender, level of intimacy, and the communicative context. In other words, pronouns function as tools of social deixis – they encode the social relationship between interlocutors within the language itself. A choice of pronoun can deepen the meaning of an utterance by signaling formality, familiarity, or deference. For example, addressing someone as *"siz"* (formal "you") in Azerbaijani immediately establishes a respectful distance, whereas *"sən"* (informal "you") implies closeness or equal status. As noted in pragmatic studies, personal pronouns are **capable of conveying extralinguistic categories such as politeness, respect, intimacy, and solidarity**, all of which are social-pragmatic meanings[1]. This means that beyond their grammatical role, pronouns actively participate in managing how speakers present themselves and relate to others in interaction.

Pronouns, Speech Acts, and Politeness Strategies

According to **Speech Act Theory**, every utterance has an illocutionary force (the intended meaning or act, such as requesting or asserting) and often a perlocutionary effect (its impact on the listener). Personal pronouns contribute significantly to the illocutionary force by expressing the speaker's stance and their relationship with the listener as part of the speech act. For instance, consider the request in Azerbaijani: *"Siz bu sənədi imzalayın,"* meaning "Please sign this document." Here, the pronoun **"siz"** is not just identifying the addressee; it also performs a polite request. The use of the formal pronoun mitigates the force of the imperative, conveying deference and formality. In contrast, using *"sən"* in the same request could either sound overly familiar or impolite in a formal context. Thus, pronoun selection is a key component of the illocutionary act – it helps the speaker perform the act (requesting, commanding, etc.) with the appropriate social tone.

In line with Brown and Levinson's **Politeness Theory**, pronoun choice is directly tied to face-saving strategies and the management of social distance. Pronouns can indicate whether a speaker is employing positive politeness (showing closeness and solidarity) or negative politeness (showing respect and deference to the addressee's desire not to be imposed upon). In Azerbaijani, *"sən"* usually signals intimacy or equal footing (a positive-politeness approach when used among friends or family), whereas *"siz"* is a negative-politeness strategy to maintain formality and respect[2]. Speakers switch between these forms depending on context: for example, one might use *"sən"* with close friends (to emphasize camaraderie and minimize distance) but switch to *"siz"* when addressing a stranger, an elder, or in a professional setting to honor the addressee's social face. This pragmatic shifting of pronouns allows speakers to perform **facework** – the ongoing work of managing one's own and others' face (self-esteem and autonomy) in conversation.

It is noteworthy that what pronouns accomplish in Azerbaijani through morphology (i.e. using different pronoun forms) is often achieved in English through other politeness strategies. English lacks a T/V distinction (the equivalent of informal vs. formal "you"), so **all** second-person address uses "you." To compensate, English speakers rely on tone, phrasing, and additional words to convey respect or familiarity. For example, an English speaker might say *"Could you please help me with this?"* – the addition of "could" and "please," along with a polite intonation, fulfills a similar polite illocutionary function as the use of *"siz"* in Azerbaijani *"Siz mənə kömək edə bilərsinizmi?"* ("Could you help me?"). In both cases, the pragmatic effect is a respectful request, but the **linguistic means** differ: Azerbaijani encodes politeness in the pronoun itself, while English uses **indirectness and politeness markers** in the surrounding language to achieve the same end.

Inclusive vs. Exclusive "We"

Pragmatic nuances of pronouns are also evident in the use of the first-person plural **"biz"** (we) in Azerbaijani. This pronoun can have two different inclusivity scopes, which the speaker chooses deliberately to shape the social relationship:

- **Inclusive "we":** *"Biz sabah görüşəcəyik"* – literally "We will meet tomorrow" – in context can mean *"You and I will meet tomorrow."* Here, **"biz"** includes both the speaker and the listener. Using inclusive "we" can create a sense of togetherness or shared intent. It minimizes distance by linguistically uniting the speaker and listener in the same group or action.

- **Exclusive "we":** *"Biz qərara gəldik"* – "We have decided" – might be said by a speaker to refer to themselves and some third party (e.g., their team or superiors), **excluding** the listener. In this case, **"biz"** does not include the person being spoken to. Exclusive "we" can serve to establish a boundary or even a subtle hierarchy (e.g. indicating that a decision was made by an authority group that the listener is not part of).

This inclusive/exclusive distinction in "we" reflects the speaker's pragmatic intentions. Choosing one or the other can either **draw the listener in** as part of an in-group or **distance the listener** by placing them outside the decision-making group. The fact that the same pronoun form carries these two interpretations underscores how context and shared knowledge are crucial in pragmatics: speakers rely on context to clarify whether "we" is meant to foster solidarity or to delineate roles. While English does not have separate words for inclusive vs. exclusive "we," the concept can be conveyed implicitly (for instance, "we (all of us here)" vs. "we (my organization)"). The deliberate use of "we" in political or organizational speech often mirrors this strategy in English as well, as the next section discusses.

Pronouns in Discourse and Identity

Beyond sentence-level interactions, personal pronouns play a pivotal role in **discourse** – especially in constructing social identities and conveying ideology. Discourse analysis shows that pronouns can index group membership and attitude. For example, in political speeches and media statements, speakers often use **"we"** to signal unity or collective identity. Phrases like *"Biz güclü dövlət quracağıq"* ("We will build a strong state") allow the speaker (e.g., a political leader) to align themselves with the people, creating an inclusive sense of *"we the nation."* This use of **"biz"** fosters collective solidarity and implies shared responsibility for future actions or goals. In contrast, the pronoun **"onlar"** ("they") might be used to delineate an out-group or opposition. A sentence such as *"Onlar bizim inkişafımıza mane olurlar"* ("They hinder our development") uses *"onlar"* to otherize and distance a certain group, attributing negative actions to them. Pragmatically, this **we vs. they** dichotomy in discourse is a powerful strategy: *"we"* creates camaraderie and shared purpose, while *"they"* can assign blame or highlight conflict. These pronoun choices subtly encode relationships between social groups and can influence how audiences align themselves (with *"us"* against *"them"*).

Pronouns in discourse also determine the speaker's **stance and level of responsibility**. The use of **"I"** (Azerbaijani *"mən"*) versus **"we"** can signal whether the speaker is expressing a personal opinion or representing a group consensus. *"Mən"* emphasizes individual agency and accountability ("I think…", "I will…"), which can be powerful in personal testimony or when a speaker wants to take direct responsibility. On the other hand, *"biz"* distributes responsibility across the group ("We believe…", "We have decided…"), which can either imply strength in numbers or, conversely, dilute personal responsibility. In organizational communication or diplomatic language, opting for *"we"* instead of *"I"* is a common pragmatic strategy to present a united front or to speak on behalf of an institution.

In everyday conversation, these distinctions manifest in simpler ways as well. Consider the question "Where are you going?" in Azerbaijani: one could ask *"Sən hara gedirsən?"* or *"Siz hara gedirsiniz?"* Both sentences seek the same information, but the pronoun choice (*sən* vs. *siz*) conveys a **different tone**

and relationship. The first version is used among friends, family, or peers (informal, signaling closeness), whereas the second is appropriate for a stranger, elder, or superior (formal, signaling respect). Thus, even a straightforward inquiry carries an additional layer of meaning delivered by the pronoun. The **communicative intent** (to ask a question) remains constant, but the **pragmatic framing** differs with social context. Such examples reinforce that personal pronouns function as **regulators of social interaction**: by simply choosing one pronoun over another, speakers navigate cultural norms of politeness and familiarity in real time.

Cross-Linguistic Differences: Azerbaijani vs. English

A comparative look at Azerbaijani and English highlights how languages encode politeness and social relations through pronouns in different ways. Azerbaijani, like many languages (such as French, Russian, or Japanese), has explicit **politeness distinctions in pronouns**. The **second-person singular** is split between an informal form (*sən*) and a formal form (*siz*), as discussed. This **T–V distinction** (from the Latin *tu* vs. *vos*) allows the speaker to directly encode the level of respect or familiarity in the pronoun itself. English, by contrast, has no such distinction in modern usage – **"you"** serves as the pronoun for any addressee, regardless of the social relationship. Historically, English once had *"thou"* (informal) and *"you"* (formal/plural) distinctions, but these faded by the 18th century[3][4]. Today, English relies on *other linguistic strategies* to convey formality or informality. These strategies include using polite modal verbs (*"could you, would you…"*), honorific titles or names (e.g. "Sir," "Madam," or Mr./Dr. + surname), and polite expressions (*"please," "excuse me,"* etc.), as well as an appropriate tone of voice.

The consequence of this structural difference is that Azerbaijani speakers make **pragmatic choices at the level of pronoun morphology**, whereas English speakers make them at the level of syntax or word choice. In Azerbaijani, failing to use *"siz"* when the situation calls for it can be perceived as a social faux pas or an act of disrespect. In English, since there is no alternate pronoun, inappropriate familiarity or respect is signaled through other missteps (such as using first names too soon, or speaking in an overly direct manner). Essentially, **Azerbaijani encodes respect and social distance overtly**, while **English tends to do so indirectly**. For example, an Azerbaijani speaker might say *"Siz bu məsələni izah edə bilərsinizmi?"* – literally "Can you explain this issue?" – where *"siz"* and the polite verb form signal respect. An English speaker in a similar formal scenario would achieve the same politeness effect with a sentence like *"Could you please explain this issue?"* (no special pronoun, but using a polite question form with *could* and *please*). Both utterances fulfill the pragmatic goal of showing deference, but through different linguistic means[5].

Cultural values also influence pronominal usage in each language. Azerbaijani culture, often described as **collectivist**, places a strong emphasis on respect for elders, family hierarchy, and group harmony. The language mirrors these values: the respectful *"siz"* form and the inclusive *"biz"* highlight community, togetherness, and acknowledgment of social roles. By contrast, cultures like those of the United Kingdom and the United States are often characterized as more **individualist**, valuing directness and individual identity. English reflects this by heavily using "I" statements and lacking obligatory markers of formality in everyday address. Interestingly, linguistic research suggests that in many traditionally collectivist societies, even the grammar can evolve to downplay the individual – for

instance, some collectivist languages are **"pronoun-dropping"**, allowing speakers to omit the subject pronoun "I" because it is understood in context. This omission, in effect, *de-emphasizes the individual self* in speech[5]. Azerbaijani itself is a pro-drop language (the verb endings often indicate the subject, so pronouns can be left out), which aligns with this tendency. In English, pronoun use is mandatory, and saying "I" is necessary even when context is clear – a feature that dovetails with a cultural tilt towards asserting one's individual presence.

Overall, the **pragmatic load** carried by pronouns is significant in both languages, but it manifests differently. Azerbaijani's pronominal system explicitly marks nuances of respect and number (singular/plural) with separate forms, whereas English relies on uniform pronouns combined with **contextual and lexical cues**. Both languages use pronouns as a means of defining the self and the other in interaction, performing what could be called *self-presentation* and *other-presentation* functions. In Azerbaijani, this may be immediately apparent through word choice (pronoun form), while in English it emerges through subtle shifts in phrasing and context.

Conclusion

In conclusion, personal pronouns are not merely grammatical placeholders or simple reference tools – they are **dynamic regulators of social and communicative relations**. This study has shown that in Azerbaijani, the choice of a personal pronoun inherently reflects social relationships, politeness norms, and even cultural values. By saying *"sən"* versus *"siz,"* a speaker indicates how they perceive the relationship (close or distant, informal or formal) and aligns with cultural expectations of respect. Similarly, choosing *"mən"* (I) or *"biz"* (we) allows speakers to craft a personal or collective identity in discourse, thereby adjusting the level of personal responsibility or solidarity expressed. In English, although the pronoun forms themselves do not change with context, pronouns still play a crucial pragmatic role. English speakers achieve the same ends – marking politeness, formality, or group identity – through context, tone, and additional wording rather than morphological changes. Thus, whether directly or indirectly, pronouns in both languages perform the essential function of defining the **relationship between speaker and listener** within an utterance.

The findings underscore that personal pronouns bridge **language and social behavior**. What might appear to be a small grammatical choice actually encodes a wealth of information about the social context and the speaker's communicative intentions. This research's novelty lies in its comparative approach: by systematically analyzing Azerbaijani pronouns through a pragmatic lens and juxtaposing them with English usage, we have identified clear links between pronominal forms and cultural communication patterns. Azerbaijani explicitly encodes distinctions of respect and collectivity in pronouns, whereas English relies on pragmatic strategies to convey similar meanings. These insights have practical implications for fields like sociolinguistics (understanding language in its social context), language education (teaching appropriate pronoun use and politeness strategies to learners), and translation studies (accurately conveying the tone of pronouns between languages).

In summary, personal pronouns should be viewed as **pragmatic instruments** as much as grammatical ones. They shape how we project ourselves (our identity, authority, solidarity) and how we acknowledge others in interaction. Future research could build on this study by exploring emotional

and **psychopragmatic** aspects of pronoun use (for example, how pronoun choice might convey empathy or sarcasm), as well as examining pronoun usage in emerging communication mediums like social media. As languages evolve and modes of communication expand, the pragmatic dimension of pronouns will remain a key factor in how we navigate social relationships through language.

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Combating Cybercrime: Legal Aspects, Practical Challenges, and Solutions

[1] Aysel Najafli

Abstract:

The rapid development of digital technologies has not only transformed many aspects of society positively but has also generated new and complex legal challenges. Among the most serious of these is the expansion and globalization of cybercrime. As a phenomenon that transcends borders and falls outside the scope of traditional legal frameworks, cybercrime poses significant challenges to modern legal systems. This article examines the international nature of cybercrime, existing legal regulations in this field, opportunities for international cooperation, as well as the growing dynamics of cybercrime and cybersecurity issues in the era of artificial intelligence. Furthermore, it assesses the effectiveness of current normative frameworks and proposes recommendations for improving legal regulations in the future. It highlights the transnational nature of cybercrime and the need for coordinated international legal frameworks, such as the Budapest Convention. The article also discusses practical challenges in combating cybercrime (e.g., evidence collection and jurisdictional issues), reviews notable incidents (like the WannaCry and NotPetya attacks and the Cambridge Analytica scandal), and explores emerging threats including AI-enabled cyberattacks and cyberbullying. Finally, the effectiveness of existing laws and recent developments – from human rights court precedents to national strategies – are evaluated to recommend future-focused legal and policy solutions.

Keywords: *Cybercrime; Digital Threats; Transnational Crimes; Cyberbullying; Legal Regulation; Budapest Convention*

Introduction

In the digital age, the exploitation of computer networks and data for malicious purposes has created unprecedented legal challenges. **Cybercrime** generally encompasses illegal acts carried out via computer systems or the internet – from traditional offenses like fraud and theft committed online to novel crimes unique to the digital realm. These offenses are often global in reach, anonymous in nature, and technically sophisticated, complicating their detection and prosecution. Conversely, **cybersecurity** refers to the protections (technical, organizational, and legal) put in place to safeguard data and systems against such threats. Cybercrime and cybersecurity are two sides of the same coin: the former represents evolving threats, while the latter embodies the responses and preventive measures to those threats.

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Modern legal systems must adapt to the borderless character of cybercrime. Offenses committed in cyberspace frequently transcend national jurisdictions, undermining laws that are traditionally bound to territory. This has led to increased international cooperation and the creation of frameworks like the Council of Europe's *Budapest Convention on Cybercrime*, which provides a baseline for harmonizing cybercrime definitions and facilitating cross-border investigative assistance. At the same time, countries are developing national laws and strategies to protect their information space and critical infrastructure.

Addressing cybercrime is not only a technical endeavor but also a legal and societal one. Law enforcement agencies worldwide face practical difficulties in gathering electronic evidence and identifying perpetrators who exploit encryption and anonymization tools. High-profile incidents – from ransomware attacks such as WannaCry and NotPetya to large-scale data breaches like the Facebook–Cambridge Analytica scandal – have exposed gaps in readiness and regulation. Moreover, the advent of artificial intelligence (AI) is spawning new cybercrime techniques (e.g., AI-generated deepfake fraud) that existing laws struggle to cover. In the social sphere, the proliferation of cyberbullying demonstrates how digital technologies can facilitate new forms of harassment that demand legal attention.

Against this backdrop, this article examines the legal aspects of combating cybercrime, the practical challenges faced by practitioners, and potential solutions. It analyzes the efficacy of current international and national legal instruments, discusses developments in case law (including human rights implications), and explores strategies to enhance cybersecurity and resilience in the face of growing digital threats.

1. Cybercrime and Cybersecurity: Concept and Scope

The concept of cybercrime in the modern era represents a multifaceted phenomenon at the intersection of legal and technological domains. In general terms, cybercrime refers to all unlawful acts committed through computer systems, networks, and digital data. These crimes not only manifest as technological iterations of traditional offenses (e.g. fraud or theft committed via digital means) but also encompass entirely novel forms of crime unique to the digital environment and previously unknown to legal practice. Cybercrime is typically divided into several main categories:

- Crimes against computers (e.g., unauthorized system intrusion, dissemination of viruses);
- Crimes committed through computers (e.g., cyber fraud, online scams, cyberstalking);
- Illegal acquisition and dissemination of information (e.g., theft of personal data);
- Attacks targeting public and national security (e.g., cyberterrorism, assaults on critical infrastructure).

The specific characteristics of crimes committed in cyberspace – such as anonymity, global reach, and high technical complexity – significantly complicate their detection and prosecution. The role of international law in this field is becoming increasingly important; however, legal mechanisms in many jurisdictions remain incomplete or inconsistent.

Cybersecurity, on the other hand, refers to the combination of technical, organizational, and legal measures aimed at protecting data, systems, and networks in the digital environment. It extends beyond technical safeguards to include legal regulations, international conventions, and mechanisms for interstate cooperation. There is a mutual interconnection between these two concepts: cybercrime functions as a threat-generating phenomenon, while cybersecurity serves as the response mechanism to such threats. Consequently, they are often addressed in parallel within legislation and international legal instruments.

The scope of issues surrounding cybercrime and cybersecurity continues to expand, affecting all actors ranging from individual users to corporations, state authorities, and international organizations. This reality necessitates regulatory approaches not only at the national level but also at the international level.

2. International Legal Regulations: The Council of Europe Convention on Cybercrime (Budapest Convention)

Emerging technologies pose significant challenges for legal regulation. Information and communications now flow easily and rapidly worldwide, and physical borders no longer impede these interactions. Offenders increasingly operate far from the locations where their crimes have effects. However, national laws typically apply only within limited geographic boundaries. Consequently, there is a pressing need for solutions at the level of international law and the adoption of relevant international instruments.

According to the Convention's Explanatory Report, Recommendation No. (89) 9 of the Council of Europe (1989) helped harmonize national legal approaches to certain computer-related abuses (Council of Europe, 2001b). Nevertheless, to effectively combat new forms of crime in this sphere, a legally binding international instrument was required. Such an instrument needed to address not only measures for international cooperation but also substantive and procedural legal issues, as well as matters directly related to the use of information technologies (Council of Europe, 2001b).

Based on these considerations, the Budapest Convention on Cybercrime was developed with respect for human rights in the context of the emerging information society. The Budapest Convention was adopted on November 23, 2001, and remains the first – and still the most comprehensive – international legal document in this field. Its main objectives include:

- Preventing unauthorized access to computer systems;
- Ensuring the protection of data and systems;
- Strengthening interstate cooperation;
- Regulating procedures for obtaining and sharing electronic evidence.

For the purposes of the Convention, key terms are defined as follows (Council of Europe, 2001a):

a) **"computer system"** means any device or group of interconnected or related devices, one or more of which, pursuant to a program, perform automatic processing of data;
b) **"computer data"** means any representation of facts, information, or concepts in a form suitable

for processing in a computer system, including a program that can cause a computer system to perform a function;

c) **"service provider"** means (i) any public or private entity that provides to users of its service the ability to communicate by means of a computer system, and (ii) any other entity that processes or stores computer data on behalf of such communication service or users of such service;

d) **"traffic data"** means any computer data relating to a communication by means of a computer system, generated by a computer system that formed a part in the chain of communication, indicating the communication's origin, destination, route, time, date, size, duration, or type of underlying service.

The offenses established under the Convention are categorized into four main groups:

- Offenses against the confidentiality, integrity, and availability of computer data and systems (Article 2 – illegal access; Article 3 – illegal interception; Article 4 – data interference; Article 5 – system interference; Article 6 – misuse of devices);

- Offenses related to the use of computer tools (Article 7 – computer-related forgery; Article 8 – computer-related fraud);

- Content-related offenses (Article 9 – offenses related to child pornography);

- Offenses related to intellectual property rights (offenses involving infringement of copyright and related rights).

The Convention also provides a comprehensive framework for criminal liability and sanctions, procedural law measures (such as preservation of stored data and expedited disclosure of traffic data), and mechanisms of international cooperation. It sets out principles for extradition and mutual legal assistance among parties, and it strives to synchronize member states' approaches to cybercrime and electronic evidence. These provisions collectively facilitate more effective cross-border investigation and prosecution of cybercriminals, addressing issues that were previously beyond the reach of any single nation's legal system (Council of Europe, 2001a).

3. The Transnational Nature of Cybercrime

Due to the globalization of information technology and digital networks, cybercriminals can operate from one country while targeting individuals, organizations, or even critical infrastructure in another. Such offenses frequently involve multiple states with different jurisdictions simultaneously, creating serious challenges for traditional criminal law mechanisms.

Criminal law must therefore evolve in line with technological advancements, as opportunities to abuse cyberspace have become highly complex and often well-organized, with the potential to cause significant harm to legitimate interests. Considering the inherently cross-border nature of the internet, combating such abuses requires joint and coordinated efforts at the international level (Council of Europe, 2001b).

Transnational cybercrimes are typically characterized by several features:

- The perpetrator is located in a different country than the victim or the targeted system;

- The commission of the offense involves servers and data transmission channels spanning multiple countries;
- Differing legal definitions of offenses and penalties across jurisdictions complicate the application of criminal law;
- Real-time cooperation between law enforcement agencies is often slower than the rapid pace of technological change, hindering timely evidence collection.

For these reasons, combating cybercrime is not feasible solely at the national level; it requires international legal frameworks and the joint implementation of effective mechanisms. In this context, the Budapest Convention – as the only binding international instrument specifically on cybercrime – aims to strengthen legal cooperation among member states, harmonize legal definitions, and standardize procedures for evidence gathering. Despite its importance, universal adoption of the Convention has not yet been achieved, and some major countries remain outside this framework, which continues to pose challenges for truly global enforcement.

4. Practical Difficulties in Combating Cybercrime

One of the primary difficulties in combating cybercrime lies in the collection and preservation of digital evidence. Electronic traces can be erased or manipulated quickly. For instance, in cases involving the theft of bank funds through hacking, law enforcement must gather perpetrators' IP addresses, server logs, and transaction records. Doing so requires technical expertise and strict adherence to legal procedures (to ensure evidence admissibility). Without international cooperation, investigating cross-border cybercrimes is nearly impossible, as crucial data often resides on servers in foreign jurisdictions.

The anonymity of perpetrators and their transnational operations pose additional obstacles. Cybercrimes are often carried out remotely, with hackers concealing their identities using virtual private networks (VPNs), proxy servers, the Tor network, and other anonymization tools. This not only complicates the efforts of national law enforcement agencies but also hampers international information exchange. For example, incidents of cyberbullying or personal data leaks on social networks may be orchestrated via foreign servers, making it difficult for a victim's local authorities to take direct action without assistance from abroad.

A further challenge arises from insufficient technical capacity within some law enforcement bodies. Inadequate training and a shortage of specialists in computer forensics and cybersecurity can hinder the prevention of cybercrimes and the effective analysis of digital evidence. Thus, developing professional expertise and modernizing investigative tools are of paramount importance. Police and forensic units need up-to-date technology and skills to trace sophisticated attacks, decrypt data, and attribute actions to specific actors.

Finally, the level of public awareness plays a crucial role in combating cybercrime. When citizens and organizations lack knowledge about basic cybersecurity practices – such as protecting personal data, using strong authentication, or recognizing phishing attempts – they inadvertently increase their vulnerability and complicate the work of law enforcement. For instance, inadequate user awareness

about phishing emails or fraudulent social media messages can lead to identity theft or financial fraud on a large scale. This underscores the need for widespread cybersecurity education campaigns and legal literacy initiatives. In short, improving public awareness and cyber hygiene is an essential preventive strategy complementing law enforcement efforts.

5. Real-World Examples of Cybercrime and International Responses

The dangers posed by cybercrime to society and legal systems have been vividly illustrated by several high-profile incidents. These cases have drawn international attention to both the legal and technological dimensions of combating digital crime:

- **WannaCry Attack (2017)** – The WannaCry ransomware attack in May 2017 was one of the most impactful cybercrime incidents worldwide. It was executed via a cryptoworm known as "WannaCry," which targeted computers running the Microsoft Windows operating system. WannaCry encrypted users' files and demanded ransom payments in Bitcoin to restore access. The attack crippled hundreds of thousands of computer systems across more than 150 countries. It hit the healthcare sector particularly hard; for example, hospitals within the UK's National Health Service (NHS) were forced to suspend operations (Whittaker, 2019). This incident demonstrated that cybercrime poses not only technical and economic risks but also direct threats to human welfare and safety.

- **Stuxnet Virus (2010)** – Stuxnet is a malicious computer worm discovered in 2010, believed to have been used as a cyber-weapon against Iran's nuclear facilities. It specifically targeted industrial control systems (SCADA systems), causing physical disruption to uranium enrichment processes. The sophistication of Stuxnet stunned cybersecurity experts, as it exploited multiple zero-day vulnerabilities and even sabotage of industrial equipment. This event showed that cybercrime (or cyber warfare) is no longer limited to fraud or data theft; cyberattacks can directly threaten national security and critical infrastructure. Stuxnet also sparked significant legal debate over the definitions of cyberterrorism and state-sponsored cyber warfare (CERT-IST, 2010).

- **NotPetya Attack (2016–2017)** – Petya is a family of ransomware-like malware first detected in 2016. It infects the master boot record of Windows systems, encrypts the file system table, and prevents the operating system from loading, then demands a Bitcoin ransom to undo the damage. In June 2017, a particularly destructive variant known as NotPetya was unleashed as part of a global cyberattack, primarily targeting businesses and government agencies in Ukraine. The malware spread rapidly via software update supply chains, causing widespread disruption (e.g., crippling ports and corporate networks around the world) (Greenberg, 2018). NotPetya's indiscriminate damage – estimated in the billions of dollars – highlighted the need for international norms and stronger defenses against state-linked cyber operations.

- **Cambridge Analytica Scandal (2018)** – This incident involved the unlawful collection of personal data from millions of Facebook users by the British consulting firm Cambridge Analytica for the purposes of political advertising and influence. The data was harvested

through a third-party Facebook application ("This Is Your Digital Life") developed in 2013 by a researcher, which collected not only quiz participants' data but also that of their friends. In early 2018, revelations about Cambridge Analytica's use of these data (without proper consent) for targeted political campaigns provoked a global debate on privacy and data protection. The scandal exposed legal gaps concerning the misuse of personal data, violations of privacy, and inadequate enforcement of information rights, while also highlighting the vulnerability of digital democratic processes to manipulation (Meredith, 2018). It directly influenced the strengthening of data protection laws (such as the EU's GDPR) and raised awareness of the importance of cybersecurity in protecting electoral integrity.

6. Cybercrime in the Age of Artificial Intelligence: Emerging Threats and Legal Challenges

The rise of artificial intelligence (AI) is profoundly transforming the landscape of cybercrime. Whereas many cybercrimes in the past were carried out manually by individuals or small groups, AI now enables perpetrators to conduct attacks that are faster, larger in scale, and more automated than ever.

AI provides cybercriminals with significant new capabilities across multiple dimensions:

- **Identity theft and blackmail via deepfakes:** AI-driven "deepfake" technology can generate highly realistic fake images, audio, or video of real people. Perpetrators can use deepfakes to impersonate individuals for fraudulent purposes or to create false compromising material for extortion and defamation. For example, an AI-generated video could falsely depict a person committing an embarrassing act, which criminals might use to blackmail the victim. Such cases blur the line between truth and fabrication, complicating legal standards of evidence and personal reputation rights.

- **Automated phishing and social engineering:** AI algorithms can sift through social media and other data to craft extremely convincing, personalized phishing emails or messages. These AI-generated phishing attacks can adapt language and tactics in real time to trick even tech-savvy users into divulging credentials or installing malware. The scale of phishing campaigns has increased as AI allows attackers to target thousands of individuals with tailored bait, undermining traditional user education countermeasures.

- **Adaptive malware:** AI-powered malware can learn and evolve to evade detection. Such "smart" malicious software might automatically test a target's defense systems, alter its behavior to avoid antivirus signatures, and even repair or re-encrypt itself if partially removed. This self-learning malware is harder for law enforcement and cybersecurity professionals to analyze, as it may not exhibit consistent patterns. It challenges existing legal frameworks that rely on identifying and classifying malware based on known signatures or behaviors.

- **Advanced social engineering and surveillance:** AI can analyze a person's online presence and communication style to mimic them (for impersonation) or to better predict their actions. For instance, AI tools could manage large numbers of fake social media accounts (bots) that interact with users in a seemingly authentic way, increasing the effectiveness of propaganda,

fraud, or recruitment for criminal activities. The ethical and legal implications of AI-driven social engineering are significant, raising questions about liability when algorithms, rather than humans, generate harmful content or deceits.

The use of AI in cybercrime raises several legal and ethical challenges for regulators and law enforcement:

- **Criminal liability for AI agents:** Traditional criminal law assumes a human perpetrator with intent. If an autonomous AI system commits an offense (for example, an AI bot carrying out an attack without direct real-time human commands), it becomes unclear who is legally responsible. Is it the owner of the system, the programmer who created the algorithm, or the user who deployed it? Legal systems have yet to establish clear accountability for harms caused by semi-autonomous or autonomous agents.

- **Attribution and evidence:** AI-enabled offenses may execute without leaving clear traces that point to a specific individual. An AI that continually modifies its code can make forensic analysis extremely difficult, complicating the collection of evidence that meets courtroom standards. Ensuring due process and the right to a fair trial becomes challenging when evidence is largely circumstantial or based on complex technical inference about AI behavior.

- **Regulatory gaps:** Currently, no universally accepted international legal framework specifically addresses cybercrimes committed using AI. National laws lag behind the technology; definitions of cybercrime may need expansion to cover new AI-driven modus operandi. International cooperation is also hindered by the novelty of these threats – countries are only beginning to discuss norms for the malicious use of AI in cyberspace.

In summary, the advent of AI necessitates proactive adaptation of the law. Legislators and international bodies will need to craft rules that encourage the beneficial uses of AI while penalizing and preventing its criminal abuses. This includes updating cybercrime laws to cover AI-generated content and perhaps establishing new standards for AI system accountability. As with earlier generations of cyber threats, a combination of technological, legal, and educational measures will be required to address the emerging challenges of the AI era.

7. Cyberbullying: A New Digital Form of Violence

Cyberbullying is a form of interpersonal harm that has emerged alongside the expansion of digital communication, essentially representing the online manifestation of traditional bullying behaviors. The term generally encompasses actions carried out through the internet, social media platforms, messaging apps, online games, and other digital tools with the intent to harass, humiliate, threaten, or socially exclude an individual (UNICEF, 2020).

Key characteristics of cyberbullying include:

- **Persistence:** Harmful messages, images, or posts can remain accessible online indefinitely, potentially causing long-term distress to the victim. Even after the abuse stops, previously shared content can continue to inflict harm by resurfacing or being further disseminated.

- **Anonymity:** Perpetrators often hide behind fake profiles or screen names, making it difficult for victims (and authorities) to identify and confront them. This perceived anonymity can embolden individuals to say or do things online that they would refrain from in person, often escalating the severity of abuse.

- **Borderlessness:** Cyberbullying can occur at any time of day and irrespective of location. A victim might be targeted while at home, in school, or anywhere with internet access. Because digital communications easily cross geographic boundaries, jurisdictional issues arise when, for instance, a bully in one country targets a victim in another.

In many countries, cyberbullying is not explicitly codified as a separate criminal offense. Instead, abusive online behaviors are prosecuted under existing laws such as those against harassment, defamation, intimidation, breach of privacy, or hate speech. However, there is a growing recognition that cyberbullying has unique facets that may require specific legal measures. Some jurisdictions have enacted targeted legislation:

- **Singapore:** The Protection from Harassment Act 2014 (POHA) in Singapore addresses various forms of harassment and anti-social behavior, explicitly including online harassment and stalking. Under POHA, victims of cyberbullying can seek protection orders, and perpetrators of electronic harassment or harmful communications can face criminal charges or fines (Ministry of Law Singapore, 2014).

- **New Zealand:** The Harmful Digital Communications Act 2015 (HDCA) was enacted to mitigate harm caused by digital communications. It established both civil and criminal remedies for serious online harassment, bullying, and the spread of harmful content. The Act provides measures such as court orders to take down offending material and criminalizes egregious cases (e.g., sending messages or posting material intended to cause serious emotional distress) (New Zealand Legislation, 2015).

Effectively addressing cyberbullying requires a multifaceted approach, as its impacts are psychological, social, and legal:

- **Psychological consequences:** Victims – especially children and adolescents – may suffer significant emotional and mental health effects. These include anxiety, depression, lowered self-esteem, feelings of humiliation, and even suicidal thoughts. Because the abuse can be ubiquitous and unrelenting (victims may feel there is "no escape," even at home), the resulting trauma can be severe. Long-term exposure to cyberbullying has been linked to self-harm and, tragically, youth suicides.

- **Social and educational consequences:** Cyberbullying can lead to withdrawal from social interaction and activities. Victims often experience strained relationships with friends or peers and may avoid school or work environments associated with the bullying. In academic settings, targeted students frequently show decreased concentration, declining performance, and higher absenteeism. The overall school or community climate can suffer when cyberbullying is widespread or tacitly tolerated, eroding trust and a sense of safety among members.

- **Legal consequences:** Depending on the nature of the behavior, cyberbullying incidents may violate civil or criminal laws. Online harassment might incur civil liability for defamation or invasion of privacy, especially if false statements or personal data are spread. More severe actions – such as credible threats of violence, sexual exploitation, hate-motivated abuse, or encouragement of self-harm – can trigger criminal charges under laws concerning threats, extortion, hate speech, or child protection. Notably, when bullying content is publicly posted, it complicates issues of content moderation and platform responsibility. Jurisdictions are increasingly holding social media companies accountable to remove or address harmful content quickly, and some legal systems allow victims to obtain court orders against both bullies and platform providers.

In summary, cyberbullying exemplifies how traditional social problems adapt to new technologies. While it extends familiar patterns of aggression into the online domain, its unique attributes demand enhanced awareness, updated legal tools, and active prevention efforts by schools, parents, tech companies, and lawmakers.

8. Cybercrime in the Context of European Court of Human Rights Precedents

Although the European Convention on Human Rights (ECHR) does not contain a provision explicitly addressing cybercrime, the European Court of Human Rights (ECtHR) has dealt with cases related to cybercrime issues through the lens of existing rights – primarily **Article 8** (right to respect for private and family life) and **Article 10** (freedom of expression). Key judgments illustrate how the Court balances state responsibilities and individual rights in the digital realm:

Article 8 – Right to Respect for Private Life

- *K.U. v. Finland* – This 2008 case is a landmark ECtHR precedent concerning online privacy, child protection, and the positive obligations of the state. An unknown person had posted a sexually suggestive advertisement on an internet dating site posing as a 12-year-old boy (the applicant, K.U.). Due to limitations in Finnish law at the time, the police were unable to compel the service provider to reveal the identity of the person who posted the ad, and the perpetrator remained unidentified. The Court unanimously found that Finland had violated the child's right to private life under Article 8. The judgment emphasized that children's privacy and safety online are matters of particularly acute state concern. The Court held that Article 8 can imply a **positive obligation** on states to enact laws that effectively protect individuals (especially minors) against serious invasions of privacy or other harms via the internet. In this case, Finland's failure to have a mechanism to identify the offender (due to strict data protection laws shielding the ISP from disclosure) left the child without an effective

remedy, amounting to a violation of the Convention (European Court of Human Rights, 2008). K.U. v. Finland thus underscores that maintaining anonymity on the internet should be balanced against the need to protect vulnerable users from criminal exploitation.

- *Benedik v. Slovenia* – In this 2018 case, the ECtHR examined whether a user's IP address falls under the protection of private life. Slovenian police, investigating criminal activity on the internet, obtained an individual's IP address from his internet service provider without a court order. Using the IP information, they identified and prosecuted the user (the applicant, Benedik). The Court found that even though an IP address is a sequence of numbers, it can be linked to a specific person's internet usage and thus to their private life. An IP address was deemed **personal data** protected by Article 8. The ECtHR concluded that law enforcement's access to subscriber information behind an IP address interfered with the user's private life. Moreover, the interference was not "in accordance with the law" because Slovenian law lacked clear and sufficient safeguards regulating such access. The case established that individuals have a reasonable expectation of privacy in their online anonymity, and states must provide proper legal procedures (like judicial authorization or other independent oversight) before unmasking an internet user's identity (European Court of Human Rights, 2018). Benedik v. Slovenia highlights the need for Cybercrime enforcement to respect data protection principles and due process.

Article 10 – Freedom of Expression

- *Delfi AS v. Estonia* – Decided by the Grand Chamber in 2015, this is a seminal case on intermediary liability and online speech. Delfi AS operated one of Estonia's largest news websites, which allowed readers to post anonymous comments under news articles. In 2006, an article about a ferry company drew numerous user comments, including highly offensive threats and hate speech directed at the ferry operator and others. Delfi's platform automatically published comments with minimal filtering and only removed them if notified of illegal content. The ferry operator sued Delfi, and Estonian courts found the company liable for failing to promptly remove the unlawful comments. Delfi AS appealed to the ECtHR, arguing that holding it liable violated its freedom of expression under Article 10. The ECtHR, however, upheld the national courts' decisions. It reasoned that Delfi was not a passive, neutral intermediary (like an internet platform that merely stores third-party content); rather, Delfi integrated the comments into its news service and had a degree of control (through the content management system and potential for moderation). The Grand Chamber held that imposing liability on Delfi for clearly unlawful comments (especially when the platform failed to promptly remove egregious hate speech after publication) was a justified and proportionate interference with Delfi's Article 10 rights (European Court of Human Rights, 2015). This ruling does not mean all platforms are liable for user comments, but it establishes that under certain conditions, online portals have a duty of care to address hate speech or threats in their comment sections. The Delfi case has been influential in the ongoing debate about regulating user-generated content, and it illustrates how freedom of expression online is not absolute – it does not protect speech that amounts to hate speech or incitement of violence.

In summary, ECtHR jurisprudence demonstrates that while cyber-specific provisions are absent in the ECHR, the existing human rights framework is being interpreted to address cyber issues. States have both **negative obligations** (to refrain from infringing on rights arbitrarily when fighting cybercrime) and **positive obligations** (to actively protect individuals from cyber threats). The Court's decisions urge a balance between upholding fundamental rights – like privacy and free expression – and enabling effective responses to cybercrime. Additionally, other Convention articles such as **Article 6** (right to a fair trial) and **Article 13** (right to an effective remedy) are increasingly relevant in cybercrime contexts, for instance, when considering fair trial rights in cybercrime prosecutions or ensuring victims have avenues for redress. As technology evolves, the ECtHR will likely continue to refine how traditional human rights principles apply to the digital environment.

9. National Legislation

Protecting Azerbaijan's information space from contemporary threats has become a key component of national security policy. The country's legislation establishes general legal foundations for information security and the protection of citizens' rights in the digital domain. The Constitution of the Republic of Azerbaijan provides broad protections: Article 32 of the Constitution of the Republic of Azerbaijan (1995) guarantees personal inviolability and the protection of private life, while Article 50 secures the right to freedom of information. These constitutional provisions form a basis for preventing cybercrimes and penalizing unlawful intrusions into the information environment.

In criminal law, Azerbaijan explicitly addresses cybercrime through specific provisions of its Criminal Code. Chapter 30 of the Criminal Code defines offenses such as unauthorized access to computer systems, violations of information security, and other unlawful acts involving computer data or networks as crimes. This framework is designed to protect both national security and the rights and interests of individuals and organizations. Key cybercrime offenses defined in the Criminal Code of Azerbaijan (1999) include:

- Article 271: Unauthorized access to a computer system;
- Article 272: Illegal acquisition of computer data;
- Article 273: Unauthorized interference with a computer system or data;
- Article 273-1: Creation, distribution, or use of programs or devices for committing cybercrimes;
- Article 273-2: Falsification of computer data or documents.

The social danger posed by these offenses primarily manifests as threats to information security and privacy. Unauthorized access to computer systems or data can compromise personal information and commercial secrets, undermining the confidentiality of individuals' and organizations' communications. Such acts violate constitutionally protected rights, including privacy of personal life and freedom of information. Cybercrimes can also disrupt economic activities – for example, hacking bank systems may lead to theft of funds or paralysis of financial operations, causing economic losses and eroding trust in online banking. Attacks on state information systems, likewise, represent a direct threat to national security, potentially resulting in the theft or alteration of sensitive government data.

The prevalence of cybercrimes in society can damage public confidence in the digital environment and hinder the healthy development of e-government and e-commerce initiatives.

The multifaceted social harm of cybercrimes in Azerbaijan can be summarized as follows:

- Impact on national security and leakage of state secrets or disruption of strategic infrastructure;
- Infringement of individuals' private life and personal data;
- Financial sector damage (frauds, thefts from bank accounts, system downtimes affecting businesses);
- Undermining public trust in digital services and institutions.

Accordingly, while punishing cyber offenders is essential, Azerbaijan also recognizes that protecting society from cybercrime must be balanced with safeguarding fundamental human rights, such as privacy and fair trial guarantees (Council of Europe, n.d.). Effective enforcement against cybercrime should therefore be accompanied by due process and oversight to prevent abuses.

Beyond the Criminal Code, Azerbaijan has administrative laws addressing less severe infractions in the information sphere. Chapter 32 of the Code of Administrative Offenses of the Republic of Azerbaijan provides for administrative liability in cases involving misuse of information resources or failures in information protection. For example, Article 371 of this Code covers violations of rules for using information resources (such as unauthorized use or dissemination of protected information), and Article 371-1 pertains to violations of requirements for securing critical information infrastructure, both of which carry administrative liability (Code of Administrative Offenses of the Republic of Azerbaijan, 2015). These administrative penalties serve as preventive tools and sanctions for offenses that may not rise to the criminal threshold but still pose risks to information security.

It should be noted that Azerbaijan has been proactive in developing a comprehensive cybersecurity strategy at the state policy level. By Presidential Decree No. 4060 dated August 28, 2023, the "Strategy of the Republic of Azerbaijan on Information Security and Cybersecurity for 2023–2027" was approved. This strategic document outlines the main objectives, principles, and priority tasks for national activities in information security and cybersecurity over a five-year period. The strategy addresses issues of both national and international significance, recognizing that the interests of individuals, society, and the state are intertwined in cyberspace. It applies to government bodies, private sector entities, non-governmental organizations, and citizens alike, calling for a coordinated approach to protecting the nation's vital information assets at all levels.

The strategy's implementation has already contributed to tangible improvements. Practical measures to build and strengthen a national cybersecurity ecosystem – such as establishing specialized response teams, improving cyber incident reporting, and investing in cybersecurity training – have improved Azerbaijan's standing in global benchmarks. For example, according to the International Telecommunication Union's Global Cybersecurity Index 2020, Azerbaijan advanced 15 places compared to previous years, achieving a score of 89.31 and ranking 40th among 194 countries (Strategy of the Republic of Azerbaijan on Information Security and Cybersecurity for 2023–2027,

2023). This progress reflects enhanced legal frameworks, capacity building, and international cooperation, aligning Azerbaijan with global best practices in the fight against cybercrime.

10. Conclusion

Cybercrime remains one of the most pressing challenges of the modern digital era. With the rapid advancement of information technologies and the expansion of global networks, cyber threats have grown increasingly complex, transnational, and disruptive. Consequently, combating cybercrime requires not only robust national measures but also extensive international cooperation and adaptive legal frameworks.

To effectively address cybercrime, several key considerations and recommendations emerge from the analysis above:

- **Enhancing national legislation:** Domestic laws must be continuously updated to cover emerging forms of cybercrime and to close gaps exploited by offenders. This includes criminalizing new types of harmful conduct (such as novel forms of data misuse or AI-facilitated crimes) and ensuring appropriate penalties. Laws should be technologically neutral yet flexible, enabling prosecutors and courts to address a range of cyber offenses without leaving loopholes.

- **Strengthening international cooperation:** Since cybercriminals operate across borders, no country can tackle the issue alone. It is essential to reinforce mechanisms for cross-border information sharing, mutual legal assistance, and, where applicable, extradition of cyber offenders. Wider adoption of international agreements like the Budapest Convention (and its supplemental protocols) can provide a common framework for cooperation. Additionally, real-time collaboration networks among law enforcement (such as INTERPOL's cybercrime division or Europol's EC3) should be supported and expanded.

- **Advancing technological defenses:** Legal efforts must be complemented by technical cybersecurity enhancements. States and organizations should invest in advanced defense tools – for example, AI-based intrusion detection, threat intelligence systems, and strong encryption – to protect critical infrastructure and data. Public-private partnerships can be particularly effective, as much of cyberspace is owned and operated by the private sector. Governments should work closely with tech companies and cybersecurity firms to anticipate threats and disseminate best practices widely.

- **Cybersecurity education and awareness:** A cyber-resilient society depends on informed citizens. Education systems should incorporate cybersecurity fundamentals, teaching children and young adults safe online behavior and how to respond to cyberbullying, scams, or suspicious communications. Public awareness campaigns are also crucial for the general population and businesses, focusing on common threats like phishing, ransomware, and identity theft. Increasing the overall "cyber literacy" of the population reduces the human vulnerabilities that cybercriminals frequently exploit.

- **Capacity building for law enforcement and judiciary:** Police, prosecutors, and judges should receive specialized training in cybercrime investigation and digital evidence handling. Establishing dedicated cybercrime units with sufficient expertise and resources is vital for effective enforcement. Similarly, the judiciary must be equipped to understand technical evidence and the nuances of cyber-law to adjudicate cases fairly and efficiently. International capacity-building programs (often facilitated by organizations like the Council of Europe or UNODC) can help less-resourced countries develop these capabilities and foster global consistency in cyber justice.

- **Transparency and accountability in cyberspace:** Governments and corporations alike should embrace transparency regarding cyber incidents and responses. Timely public reporting about data breaches, cyber-attacks, and enforcement actions builds trust and allows stakeholders to learn from each incident. Additionally, holding organizations accountable for negligence in cybersecurity (for instance, companies that fail to secure user data) through appropriate legal or regulatory penalties will incentivize better practices. At the same time, ensuring the accountability of state surveillance and cyber operations under the rule of law will help maintain public confidence that cybersecurity measures do not unduly infringe on civil liberties.

In conclusion, the fight against cybercrime demands a sustained and multifaceted approach. It is not merely a legal obligation of states under international or domestic law, but a collective responsibility of all stakeholders – governments, private sector, civil society, and individual users – to foster a safe digital environment. By strengthening legal frameworks, improving international collaboration, investing in security technologies, and educating users, societies can better safeguard themselves against cyber threats. These comprehensive measures will not only enhance the security of digital information and infrastructure but also uphold the rule of law and fundamental rights in cyberspace. Ultimately, effectively combating cybercrime is the only path to securing our digital future and ensuring that technological innovation can continue to advance free from the shadow of criminal misuse.

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XIX Century World Fine Arts: From Classicism to Modernism

[1] Seyyare Sadikhova

Abstract:

XIX century represents a transformative epoch in the history of world fine arts, marking the decisive transition from the disciplined rationality of Classicism to the expressive freedom of Modernism. This period reflected the profound social, political, and philosophical shifts of an industrializing and increasingly globalized world. Artists began to challenge traditional hierarchies of beauty, truth, and representation, moving away from idealized forms toward explorations of emotion, perception, and individuality.

Through successive movements—Neoclassicism, Romanticism, Realism, Impressionism, and Symbolism—art became a mirror of modern consciousness, capturing the complexity, uncertainty, and dynamism of contemporary life. The democratization of artistic production, the rise of the independent artist, and cross-cultural exchanges expanded the boundaries of artistic creation and interpretation.

Ultimately, the 19th century laid the intellectual and aesthetic foundations of Modernism by redefining art as a medium of personal vision rather than imitation. It was an age of both continuity and rupture, where the ideals of the past coexisted with the impulses of innovation. In bridging the classical and the modern, the century forged a new artistic language—one that continues to shape global visual culture and the evolving quest for meaning in art today.

Keywords: *fine arts, Neoclassicism, Romanticism, Realism, Impressionism and Symbolism*

1. Introduction

The 19th century was one of the most transformative periods in the history of world art, marking a profound departure from the aesthetic ideals of Classicism and laying the intellectual and stylistic groundwork for Modernism. At the beginning of the century, European art remained largely under the influence of Neoclassicism, a movement that sought to revive the order, clarity, and moral rigor of Greco-Roman antiquity (Babayev, 2024). This style mirrored the Enlightenment's belief in reason, universal beauty, and the didactic power of art (Honour, 1981). Neoclassical art emphasized idealized human figures, balanced composition, and heroic narratives that reinforced civic virtue and rational thought. Jacques-Louis David, the leading figure of this movement, encapsulated these principles in

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works such as *The Death of Socrates* (1787) and *Oath of the Horatii* (1784), which projected stoic discipline and moral clarity.

However, the dawn of XIX century also witnessed the beginning of significant upheavals that would gradually undermine the classical order. The French Revolution (1789–1799) and the Napoleonic Wars redefined the political and cultural landscape of Europe, challenging the aristocratic patronage systems that had sustained academic art. Simultaneously, the Industrial Revolution brought about rapid urbanization, technological innovation, and the rise of a new middle class with distinct aesthetic and cultural sensibilities. These changes fostered new artistic concerns—emotion, individual experience, and social reality—giving rise to movements that diverged from classical ideals.

The emergence of Romanticism in the early XIX century represented the first major break from Neoclassical restraint. Romantic artists and writers rejected reason as the sole guide to truth, celebrating emotion, imagination, and the sublime power of nature instead. The Romantic emphasis on subjective experience and the spiritual dimensions of art anticipated many of the values that would later define Modernism. Artists such as Eugène Delacroix, J. M. W. Turner, and Francisco Goya expanded the expressive capacity of color, composition, and brushwork to evoke passion, mystery, and the tragic dimensions of human existence.

By mid-century, the growing influence of scientific realism and the social upheavals of the 1848 revolutions paved the way for Realism, a movement that rejected both the idealization of Classicism and the emotional excesses of Romanticism. Artists such as Gustave Courbet and Jean-François Millet sought to portray everyday life and the working class with unembellished honesty, asserting that art should reflect the real conditions of modern society. This marked a turning point in the artist's role— from moral educator or myth-maker to social observer and critic.

Toward the latter part of the century, new artistic movements such as Impressionism, Post-Impressionism, and Symbolism further expanded the limits of artistic perception and representation. The invention of photography, developments in optical science, and exposure to non-European visual traditions—especially through colonial expansion and the opening of Japan—transformed the visual vocabulary of Western artists. Painters such as Claude Monet, Paul Cézanne, Vincent van Gogh, and Paul Gauguin moved away from narrative and illusionism toward a focus on perception, abstraction, and psychological depth. These explorations would later evolve into the radical innovations of XX century, including Cubism, Expressionism, and Surrealism. Claude Monet's impact is also noticed in Hussein Aliyev's works (Садыхова, 2017).

The shift from Classicism to Modernism, therefore, was not a linear progression but a complex, multidirectional evolution shaped by historical, technological, and philosophical forces. It reflected changing conceptions of truth, beauty, and representation—moving from a belief in universal ideals to a recognition of the subjective, fragmented, and ever-changing nature of human experience. This study seeks to trace the intellectual and stylistic currents that underpinned this transformation, examining how XIX century art bridged the world of classical tradition and the experimental spirit of the modern era.

2. Methods

This research employs a qualitative and historical-analytical methodology designed to trace the intellectual, aesthetic, and sociocultural evolution of 19th-century world fine arts. The aim of this methodological approach is to understand how artistic movements and individual creators contributed to the gradual transition from Classicism to Modernism. The study relies on interdisciplinary perspectives, incorporating art history, philosophy, sociology, and cultural studies to contextualize stylistic changes within broader historical developments.

2.1. Data Sources and Selection Criteria

Primary and secondary data sources were used to ensure both historical accuracy and interpretive depth.

- Primary sources include visual artworks, exhibition catalogs, artists' manifestos, and critical essays from XIX century, such as writings by Charles Baudelaire and John Ruskin. These texts provided direct insight into the aesthetic philosophies and artistic debates of the era.

- Secondary sources consist of scholarly books, peer-reviewed journal articles, and museum archives that analyze major art movements and their sociohistorical contexts. Key sources include Honour (1981), Nochlin (1971), and Clark (1985), among others.

Selection criteria for artworks focused on their representativeness of distinct artistic phases—Neoclassicism, Romanticism, Realism, Impressionism, and early Modernism. Each movement was examined through case studies of prominent artists such as Jacques-Louis David, Eugène Delacroix, Gustave Courbet, Claude Monet, and Vincent van Gogh. These figures were chosen for their influence, innovation, and ability to exemplify broader shifts in technique, subject matter, and philosophy.

2.2. Analytical Framework

The analysis followed a comparative and thematic approach. Each art movement was analyzed in relation to its predecessor and successor, with emphasis on three key variables:

1. Aesthetic principles – including composition, color theory, form, and technique.

2. Intellectual context – encompassing philosophical ideas (e.g., Enlightenment rationalism, Romantic subjectivity, positivism) and their influence on artistic production.

3. Sociohistorical context – such as industrialization, urbanization, colonial expansion, and technological innovation, which shaped artistic patronage and audience reception.

The comparative method allowed for the identification of continuities and ruptures in artistic evolution. For instance, Romanticism's emotionalism was analyzed as both a response to and a rejection of Neoclassical order, while Impressionism was interpreted as an extension of Realism's focus on everyday life combined with a new concern for light and perception.

2.3. Visual and Contextual Analysis

A visual analysis framework was applied to selected artworks to interpret formal and symbolic features. This included examining composition, use of light and shadow, color palette, and brushwork. The visual analysis was complemented by contextual interpretation, which related artistic choices to contemporary social and technological conditions. For example, the impact of photography on Impressionist composition and framing was studied as an instance of cross-media influence.

To ensure reliability, the study cross-referenced interpretations with multiple art-historical accounts and curatorial commentaries from major institutions such as the Louvre, the Musée d'Orsay, and the Metropolitan Museum of Art. These institutional archives provided chronological and stylistic benchmarks that supported the analysis.

2.4. Limitations

While this research aims for comprehensive coverage, certain limitations are acknowledged. The primary focus remains on the European art tradition, as Europe served as the dominant cultural center during XIX century. However, references to global influences—such as Japanese woodblock prints (*ukiyo-ė*), African sculpture, and Middle Eastern ornamentation—are included to reflect the increasingly interconnected nature of the art world during this period (Sadikhova, 2025). Future research could extend this analysis to non-European artistic developments that paralleled or interacted with Western movements.

3. Results

The historical and comparative analysis reveals that the evolution of XIX century world fine arts from Classicism to Modernism was characterized by a sequence of interrelated stylistic transformations, each reflecting changing philosophical, social, and technological conditions. These transformations can be grouped into several key phases that demonstrate the progressive loosening of formal rules, the diversification of subject matter, and the increasing emphasis on personal expression and visual experimentation.

3.1. Neoclassicism: The Rational Ideal

At the start of XIX century, Neoclassicism embodied the Enlightenment's belief in rational order, universal harmony, and moral clarity. Artists drew upon Greco-Roman mythology and history to express civic virtue and stoic heroism. The French painter Jacques-Louis David set the standard for this style, employing sharp contours, balanced symmetry, and idealized anatomy in works such as *Oath of the Horatii* (1784) and *The Death of Socrates* (1787). His students, including Jean-Auguste-Dominique Ingres, continued this tradition with a heightened sense of line and form, as seen in *Grande Odalisque* (1814).Neoclassicism's structured visual language reflected the social and political ideals of the Enlightenment, serving as a moral and educational instrument. However, its rational restraint and historical detachment soon came under scrutiny as artists and intellectuals sought new modes of expression to convey the complexities of human emotion and experience.

3.2. Romanticism: The Triumph of Emotion and Imagination

By the early to mid-XIX century, Romanticism emerged as a powerful reaction against the perceived coldness of Neoclassical rationalism. Romantic artists emphasized emotion, imagination, and the sublime forces of nature, often exploring themes of heroism, national identity, and the struggle for freedom. Eugène Delacroix's *Liberty Leading the People* (1830) exemplified Romanticism's political fervor and painterly dynamism, while J. M. W. Turner's turbulent seascapes—such as *The Slave Ship* (1840)—captured the uncontrollable power of the natural world. This period also saw the rise of a new individualism in art: the artist was increasingly viewed as a visionary or genius whose inner world could challenge conventional truths. Romanticism expanded the artist's role from moral teacher to emotional interpreter, setting the stage for the subjective explorations of Modernism.

3.3. Realism: The Mirror of Modern Life

Following the social and political upheavals of the 1848 revolutions, Realism emerged as a critical response to both Neoclassical idealism and Romantic escapism. Realist artists rejected mythological subjects and instead depicted ordinary people, working-class laborers, and rural life. Gustave Courbet's *The Stone Breakers* (1849) and Jean-François Millet's *The Gleaners* (1857) exemplified a new attention to social reality and the dignity of common experience. Realism's philosophical foundation was shaped by positivism—the belief that art, like science, should observe and record the real world objectively. Yet even as Realism sought truth, it subtly paved the way for subjectivity, as the artist's choice of what to depict and how to depict it became an implicit form of commentary on modern life (Gombrich,1995).

3.4. Impressionism: The Science of Seeing

By the 1870s, Impressionism redefined visual representation through its focus on perception, light, and color. Influenced by developments in optics, color theory, and the invention of portable paint tubes, Impressionist artists moved their easels outdoors to capture fleeting atmospheric effects. Claude Monet's *Impression, Sunrise* (1872) gave the movement its name and symbolized its radical departure from traditional composition and linearity. Edgar Degas, Pierre-Auguste Renoir, and Camille Pissarro experimented with new approaches to brushwork and perspective, emphasizing the ephemeral nature of experience. Their works mirrored the rhythms of modern urban life in Paris—a city transformed by industrialization and Haussmann's urban reforms. Impressionism thus marked a key moment in the emergence of modern artistic autonomy, privileging visual sensation over narrative content (Sadikhova, 2023).

3.5. Post-Impressionism and Symbolism: The Search for Meaning

By the late XIX century, dissatisfaction with Impressionism's preoccupation with visual perception led to new directions that explored structure, emotion, and symbolism. Post-Impressionist painters such as Paul Cézanne, Vincent van Gogh, and Paul Gauguin sought to move beyond optical realism toward deeper emotional and spiritual truths. Cézanne's geometric simplifications in *Mont Sainte-Victoire* (c. 1887) anticipated Cubism, while van Gogh's expressive brushwork in *Starry Night* (1889) exemplified the psychological intensity that defined early Modernism.

Simultaneously, Symbolism emerged across Europe as a reaction against materialism and realism, emphasizing dream, myth, and spirituality. Artists like Gustav Moreau, Odilon Redon, and Fernand Khnopff used allegorical imagery and mystical color palettes to evoke the unseen dimensions of consciousness. Symbolism bridged Romantic mysticism and modern abstraction, influencing early 20th-century movements such as Expressionism and Surrealism.

3.6. The Pre-Raphaelite and Art Nouveau Movements: Unity of Art and Design

Parallel to these developments, the Pre-Raphaelite Brotherhood in England, led by Dante Gabriel Rossetti and John Everett Millais, sought to revive the detail, color, and moral earnestness of early Renaissance art. Their works combined medieval symbolism with modern moral themes, contributing to a revival of craftsmanship and aesthetic idealism (SADIKHOVA, 2022). By the century's end, Art Nouveau emerged as an international style that sought to unify art, architecture, and design through flowing organic lines and decorative motifs (Sadikhova, 2024). Artists and designers such as Alphonse Mucha, Gustav Klimt, and Antoni Gaudí fused natural forms with modern materials, symbolizing the intersection between industrial progress and artistic creativity.

3.7. Global and Cross-Cultural Influences

The analysis also highlights the growing global interconnectedness of art during this century (Javid & Sadikhova, 2025). The opening of Japan to the West in the 1850s introduced Japanese ukiyo-e prints, whose flat planes, asymmetrical composition, and bold outlines inspired European artists—a phenomenon known as *Japonisme*. Similarly, the European fascination with African, Islamic, and Middle Eastern art expanded the visual vocabulary of Modernism, inspiring artists like Pablo Picasso and Henri Matisse in the next generation. These cross-cultural exchanges challenged Eurocentric notions of beauty and representation, contributing to the pluralistic foundations of Modernism that would define XIX century art.

4. Discussion

The transition from Classicism to Modernism in XIX century fine arts was not merely a stylistic or technical evolution—it was a profound cultural, philosophical, and ideological transformation that mirrored the shifting consciousness of a rapidly changing world. This period saw the dismantling of centuries-old artistic conventions, the redefinition of beauty and representation, and the emergence of the artist as a self-conscious innovator rather than a servant of tradition. The results of this study reveal that these artistic shifts were deeply intertwined with broader societal changes: industrialization, political revolution, scientific progress, and globalization (Namig, 2015).

4.1. The Decline of Classical Universality

At the heart of XIX century transformation lay the erosion of the classical worldview, which had dominated Western art since the Renaissance. The Neoclassical ideal of universal beauty, grounded in rational proportion and moral virtue, began to lose relevance in an age marked by political upheaval and social fragmentation. The Romantic revolt against reason reflected a growing skepticism toward the Enlightenment belief in objective truth and human perfectibility. Artists such as Delacroix and

Turner replaced order and symmetry with emotion and dynamism, revealing that the world was no longer stable or unified but fluid, subjective, and unpredictable. This decline of classical universality paralleled larger intellectual developments—most notably the rise of Kantian aesthetics, which emphasized the autonomy of aesthetic judgment, and later Nietzsche's critique of rational morality, which questioned the very foundations of Western idealism. Art, once a mirror of universal harmony, became an arena for individual perception and existential inquiry.

4.2. Industrialization and the Transformation of Artistic Purpose

The Industrial Revolution fundamentally altered both the production and perception of art. The mechanization of labor, the growth of cities, and the rise of a capitalist economy redefined artistic patronage and the artist's audience. No longer dependent solely on aristocratic or ecclesiastical commissions, artists increasingly engaged with the bourgeois public sphere, participating in a commercial art market that valued originality and innovation. Technological advances also changed artistic practice itself. The invention of photography in the 1830s challenged painters to reconsider their role in representing reality. While Realist artists like Courbet sought to rival photography in fidelity, Impressionists responded by emphasizing the fleeting, emotional aspects of vision that the camera could not capture. In this sense, photography paradoxically liberated painting from its mimetic function and propelled it toward abstraction. Moreover, the availability of synthetic pigments, new binders, and portable paint tubes allowed artists to work outdoors (*en plein air*), leading to the vibrant color palettes and spontaneous brushwork characteristic of late XIX century art. Thus, technological progress not only redefined the tools of art but also expanded its expressive possibilities.

4.3. The Rise of the Modern Artist

Throughout XIX century, the social identity of the artist underwent a radical transformation. Once viewed as a craftsman serving collective ideals, the artist increasingly came to be seen as a visionary, an outsider, or even a rebel. Romanticism established the archetype of the tortured genius—an individual whose creative insight transcended social convention. By the late XIX century, artists like Van Gogh, Gauguin, and Cézanne embodied this ideal, using art as a form of personal exploration and spiritual expression. This shift in artistic identity paralleled broader changes in cultural production. The establishment of independent exhibitions, such as the Salon des Refusés (1863), allowed artists to bypass academic institutions and appeal directly to the public. The art market's democratization fostered a climate of competition and experimentation that accelerated the pace of innovation. The concept of the avant-garde, which would dominate XX century aesthetics, was thus born in XIX century as artists positioned themselves at the forefront of social and intellectual change.

4.4. Global Encounters and the Expansion of Aesthetic Horizons

XIX century was also a period of intense global contact, shaped by colonial expansion, trade, and cross-cultural exchange. These interactions profoundly influenced the visual arts, broadening the European aesthetic vocabulary and challenging entrenched hierarchies of artistic value (Sadikhova & Babayev, 2025).

The phenomenon of *Japonisme* introduced asymmetry, flatness, and decorative abstraction into European art, influencing Impressionists and Post-Impressionists alike. Similarly, encounters with African and Oceanic art later inspired Modernist abstraction by emphasizing form and expressive distortion over naturalism. This appropriation was often filtered through a colonial gaze; however, it simultaneously signaled a growing recognition that creativity was not the exclusive domain of Western civilization. These global exchanges foreshadowed the pluralism that would characterize XX century Modernism. The dialogue between cultures, even amid imperial inequality, generated new hybrid aesthetics that destabilized Eurocentric artistic narratives and expanded the boundaries of what could be considered "fine art."

4.5. The Philosophical and Psychological Turn

The final decades of XIX century witnessed an increasing interest in the inner life of the artist—a development closely linked to the emergence of psychology as a scientific discipline. Symbolist and Post-Impressionist artists sought to represent the world of dreams, emotions, and the unconscious. This inward turn signaled a movement away from external representation toward self-reflective modernity.
Cézanne's geometric simplifications, Van Gogh's expressive distortions, and Gauguin's mystical symbolism each represented an attempt to uncover underlying truths rather than surface appearances. These tendencies anticipated the radical formal and conceptual innovations of early XX-century art, including Cubism, Fauvism, and Expressionism, all of which explored perception, form, and psychological intensity in unprecedented ways.

4.6. The Legacy of XIX Century

XIX century thus stands as the threshold of modern artistic consciousness. It witnessed the breakdown of academic authority, the democratization of artistic production, and the birth of new aesthetic philosophies grounded in subjectivity and experimentation. The century's artistic trajectory—from the structured harmony of Neoclassicism to the expressive freedom of Post-Impressionism—mirrors humanity's shifting understanding of its place in an increasingly complex and uncertain world. The cumulative result of these transformations was the liberation of art from imitation and doctrine. By the century's close, artists no longer sought to represent reality as it appeared but to interpret it as it was experienced. This redefinition of art's purpose paved the way for Modernism's radical inquiries into abstraction, identity, and meaning—questions that continue to shape global art in XX century.

The global dimension of this transformation also deserves recognition. While Europe remained the epicenter, exchanges with Japanese, African, and Middle Eastern art broadened perspectives and inspired movements such as Japonisme and Primitivism. These encounters further accelerated the break from academic traditions and the embrace of stylistic plurality that defined Modernism (Tinterow & Loyrette, 1994).

5. Conclusion

XIX century represents a transformative epoch in the history of world fine arts, marking the decisive transition from the disciplined rationality of Classicism to the expressive freedom of Modernism. This period reflected the profound social, political, and philosophical shifts of an industrializing and increasingly globalized world. Artists began to challenge traditional hierarchies of beauty, truth, and representation, moving away from idealized forms toward explorations of emotion, perception, and individuality.

Through successive movements—Neoclassicism, Romanticism, Realism, Impressionism, and Symbolism—art became a mirror of modern consciousness, capturing the complexity, uncertainty, and dynamism of contemporary life. The democratization of artistic production, the rise of the independent artist, and cross-cultural exchanges expanded the boundaries of artistic creation and interpretation.

Ultimately, the 19th century laid the intellectual and aesthetic foundations of Modernism by redefining art as a medium of personal vision rather than imitation. It was an age of both continuity and rupture, where the ideals of the past coexisted with the impulses of innovation. In bridging the classical and the modern, the century forged a new artistic language—one that continues to shape global visual culture and the evolving quest for meaning in art today.

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Nakhchivan as a Microcosm: Reflections on Language, Culture, and History

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Abstract:

This article explores *Nakhchivan as a microcosm* of the broader Azerbaijani and Caucasian cultural-historical landscape. Situated between Armenia, Iran, and Turkey, Nakhchivan's geopolitical isolation has fostered a distinctive synthesis of language, culture, and history that both mirrors and amplifies wider regional dynamics. Through an interdisciplinary qualitative analysis, this study synthesizes linguistic, cultural, and historical research to interpret how Nakhchivan's evolution reflects the resilience and adaptability of its people. The linguistic dimension emphasizes the preservation and modernization of Azerbaijani as the main language, alongside growing attention to English education. The cultural dimension examines Yallı folk dances, cuisine, and heritage preservation as vital symbols of identity and transnational Turkic unity. The historical analysis traces Nakhchivan's development from ancient settlements to its present autonomous status, highlighting struggles for survival, autonomy, and modernization amid geopolitical shifts. Collectively, these findings affirm Nakhchivan's significance as a living reflection of Azerbaijan's linguistic vitality, cultural endurance, and historical continuity, providing insights into how small regions can embody and sustain the essence of broader civilizations.

Keywords: *Nakhchivan; language; culture; history; identity*

Introduction

Nakhchivan is an autonomous exclave of the Republic of Azerbaijan, distinguished by its rich tapestry of language, culture, and history. Geographically separated from mainland Azerbaijan and nestled between Armenia, Iran, and Turkey, Nakhchivan has often been described as a microcosm of the broader Caucasus and Near Eastern region. Over millennia, this land has absorbed influences from various civilizations while cultivating its own unique identity. From ancient legends – such as those connecting Nakhchivan with the Biblical patriarch Noah – to modern developments, the region encapsulates a spectrum of human experience.

This article examines Nakhchivan's multifaceted character through the lenses of language, culture, and history. By reviewing scholarly literature and historical accounts, we aim to illuminate how Nakhchivan's local experiences reflect wider patterns in Azerbaijani and regional contexts. The

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language of Nakhchivan, primarily Azerbaijani Turkish, carries traces of historical contact and faces contemporary challenges in education and globalization. The cultural heritage of Nakhchivan, from its traditional dances and cuisine to its monuments and folklore, highlights a convergence of Turkic, Persian, and Caucasian influences, symbolizing the region's role as a cultural crossroads. Meanwhile, Nakhchivan's history – spanning ancient civilizations, medieval empires, and modern autonomy – exemplifies resilience and adaptation amid shifting geopolitical currents.

Framing Nakhchivan as a microcosm suggests that despite its modest size and population, the region's internal dynamics mirror broader themes found across Azerbaijan and the wider Turkic and Caucasus worlds. In the following sections, we first outline our methodological approach, then delve into the findings on Nakhchivan's language and education, cultural identity, and historical trajectory. Finally, we discuss how these elements interrelate and conclude with reflections on Nakhchivan's significance in the larger regional narrative.

Methodology

This study employs an interdisciplinary qualitative approach, synthesizing information from historical, linguistic, and cultural research on Nakhchivan. We conducted a literature review of academic sources that focus on the Nakhchivan Autonomous Republic's development in various domains. Key materials include historical analyses of Nakhchivan's political struggles (e.g., Abbasov, 2024), ethnographic and cultural studies (Askerov, 2018; Rzayeva, 2025), archaeological reports (Bahshaliyev, 2018), and educational research (Khalilov, 2022; Hacıyeva, 2024). By integrating sources across disciplines, we adopt a holistic perspective on how language, culture, and history intertwine in the region.

No new empirical data were collected for this article; instead, we rely on secondary data and existing scholarship. The historical analysis draws on published works covering periods from antiquity to the modern era, while the cultural analysis references studies on traditional dances, cuisine, and heritage preservation. For the language and education perspective, we consider research on language learning and educational transformation in Azerbaijan with specific attention to Nakhchivan (Hasan, 2023; Nakhchivan, 2023). This combination of sources allows us to cross-verify information and ensure a comprehensive understanding. All references are cited in APA style. Given the scope of this review, our approach remains theoretical and interpretive, aiming to weave a narrative that connects the diverse facets of Nakhchivan's identity without introducing new primary findings.

Results

Language and Education in Nakhchivan

Language in Nakhchivan is predominantly Azerbaijani (a Turkic language), which serves as the mother tongue for the vast majority of the population. Over the course of history, other languages such as Persian, Armenian, and Russian have also been present due to various imperial rules and neighboring communities, but Azerbaijani has remained the cornerstone of local identity. In the late 19th and early 20th centuries, secular schools began to appear in Nakhchivan (alongside traditional religious education), giving rise to a local intellectual class. By the early 1900s, a network of modern schools

had fostered widespread literacy and a lasting appreciation for education as a vehicle of social progress (Khalilov, 2022).

Under Soviet rule (1920–1991), Azerbaijani was the primary language of instruction in Nakhchivan's schools (with Russian taught as a second language). After Azerbaijan's independence in 1991, Nakhchivan, like the rest of the country, transitioned its script back to the Latin alphabet and renewed emphasis on the national language and heritage. The challenging years of the early 1990s – marked by the conflict in neighboring Nagorno-Karabakh and an economic blockade on Nakhchivan – had significant impacts on education and society. Despite those hardships, the autonomous republic invested in rebuilding and expanding its educational institutions once stability was restored. As noted by Hacıyeva (2024), the post-1995 period in Nakhchivan saw concerted efforts to revive socio-cultural development, including improvements in education infrastructure and programming. Local leadership prioritized schooling and cultural institutions as a means to overcome the isolation imposed by regional conflicts (Hacıyeva, 2024).

In recent decades, Nakhchivan's education system has continued to evolve, aligning with nationwide reforms and global trends. Higher education in the region is exemplified by Nakhchivan State University (NSU), which has become a hub for academic activity in the exclave and contributes to the diversity of Azerbaijan's higher education landscape (Isakhanli & Pashayeva, 2018). Researchers have highlighted innovative approaches emerging from Nakhchivan's academic community, particularly in language education. For instance, there is increasing focus on teaching English as a foreign language to meet international communication needs. Studies by Hasan (2023) discuss innovative strategies for teaching English to novice learners in higher education, reflecting broader efforts in Azerbaijan to modernize language instruction. Similarly, Hajiyeva (2024) examines the phenomenon of language anxiety among English as a Second Language (ESL) learners – an issue relevant to students in Nakhchivan as they navigate multilingual competencies. These works suggest that educators in Nakhchivan are actively engaging with contemporary pedagogical methods to improve foreign language proficiency, recognizing English as a key to greater academic and professional opportunities.

A concrete example of pedagogical innovation in Nakhchivan is the integration of eclectic teaching methods in linguistics courses at NSU. An eclectic method combines various instructional approaches to optimize student engagement and learning. Nakhchivan (2023) reports on the application of such methods in teaching phonetics and phonology at NSU, highlighting that empowering students through research-oriented learning can deepen their understanding of language. By blending traditional lecture-based teaching with interactive, student-led projects, instructors have found that learners become more confident and skilled in both theoretical and practical aspects of language. This approach not only enhances pronunciation and linguistic competence, but also helps reduce learners' anxiety by providing multiple avenues to grasp concepts (Nakhchivan, 2023).

In summary, the linguistic and educational domain of Nakhchivan reflects a microcosm of wider trends: a commitment to preserving the national language and identity, coupled with openness to global languages and instructional innovations. The region's long-standing value of education – dating back to early 20th-century enlightenment initiatives – parallels Azerbaijan's broader development,

while current efforts in language education demonstrate Nakhchivan's engagement with global academic and cultural currents.

Cultural Heritage and Identity

Nakhchivan's cultural heritage is extraordinarily rich, blending indigenous traditions with influences from across the Middle East and Central Asia. One emblematic aspect of this heritage is the traditional dance known as Yallı. Yallı is a collective folk dance performed in a circular formation, accompanied by folk music, and it holds a cherished place in Nakhchivani identity. Often called the "land of yallis," Nakhchivan has been a cradle for these dances for centuries (Askerov, 2018). Scholars note that Yallı is among the oldest collective dances in the region, with roots tracing back to Bronze Age petroglyphs found in the mountains of Nakhchivan (Askerov, 2018). The dance's endurance through millennia underscores a continuity of cultural expression. Yallı dances embody communal values such as unity, solidarity, and the celebration of nature and life. The themes of many Yallı songs and movements express reverence for the homeland, heroism, and the joy of collective existence (Askerov, 2018). In modern times, Yallı has gained international recognition as part of Azerbaijan's intangible cultural heritage – it was inscribed on UNESCO's List of Intangible Cultural Heritage in Need of Urgent Safeguarding in 2018, specifically highlighting its Nakhchivan variants. This recognition has helped mobilize efforts to preserve Yallı for future generations, reflecting how a local art form carries global cultural significance.

Beyond dance, Nakhchivan's cultural mosaic includes traditional music, crafts, and a distinctive cuisine, all of which reflect the intermingling of Turkic and Persianate cultures. Cuisine is an integral part of Nakhchivan's cultural identity. The region's cooking features hearty dishes and unique preparations that have been passed down through folklore and family traditions. Recent scholarship has delved into how historical folklore texts mention local foodways, indicating the longstanding importance of cuisine in Nakhchivan's social life. Rzayeva (2025) finds that many folk narratives and songs of Nakhchivan contain references to traditional foods – from staple breads and dairy dishes to festive meats and sweets. Such references suggest that food is not only a matter of sustenance but also a symbol of heritage and community values. Traditional meals like ash (grain-based porridge or pilaf) and qovurma (a method of preserving meat in fat) are deeply tied to seasonal cycles and rites of hospitality. The effort to study and document Nakhchivan's culinary heritage (Rzayeva, 2025) is part of a broader preservation initiative, recognizing that recipes and food-related folklore are intangible assets linking the present generation to their ancestors.

Heritage preservation in Nakhchivan also involves safeguarding its historical monuments and artifacts. The region boasts remarkable architectural landmarks, such as the 12th-century Momine Khatun mausoleum in Nakhchivan City, with its intricate Seljuk-era brickwork and Kufic inscriptions. However, not all heritage has been uniformly protected; the fate of certain monuments has become entangled in regional political conflicts. Dorfmann-Lazarev and Khatchadourian (2023) discuss how numerous medieval monuments in Nakhchivan (some of Persian or Armenian origin and others of Turkic-Islamic origin) have found themselves at the center of competing national narratives. The authors illustrate that in contemporary geopolitical conflicts, cultural heritage can be politicized – one

community's cherished monument might be targeted by another as a way of asserting a rival historical narrative. For instance, the medieval Armenian khachkar (carved cross-stone) cemetery of Julfa in Nakhchivan was famously destroyed in the early 2000s, an act condemned internationally as a devastating loss of cultural heritage. This example is often cited as evidence of how heritage sites can become casualties of identity struggles. The tug-of-war over monuments shows that Nakhchivan's cultural landscape is not just about local memory, but is also symbolic within a larger discourse on national identity and historical ownership (Dorfmann-Lazarev & Khatchadourian, 2023).

Another dimension of Nakhchivan's cultural identity is its relationship with the wider Turkic world. The Nakhchivan Agreement of 2009, which formally established the Cooperation Council of Turkic-Speaking States (now known as the Organization of Turkic States), was signed in Nakhchivan City. This diplomatic milestone linking Azerbaijan, Turkey, and other Turkic republics was deliberately set in Nakhchivan, reflecting the region's historical and cultural ties to the Turkic civilization. Kasseinov (2019) notes the importance of this event, explaining that Nakhchivan's heritage and location made it a fitting venue to reaffirm Turkic unity. Moreover, Nakhchivan has been active in TURKSOY (the International Organization of Turkic Culture) initiatives, hosting events that celebrate shared traditions such as music and art festivals. The Turkic Council's 10th anniversary commemorations highlighted Nakhchivan's role in fostering cultural diplomacy among Turkic nations (Kasseinov, 2019). Thus, the region serves as a cultural bridge – its very position at the crossroads of Turkey, Iran, and the Caucasus has enabled it to partake in a broad exchange of cultural practices and to act as a node in transnational cultural networks.

Nakhchivan's traditional knowledge is closely tied to its natural environment. Ethnobotanical research confirms that local uses of medicinal plants in Nakhchivan closely resemble those in neighboring regions, underscoring a shared cultural ecology that transcends political boundaries (Ozturk et al., 2018). In this way, Nakhchivan's local traditions echo those of a wider geographical expanse, reinforcing the idea of the region as a microcosm of the diverse yet interconnected cultures in its vicinity.

Historical Trajectory of Nakhchivan

The history of Nakhchivan is marked by continuity, change, and a steadfast sense of local identity. Archaeological evidence indicates that the region has been inhabited since prehistoric times. Excavations at sites like Nakhchivan Tepe have unearthed settlements dating back to the Chalcolithic period (5th millennium BCE), revealing that early inhabitants of Nakhchivan were part of the ancient Near Eastern cultural sphere (Bahshaliyev, 2018). Pottery and other artifacts from these digs show connections to contemporary cultures around the Urmia Basin and beyond, suggesting that even in prehistory, Nakhchivan was engaged in networks of trade and cultural exchange (Bahshaliyev, 2018). This deep historical footprint lays the foundation for Nakhchivan's later importance on the Silk Road and as a crossroads of empires.

Over the course of antiquity and the Middle Ages, Nakhchivan was ruled by various empires – Persian, Armenian, Arab, and Turkic – each leaving its imprint on the region's multicultural fabric. In the early modern era, Nakhchivan was contested between Persia and the Ottoman Empire, and was ultimately

ceded to the Russian Empire in 1828. The early 20th century was a tumultuous yet formative time, as Nakhchivan became the focus of competing national aspirations after the collapse of the Russian Empire. In the face of incursions by an independent Armenia and the advance of Bolshevik forces, Nakhchivan's Turkic population engaged in a determined struggle for self-determination and sought protection from Turkey. A series of conflicts and negotiations culminated in the 1921 Moscow and Kars treaties, which secured Nakhchivan's status as an autonomous territory under Azerbaijan's sovereignty (with Turkish guarantorship) in the Soviet Union (Abbasov, 2024). In 1924, the Nakhchivan Autonomous Soviet Socialist Republic was officially established. This hard-won autonomy – achieved through local resistance and diplomacy – remains a source of pride in Nakhchivan's historical memory, testament to the population's resilience and political acumen (Abbasov, 2024).

Under Soviet rule, Nakhchivan developed in parallel with the rest of Azerbaijan, though its status as an exclave (separated from mainland Azerbaijan by Armenian territory) often made it reliant on external routes for access. During the Soviet era, significant progress was made in education, healthcare, and infrastructure in Nakhchivan, but the region remained somewhat peripheral – a quiet corner of the USSR known for its agricultural produce and historical sites. The ethnic composition of Nakhchivan also shifted: whereas early 20th-century Nakhchivan had sizable Armenian communities, by the late Soviet period the population was overwhelmingly Azerbaijani after the out-migration of Armenians (Mukhtar oglu, 2023). This demographic change was largely the result of the conflicts and population movements in the 1918–1920 period, after which Nakhchivan's Armenian population sharply declined.

The post-Soviet chapter of Nakhchivan's history began dramatically. As Azerbaijan and Armenia went to war over Nagorno-Karabakh in the early 1990s, Nakhchivan was also attacked on its northern border by Armenian forces. Though a full-scale invasion was averted, the region suffered from a blockade that cut off transport and trade routes. At this critical juncture, Heydar Aliyev – who had returned to his native Nakhchivan after a political fall-out in Moscow – assumed leadership of the autonomous republic's government. His governance (1991–1993 as chairman of Nakhchivan's parliament) is credited with stabilizing Nakhchivan during the war and humanitarian crisis (Hacıyeva, 2024). Aliyev negotiated with neighboring Turkey and Iran to secure supply lines, ensuring the exclave's survival when energy and food were scarce. In 1995, after Aliyev became President of Azerbaijan, Nakhchivan continued under the de facto leadership of his allies, and the region embarked on a path of rebuilding and development.

Between 1995 and 2020, Nakhchivan underwent significant socio-economic changes. The autonomous republic invested in modern infrastructure – airports, roads, schools, and hospitals – transforming the region into one of the more stable and developed parts of Azerbaijan. Hacıyeva (2024) notes that scholarship on this period highlights a deliberate strategy to foster socio-cultural growth despite the region's continued isolation by land. Initiatives included the revival of cultural festivals, the opening of new museums and libraries, and improvements in higher education. Education in particular progressed with new institutions and curricula, echoing the broader transformation of Azerbaijan's higher education system in the post-Soviet period (Isakhanli &

Pashayeva, 2018). By the early 21st century, Nakhchivan had not only preserved its historical heritage but also begun to embrace technology and globalization within the limits of its geopolitical situation.

Looking toward the future, further strengthening multilingual education and leveraging cultural heritage for sustainable development are often highlighted as priorities for Nakhchivan (Taleh, 2021). In essence, Nakhchivan's historical trajectory – from ancient settlement to modern autonomous republic – encapsulates narratives of survival, adaptation, and continuity that resonate with the experiences of many small regions navigating larger geopolitical currents.

Discussion

Positioned as a microcosm, Nakhchivan reflects in miniature the broader historical and cultural dynamics of Azerbaijan and its surrounding regions. The examination of language, culture, and history in Nakhchivan reveals a tapestry where local specifics mirror regional themes. For instance, the commitment to language and education in Nakhchivan – from early 20th-century enlightenment efforts to contemporary English teaching – parallels the nationwide prioritization of education as a means of progress. The challenges faced (such as geographic isolation and foreign language anxiety among learners) and the solutions applied (innovative teaching methods, policy support) are not unique to Nakhchivan, yet the region's contained setting accentuates their impact. As a result, Nakhchivan offers a case study in how strong educational values can persist even in adverse conditions, illustrating that investment in human capital is a universal strategy for community resilience.

Similarly, Nakhchivan's cultural heritage underscores themes of both unity and contestation common in the Caucasus. The preservation of Yallı dances and local cuisine exemplifies how communities maintain their unique identity through traditions, even as those traditions engage in dialogue with neighboring cultures. The inclusion of Nakhchivani dances and practices in international heritage lists demonstrates how local culture can gain global recognition, reinforcing local pride and encouraging preservation efforts. On the other hand, the disputes over historical monuments highlight how culture and history can become battlegrounds for identity – a phenomenon seen across many multiethnic regions. This dual aspect of culture – as a source of both solidarity and conflict – is vividly present in Nakhchivan's experience. It is a reminder that cultural heritage management is crucial for peace and mutual understanding, not just a matter of local interest.

In the realm of history, the narrative of Nakhchivan encapsulates the broader story of a small region navigating the currents of great-power politics. Nakhchivan's people faced the dissolution of empires, the rise of nation-states, and the ideological divisions of the Cold War, yet they leveraged diplomacy and local unity to secure a degree of self-governance that has lasted into the present. This is emblematic of many regions worldwide that have maintained distinct status or autonomy through turbulent historical changes. Nakhchivan's continued autonomy within Azerbaijan, and the relative success it has made of that status, can be seen as a microcosm of the balancing act that many small polities must perform – aligning local aspirations with the realities of larger political frameworks.

Another insight from viewing Nakhchivan as a microcosm is recognizing the interdependence of language, culture, and history. Each facet reinforces the others: historical experiences shape cultural identity (for example, dances or foods that commemorate historical events), while cultural practices and language help transmit historical memory. In Nakhchivan, the Azerbaijani language serves as a repository of folklore and collective memory, binding people to their past. Educational institutions in the region teach not only modern skills but also the history and literature that form the core of local identity. In turn, a strong sense of history and culture has contributed to the resilience Nakhchivan showed during periods of crisis, as people rallied around shared values and narratives.

Conclusion

Nakhchivan stands as a vivid example of how a small region can encapsulate a broad swath of human cultural and historical experience. Through the exploration of its language and educational progress, we see echoes of national development in a local setting. Through its cultural traditions – from age-old dances and culinary arts to the stewardship (and sometimes politicization) of monuments – we observe the interplay of local pride and external influences. Through its historical journey, we witness the microcosm of a people's resilience amid empire, conflict, and change.

In framing Nakhchivan as a microcosm, this article has highlighted that the significance of the region extends beyond its geographic bounds. Nakhchivan offers lessons in the preservation of identity, the adaptation to shifting political winds, and the value of cultural continuity. It reminds us that every small community is a world unto itself, yet also a mirror reflecting larger patterns of human civilization. In the case of Nakhchivan, that mirror reveals the indomitable spirit of a people who – against many challenges – have maintained their language, celebrated their culture, and remembered their history, thereby contributing an essential chapter to the story of the Caucasus and the Turkic world.

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Phraseological Riddles as a Linguistic and Cognitive Phenomenon: A Theoretical Perspective

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Abstract:

Phraseological riddles represent one of the most intricate intersections between language, cognition, and culture. They combine the stability of phraseological units with the metaphorical flexibility of riddles, forming a unique linguistic phenomenon that encodes collective wisdom, cultural identity, and creative thought. As linguistic constructs, phraseological riddles reveal how fixed expressions can extend beyond conventional meanings to generate associative, symbolic, and cognitive interpretations. Their structure embodies the balance between linguistic constraint and imaginative freedom, where metaphor, symbolism, and parallelism operate simultaneously to produce layered meanings. From a theoretical standpoint, phraseological riddles are more than mere folkloric entertainment; they function as cognitive and semiotic systems through which a community expresses its worldview and mental models. Within their compact form, these riddles encapsulate the principles of metaphorical thinking, idiomatic stability, and semantic transformation. They illustrate how phraseological systems serve not only communicative but also epistemological and cultural purposes. In this sense, phraseological riddles exemplify the dynamic nature of language as both a social construct and a cognitive tool. This paper provides a theoretical exploration of phraseological riddles as a linguistic phenomenon, emphasizing their semantic, syntactic, and pragmatic dimensions. It aims to clarify how phraseological units operate within the riddle structure to express hidden meanings and cultural codes. By situating phraseological riddles within the broader framework of linguistic creativity and cognitive linguistics, the study highlights their significance in understanding the interplay between language, thought, and culture. The theoretical insights offered here lay the groundwork for future comparative and translational research in phraseological studies.

Keywords: *phraseological riddles, phraseology, cognition, metaphor, semiotics, culture, linguistic creativity*

1. Introduction

Language serves not only as a medium of communication but also as a repository of collective thought, culture, and identity. Within this framework, folklore genres such as riddles hold a unique place, as they represent the creative synthesis of linguistic form and cultural cognition. Among these, phraseological riddles occupy a particularly intriguing niche. They merge the metaphorical nature of riddles with the stability of phraseological units, revealing how figurative language can function

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simultaneously as a linguistic construct and a cultural symbol. As a result, phraseological riddles constitute a distinctive linguistic phenomenon that reflects the intellectual, emotional, and aesthetic aspects of a speech community's worldview.

The theoretical exploration of phraseological riddles contributes to understanding how language encapsulates cultural and cognitive models. According to Nida (1964), language is not merely a tool for conveying information but "a vehicle for thought and culture" (p. 3). This statement underscores the necessity of studying phraseological riddles as manifestations of the intricate relationship between linguistic form and cultural cognition. These riddles embody metaphorical compression: they express complex ideas through fixed expressions and symbolic associations, demonstrating the power of phraseology to convey meaning beyond literal interpretation.

From a linguistic standpoint, phraseological riddles operate on multiple levels—lexical, syntactic, and pragmatic. On the lexical level, they rely on idiomatic combinations that maintain semantic stability while allowing contextual creativity. On the syntactic level, rhythmic and parallel structures reinforce coherence and aesthetic unity. Pragmatically, they engage the listener's inferential and interpretive abilities, stimulating a process of decoding metaphoric meaning. As Cowie (1998) suggests, phraseological expressions exist "in a flexible balance between fixedness and creativity" (p. 6), a principle vividly exemplified in phraseological riddles.

Furthermore, phraseological riddles serve a cognitive and semiotic function: they invite individuals to think metaphorically and perceive reality through symbolic reasoning. This aligns with Wierzbicka's (2019) view that linguistic meaning is inseparable from cultural cognition. Through their condensed form, phraseological riddles reveal how communities encode knowledge, emotion, and value systems into stable linguistic forms.

Recent studies (e.g., Charteris-Black, 2017; Schäffner, 2019) also emphasize the role of metaphor and translation in mediating cultural cognition, reinforcing the idea that figurative structures such as riddles provide access to the deep conceptual organization of thought. Therefore, this study approaches phraseological riddles not as isolated folkloric artifacts but as theoretical constructs that bridge language, thought, and culture. It seeks to elucidate their linguistic and cognitive characteristics, emphasizing their significance in understanding the creative and intellectual dimensions of language use.

2. Theoretical Foundations

The study of phraseological riddles rests upon the intersection of several linguistic disciplines—phraseology, cognitive linguistics, and semiotics. Each of these fields contributes to understanding how language encapsulates metaphorical thinking and collective cognition through stable yet creatively functional structures. Phraseological riddles, in this sense, may be defined as compressed linguistic models where idiomatic expressions and metaphorical associations converge to encode thought and cultural experience. Their theoretical basis lies in the way language, as a symbolic system, reflects the worldview of its users.

In the domain of phraseology, fixed expressions are regarded as stable linguistic units that convey meanings beyond the sum of their parts. As Cowie (1998) observes, phraseological units "occupy an intermediate position between freedom and fixity" (p. 6), functioning as a bridge between individual creativity and conventional language. When embedded in riddles, these units acquire additional semiotic depth, as they are not only linguistic elements but also cognitive triggers that activate interpretive reasoning. The riddle, by its nature, invites an intellectual challenge; the phraseological component heightens this challenge by introducing figurative ambiguity and multiple layers of meaning.

From a cognitive perspective, phraseological riddles illustrate how language functions as a tool of conceptualization rather than mere communication. They manifest the principle that linguistic meaning is inseparable from human cognition. As Wierzbicka (2019) notes, every linguistic expression embodies a culture-specific way of interpreting the world, reflecting how speakers categorize experience through shared metaphors and symbolic associations. Phraseological riddles therefore act as cognitive frames that encourage speakers to perceive familiar realities through unfamiliar configurations of thought.

Semiotically, phraseological riddles can be understood as multi-layered sign systems where linguistic, cultural, and cognitive codes interact. Each riddle functions as a miniature semiotic universe: the literal linguistic form (signifier) conceals a metaphorical or symbolic meaning (signified) that the audience must decode. Mounin (1963) emphasizes that "the preservation of stylistic and figurative meaning is essential for the full comprehension of an expression" (p. 112). In phraseological riddles, this principle is fundamental, as the figurative layer is not decorative but constitutive of meaning itself.

This theoretical perspective also aligns with Charteris-Black's (2017) analysis of metaphor as a persuasive and cognitive force that bridges linguistic form and ideology. Similarly, Fillmore and Kay's (2013) concept of *frame semantics* explains how meaning arises within culturally shared conceptual structures, a process clearly visible in the cognitive mechanisms of riddles. Phraseological riddles employ such frames to represent everyday experiences metaphorically—thereby transforming ordinary linguistic material into an act of creative cognition.

Recent work in translation and intercultural communication (Göpferich, 2021; Schäffner, 2019) has further shown that metaphorical and phraseological expressions serve as vehicles of cultural cognition. This connection strengthens the argument that phraseological riddles, as condensed cultural units, play a central role in transmitting collective knowledge. Thus, the theoretical study of these riddles reveals the symbiosis between phraseological fixity and metaphorical productivity: stability and creativity emerge as interdependent aspects of linguistic evolution.

In summary, the theoretical foundation of phraseological riddles integrates phraseological theory, cognitive linguistics, and semiotics into a coherent model. Through these lenses, such riddles can be understood as condensed linguistic systems that preserve and reproduce the intellectual and cultural memory of a community.

3. Linguistic and Cognitive Features of Phraseological Riddles

Phraseological riddles embody a complex interplay of linguistic stability and cognitive flexibility. Their structure and function illustrate how fixed expressions can generate dynamic meaning through metaphor, inference, and symbolic association. From a linguistic perspective, these riddles operate simultaneously on several levels—lexical, syntactic, semantic, and pragmatic—each contributing to the overall depth of interpretation.

At the **lexical level**, phraseological riddles rely on idiomatic expressions that preserve a degree of semantic fixity while allowing contextual reinterpretation. The phraseological unit acts as the core of the riddle's semantic structure, encapsulating shared cultural knowledge and figurative meaning. Because idioms are semantically non-transparent, they invite interpretive engagement from the listener, who must reconstruct the intended meaning through associative reasoning. This process exemplifies *metaphoric inference*, where language bridges literal form and conceptual abstraction.

At the **syntactic level**, phraseological riddles are characterized by rhythmic balance, repetition, and parallelism—features that reinforce their mnemonic and aesthetic quality. The parallel structure often mirrors cognitive symmetry, helping the listener to detect semantic patterns and hidden relations between clauses. These syntactic regularities are not merely stylistic; they fulfill a cognitive function by guiding attention and framing the inferential process that leads to comprehension.

The **semantic dimension** reveals how meaning is constructed through metaphor and polysemy. Figurative language activates multiple semantic layers that coexist within a single expression. The literal and metaphorical meanings interact, producing semantic tension—a feature that makes riddles both intellectually engaging and aesthetically rich. In this sense, the riddle becomes a site of *semantic negotiation*, where meaning is co-created through cultural and cognitive frameworks.

At the **pragmatic level**, phraseological riddles perform a dual communicative function: they both conceal and reveal meaning. The concealment provokes curiosity and intellectual challenge, while the revelation produces cognitive satisfaction and aesthetic pleasure. Pragmatically, these riddles foster interpretive cooperation between speaker and listener, activating what Sperber and Wilson (1995) call *inferential communication*.

From a cognitive linguistic viewpoint, phraseological riddles demonstrate how metaphor serves as a fundamental mechanism of thought. They reflect the human tendency to conceptualize abstract ideas through concrete imagery, aligning with Lakoff and Johnson's (1980) claim that metaphor is central to human cognition. Thus, phraseological riddles exemplify the cognitive processes through which meaning is constructed, negotiated, and shared.

4. The Role of Phraseological Riddles in Language and Culture

Phraseological riddles represent a vital link between linguistic form and cultural consciousness. As condensed manifestations of a community's creative thought, they preserve collective knowledge, value systems, and worldview through metaphorical and idiomatic language. Their role extends far beyond entertainment: they function as cultural texts that encode social experience and transmit traditional wisdom across generations.

Culturally, phraseological riddles serve as repositories of symbolic meaning. They embody what Wierzbicka (2019) calls *cultural scripts*—linguistic representations of shared beliefs and behaviors. Each riddle reflects a specific way of seeing and interpreting reality, grounded in the community's ecological, historical, and social context. The phraseological component intensifies this cultural resonance because idioms themselves are products of collective metaphorical thinking. Thus, phraseological riddles are not simply linguistic puzzles; they are cultural models through which societies articulate their understanding of human experience.

From an anthropolinguistic standpoint, the role of phraseological riddles lies in their ability to maintain cultural continuity through language. They exemplify how idiomatic expression can serve as a mnemonic tool for preserving collective memory. As Mounin (1963) observed, linguistic form is a vessel for both aesthetic and cultural meaning, and in riddles this duality becomes particularly visible. Through their compact and rhythmical form, phraseological riddles allow complex cultural concepts—such as morality, wisdom, or social norms—to be transmitted in a memorable and emotionally resonant way.

In linguistic terms, phraseological riddles also highlight the interaction between language stability and cultural dynamism. Although their phraseological units are relatively fixed, their meanings evolve as the cultural context changes. This adaptability ensures that the riddles remain relevant and intelligible to new generations. The process of reinterpretation illustrates how culture continuously reshapes its own linguistic heritage.

Moreover, phraseological riddles perform an important pedagogical and communicative role. They foster linguistic creativity, metaphorical thinking, and cultural literacy, encouraging speakers to explore the expressive potential of their language. In multilingual and multicultural contexts, they can serve as instruments for intercultural understanding, illustrating how metaphor and idiom function as universal cognitive mechanisms across languages (Charteris-Black, 2017; Schäffner, 2019). This perspective aligns with Nida's (1964) assertion that language is "a bridge between cultures rather than a barrier" (p. 3).

In sum, phraseological riddles function as dynamic cultural and linguistic systems. They embody the shared cognitive heritage of a community while simultaneously adapting to its evolving communicative needs. By integrating idiomatic expression with cultural symbolism, they demonstrate how language not only reflects culture but actively shapes it.

5. Conclusion

Phraseological riddles stand at the crossroads of language, cognition, and culture, embodying the intricate relationship between linguistic form and human thought. As this theoretical study has demonstrated, they are not merely products of folk creativity but systematic linguistic phenomena that reveal how meaning is constructed, encoded, and interpreted within a cultural framework. Their phraseological nature combines stability and creativity, allowing language users to communicate complex ideas through metaphor, symbolism, and idiomatic compression.

The analysis has shown that phraseological riddles operate simultaneously on lexical, syntactic, semantic, and pragmatic levels. They utilize fixed expressions to achieve figurative ambiguity and conceptual depth, thereby transforming ordinary language into a tool for cognitive engagement. Their form not only reflects linguistic artistry but also activates interpretive reasoning, encouraging the listener to perceive familiar concepts from novel perspectives.

Culturally, phraseological riddles play a crucial role in preserving and transmitting collective knowledge. They encode the moral, intellectual, and emotional heritage of a community, functioning as symbolic texts that maintain cultural continuity. By integrating idiomatic structures with metaphorical meaning, these riddles reflect the worldview and value systems of the people who create and share them.

In conclusion, phraseological riddles exemplify the unity of linguistic stability, cognitive creativity, and cultural expression. Their theoretical significance lies in their ability to illuminate how language operates as both a system of communication and a medium of cultural cognition. Further research may explore their translational and comparative aspects, extending the understanding of how phraseological meaning traverses linguistic and cultural boundaries.

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