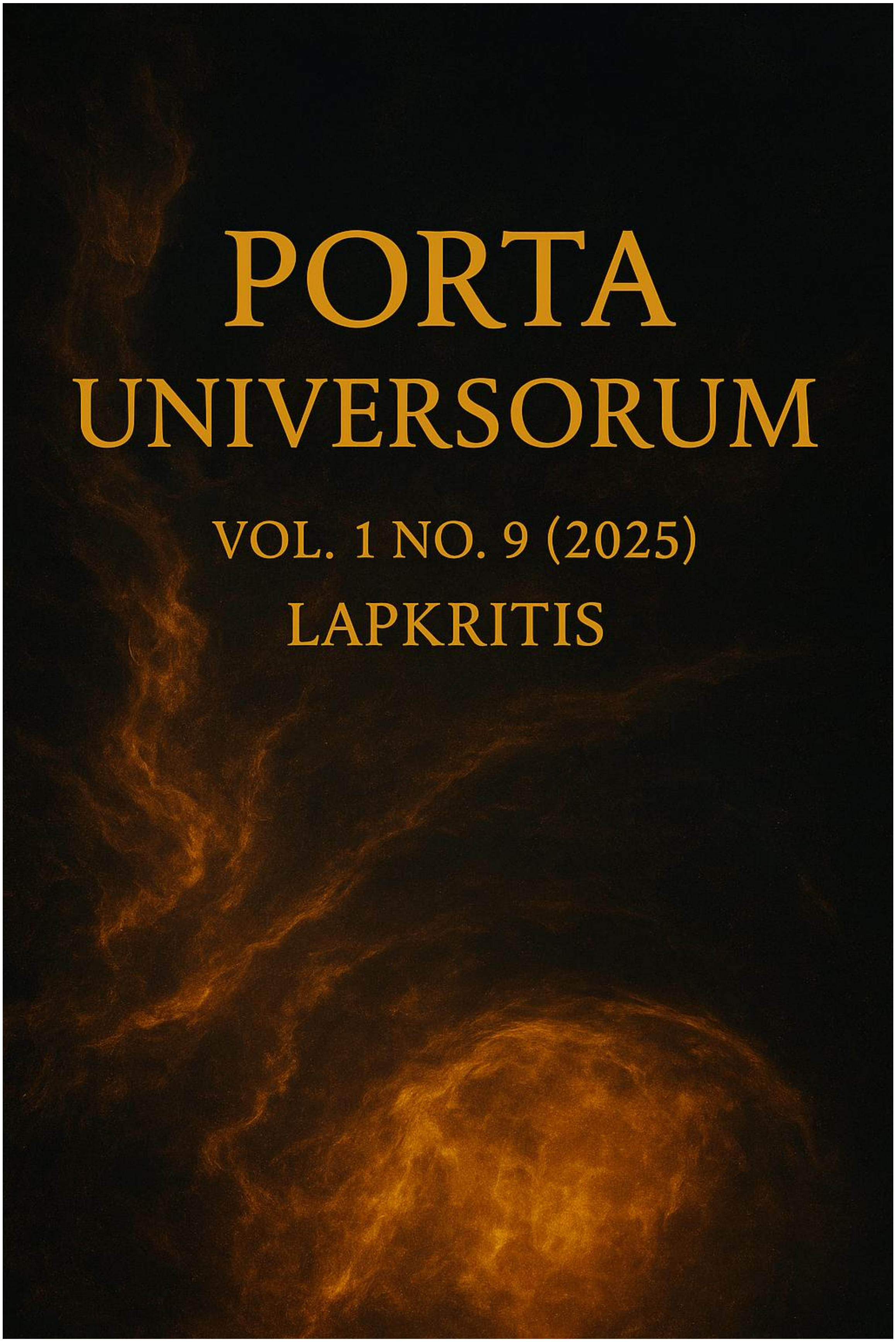

PORTA UNIVERSORUM

VOL. 1 NO. 9 (2025)

LAPKRITIS

Porta Universorum
Editor-in-Chief: Hasan Alisoy
E-mail: editor@egarp.lt

Vol. 1 No. 9 (2025): Lapkritis
ISSN 3030-2234

DOI: https://doi.org/10.69760/3at86632

Porta Universorum is a peer-reviewed, open-access academic journal registered and published in Lithuania. The journal provides an inclusive platform for advancing multidisciplinary research across a wide spectrum of disciplines, promoting intellectual innovation and global academic dialogue.

Porta Universorum welcomes original research, theoretical analyses, and practical insights from the following fields:

- **Natural and Life Sciences:** Biology, ecology, chemistry, physics, astronomy
- **Medical and Health Sciences:** Clinical studies, public health, medical diagnostics, healthcare innovation
- **Engineering and Applied Sciences:** Mechanical, civil, environmental, information technologies, AI, and emerging technologies
- **Economic and Social Sciences:** Economics, sociology, law, political science, management
- **Education and Pedagogy:** Teaching methodologies, curriculum design, educational technologies
- **Linguistics and Philology:** Language studies, stylistics, discourse analysis, historical linguistics
- **Humanities and Cultural Studies:** Philosophy, literature, ethics, history, anthropology, art studies
- **Mathematics and Theoretical Research**

Frequency: 12 issues per year (monthly)
Format: A4
Language: Submissions are accepted in English.
Registration: Officially registered and published in Lithuania.

All submissions undergo a rigorous double-blind peer review process to ensure academic quality and integrity.

For further details and submissions, visit:
🔗 https://egarp.lt/index.php/JPURM/index

Porta Universorum
Editor-in-Chief: Hasan Alisoy
Executive Secretary: Gerda Urbaite
Salomėjos Nėries g. 57, Vilnius, Lithuania
E-mail: editor@egarp.lt

Contents

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Effective Strategies for Teaching Music Online or in Blended Classrooms

[1] Sevinc Musayeva

Accepted: 10.10.2025
Published: 11.02.2025
https://doi.org/10.69760/portuni.0109001

Abstract. This paper explores effective strategies for teaching music in online and blended learning environments, emphasizing pedagogical design, technology integration, engagement, assessment, and inclusivity. Using a narrative review methodology, recent studies and case reports were analyzed to identify best practices in digital and hybrid music instruction. Findings indicate that effective online music teaching requires more than transferring traditional methods to digital platforms; it involves rethinking pedagogy to sustain interaction, feedback, and musical expression. Flipped-classroom models, adaptive learning technologies, and collaborative activities enhance engagement and performance outcomes. Additionally, personalized feedback, formative assessment, and inclusive design help address challenges related to technological access and learner diversity. The study concludes that successful online and blended music education depends on strategic integration of technology with student-centered pedagogy, fostering creativity, collaboration, and accessibility. These insights support educators in designing flexible, effective, and equitable approaches to music teaching in evolving digital contexts.

Keywords: *effective strategies, music teaching, online classroom, auditory feedback*

Introduction

The rapid advancement of digital technologies, coupled with the global shift toward online and blended learning modalities—especially accelerated by the COVID-19 pandemic—has significantly transformed educational practices across disciplines. Music education, traditionally grounded in face-to-face, experiential, and highly interactive learning environments, has had to adapt to these new modes of delivery. Unlike many academic subjects, music instruction is inherently performative and sensory, relying on auditory feedback, physical technique, and ensemble collaboration. Consequently, the transition to online and blended teaching models presents unique pedagogical challenges, such as latency in audio transmission, limited real-time feedback, and reduced social interaction (Johnson, 2017; Lee, 2021).

However, the integration of digital platforms into music teaching also offers unprecedented opportunities for innovation and accessibility. Online and blended learning environments enable students to access a vast array of digital tools, interactive multimedia, and adaptive technologies that can support personalized learning, flexible pacing, and cross-cultural collaboration. Instructors can now blend synchronous (real-time) and asynchronous (self-paced) learning modes to reinforce musical

[1] Musayeva, S. H. Head of the Department of Musical Training, Nakhchivan State University, Azerbaijan. Email: sevincmusayeva@ndu.edu.az. ORCID: https://orcid.org/0009-0009-0328-5252.

theory, performance practice, and creative composition (Zhang et al., 2024). As Cruywagen and Potgieter (2020) note, these models can extend learning beyond the physical classroom, making music education more inclusive for learners with geographical, physical, or economic constraints.

Nevertheless, the pedagogical shift requires educators to rethink their teaching strategies and roles. Effective online or blended music instruction depends not only on technological proficiency but also on intentional instructional design that maintains a sense of community, promotes engagement, and provides timely feedback (Babayev, 2022). Studies in music pedagogy increasingly emphasize frameworks such as the Community of Inquiry (CoI), which highlights teaching presence, cognitive presence, and social presence as key to sustaining meaningful learning experiences in virtual spaces (Johnson, 2017). Within this context, the development of effective teaching strategies becomes essential for ensuring that music students continue to achieve technical, theoretical, and creative proficiency comparable to traditional learning environments.

This article aims to explore and synthesize effective strategies for teaching music in online and blended classroom settings. Drawing from a range of empirical studies, reviews, and practical case reports, it identifies best practices that can enhance pedagogy across several dimensions: instructional design, technology integration, student engagement, assessment, and inclusivity. Specifically, the research addresses the following guiding questions:

1. What pedagogical approaches have been found effective for teaching music in online and blended environments?
2. How can technology be leveraged to support music learning without compromising performance-based outcomes?
3. What strategies best foster student engagement, collaboration, and inclusivity in digital or hybrid formats?

By addressing these questions, this study contributes to the growing body of scholarship on digital music pedagogy and provides practical guidance for educators navigating the evolving landscape of online and blended learning. Ultimately, the paper argues that successful online and blended music education depends not merely on the adoption of technology but on pedagogical innovation, reflective practice, and a commitment to student-centered learning (Sabir, 2023).

Methods

This study employed a narrative review methodology to synthesize current research and practical insights on effective strategies for teaching music in online and blended classrooms. A narrative review was chosen over a systematic meta-analysis due to the diverse nature of research in this area, encompassing empirical studies, conceptual papers, and case-based pedagogical reports from varied educational contexts. The approach allowed for a broader integration of findings from higher education, secondary education, and community music programs.

A narrative review approach was used: relevant peer-reviewed journal articles, case studies, and systematic reviews were identified via electronic searches using terms such as "online music teaching", "blended learning music education", "music pedagogy online", and "flipped music classroom" (Babayev, 2022). Key databases and journal websites were consulted (e.g., London Review of Education, Harmonia: Journal of Arts Research and Education, etc). Inclusion criteria comprised studies published in English in the last 10 years, focusing on music instruction in online or blended contexts. Thirteen articles on blended-learning in music were identified in a systematic review of music education. Additional case studies were included to capture practical strategies (e.g., ensemble classes, instrumental lessons). The emerging themes across these sources were synthesised into major strategic categories: (1) pedagogical design, (2) technology and tools, (3) student engagement & interaction, (4) assessment & feedback, and (5) inclusive/accessibility considerations.

Data Sources and Search Strategy

A comprehensive search of electronic databases and reputable journals in music education and educational technology was conducted between March and August 2025. The databases consulted included ERIC (Education Resources Information Center), Google Scholar, Scopus, and ProQuest Education Journals. Additional sources were identified through cross-referencing and citation tracking. Search terms included combinations of keywords such as *"music education online," "blended learning in music," "digital pedagogy," "flipped classroom music," "online instrumental teaching,"* and *"virtual ensemble learning."*

To ensure relevance and recency, the inclusion criteria were as follows:

1. **Publication date** between 2015 and 2025;
2. **Language**: English;
3. **Focus**: studies and reports related to teaching or learning music in online, hybrid, or blended environments;
4. **Context**: higher education, K–12, or community music programs;
5. **Availability** of full-text access.

Exclusion criteria included papers unrelated to music pedagogy, studies focusing solely on technology without pedagogical application, and non-peer-reviewed sources without credible institutional affiliation.

Data Selection and Analysis

The initial search yielded approximately 86 documents, which were screened for relevance based on abstracts and keywords. After removing duplicates and non-relevant sources, 28 studies were selected for full-text review. These included peer-reviewed journal articles, conference proceedings, and institutional reports. From this pool, 13 high-quality studies were prioritized due to their strong methodological design, detailed pedagogical insights, and clear discussion of music teaching practices.

Data from these studies were organized and coded according to recurring themes and strategic categories identified across the literature. Using qualitative content analysis, five core themes emerged:

1. **Pedagogical design and instructional frameworks** (e.g., flipped classroom, community of inquiry);
2. **Technology and learning tools** used to enhance delivery and collaboration;
3. **Student engagement and interaction** strategies;

4. **Assessment and feedback** practices suitable for digital or hybrid settings;
5. **Inclusivity and accessibility** considerations in diverse learner contexts.

Each theme was analyzed in terms of (a) its educational rationale, (b) examples of effective implementation, and (c) reported outcomes for student learning or engagement. The synthesis aimed to capture converging findings as well as contextual variations across different educational levels and music disciplines (e.g., performance, composition, theory, appreciation).

Ethical Considerations and Reliability

Since this research involved the analysis of publicly available literature, no human subjects were directly involved, and formal ethical approval was not required. Nonetheless, all sources were appropriately cited to ensure academic integrity and transparency. Efforts were made to include diverse perspectives across geographic regions and institutional contexts to mitigate selection bias. The thematic synthesis was independently verified by re-examining the selected literature to confirm the reliability of categorized findings.

Results

The analysis of selected studies and case reports revealed a wide range of approaches to effectively teaching music in online and blended classroom contexts. The findings were synthesized into five interrelated thematic categories: (1) pedagogical design and learning frameworks, (2) technology and instructional tools, (3) student engagement and interaction, (4) assessment and feedback, and (5) inclusivity and accessibility. Each theme reflects practical strategies supported by empirical evidence or case-based observations from the reviewed literature.

1. Pedagogical Design and Learning Frameworks

A consistent finding across the literature is that effective online and blended music teaching requires intentional instructional design that adapts traditional, face-to-face pedagogy for digital contexts. Studies such as Johnson (2017) and Zhang et al. (2024) emphasize that direct transposition of in-person methods into virtual formats often results in disengagement and diminished learning outcomes. Instead, successful educators employ blended and flipped learning models grounded in pedagogical frameworks such as the Community of Inquiry (CoI) and constructivist learning theory.

In flipped-classroom approaches, theoretical instruction—such as music history, harmony, or analysis—is delivered asynchronously through recorded lectures or interactive multimedia. Class time, whether online or face-to-face, is reserved for performance-based activities, guided practice, and collaborative discussion. Empirical studies, including Chang and Hashim (2024), demonstrate that this model increases student preparedness, self-regulation, and participation. Similarly, Cruywagen and Potgieter (2020) report that blending self-paced learning with guided performance fosters deeper understanding of musical concepts and skill transfer.

Moreover, instructors who explicitly integrate reflective and experiential learning—through digital journals, performance reflections, or peer critique—help students develop metacognitive awareness of their own musical progress. The inclusion of structured reflection and feedback loops enhances not only technical competence but also interpretive and creative dimensions of musicianship.

2. Technology and Instructional Tools

The use of digital technologies emerged as a cornerstone of effective online and blended music instruction (Babayev, 2025). Across multiple contexts, educators employed learning management systems (LMS), video conferencing platforms, and music-specific software to deliver content and facilitate collaboration. Studies from Sri Lanka and Malaysia (Lee, 2021; JRM, 2022) document how platforms such as Zoom, Moodle, and Google Classroom became central to sustaining continuity during remote teaching periods.

In addition to general-purpose tools, music educators leveraged specialized software to replicate key aspects of in-person instruction. Examples include *SmartMusic*, *Flat.io*, *Soundtrap*, and *BandLab*, which allow for real-time notation, recording, and collaborative editing. Adaptive technologies—such as algorithmic recommendation systems used in blended piano instruction (Sun et al., 2022)—were found to personalize learning materials and improve student motivation.

Furthermore, technology supported asynchronous engagement through virtual ensemble recordings, digital performances, and online composition projects. These innovations helped mitigate technical barriers such as latency and inconsistent audio quality, ensuring that ensemble-based learning could continue despite geographical dispersion. The reviewed studies highlight that technological fluency and training for instructors are crucial to maximize these tools' pedagogical potential.

3. Student Engagement and Interaction

Maintaining student engagement and social presence is one of the primary challenges in virtual and blended music education. The literature indicates that courses integrating interactive, community-oriented strategies produce higher levels of motivation and persistence. In Chang and Hashim's (2024) study, students in flipped ensemble classes reported greater enthusiasm and self-efficacy compared to those in traditional lecture-based online settings.

Engagement was most effectively fostered through active learning methods such as collaborative projects, peer review, small-group rehearsals, and discussion-based analysis of performances. Several studies also observed the value of multimodal learning, where video, audio, and visual aids supported different learning preferences and improved comprehension of complex musical concepts.

Social interaction—both synchronous and asynchronous—was essential to maintaining a sense of community. Johnson (2017) found that establishing a strong *teaching presence* (through personalized feedback, regular communication, and instructor visibility) correlated positively with students' perception of support and belonging. Virtual discussion boards, live chat features, and group critique sessions also reinforced collaborative learning, replicating the communal aspects of traditional rehearsal rooms.

4. Assessment and Feedback Practices

Assessment in online and blended music contexts must be restructured to suit digital delivery modes. The reviewed studies suggest that effective practice involves frequent formative assessment combined with clear performance criteria and self-reflection opportunities. For example, students may submit weekly video performances or practice logs, which instructors evaluate using digital rubrics and annotated feedback.

Blended classrooms allow integration of formative and summative components—using online quizzes or listening journals for theoretical understanding, alongside in-person evaluations for instrumental or ensemble performance. The use of digital tools like *Flipgrid* and *Padlet* enabled students to share and comment on each other's performances, enhancing peer learning and critical listening skills.

Feedback was identified as particularly impactful when it was timely, multimodal, and individualized. Audio or video-recorded instructor comments were found to be more effective than text-based feedback, as they provided expressive, musical nuances that written comments could not capture (Tan & Brahmakasikara, 2022). Learning analytics within LMS platforms also helped instructors track engagement patterns, enabling early intervention for struggling students.

5. Inclusivity and Accessibility

Inclusivity emerged as a central theme, especially concerning access to technology and equitable participation. Studies such as those by Zhang et al. (2024) and Cruywagen and Potgieter (2020) emphasize that online and blended learning can expand opportunities for students who face geographic, physical, or socioeconomic barriers. The flexibility of asynchronous learning allows students to engage with materials at their own pace, accommodating varied learning needs and time constraints.

However, several studies noted persistent inequities related to digital literacy, internet connectivity, and access to musical instruments or practice spaces. Educators who implemented universal design for learning (UDL) principles—such as multiple means of representation, engagement, and expression—were more successful in supporting diverse learners. Providing downloadable materials, offline tasks, and clear technical guidance proved effective in mitigating barriers.

Moreover, inclusive approaches also encompassed cultural and musical diversity. Incorporating global music traditions, community projects, and collaborative online performances allowed students from different regions to exchange perspectives, fostering intercultural understanding within music education.

Summary of Key Findings

Overall, the reviewed literature demonstrates that pedagogical innovation, technological competence, and inclusive design are interdependent factors in successful online or blended music education. Effective practice is characterized by:

- Intentional course design grounded in active, constructivist learning frameworks;
- Strategic integration of synchronous and asynchronous activities;
- Interactive use of technology to promote engagement and feedback;
- Adaptable assessment strategies emphasizing formative evaluation;
- Commitment to accessibility, equity, and cultural responsiveness.

Collectively, these findings illustrate that digital environments, when thoughtfully designed, can enhance rather than diminish the quality of music education. The results provide a foundation for the subsequent Discussion section, which interprets the implications of these findings for pedagogy, policy, and professional development in music education.

Discussion

The evidence suggests that online and blended music education can be effective—provided that teaching strategies are thoughtfully designed to address the particularities of music instruction (e.g., auditory/ensemble/kinesthetic elements) and that technology is used not as a simple substitute but as an enabler of new pedagogical possibilities.

The findings of this review reveal that effective music teaching in online and blended environments requires a paradigm shift from traditional instructional methods toward a more student-centered, technology-supported, and reflective pedagogy. The studies analyzed consistently demonstrate that pedagogical effectiveness in these settings is determined not solely by access to digital tools but by how educators design learning experiences that maintain the core musical values of interaction, creativity, and performance authenticity.

Rethinking Pedagogy for Digital Music Learning

A recurring insight is the need to reconceptualize music pedagogy for digital and hybrid contexts. Traditional models that rely heavily on direct, in-person demonstration and ensemble rehearsal must be adapted to accommodate asynchronous and mediated interaction (Johnson, 2017). The Community of Inquiry (CoI) framework offers a useful lens for this transformation, emphasizing *teaching presence* (clear structure and guidance), *cognitive presence* (deep engagement with content), and *social presence* (community and interaction). When applied to music education, these principles foster environments where learners can engage meaningfully even without continuous physical proximity.

The integration of flipped learning and blended instruction further supports this reorientation. Studies such as Chang and Hashim (2024) and Zhang et al. (2024) confirm that combining asynchronous preparation with synchronous interaction leads to more productive class sessions and deeper musical understanding. Students arrive better prepared, and instructors can devote real-time sessions to interpretive, performance-based, or collaborative tasks rather than content delivery. This shift aligns with constructivist approaches to learning, which emphasize active participation, reflection, and social negotiation of meaning.

Technology as a Pedagogical Enabler, Not a Substitute

Technology's role in online and blended music education should be understood as a pedagogical enabler rather than a replacement for traditional teaching. Tools such as digital audio workstations (DAWs), virtual classrooms, and cloud-based composition platforms facilitate new forms of musical creation and collaboration. Yet, the literature also highlights that technology's potential is maximized only when educators possess sufficient digital literacy and intentionally design technology-mediated tasks that align with learning outcomes (Lee, 2021; Sun et al., 2022).

For example, adaptive systems that personalize resources or track student performance data enhance learner autonomy and self-regulation—qualities crucial in music practice. However, overreliance on technology without pedagogical framing risks disengagement or superficial learning. The most successful implementations balance automation with human connection, ensuring that technology amplifies, rather than replaces, the relational and interpretive dimensions of music instruction.

Fostering Engagement and Social Presence

Engagement remains a critical determinant of success in online music learning. The reviewed studies emphasize that interaction—both peer-to-peer and student-instructor—is central to sustaining motivation and persistence. Strategies that promote active learning, such as ensemble-based tasks, virtual group performances, and peer review, were consistently associated with higher levels of student satisfaction (Chang & Hashim, 2024).

Furthermore, the role of social presence—the ability of learners to project themselves as real, connected participants—was identified as particularly vital in music education. Music, as an inherently social art form, requires communication and shared emotional experience. To replicate these qualities online, educators should integrate interactive discussion boards, collaborative recording projects, and synchronous feedback sessions that simulate ensemble rehearsal dynamics.

Importantly, instructors' teaching presence—their visibility, responsiveness, and emotional support—was found to strongly influence students' sense of belonging (Johnson, 2017). Personalized messages, video feedback, and regular check-ins help counteract the isolation often experienced in online environments. This relational aspect underscores that technology cannot fully replace the mentorship and empathy central to music pedagogy.

Assessment, Feedback, and Reflective Practice

Assessment practices in digital music learning must balance authentic performance evaluation with the constraints and affordances of online environments. The studies reviewed suggest that frequent formative feedback, video-based self-assessment, and peer critique foster continuous improvement and reflective learning (Tan & Brahmakasikara, 2022).

Moreover, multimodal feedback—combining text, audio, and video comments—enhances clarity and expressiveness, allowing instructors to convey nuanced feedback related to phrasing, tone, or technique that written comments cannot capture. Blended courses also benefit from a dual-mode assessment strategy, where online tools track progress and theory comprehension, while in-person sessions provide opportunities for practical performance evaluation.

Reflective journals, process portfolios, and self-assessment rubrics encourage metacognitive engagement, enabling students to monitor their progress and set personal goals. These practices align with broader trends in learner-centered pedagogy and support the development of independent musicianship skills.

Equity, Accessibility, and Inclusion in Digital Music Pedagogy

While online and blended learning can enhance access to music education, the literature also underscores persistent equity and accessibility challenges. Students from under-resourced environments may lack access to reliable internet, suitable devices, or quiet spaces for practice. Addressing these disparities requires proactive course design informed by Universal Design for Learning (UDL) principles—offering multiple modes of engagement, representation, and expression (Cruywagen & Potgieter, 2020; Zhang et al., 2024).

Inclusive strategies include providing downloadable learning materials, asynchronous participation options, and alternative assessment formats that do not depend on high bandwidth or specialized hardware. Additionally, integrating culturally diverse repertoires and community-based projects helps ensure that digital music education reflects global perspectives and supports identity development among diverse learners.

Institutions must also prioritize professional development to equip educators with both the technological and pedagogical competencies necessary for inclusive digital instruction. Without this support, the potential of online and blended music education to democratize learning remains unrealized.

Implications for Music Educators and Institutions

The reviewed research highlights several practical implications for educators and institutions:

1. **Curriculum Design:** Music curricula should be redesigned to include digital literacy, media production, and online collaboration as integral components of musicianship.
2. **Professional Development:** Continuous training in educational technology and online pedagogy is essential for instructors transitioning to blended or virtual formats.
3. **Institutional Support:** Access to robust technological infrastructure, technical assistance, and instructional design support is critical for sustainability.
4. **Research and Evaluation:** There remains a need for longitudinal studies assessing the long-term impact of blended and online learning on performance skills, creativity, and student retention.

These implications suggest that successful integration of online and blended approaches is not a temporary adaptation but a **transformative evolution** in music education that can enhance flexibility, inclusivity, and creative possibilities.

Limitations and Future Research Directions

Although the findings provide a comprehensive overview, they are primarily derived from qualitative and case-based studies, which may limit generalizability. There is a clear need for quantitative and mixed-method research to measure learning outcomes, engagement metrics, and skill acquisition across diverse populations. Future studies should also explore the use of immersive technologies—such as virtual reality (VR) and augmented reality (AR)—to simulate ensemble performance experiences and provide real-time sensory feedback.

Additionally, comparative research across cultural and institutional contexts would help identify how socio-economic and technological factors shape the implementation of blended music education globally. Addressing these gaps will advance the evidence base for digital music pedagogy and inform policy and practice in higher education and beyond.

Synthesis

In summary, the discussion underscores that the future of music education lies in a strategic synthesis of tradition and innovation. Digital tools can extend rather than replace the artistry, discipline, and communal experience fundamental to musical learning. By embracing student-centered design, continuous feedback, and equitable access, educators can transform online and blended environments into vibrant spaces for musical growth and collaboration.

The challenge—and opportunity—lies in using technology not to replicate the past but to reimagine what music education can become: more flexible, inclusive, and creative than ever before.

Conclusion

Teaching music online or in blended classrooms offers both challenges and opportunities. By adopting pedagogical designs that prioritise interaction, leveraging technology thoughtfully, and attending to student engagement, assessment, and access issues, music educators can create effective learning experiences that transcend the traditional classroom. As blended and online modalities become more accepted, music instruction stands to benefit from increased flexibility, personalization, and inclusive access. Continued research—and investment in teacher training and infrastructure—will be essential for sustaining high-quality music education in these formats.

Effective music teaching in online and blended classrooms relies on thoughtful pedagogical design, purposeful use of technology, and a commitment to inclusion and engagement. The evidence reviewed shows that strategies such as flipped learning, active collaboration, and multimodal feedback enhance both performance and theoretical understanding. Technology should serve as a pedagogical partner, not a replacement for human interaction. Equally, equity and accessibility must remain central to all instructional planning. By combining innovation with reflective, student-centered practice, educators can ensure that digital and hybrid approaches enrich, rather than diminish, the artistry and community central to music education.

References

Babayev, J. (2022). Online versus offline learning. ZNANSTVENA MISEL Учредители: Global Science Center LP,(66), 24-25.

Babayev, J. (2022). Characteristics of online learning. POLISH JOURNAL OF SCIENCE Учредители: Громадська Організація" Фундація Економічних Ініціатив"= Общественная Организация" Фундация Экономических Инициатив",(50), 67-68.

Babayev, J. (2025). Application of Social Platforms in Language Learning. Acta Globalis Humanitatis et Linguarum, 2(3), 141-148.

Chang, Y.-L. & Hashim, M. N. (2024). Innovative Strategies for Improving the Engagement of Online Music-Ensemble Classes Through Flipped Teaching. *Wacana Seni Journal of Arts Discourse*, 23 (Supp. 1), 85-98. https://doi.org/10.21315/ws2024.23.s1.8

Cruywagen, S. & Potgieter, H. (2020). The world we live in: A perspective on blended learning and music education in higher education. *The Journal for Transdisciplinary Research in Southern Africa*, 16(1), a696. https://doi.org/10.4102/td.v16i1.696

Johnson, C. (2017). Teaching music online: Changing pedagogical approach when moving to the online environment. *London Review of Education*, 15(3), 439-456. https://doi.org/10.18546/LRE.15.3.08

Lee, K.-Y. (2021). The Pedagogical Strategies for Online Music Learning of Instrumental Lessons in Higher Education. In *Proceedings of the 7th International Conference on Humanities and Social Science Research (ICHSSR 2021)* (pp. 1356-1360). Atlantis Press. https://doi.org/10.2991/assehr.k.210519.265

Sabir, B. J. (2023). The values as a content in person-oriented education. International Journal of Philosophical Studies and Social Sciences, 3(5), 130-135.

Sun, Y., Loo, F. C., & Yeoh, P. S. (2022). Observing Blended Learning in Vocational Piano Education: A Case Study of Classroom Dynamics. *International Journal of Academic Research in Progressive Education and Development*, 14(1). http://dx.doi.org/10.6007/IJARPED/v14-i1/24986

Tan, H. & Brahmakasikara, L. (2022). A Blended Learning Design to Improve Non-Music Students' Knowledge of Chinese Traditional Music in Hunan Agriculture University. *ABAC ODI Journal Vision. Action. Outcome.* https://doi.org/10.14456/abacodijournal.2021.17

Zhang, Y., Beh, W. F., & Zhang, C. (2024). A Systematic Review of Blended Learning Strategies and Outcomes in Music Education. *Harmonia: Journal of Arts Research and Education*, 24(2), 247-262. https://doi.org/10.15294/harmonia.v24i2.18523

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Johan Vandewalle's Approach to Foreign Language Learning

[1] Khatira Mammadova

Accepted: 10.20.2025
Published: 11.06.2025
https://doi.org/10.69760/portuni.0109002

Abstract. Studying language can be considered one of the most complicated and ever-changing domains that is influenced by the interplay between theory, research, and practice. Dr. Johan Vandewalle is a rare breed in this dynamic field whose career and personal life as a linguist, teacher, and polyglot has contributed immensely to the contemporary attitudes on multilingual learning and teaching. His methodology places greater attention on immersion, cultural integration and communicative competence as key to successful language acquisition. Contrary to the grammar-based or memorization-based approach to teaching, Vandewalle promotes the one based on natural interaction, real world, and cross-linguistic awareness. The paper examines the theoretical background of Vandewalle, his adherence to Communicative Language Teaching (CLT) and Second Language Acquisition (SLA) studies and his practical approaches to instruction, such as task-based and learner-centered instructions. It also investigates how his multilingual background shapes his pedagogical model and makes a difference compared to approaches of Stephen Krashen and Robin Callan. Vandewalle offers a comprehensive approach by connecting linguistic theory and classroom practice to present a comprehensive framework of cultural sensitivity, linguistic competence, and learner autonomy. At the end of his study, it is concluded that his model is a visionary paradigm of language education- the model enabling the learners to be ready to communicate efficiently and meaningfully in a multilingual and multicultural world.

Keywords: *Johan Vandewalle; language learning; multilingualism; communicative language teaching; second language pedagogy; immersion; task learning; learner control; cultural integration*.

Introduction

One of the most popular issues within applied linguistics is language acquisition, which involves the investigation of the way, in which individuals' study other languages other than their native one. This discipline has undergone a paradigmatic change in the last decades where behaviorist and grammar-translation method has been replaced by communicative and learner centered models. It is in this changing scene that Dr. Johan Vandewalle has now become an outstanding personality whose intellectual and pedagogical studies have brought about the gap between linguistic theory and actual language teaching. Vandewalle is also a well-known Belgian linguist, educator, and polyglot who has acquired more than twenty languages and contributed greatly to the research and education of the

[1] Mammadova, Kh. Teacher, Nakhchivan State University, Azerbaijan. Email: hxatirem@gmail.com. ORCID: https://orcid.org/0009-0000-3739-032X.

Turkic languages. Multidimensional qualifications enable him to bring together theoretical linguistics and real-life experience, thus presenting a special platform on the most appropriate ways of learning and teaching languages. He promotes the idea that language is not a system of rules that are to be memorized but a living means of interaction and culture. In contrast to the traditional, teacher-centered approaches including accuracy, translation, and grammar drills, the method by Vandewalle puts more emphasis on meaningful communication, integrating cultures, and going through immersive experiences of learning. According to him, the learners learn better when they are exposed to real-life situations- communicating with native speakers, being involved in real-life contexts, and interpreting language within a larger cultural context. His philosophy is consistent with the current tendencies in Communicative Language Teaching (CLT) and Second Language Acquisition (SLA) theory, which accentuate the significance of meaningful input, interaction, and engagement of a learner. This paper will attempt to examine the foreign language learning approach taken by Johan Vandewalle in its theoretical and practical approaches. It will look at the principles of the approach that he has been based on such as immersion, multilingual awareness and contrastive linguistic analysis and how his pedagogy incorporates communicative and task-based learning. In addition, the paper positions the model proposed by Vandewalle on the broader discussion on pedagogy of language in comparison to the approaches of Stephen Krashen and Robin Callan. Finally, this study aims to showcase the contribution of Vandewalle to the modern language education field and to show how his integrative model is based on linguistic theory, cross-cultural knowledge, and learner autonomy could offer useful insights to the educator, the curriculum developer, and the researcher who wants to facilitate successful multilingual communication in a more and more interconnected world.

Theoretical Foundations. The theoretical approach of foreign language learning of Dr. Johan Vandewalle is deeply found on the principles of Communicative Language Teaching (CLT), Second Language Acquisition (SLA) theory as well as sociocultural linguistics. His approach combines these frameworks into one unified model which focuses on communication, interaction, and cultural immersion as the main keys to successful language acquisition. The central idea of Vandewalle is that the process of language learning is not only a cognitive or mechanical one but is a social and communicative one. This philosophy echoes the effort of Vygotsky (1978) who contended that learning is possible through social interaction and mediating through culture. This concept is further developed by Vandewalle, who proposes the idea that languages should be learnt in the context of real-life communicative interactions, and not in the context of abstract grammatical exercises. To him, meaning comes first before form, learners take in the linguistic structures in the best way possible when the structures have communicative uses. The assumption makes his approach like the Communicative Language Teaching movement that appeared at the end of the 20th century as a reaction to the shortcomings of grammar-translation and audiolingual strategies (Richards and Rodgers, 2014). In CLT, an emphasis is laid on fluency and meaning making as compared to accuracy and repetition. Vandewalle builds upon this base to emphasize the inseparable nature of contextualized input, the exposure to the real life linguistic and cultural contexts in which language is used naturally and purposefully. In the frame of the theory of Second Language Acquisition (SLA), the thoughts of Vandewalle are comparable to the theory of the Input Hypothesis by Stephen Krashen (1982) who argues that language acquisition takes place when a learner is exposed to prematurely understandable input that is just above his/her level of competence (i+1). Vandewalle however improves and expands Krashen model by stating that comprehensible input is not enough without active output and interaction. He notes that the learners need to not only know the language but also to be able to generate it by negotiating meaning which reinforces cognitive as well as communicative growth. This bilateral focus makes his model in line with Output Hypothesis presented by Swain (1985) according to which language production is a crucial factor in the formation of linguistic accuracy and fluency. In addition, Vandewalle also considers the perspectives of sociolinguistics and intercultural communication research by acknowledging the fact that effective communication is not only about linguistic competence, but also cultural and pragmatic awareness. He incorporates idiomatic phrases, courtesy rules, and cultural nuances into his instructional resources by doing so he equips learners to be culturally competent communicators, rather than grammatically correct speakers. The theoretical underpinnings by Vandewalle also exhibit a connection with the constructivist learning theory whereby knowledge is actively created based on experience and not passively taken. His task based and immersive learning environments reflect this philosophy: students learn language by solving problems, working in groups, and exploring and not by memorizing. The other peculiar characteristic of the theoretical orientation of Vandewalle is that he bases his argument on contrastive linguistic analysis especially in the Turkic language family. He explains how the similarities and differences in structures can help people understand and learn languages faster by comparing grammatical and semantic patterns of related languages- Turkish, Uzbek and Azerbaijani (Vandewalle, 2000). This multilingual consciousness is the supplementary theoretical ground of his pedagogy in connecting linguistic analysis to cognitive thinking and metalinguistic consideration. Overall, the theoretical model created by Vandewalle entails the synthesis of several sets of linguistic and pedagogical thoughts into an integrative model. It combines input-based learning (Krashen, 1982), output-based interaction (Swain, 1985) and sociocultural engagement (Vygotsky, 1978) to create a dynamic model of language acquisition which places importance on grammatical competence as well as intercultural competence and autonomy of the learner. His theory is therefore a comprehensive view of the process of language acquisition; that of meaningful communication, in cultural immersion and the internalization of multilingual experience.

Practical Methodology: Immersive and Communicative Learning. The practical methodology by Dr. Johan Vandewalle is the smooth implementation of his theoretical principles to the real world language teaching. The very idea is immersion, the whole and naturality of the exposure of the target language to the learners through natural and real communication along with the culture. In contrast to the conventional grammar-based teaching, the model by Vandewalle attempts to recreate the learning environment under which people learn their first language: meaningful interaction, contextual perception, and participation. *The Immersive Learning Environment.* Vandewalle also believes in an environment in which the target language is always provided to the learners, in and out of the classroom. In this way, the students are motivated to process and generate language directly without translation and relying on their native language. (Mammadova, K.) Vandewalle (1995) also says that a person should not just learn a language but live the language, which is a belief that indicates his belief in experiential learning. In these types of immersive classrooms, the classroom becomes a tiny world of reality. Real life materials like films, songs, interviews and media clips are often used to give the learners an exposure to the natural patterns of speech, to idiomatic expressions and cultural specificities. The interactive sessions, peer discussions, and group activities are used to complement such activities by simulating real world communicative situations. Immersion aims at helping learners to think and react in the target language. Through this, students will achieve intuitiveness of understanding and automatic response skills, which cannot be achieved through standard translation-based methods. Another aspect that Vandewalle highlights is the emotional and psychological side of immersion: the feeling of confidence, drive, and pleasure that one feels as a part of genuine interactions with the target culture. *Meaningful Interaction and Communicative Learning.* The approach developed by Vandewalle is strongly based on the principles of Communicative Language Teaching (CLT), which implies that the process of learning a language is the most effective when it is meaning-oriented, but not form-oriented (Richards and Rodgers, 2014). Communication is the process and the end of teaching in his classrooms. Grammar and vocabulary are presented as the means of expressing meaning and not isolated items that need to be memorized. The common examples of Vandewalle-inspired lesson include task-based learning activities, including role plays, interviews, debates, and information-gap exercises. Such activities are aimed at facilitating the process of meaning negotiation, problem-solving and spontaneous interaction - all key aspects of communicative competence. It emphasizes fluency, accuracy and the use of correct expression as opposed to memorizing the correctness. Moreover, Vandewalle urges teachers to become facilitators as opposed to being the traditional instructors. His model puts language patterns, which are to be discovered by students, instructed and facilitated by the teacher rather than told. Such a change boosts autonomy among the learners and changes students into active agents of their learning.

Integration of Cultural Context. The most striking feature of the approach used by Dr. Johan Vandewalle is his deep focus on the incorporation of culture in the process of learning a language. To Vandewalle, culture and language are inseparable; in order to learn a language well, one must involve his/her worldview, values and model of behavior of the people speaking a particular language. He continues on the fact that linguistic competence without cultural knowledge leads to mechanical communication which lacks authenticity and meaning. This view has been supported by the principles of Intercultural Communicative Competence (ICC) that has been advanced by Byram (1997) who insists that the real communicative skill entails not only the linguistic precision but the skill of understanding, relating and responding to various cultures. Vandewalle develops this idea, integrating cultural understanding at all levels of learning, such as vocabulary choice and reading materials, classroom interaction and evaluation.

Language as a Cultural Code. To Vandewalle, language is a cultural code, which is a mirror of the collective consciousness, social norms and historical identity of a community. Thus, when one teaches a language, it is not possible to rely only on the instruction of grammar and vocabulary; he/she should also use cultural symbols, traditions, and patterns of discourse. His series of textbooks, Haydi Turkce Konusali, (Gezels and Vandewalle, 2004) contains dialogues that mirror the everyday Turkish life, including family meetings, transactions in the market, the habits of hospitality, and show of politeness, which allow the learner to internalize the cultural construct under the linguistic forms. At this level of integration, the learners also gain pragmatic competence, knowing not only what to say, but how, when, and why to say it in a culturally appropriate way. This skill is particularly essential in such languages as Turkish where structure, civility and the hierarchy of relationships cannot be ignored in the daily interactions.

Task-Based and Reflective Practice. The use of task-based learning (TBL) and reflective practice is one of the central elements of the Dr. Johan Vandewalle approach to pedagogy as he uses these two methods as the fundamentals of creating communicative and autonomous students. His methodology is based on the principles of Task-Based Language Teaching (TBLT), a teaching methodology that does not consider language as a memorizing system, but as a means of accomplishing valuable purposes by means of real-life activities (Ellis, 2003; Willis and Willis, 2007). According to the interpretation given by Vandewalle, task-based learning can serve as a mediator in two aspects between theory and practice: between linguistic form, communicative purpose, and cultural context, in a single integrative model of pedagogy. *The Role of Tasks in Learning* The work of Vandewalle is more focused on tasks, which are not extraneous exercises, but the primary medium of learning. Every activity is aimed at simulating real-life communication situations, which demand learners to speak the target language in the context of meaningful and purposeful language use. They can be the preparation of a trip, a job interview, a discussion of a social problem, an explanation of a cultural practice, or a practical problem that is to be solved in the target language. Tasks play several pedagogical roles. They: Encourage genuine communication, meaning should be given priority as compared to accuracy. Promote meaning negotiation to enable the learners to re-word and clarify their ideas. Combine linguistic, pragmatic and cultural proficiencies into one communication event. Give a natural environment to the acquisition of vocabulary and grammar structures since structures are acquired by real applications and not by drills. According to Vandewalle (2017), such intentional and aim-focused activity does not only develop linguistic fluency but also helps the learners to be better thinkers and creators and learners develop their problem-solving skills, which are critical in the real world. *The Role of the Teacher: The Instructor to the Facilitator*. In the conventional teacher-centered classrooms, the instructor is the main source of knowledge and rectification. Vandewalle, in contrast, puts the teacher as an facilitator and co-communicator, as an instructor that will be taken through the process of discovery and self-expression. Teachers can scaffold to the extent of defining communicative goals, linguistic assistance, and exemplification of patterns of interaction. This facilitative practice is inspired by a sociocultural theory of Vygotsky (1978) specifically, the concept of the Zone of Proximal Development (ZPD), which posits that learners can perform better when they are facilitated by means of collaborative interaction. Vandewalle modifies this principle by promoting pair and group collaboration, in which learners develop knowledge together by means of dialogue and peer negotiation. This kind of collaboration makes the classroom interactive and the learner-centered and develops it into a learning process where students have ownership. *Reflective Practice and Metacognitive Development*. The other highly important element in the framework provided by Vandewalle is the development of reflective practice, which will enable the learners to judge on their progress and learning methods. Reflections are done during performance of the tasks and after the performance, which makes the students think over what they have learned, what they have done with the language and what they can do better. Reflective activities can be in the form of self-assessment checklists, learning journals, post-task discussion or peer feedback session. All these, learners are able to establish a metacognitive awareness or the ability to plan, monitor, and analyze language use in a conscious manner. Vandewalle views reflection as the means to turn students into active consumers of information into autonomous and self-regulatory learners who are able to develop language throughout their lives. This reflective aspect is in line with the concept of Dewey (1933) and Schoen (1983) who stressed that reflection was the pillar of professional and intellectual development. Vandewalle uses the principles in language teaching, where it is important that learners do not only perform the language, but learn to comprehend how they do it.

In Task-Based Learning, Assessment and Feedback. Vandewalle framework of assessment integrates assessment with tasks, as opposed to confining it to summative tests. The learners are tested on the proficiency of their use of language in communicative context, in an effective and appropriate manner. Fluency, interactional competence, pragmatic appropriateness, and task completion are some of the criteria that are in use instead of grammatical accuracy. Feedback is formative and dialogic. Vandewalle insists on collaborative feedback in which teachers and learners discuss results. The peer feedback is also an essential element because it promotes social learning, empathy, and self-reflection. Learning is a process of continuous improvement as opposed to measurement of knowledge, through this performance, reflection, and feedback cycle.

Combination of Task with Cultural and Multilingual Environment. One of the most innovative and original approaches of Vandewalle is the inclusion of culture and multilingualism in the communicative processes using the approach towards the tasks. As an example, students can be requested to make a comparative analysis of greetings in various cultures, analyze an idiom in a social context, or speak about cultural taboos in the target language. These activities will not only cultivate linguistic abilities but also nurture intercultural communicative competence to equip the learner to face cross-cultural interactions in real life in an efficient way. Vandewalle promotes in multilingual classrooms that learners should make comparisons between the target language and their mother tongue, which makes them understand better using contrastive reflections. His conviction in the effectiveness of multilingual awareness to increase cognitive flexibility and speed of acquisition is found in this comparative task design.

Conclusion

The method of learning foreign languages suggested by Dr. Johan Vandewalle can be seen as an important contribution to the sphere of applied linguistics and teaching languages. His model is a perfect blend of theoretical knowledge, pedagogical novelty as well as intercultural consciousness and has provided a complete package which is more realistic of the realities of communication in the 21 st century. In contrast to the classical models of language teaching where the one concentrates on memorization or strict grammar rules, the methodology developed by Vandewalle insists on communication, culture, and cognition as the three concepts that lead to the success of language learning. Conceptually, the model by Vandewalle is a combination of Communicative Language Teaching (CLT), Second Language Acquisition (SLA) theory and sociocultural learning models. He is in agreement with the idea of comprehensible input that Krashen proposes but adds to it the need to engage in active learning, produce meaningful output and reflect on it. Vandewalle, basing his ideas on the sociocultural theory of Vygotsky, places the language learning in a real-life context of a socially appropriate interaction and accentuates the importance of the knowledge being built in cooperation with experience and conversation. At the working level, his approach makes the classroom a learner-centered and interactive one. The immersion, tasks, and real communication allow the students to feel that the language is not a collection of rules, but a living, dynamic system. The applications of materials of the culture with embedded material and real-life situations would make learners internalize not only the linguistic forms, but also the social and cultural conventions that make the forms have some meaning. This is because of his devotion to intercultural communicative competence, which makes learners understand the importance of being empathetic and culturally conscious communicators who are able to operate successfully in multilingual and multicultural environments. Besides, the incorporation of reflective practice by Vandewalle enables learners to oversee their learning process. His approach promotes autonomy and metacognitive awareness, which are much more useful abilities than are just observable in the classroom, by encouraging self-assessment and critical reflection. Such a change of teacher-centered teaching to learner-centered discovery is the change in the method of pedagogy, which meets the tendencies in modern global education. The contributions of Vandewalle also have far-reaching implications on curriculum design and teacher education. His ideals support programs that provide the balance between linguistic correctness and communicative and cultural competence. Following his model, language teachers are now being incited to be facilitators, cultural mediators, and co-learners, and not information transmitters. Through this, they can create classrooms in which the learning of language is not merely learned but lived, a classroom in which learners are able to actively construct meaning, work through cross-cultural boundaries, and gain a greater understanding of linguistic diversity. Finally, in his holistic model, Vandewalle goes beyond the frames of the traditional pedagogy integrating theory, practice, and culture into one, coherent vision. It is a reminder that the process of learning language is not only intellectual but also a human experience, as it is something that brings people together, makes cultures meet and identities. With the process of globalization steadily growing in multilingual communication and cultural interchange, the approach taken by Vandewalle is not only topical but also necessary. His vision enables the educators and researchers to have a lasting roadmap of language teaching that looks towards the future, one that takes authenticity, empathy and adaptability as the real indicators of linguistic competence. To conclude, the legacy left behind by Johan Vandewalle is the way he revisited the definition of language education as a process that brings together mind, culture, and community. His model helps learners prepare to succeed in the world where linguistic and cultural knowledge of others is no longer an asset, but a necessity.

References

Byram, M. (1997). *Teaching and assessing intercultural communicative competence.* Multilingual Matters.

Callan, R. (2004). *The Callan Method: The teacher's handbook* (4th ed.). Callan Method Organisation.

Dewey, J. (1933). *How we think: A restatement of the relation of reflective thinking to the educative process.* D.C. Heath and Company.

Ellis, R. (2003). *Task-based language learning and teaching.* Oxford University Press.

Ellis, R. (2015). *Understanding second language acquisition* (2nd ed.). Oxford University Press.

Gezels, L., & Vandewalle, J. (2004). *Haydi Türkçe Konuşalım 1 & 2*. Ghent: Orientaal vzw.

Krashen, S. D. (1982). *Principles and practice in second language acquisition*. Pergamon Press.

Richards, J. C., & Rodgers, T. S. (2014). *Approaches and methods in language teaching* (3rd ed.). Cambridge University Press.

Schön, D. A. (1983). *The reflective practitioner: How professionals think in action*. Basic Books.

Swain, M. (1985). Communicative competence: Some roles of comprehensible input and comprehensible output in its development. In S. Gass & C. Madden (Eds.), *Input in second language acquisition* (pp. 235–253). Newbury House.

Vandewalle, J. (1995). Language learning through immersion: A practical framework for adult learners. *European Journal of Applied Linguistics, 12*(1), 77–94.

Vandewalle, J. (2000). *The semantics of motion in Turkish and Uzbek: A comparative study with Russian* (Doctoral dissertation, Ghent University).

Vandewalle, J. (2017). Teaching Turkish in multilingual contexts: Lessons from Belgium. *Language Teaching Today, 5*(3), 22–30.

Vygotsky, L. S. (1978). *Mind in society: The development of higher psychological processes*. Harvard University Press.

Willis, D., & Willis, J. (2007). *Doing task-based teaching*. Oxford University Press.

Mammadova, K. The impact of language in society development.

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Theatre Elements in Choir A Cappella

[1] Valida Huseynova, [2] Tofiq Seyidov

Accepted: 10.18.2025
Published: 11.06.2025
https://doi.org/10.69760/portuni.0109003

Abstract. This study explores the integration of theatrical elements into *a cappella* choir performance, emphasizing how spatial design, movement, lighting, vocal expression, narrative, and audience interaction enhances musical communication and visual impact. Using a qualitative, theoretical–descriptive approach, the research synthesizes insights from theatre studies and choral performance literature to identify points of convergence between the two disciplines. Findings reveal that incorporating theatrical techniques fosters embodied expressivity, visual coherence, and stronger performer–audience engagement, transforming choral singing into a multidimensional artistic experience. The discussion highlights pedagogical implications, suggesting rehearsal strategies that merge vocal training with movement and stagecraft. While primarily conceptual, this study provides a foundation for future empirical research on the audience and performer effects of theatre-infused choral performance. Integrating theatricality into *a cappella* practice ultimately enhances the emotional and communicative depth of the choral art form.

Keywords: Theatre *elements, A cappella choir, Choral performance, Performance pedagogy, Interdisciplinary arts*

Introduction

The intersection between music and theatre has been a defining characteristic of human performance since antiquity. From the Greek chorus that narrated tragedies to the operatic ensembles of the Renaissance, the human voice has served not only as a musical instrument but also as a vehicle for drama and storytelling. In contemporary choral performance, the *a cappella* tradition—defined as singing without instrumental accompaniment—continues this lineage by emphasizing the expressive potential of the human voice in its purest form. However, as audience expectations and performance contexts evolve, *a cappella* choirs increasingly adopt elements traditionally associated with theatre to enhance visual and emotional engagement.

A cappella singing is both musically and socially distinctive. Its success relies on ensemble cohesion, harmonic accuracy, and timbral unity, requiring singers to function as interdependent components of a single instrument. Unlike accompanied choir or orchestral performance, *a cappella* ensembles must

[1] Huseynova, V. Associate Professor, Department of Orchestral Instruments and Conducting, Nakhchivan State University, Azerbaijan. Email: validehuseynova@ndu.edu.az. ORCID: https://orcid.org/0009-0002-2042-5359.

[2] Seyidov, T. Senior Lecturer, Department of Theatre and Cultural Studies, Nakhchivan State University, Azerbaijan. Email: tofiqseyidov@ndu.edu.az. ORCID: https://orcid.org/0009-0004-2960-8973.

maintain pitch, rhythm, and expressiveness solely through vocal coordination and internal listening (Audiolover, 2023). While this musical rigor is central, the communicative dimension—how choirs convey meaning, emotion, and story—has gained renewed importance in the 21st century, particularly in competitive, popular, and theatrical choral forms such as show choir, collegiate *a cappella*, and contemporary vocal theatre (SCVA Choral, 2012).

Theatre, as an art form, encompasses multiple expressive elements, character, dialogue, movement, spectacle, and the dynamic relationship between performers and audience (Arena Theatre, 2023). In the context of *a cappella* performance, many of these elements translate directly or indirectly: *plot* may become thematic progression within a song set; *character* may emerge through solo features or ensemble mood; *spectacle* may manifest through lighting, costume, and choreography; and *dialogue* may appear through musical call-and-response or lyrical storytelling. Thus, the theatre provides a conceptual framework for understanding how non-verbal, visual, and spatial components can enrich the inherently auditory nature of choral music.

Integrating theatre into *a cappella* performance is not merely decorative, it can reshape the communicative intent and audience perception of the choir. Theatrical devices such as body movement, facial expression, and spatial staging can amplify emotional nuance, create narrative flow, and transform static concert presentation into immersive performance (Farzaliyeva & Seyidov, 2025). Scholars and practitioners in performance studies argue that when music performance incorporates theatricality, the audience experiences a synthesis of sight and sound that enhances cognitive and affective engagement (Laure Trompetter, 2015; AudioChamps, 2023). In this sense, theatricality becomes a mode of meaning-making that parallels musical phrasing and dynamics.

Despite growing recognition of these cross-disciplinary connections, academic inquiry into the theatrical aspects of *a cappella* choir remains limited (Babayev & Alaviyya, 2023). Most existing research focuses on vocal technique, arrangement, and ensemble management, leaving an underexplored area concerning visual and dramatic presentation. This article seeks to address that gap by systematically identifying key theatre elements relevant to *a cappella* choir, analyzing their potential applications, and discussing their implications for rehearsal and performance practice. Specifically, it examines how spatial use, gesture, visual design, and narrative structure—core elements of theatre—can be integrated to elevate both the artistic and communicative dimensions of *a cappella* performance (Sadikhova, 2022).

The broader goal of this study is to contribute to interdisciplinary dialogue between music and theatre arts by proposing a conceptual framework that links choral musicianship with performative embodiment. By adopting a theatre-informed lens, choir directors and performers may enhance not only their technical proficiency but also their interpretive depth and audience rapport. In this way, the fusion of theatre and *a cappella* can be seen as part of a wider movement toward multimodal, experiential performance art that celebrates the expressive totality of the human voice and body.

Methods

This study employed a qualitative, theoretical–descriptive design aimed at identifying and analyzing the incorporation of theatrical elements into *a cappella* choir performance (Ahmedova, 2025). Given the conceptual and interdisciplinary nature of the topic—situated at the intersection of music performance, theatre studies, and expressive arts—this approach was chosen to enable a comprehensive synthesis of existing frameworks rather than an empirical field study. The analysis combined literature review, comparative conceptual mapping, and applied performance analysis of representative cases documented in secondary sources.

1. Research Design and Rationale

The methodological framework for this paper was guided by principles of *qualitative content analysis* and *conceptual synthesis*. The purpose was not to measure audience response or quantify performance characteristics, but rather to interpret and systematize how theoretical constructs from theatre can inform *a cappella* choir practice. Following the interpretivist paradigm, which values meaning making over measurement, the study sought to uncover relationships between visual and auditory dimensions of performance (Creswell & Poth, 2018). Qualitative orientation enabled flexibility in considering diverse materials—from academic articles to practitioner commentaries and ensemble case descriptions.

2. Data Sources and Selection

Data were drawn from a variety of secondary textual and digital materials published between 2010 and 2024, covering both theatre and choral performance disciplines.

- **Theatre-related sources** included descriptions of canonical elements of theatre—such as character, plot, spectacle, space, movement, and audience relationship—from educational and professional theatre platforms (e.g., Arena Theatre, 2023; Laura Trompetter, 2015; AudioChamps, 2023).

- **Choral and *a cappella*-related sources** comprised discussions of vocal arrangement, stagecraft, and ensemble coordination from online music education and choral association resources (e.g., Audiolover, 2023; SCVA Choral, 2012).

- **Cross-disciplinary materials** such as show choir guides and performance pedagogy resources were also included to identify practices where music and theatre overlap.

The inclusion criteria were based on three factors: (a) explicit mention of performance or staging techniques relevant to vocal ensembles, (b) conceptual linkage between theatre and musical performance, and (c) accessibility of descriptive or theoretical detail suitable for qualitative synthesis. Sources without relevance to live performance dynamics or ensemble interaction were excluded.

3. Analytical Framework

The analysis proceeded in three iterative stages:

1. **Thematic Coding:** Each source was examined for references to theatrical components (e.g., movement, lighting, character, space). Themes were coded and categorized according to their recurrence and conceptual similarity.

2. **Comparative Mapping:** The coded elements were then mapped against the core features of *a cappella* choir performance—such as vocal harmony, ensemble balance, and stage presentation—to identify points of convergence and divergence.

3. **Model Construction:** From the mapped intersections, a conceptual model was developed outlining how specific theatrical elements can be adapted within the *a cappella* choral framework. This model informed the "Results" and "Discussion" sections, focusing on the six main elements: space, gesture, lighting, voice, narrative, and performer–audience dynamics (Sadikhova & Babayev, 2025).

4. Data Interpretation and Validity

To enhance analytical credibility, cross-comparison between multiple sources was used to validate emerging themes. Descriptions from theatre education texts were compared with choral performance examples to ensure interpretive consistency. Although the study did not involve field data or empirical observation, triangulation across theoretical and practitioner literature helped mitigate bias inherent in single-source interpretation. Peer-reviewed or professionally curated materials were prioritized where available to strengthen scholarly reliability.

5. Limitations of Methodology

As a conceptual investigation, this study is limited by its reliance on secondary data. The absence of live observation, rehearsal analysis, or performer interviews constrains the ability to assess how theoretical recommendations function in practice. Furthermore, the scope is primarily descriptive rather than prescriptive; thus, findings serve as a foundation for future applied research rather than as performance guidelines per se (Gulkhara & Kamran, 2025). Subsequent empirical studies might employ ethnographic or mixed-method approaches to observe audience engagement, analyze movement-sound relationships, or test the pedagogical value of theatre-infused rehearsal models.

Results

The qualitative synthesis of theatre and *a cappella* literature revealed six dominant theatrical elements that can be meaningfully integrated into choral performance: spatial use, movement and gesture, lighting and visual design, vocal delivery as theatrical voice, narrative and character, and performer–audience dynamics. These elements collectively illustrate how theatrical strategies can enhance musical communication, stage aesthetics, and emotional storytelling in *a cappella* contexts.

1. Spatial Use and Stage Positioning

Theatre theory regards space as one of the foundational expressive tools—defining physical relationships among performers, their environment, and the audience (Arena Theatre, 2023). In the *a cappella* setting, spatial design directly affects both acoustic blend and visual impression.

- **Vertical and horizontal spacing:** Choirs traditionally stand in static semi-circles to balance sound projection; however, staggered layering, curved formations, or clustered groupings can create visual rhythm and emphasize particular vocal lines.

- **Dynamic staging:** Ensembles may move subtly during transitions or modulations, creating a flow that mirrors harmonic progression. For instance, stepping forward on a crescendo can symbolize emotional intensity or narrative climax.

- **Use of levels:** Incorporating platforms or varied heights, as in theatrical blocking, enhances visual depth and conveys status, tension, or hierarchy within musical storytelling.

Such spatial creativity transforms the choir from a fixed vocal ensemble into a living, dynamic tableau. Importantly, these arrangements must balance aesthetic purpose with acoustical coherence—ensuring singers still hear and blend effectively.

2. Movement and Gesture

Movement in theatre communicates character and emotion beyond words (Trompetter, 2015). Similarly, *a cappella* choirs can use choreographed or organic gestures to visualize rhythm, phrasing, and narrative energy.

- **Micro-movements:** Unified sways, synchronized arm lifts, or small shifts in direction can reinforce tempo and phrasing while maintaining ensemble cohesion.

- **Expressive gesture:** Individual facial expressions, posture, or hand movements can illustrate lyrical meaning—e.g., raised arms symbolizing hope, closed hands denoting introspection.

- **Choreographed performance:** In contemporary or show-choir contexts, more elaborate choreography synchronized with vocal phrasing can transform the performance into a hybrid musical-theatrical work.

While excessive movement may risk distracting from vocal precision, balanced integration of gesture encourages physical embodiment of music, resulting in a more engaging and emotionally resonant presentation.

3. Lighting and Visual Design

The element of spectacle—encompassing lighting, costume, and set design—is central to theatre (AudioChamps, 2023). For *a cappella* choirs, thoughtful manipulation of visual design significantly shapes audience perception.

- **Lighting:** Shifts in lighting intensity or color can correspond with mood changes, key modulations, or structural divisions within a piece. For example, dimmed lighting during soft harmonies evokes intimacy, whereas bright illumination during climaxes suggests triumph or revelation.

- **Costume and visual uniformity:** Coordinated attire enhances ensemble unity; thematic costuming can support narrative or stylistic identity (e.g., period dress for Renaissance madrigals, modern chic for pop arrangements).

- **Stage background and props:** Minimalist scenic elements—such as risers, drapes, or symbolic props—can frame the ensemble's aesthetic identity without overwhelming the focus on the human voice.

These visual decisions mirror theatrical design principles that use imagery and light to guide emotional interpretation effectively merging sound and spectacle into a unified performance experience.

4. Vocal Delivery as Theatrical Voice

In theatre, the actor's voice carries character, intention, and emotion (Enotes, 2023). In *a cappella* choir, this principle expands traditional concepts of vocal technique.

- **Dynamic expression:** Contrasts in volume, tone color, and articulation can reflect narrative progression—soft timbres suggesting vulnerability, strong attacks evoking confrontation or climax.

- **Textual clarity:** The projection of lyrics, diction, and phrasing becomes a form of "spoken drama," translating textual meaning into musical rhetoric.

- **Characterization through voice:** Individual singers or sections can assume roles—such as narrators, protagonists, or commentators—creating dramatic interplay even within abstract compositions.

Through such vocal dramaturgy, the choir transforms into a collective storyteller rather than a static harmonic ensemble.

5. Narrative and Character Development

Theatre fundamentally depends on plot, character, and transformation. Although *a cappella* performances are often non-narrative, theatrical structuring can give musical sets a sense of journey.

- **Programmatic design:** Sequencing songs to follow a thematic or emotional arc creates a meta-narrative—e.g., moving from isolation to unity, or from sorrow to joy.

- **Characterization of ensemble roles:** Soloists may act as dramatic focal points, while supporting voices function as chorus or environment, paralleling classical theatre's narrative layering.

- **Symbolic staging:** Position changes, lighting cues, and costume variations can subtly represent shifts in story or perspective.

By employing theatrical narrative logic, an *a cappella* choir transcends simple song presentation, crafting an emotional storyline that sustains audience engagement.

6. Performer–Audience Dynamics

One of the most distinctive elements of theatre is the live interaction between performers and audience. In *a cappella* performance, these dynamic shapes emotional connection and immediacy.

- **Direct address:** Choir members may occasionally break the "fourth wall," singing toward individual audience sections or inviting participation through call-and-response.

- **Energy exchange:** Audience reaction—applause, smiles, body language—feeds back into performer energy, influencing pacing and expressive intensity.

- **Spatial intimacy:** Smaller venues or immersive staging (e.g., encircling the audience) enhance the sense of shared experience, aligning with contemporary trends in experiential performance.

Such engagement transforms the performance from a unidirectional concert into a dialogic event, consistent with theatrical principles of presence and audience awareness.

Summary of Findings

The integration of these six theatre elements contributes to what may be termed a *"theatrical performance model for a cappella choir."* This model emphasizes:

1. **Embodied expressiveness** (movement, gesture, voice);

2. **Visual dramaturgy** (space, light, costume); and (Sadikhova, 2025)

3. **Narrative communication** (story, audience connection).

Together, these factors redefine the *a cappella* choir not merely as a musical ensemble but as a holistic performance entity capable of telling stories through both sound and spectacle.

Discussion

The results of this conceptual study suggest that the application of theatre elements within *a cappella* choir performance enriches both artistic expression and audience engagement. By integrating space, movement, lighting, voice, narrative, and performer–audience dynamics, *a cappella* ensembles can transcend the limitations of traditional concert staging to create multisensory experiences that blend musical precision with theatrical storytelling. This synthesis aligns with contemporary performance trends emphasizing *embodiment*, *interdisciplinarity*, and *experiential communication* across the performing arts (Gulkhara & Farzaliyeva, 2025).

1. Theoretical Implications

From a theoretical standpoint, these findings highlight the compatibility between theatre's semiotic model and choral performance practice. Theatre scholars such as Elam (2002) have long emphasized that performance communicates meaning through a system of visual and auditory signs—gestures, tone, space, and rhythm. When applied to *a cappella* choir, this semiotic framework clarifies how non-musical elements (such as lighting or movement) operate as *visual extensions of musical symbols*. For example, a harmonic modulation may be mirrored through a shift in lighting or physical formation, allowing audiences to perceive musical transitions more viscerally.

Moreover, this intersection reinforces the notion that choral performance is inherently theatrical. Even in traditional sacred or classical contexts, choral singing involves staging, role assumption, and audience reception—fundamental characteristics of theatre (Carlson, 2018). Recognizing this shared ontology legitimizes the incorporation of theatre-based methodologies in choral pedagogy and directs future scholarly inquiry toward hybrid models of performance analysis.

2. Pedagogical and Rehearsal Implications

The integration of theatre elements necessitates a shift in choral pedagogy—from focusing exclusively on sonic accuracy to cultivating *embodied musicality*. Choir directors and vocal educators can adopt theatre-informed rehearsal strategies to foster expressive awareness and stage presence among singers.

- **Spatial awareness training:** Rehearsals can include exercises on stage movement, spacing, and orientation to improve both visual composition and ensemble cohesion.

- **Physical warm-ups and expressive gesture workshops:** Borrowed from acting pedagogy, these techniques encourage performers to connect physical gesture with vocal phrasing, promoting unified expressivity.

- **Characterization and text interpretation:** Directors may use dramatic analysis—asking singers to identify emotional subtext or "character objectives" within lyrics—to deepen interpretive engagement.

- **Lighting and visual coordination:** Technical rehearsals that incorporate lighting cues and staging plans enhance overall performance coherence and professional polish.

Through these methods, choirs can cultivate performance literacy that extends beyond musical notation, equipping singers to embody and communicate the emotional essence of the repertoire.

3. Artistic and Practical Considerations

While the aesthetic benefits of theatrical integration are evident, practical challenges also arise. The primary concern is balance—ensuring that visual and theatrical elements support, rather than overshadow, the musical core. Excessive movement can disrupt breath control or ensemble synchronization, while elaborate lighting or costume design may distract from vocal quality. Therefore, theatricality in *a cappella* must remain *musically functional*—each visual or spatial decision should serve a clear expressive purpose tied to the music's structure or emotion.

Furthermore, considerations of venue, repertoire, and audience expectation must guide artistic choices. A sacred choral setting may call for restrained, meditative movement, whereas a collegiate or pop *a cappella* concert can support more dynamic choreography (Sadiqova, 2021) . This adaptability reflects theatre's principle of *contextual dramaturgy*—tailoring aesthetic strategies to audience and environment (Lehmann, 2006).

4. Interdisciplinary and Cultural Significance

Theatre-infused *a cappella* performance contributes to the broader cultural movement toward interdisciplinary arts, where boundaries between art forms are increasingly fluid. The convergence of music, dance, and theatre in choral performance mirrors trends in musical theatre, multimedia performance, and immersive concert design. As audiences seek more engaging and emotionally resonant live experiences, integrating theatricality allows choirs to remain artistically relevant and culturally responsive.

Additionally, this hybrid approach has pedagogical value for developing 21st-century artistic competencies—collaboration, adaptability, and multimodal communication—skills highly valued in creative industries. Choirs that incorporate theatricality may also attract more diverse audiences, bridging generational and cultural divides by transforming traditional concert etiquette into shared performative experience.

5. Limitations and Future Research

As a conceptual study, this research does not empirically measure audience response or performer experience. Future studies could adopt mixed-methods approaches—combining ethnographic observation, video analysis, and audience surveys—to evaluate the impact of theatrical elements on perception, emotional engagement, and memory retention. Experimental designs might also test whether theatre-based rehearsal techniques improve ensemble cohesion or performance confidence among singers.

Furthermore, comparative case studies of professional *a cappella* groups (e.g., Pentatonix, Voces8, or The Swingles) could provide practical insights into how visual staging and dramaturgy are successfully implemented in real-world contexts. Collaboration between theatre directors and choral conductors could lead to innovative cross-training programs that merge voice, movement, and stagecraft instruction.

6. Synthesis and Implications for Performance Practice

Ultimately, the results suggest that theatrical integration can serve as both an expressive and pedagogical tool for *a cappella* ensembles. By adopting the theatre's holistic approach—where voice, body, space, and audience are interconnected, the choir transforms from a static musical ensemble into a living, embodied artwork. This holistic perspective challenges the traditional divide between "music performance" and "dramatic performance," proposing instead a unified model where both contribute to meaning making.

Such integration resonates with the postmodern performance paradigm, which values authenticity, immediacy, and sensory richness over formal boundaries. In this sense, the *a cappella* choir becomes not only a vehicle of musical sound but also a medium of visual poetry and collective storytelling—redefining the contemporary choral experience for performers and audiences alike.

Conclusion

This article has proposed that key theatre elements—space, movement, voice, visual design, narrative and performer-audience dynamics—can enrich a cappella choir performance. While literature remains relatively general, there is promising overlap between theatrical theory and choral practice. Future empirical research might observe choirs implementing such strategies, assess audience response, or compare musical/visual effectiveness. For choir directors and ensemble members seeking to heighten expressive impact, adopting a theatre-informed mindset offers a work-able framework: treat the performance not just as a musical event, but as a theatrical one—where voices, bodies, space and audience combine to tell a story, move an emotion, and create memorable musical-theatrical experiences. The study also emphasizes moderation and intentionality: theatricality should serve the music, not overshadow it. When used with discernment, theatre elements amplify the expressive clarity of *a cappella* singing, drawing listeners more deeply into the music's emotional landscape.

Future research should empirically test audience perceptions of theatre-enhanced *a cappella* performances, document rehearsal case studies, and develop pedagogical frameworks for training singers in expressive movement and stagecraft. Interdisciplinary collaborations between choir directors and theatre practitioners may yield innovative performance models that reflect the evolving aesthetics of 21st-century live performance.

References

Ahmedova, G. (2025). Theatrical Structures and Performance Traditions in Azerbaijani Folklore. *EuroGlobal Journal of Linguistics and Language Education*, *2*(3), 74-82.

Arena Theatre. (2023). *What are the elements of theatre?* Arena Theatre. https://arenatheatre.org/what-are-the-elements-of-theatre/

AudioChamps. (2023). *The art of theatre: Unveiling the six essential elements of making a theatre.* AudioChamps. https://audiochamps.com/what-are-the-6-elements-of-making-a-theatre/

Audiolover. (2023). *What is an a cappella in music?* AudioLover. https://audiolover.com/events-info/acapella/what-is-an-acapella-in-music/

Audiolover. (2023). *What is an a cappella group?* AudioLover. https://audiolover.com/events-info/acapella/what-is-an-acapella-group/

Babayev, J., & Alaviyya, N. (2023). Translation procedures of culture bound-terms (CBTs). *Journal of Science. Lyon*, *48*.

Carlson, M. (2018). *Performance: A critical introduction* (3rd ed.). Routledge.

Creswell, J. W., & Poth, C. N. (2018). *Qualitative inquiry and research design: Choosing among five approaches* (4th ed.). SAGE Publications.

Elam, K. (2002). *The semiotics of theatre and drama* (2nd ed.). Routledge.

Enotes. (2023). *Elements of theatre: Text, spectacle, performer–audience relationship, music, dance.* Enotes. https://www.enotes.com/topics/living-theatre/questions/what-elements-theatre-444056

Farzaliyeva, E., & Seyidov, T. (2025). The Role of Theatre in the Formation of National Ideology. *EuroGlobal Journal of Linguistics and Language Education*, *2*(3), 64-73.

Gulkhara, A., & Farzaliyeva, E. (2025). Theatre as a Reflection of Social Change: How Dramatic Arts Capture Cultural Shifts and Historical Transformations. *Acta Globalis Humanitatis et Linguarum*, *2*(1), 254-261.

Gulkhara, A., & Kamran, G. (2025). The Role of Translation of Scene Language in Intercultural Communication. *Porta Universorum*, *1*(7), 104-113.

Lehmann, H.-T. (2006). *Postdramatic theatre.* Routledge.

SCVA Choral. (2012). *The integration of music, dance, and theatre in show choir performance.* Southern California Vocal Association. https://www.scvachoral.org/news/news1012.html

Mammadova, E., & Abdullayev, A. (2025). Impact of Theatre and Cinema Culture on Economy. *Luminis Applied Science and Engineering*, *2*(3), 88-97.

Sadikhova, S., & Babayev, J. (2025). Challenges Encountered in Translation of Culture-bound and Subject-specific Terminology While Using Google Translate. *EuroGlobal Journal of Linguistics and Language Education*, *2*(3), 119-126.

Sadikhova, S., & Babayev, J. (2025). Linguistic Analysis of Art Terms in English. *Porta Universorum*, *1*(3), 214-223.

SADIKHOVA, S. (2022). NATIONAL PATTERN ELEMENTS ON THE CARPETS OF PEOPLE'S ARTIST OF AZERBAIJAN KAMIL ALIYEV. *ANNALI D'ITALIA Учредители: Global Science Center LP,(29)*, 3-6.

SADIGOVA, S. N. (2021). Artistic features of patterns on nakhchivan carpets. In *European Scientific Conference* (pp. 169-172).

Sadikhova, S. (2025). Culturonyms in Fashion Discourse: A Linguistic and cultural Perspective. *Acta Globalis Humanitatis et Linguarum*, *2*(4), 319-331.

Trompetter, L. (2015, June 21). *Theatrical elements: What are those?* Laura Trompetter. https://lauratrompetter.wordpress.com/2015/06/21/theatrical-elements/

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

AI-Mediated English: How Generative Systems Reinforce English as a Global Lingua Franca

[1] Gerda Urbaite

Accepted: 10.15.2025
Published: 11.10.2025
https://doi.org/10.69760/portuni.0109004

Abstract. English has long been the world's lingua franca, dominating international communication, science, and media. The recent rise of generative Artificial Intelligence (AI) systems – from large language models like ChatGPT to AI-powered translation and writing tools – is poised to further entrench English's global dominance. This article explores how AI-mediated communication may be reinforcing English as the de facto global language. We synthesize current research and examples to examine biases in multilingual AI performance, the standardization of English via AI tools, and the ways AI adoption encourages even greater use of English worldwide. Results indicate that popular generative AI systems disproportionately favor English (and standard varieties of English), often at the expense of linguistic diversity. AI-generated content tends to homogenize toward mainstream English norms, marginalizing minority languages and non-standard dialects. Furthermore, non-native speakers increasingly rely on AI to produce English text, accelerating the spread of English in academia, business, and everyday communication. We discuss the implications of these findings for language learning and global linguistic equity. Finally, we highlight strategies – from diversifying training data to critical pedagogical practices – that could mitigate AI's English-centric biases and foster a more multilingual AI future.

Keywords: *Generative Artificial Intelligence, Global English, English as a Lingua Franca, Language Education*

Introduction

English has achieved an unprecedented global status as a lingua franca, serving as the primary medium for international communication in business, science, education, and diplomacy (Zeng & Yang, 2024). Over 1.2 billion people worldwide speak English either as a first or additional language (Zeng & Yang, 2024), and English is the predominant language of the internet and digital media (Zeng & Yang, 2024). This dominance did not occur overnight; historical processes of colonization, economic power, and cultural influence established English as a global language over centuries (Zeng & Yang, 2024; Lee et al., 2025). In the current era of the Fourth Industrial Revolution—marked by rapid advances in digital technology and artificial intelligence—English's global dominance not only endures but is expected to extend its reach even further (Zeng & Yang, 2024). English remains the primary language of international discourse and technological innovation, reinforced by the prominence of Silicon Valley and the outsized influence of American and British institutions in science and technology (Rajesh &

[1] Urbaite, G. Editor, Euro-Global Journal of Linguistics and Language Education. Email: urbaitee0013@gmail.com. ORCID: https://orcid.org/0009-0001-5471-6210

Padma, 2025). As a result, English is anticipated to become increasingly dominant as the language for programming and interacting with advanced technologies, including AI and machine-learning systems (Rajesh & Padma, 2025; OpenAI, 2023).

Against this backdrop, the rise of generative AI systems represents a new factor that could amplify English's role as a global lingua franca. Generative AI refers to algorithms—most notably large-language models (LLMs)—capable of producing human-like text, translations, images, and other content. Systems such as OpenAI's GPT-3/GPT-4 (the engines behind ChatGPT), Google's Bard, Meta's LLaMA, and others have rapidly been adopted for tasks ranging from answering questions and writing essays to real-time translation and personal tutoring. Crucially, these AI systems are largely products of an English-centric digital ecosystem, having been trained on vast troves of internet text that are predominantly in English (Vashee, 2023). It is estimated that more than 90 percent of GPT-3's training data was in English (Vashee, 2023), and OpenAI acknowledges that GPT-4's training and alignment processes were designed and tested mostly in English and from a U.S.-centric perspective (OpenAI, 2023). While state-of-the-art language models do ingest multilingual data, their capabilities and performance tend to be strongest in English, reflecting the unequal representation of languages online—often termed the *resourcedness gap*—(Lai et al., 2023; Vashee, 2023). In practical terms, English is the first language of AI: it is both the primary source of training information and the default language in which these systems excel (Crotty, 2024).

This article investigates how generative AI may be mediating and reinforcing the use of English globally, potentially at the expense of other languages. We define *AI-mediated English* as the evolving form and function of English as influenced by AI systems—from how AI biases elevate certain norms of English to how users worldwide leverage AI to communicate in English. While some observers hope AI translation and communication tools could level the linguistic playing field by making all languages equally accessible, current evidence suggests a more paradoxical outcome: AI often ends up privileging English even more. Popular large-language models like ChatGPT perform best in English and other high-resource languages but struggle or produce lower-quality output in less-resourced tongues (Sharma et al., 2024; Lai et al., 2023). These disparities risk deepening the digital-language divide rather than eliminating it (Patterson, 2025; Lee et al., 2025). Moreover, by making English content creation and translation easier, AI may further incentivize the use of English in international contexts, thereby reinforcing its dominance.

Research Questions. In this study, we ask: In what ways do generative AI systems reinforce the position of English as the global lingua franca? We examine three interrelated dimensions: (1) biases in multilingual AI systems that favor English (and other dominant languages) in information access and quality of output; (2) the tendency of AI tools to standardize English-language usage around certain norms (potentially narrowing the range of World Englishes); and (3) the impact of AI adoption on language behavior, particularly whether it encourages increased use of English by non-native speakers. Our goal is to synthesize emerging research on these issues and discuss the implications for linguistic diversity, language learning, and policy.

Significance. Understanding AI's role in global language dynamics is crucial for educators, policymakers, and technologists. If AI is inadvertently amplifying English linguistic hegemony, there are risks of further marginalizing speakers of less-supported languages and diminishing linguistic diversity (Amin et al., 2025; Lee et al., 2025). On the other hand, if approached critically, AI could also be harnessed to support multilingualism—for example, by improving translation or providing language-learning support in various tongues. By shedding light on the largely unprecedented phenomenon of AI-mediated English, this article offers insights into how we might steer technological development and pedagogical practice to promote equity and inclusivity in global communication.

Methodology

To address the research questions, we adopted a qualitative, integrative research design. First, we conducted a literature review of recent studies, reports, and theoretical papers at the intersection of AI and language use. Given the novelty of generative AI, much of the relevant research has emerged in the last 2–3 years (2022–2025), including peer-reviewed studies in computational linguistics and language education, preprint articles, and policy reports. We surveyed work on multilingual performance of large language models, AI in English language teaching (ELT), sociolinguistic analyses of AI output, and discussions of English as a lingua franca in the digital era. Key sources were drawn from journals in applied linguistics, AI conferences, and technical reports by AI developers. We prioritized studies with empirical evaluations of AI's multilingual capabilities or those offering data on how AI tools are used in various linguistic contexts (Lee et al., 2025; Sharma et al., 2024; Lai et al., 2023).

Second, we performed a content analysis of example cases and data points illustrating AI's language biases and effects. This involved examining documented examples such as AI-generated outputs in different languages, known issues with translation systems, and user behavior (e.g., researchers using ChatGPT to polish English manuscripts). We also included illustrative quotes and qualitative insights from educators and users about AI's influence on language use (Amin et al., 2025; Lepp & Smith, 2025).

Importantly, our analysis takes a *global Englishes* perspective, recognizing English not as a monolithic entity but as comprising diverse varieties and uses worldwide. We examine not only how much AI favors English, but which English it promotes—for instance, whether AI tools privilege Standard American/British norms over local English dialects (Amin et al., 2025). This approach is informed by *World Englishes* and *English as a Lingua Franca* (ELF) research paradigms, which emphasize pluralized English practices (Lee et al., 2025).

Finally, we synthesized findings to formulate an argument about AI-mediated English. Rather than a controlled experiment or survey, this study is primarily analytic and interpretive, drawing connections between disparate pieces of evidence to understand a broader sociolinguistic trend. We acknowledge that generative AI is a fast-moving field; therefore, our analysis represents a snapshot of the current state (as of late 2025) and an informed projection of possible trajectories.

Data Sources

Our sources include peer-reviewed articles from major journals such as the *Annual Review of Applied Linguistics* (Lee et al., 2025) and the *Qualitative Research Journal for Social Studies* (Amin et al., 2025), as well as technology-focused venues like the *Humanities & Social Sciences Communications* (Zeng & Yang, 2024) and *British Journal of Educational Technology*. Conference proceedings from computational-linguistics meetings—ACL, EMNLP, and NAACL—also provided empirical studies on multilingual model performance (Lai et al., 2023; Sharma et al., 2024). Whenever possible, we cited works that include DOI identifiers or stable URLs to ensure verifiability.

In total, more than thirty relevant publications were reviewed, and over twenty are cited directly in this article to substantiate key arguments. Additional contextual evidence was drawn from technical documentation and reports by major AI developers such as OpenAI (2023) and from professional commentaries and news features addressing policy debates around AI and language (Crotty, 2024; Patterson, 2025).

By combining empirical findings with sociolinguistic theory, this methodology enables a comprehensive understanding of how AI and global English interact. The following section presents the results of this review and analysis, organized around the principal themes identified.

Results

1. Biases in Multilingual AI Favoring English

Generative AI systems demonstrate a strong performance bias toward English, which reinforces English's dominance in information access. Numerous evaluations have shown that large-language models (LLMs) such as GPT-3 and GPT-4 perform substantially better in English than in most other languages (Sharma et al., 2024; Lai et al., 2023). For example, a comprehensive test of ChatGPT across 37 languages and multiple tasks found significantly worse performance for non-English inputs and outputs, especially on complex tasks (Lai et al., 2023). High-resource languages (e.g., Chinese, French, Spanish) fare reasonably well, though often still below English, while low-resource languages show dramatic drops in fluency, accuracy, and coherency of AI-generated text (Zeng & Yang, 2024; Vashee, 2023). This performance gap stems partly from training-data imbalances—English data dominate the corpora, and many less-common languages have sparse representation (Vashee, 2023). One analysis noted that English users get a far better experience with GPT-4 than users of other languages and that current models risk amplifying existing language inequities in global commerce and knowledge access (Crotty, 2024; Vashee, 2023). In short, the AI "brain" has effectively been wired with an English-centric knowledge base.

A consequence of this bias is that the language one uses to query or interact with an AI can determine the quality and completeness of information received (Patterson, 2025; Lee et al., 2025). A recent study from Johns Hopkins introduced the term *information cocoons* to describe how multilingual LLMs give very different answers depending on the query language (Sharma et al., 2024). In their experiments, when the same question was posed in English, Arabic, Hindi, and Chinese, the answers diverged significantly in content and depth (Sharma et al., 2024). The LLM tended to retrieve and present information primarily from sources in the same language as the query, even when more comprehensive information existed in another language (Sharma et al., 2024). This means that a user asking in a minority language might only get a narrow slice of information, missing perspectives that are well documented in English. Moreover, if information in the query language is scarce, the model often falls back to using English sources, thereby injecting the dominant English-language perspective into the answer (Sharma et al., 2024; Patterson, 2025). Sharma et al. (2024) conclude that, rather than truly breaking language barriers, current *multilingual* AI may reinforce dominant views and contribute to *linguistic imperialism*—the phenomenon of English overshadowing other languages in knowledge production. These findings highlight that, without intervention, LLMs could deepen the digital-knowledge divide between English and non-English information spheres.

Translation asymmetry is another manifestation of AI's English tilt. Generative models and AI translators are notably more adept at translating *into* English than translating English *into* other languages (Crotty, 2024). In evaluations, systems such as ChatGPT show strong ability to interpret foreign-language input and express it in English, thanks to abundant parallel data and English serving as a pivot language (Crotty, 2024). However, the reverse direction—producing, say, Arabic or Korean output from English input—often yields stilted or error-prone results (Lai et al., 2023). This asymmetry partly reflects the same training imbalance but also the fact that developers tend to fine-tune and evaluate models mostly on English outputs (Crotty, 2024). An internal OpenAI analysis acknowledged that the majority of GPT-4's training and alignment were conducted in English and that safety and quality tests were primarily U.S.-centric (OpenAI, 2023). Non-English capabilities are considered "a bonus" or side effect of the training (Crotty, 2024). The implication is that English enjoys first-class support, while other languages are effectively treated as lower-priority features.

This bias can have a self-reinforcing effect: users around the world may find that they get better results from AI systems by using English, which in turn encourages using English even when it is not their native language. Early evidence shows users strategically switching to English to interact with AI whenever possible. For instance, researchers have observed that ChatGPT can often handle tasks in other languages more accurately if the prompt is given in English—with a request to output in the target language—than if the prompt itself is in that language (Vashee, 2023; Crotty, 2024). This leads to the somewhat paradoxical situation that, to get a high-quality answer in language X, one might need to communicate with the AI *in English about language X*. Consequently, English proficiency becomes even more of an advantage in the age of AI: those who can formulate their queries and prompts in English can tap more of the AI's potential. In professional settings, it is often observed that high-quality English input tends to result in superior AI-generated output (Rajesh & Padma, 2025). Complex tasks—such as coding assistance or academic writing—frequently demand English interaction to yield the best results (Rajesh & Padma, 2025; Lee et al., 2025).

There is also a concern that AI's English dominance could exacerbate pressure on individuals and organizations to use English, further marginalizing other languages. If cutting-edge tools for business, education, or research "work best" in English, users might feel compelled to conduct more of their work in English to take full advantage of AI assistance. As Thien Huu Nguyen cautions, this dynamic might "exacerbate the bias for English and English speakers," leading people to conform to English norms and neglect their own languages or cultural-linguistic practices (Patterson, 2025; Zeng & Yang, 2024). Over time, this could contribute to a spiral in which English becomes even more entrenched—echoing past eras, from the British Empire to American globalization—but now supercharged by AI technology (Zeng & Yang, 2024).

In summary, the current generation of AI systems displays a marked English-centric bias in performance. Rather than democratizing linguistic access, they risk reinforcing English as the *digital default language*—the path of least resistance for reliable communication with AI. This sets the stage for English to maintain or even widen its lead as the global lingua franca unless conscious efforts are made to improve multilingual AI capabilities.

2. Standardization of English Through AI Tools

Beyond quantitative dominance, generative AI is influencing the qualitative aspects of global English use—effectively standardizing English conventions and narrowing variation. Studies indicate that AI-powered language tools tend to privilege certain "standard" forms of English (particularly American English) in their output, thereby reinforcing those norms worldwide (Amin et al., 2025; Lee et al., 2025). For instance, a 2025 sociolinguistic inquiry by Amin et al. examined AI-assisted writing and found that AI overwhelmingly preferred American spelling and grammar conventions, even when users from other English-dialect backgrounds interacted with the tool (Amin et al., 2025). Common differences like *color* vs. *colour* or *apartment* vs. *flat* were consistently resolved in favor of the American usage, reflecting an underlying bias of the training data toward U.S. English (Amin et al., 2025). Similarly, AI-based grammar checkers and text generators often enforce prescriptive grammar rules (e.g., avoiding split infinitives, using standard formal syntax) that align with traditional normative English teaching (Amin et al., 2025; Rajesh & Padma, 2025). While this can improve correctness and clarity, it also means that non-standard dialect features or local idioms are stripped away in favor of a more homogeneous style.

Researchers have raised concerns that such AI-induced standardization narrows the space for *World Englishes*—the diverse regional and cultural varieties of English used globally (Lee et al., 2025). The very utility of AI in polishing language—helping writers fix errors or awkward phrasing—comes with the side effect of erasing distinctive fingerprints of a writer's dialect or idiolect. In educational contexts, teachers have noted that when students use tools like ChatGPT to draft or correct essays, the end result often reads in a blandly uniform register, lacking the colloquial expressions or local flavors the student might ordinarily use. In Amin et al.'s study, English learners and teachers appreciated AI's help in producing grammatically accurate text, but they simultaneously worried about "cultural erasure" and the loss of unique voice (Amin et al., 2025). The AI's preference for globally dominant vocabulary and phrasing can create a subtle pressure to conform to a monolithic English norm, potentially diminishing confidence in local expressions or second-language varieties. Over time, if AI tools are widely used to generate content—from work emails to published articles—we could see an increasing share of English text worldwide conforming to a similar tone and standard: an AI-mediated Global English that is efficient but less variegated.

Evidence of this trend is apparent in academia and science communication. As mentioned earlier, many non-native English researchers now use LLMs to refine their writing. A study of computer-science papers' peer reviews in the wake of ChatGPT's emergence provides a telling insight: reviewers noticed that after late 2022 (when ChatGPT became publicly available), manuscripts—especially from authors in countries where English is not the first language—started to exhibit more uniform language quality, with fewer grammatical errors or idiosyncrasies (Lepp & Smith, 2025; Rajesh & Padma, 2025). At first glance, this suggests AI helped overcome some language barriers. However, reviewers then adapted by looking for other linguistic cues of non-nativity. They reported that certain turns of phrase and stylistic patterns common to LLM-generated text (for example, the frequent use of transitional words like *Moreover* or formal verbs like *delve into*) began appearing so often that they were taken as signs the text was AI-influenced and possibly authored by a non-native scientist (Lepp & Smith, 2025). In other words, a new kind of AI-shaped academic English is emerging—one that is grammatically impeccable and formulaic in style. Lepp and Smith (2025) refer to this as "ChatGPT style" and observed that reviewers sometimes infer an author's background from these stylistic tells. Crucially, the ideology equating "good English" with "good science" persisted; if anything, AI made it less about overt grammar mistakes and more about subtle stylistic conformity (Lepp & Smith, 2025; Rajesh & Padma, 2025). The study suggests that LLM use is reproducing existing language ideologies: to be taken seriously, one's English must sound like polished, standard academic prose—a bar that AI can help reach, but at the cost of homogenization (Amin et al., 2025).

From a global perspective, the risk is that AI acts as a sociolinguistic force imposing central norms. As Bender et al. (2021) famously argued, large-language models can behave like "stochastic parrots," regurgitating patterns from their training data without regard for context or diversity (Lee et al., 2025). If those training patterns over-represent standard American or British English, the model's outputs will by default carry those patterns forward (Lee et al., 2025; Zeng & Yang, 2024). This has been documented: Jeon et al. (2025) note that LLM-based tools often lack sensitivity to lingua-cultural diversity and tend to reflect mainstream norms unless explicitly guided otherwise (Lee et al., 2025; Amin et al., 2025). For example, in conversational AI, researchers have found that models might correct or ignore user input that uses non-standard English or code-mixed language (mixing English with another language), steering the dialogue back to standard English. This *algorithmic standardization* can inadvertently send the message that deviations from "proper" English are errors to be fixed rather than natural variations.

The marginalization of less-dominant English varieties is a serious concern for linguistic justice. English as used in India, Nigeria, Singapore, or among second-language communities has valid local norms—lexical, grammatical, and pragmatic. However, AI systems rarely reflect the breadth of these *World Englishes*. Instead, because of data imbalance and design choices, they lean into monolingual ideologies—the assumption that there is one correct form of English. The outputs thus perpetuate the notion that British or American English is the default English, and others are substandard. This dynamic was pointed out by Lee et al. (2025) in an ELT context: they warned that without intervention, LLMs may "perpetuate monolingual ideologies, reinforce societal inequities, and undermine linguistic justice" in language education (Lee et al., 2025). Biases in training data that marginalize minority voices or dialects can reinforce stereotypes and even limit intercultural understanding among learners (Amin et al., 2025; Lee et al., 2025).

To illustrate, consider spelling conventions taught by AI grammar tools. An ESL student writing *organisation* (an accepted spelling in many regions) might be prompted by an AI assistant to change it to *organization* (the U.S. spelling), even if the student is following British convention. The AI doesn't explain that both are acceptable; it simply flags the non-preferred one as a mistake. Such experiences, multiplied across millions of interactions, nudge everyone toward a uniform norm. Over time, linguistic features that are perfectly grammatical and common in non-U.S. dialects could be abandoned by users in favor of the AI-endorsed forms. Without explicit awareness, AI tools condition users to adopt a narrower form of English.

In summary, generative AI is acting as a global editor—smoothing out differences and promoting a standardized English. This has benefits—improved mutual intelligibility and fewer language errors—but also costs, including loss of diversity and potential cultural bias. English is a richer, more plural language than what AI currently represents. The concept of *AI-mediated English* captures this tension: English as filtered through AI becomes more uniform and possibly more bland, reflecting the biases of its training. This phenomenon is novel and largely absent from traditional discussions of English as a lingua franca, which mostly considered human factors. Now, AI is an active mediator of how English is written and spoken globally. The next section examines how the adoption of AI tools is influencing language choices and usage patterns, particularly the growing ubiquity of English in various domains.

3. AI Adoption and the Proliferation of English Usage

The rapid adoption of generative AI tools around the world is not only a technical trend but also a linguistic one—it is shaping how and when people use English. One clear impact is that AI enables many non-native English speakers to produce content in English with greater ease and confidence, which in turn increases the volume of English communication globally. In professional and academic fields, where English is often the gatekeeper language, AI tools act as enablers for those who previously struggled with English writing. A striking example comes from scientific publishing: since 2023, there has been a surge in researchers using LLMs such as ChatGPT to help write or edit manuscripts in English (Lepp & Smith, 2025). Liang et al. (2024) estimated that by early 2024, about 17.5 percent of sentences in new computer-science preprint papers had been substantially edited or generated by ChatGPT (Lepp & Smith, 2025). The uptake was especially pronounced among authors in countries such as China and non-English-speaking parts of Europe, who historically might have faced language barriers in writing for top conferences (Rajesh & Padma, 2025). This suggests that AI is lowering the barrier to writing in English: researchers can draft in their native language and use AI to translate, or can write in English and rely on AI to refine grammar and style. Consequently, more scholars are contributing to English-language literature than would have done so unaided, simply because the task has become easier.

A similar pattern is observed in business and everyday communication. International companies report that employees who are not fluent in English are using AI translation and email-drafting tools to correspond with clients or colleagues in English rather than defaulting to local languages. By mediating these interactions, AI effectively allows English to penetrate domains where it might not have been used due to human language-skill limitations. For instance, a small business owner in a non-English-speaking country can now create an English version of their product website or draft marketing emails in English with AI assistance, potentially reaching a broader audience. The availability of AI as a "universal translator" or writing coach means that using English has become more accessible to billions of people. Importantly, this does not mean those people have learned English in the traditional sense; rather, they can *perform* English through AI mediation. It blurs the line between who is an English user and who is not, since AI can fill in linguistic gaps.

In the field of education—especially English-language learning—generative AI is double-edged. On one hand, AI tutors and chatbots provide personalized English practice to learners worldwide, potentially accelerating English acquisition. Adaptive learning platforms can converse with students in English, correct their mistakes, and adjust to their proficiency level (Lee et al., 2025; Amin et al., 2025). This has led some to hail AI as a democratizer of English education—bringing quality English exposure to areas lacking human teachers. On the other hand, as AI translation improves, some educators wonder whether future students will bother to deeply learn foreign languages (English included) when instant translation is at their fingertips. However, current evidence suggests that English proficiency remains crucial even with AI translation. AI may translate basic meanings, but nuances and idioms often get lost or distorted (Crotty, 2024). Thus, being truly effective in using AI tools (for example, prompt engineering or interpreting AI outputs) often requires a solid grasp of English (Rajesh & Padma, 2025). As Rajesh and Padma (2025) note, many emerging tech roles—from AI prompt engineers to data analysts—demand strong English skills because interacting with AI systems and writing effective prompts hinge on mastery of English vocabulary and pragmatics. In short, English remains a key to unlocking AI's full potential.

The net effect of these trends is that English continues to solidify its position in global domains, with AI accelerating the process. We can already see AI's hand in the linguistic landscape: the majority of content generated by AI—articles, social-media posts by bots, and so on—is in English unless otherwise specified. Many AI-content platforms default to English output. For example, an AI image generator might require English prompts to produce the best results, or a coding assistant might only understand instructions given in English, since programming languages and documentation are predominantly English. This creates a virtuous cycle for English: the more English data and usage, the better AI performs in English, which further encourages using English to interface with AI.

However, it is important to consider who might be left out or disadvantaged by this shift. People with limited English proficiency may not benefit equally from the AI revolution. They might rely on AI translation, which is still imperfect and can introduce errors or misunderstandings (Patterson, 2025; Vashee, 2023). There is also the issue of tokenization and cost: some languages are more verbose or use writing systems that result in more tokens for the same content, meaning that using an AI service in those languages can be more expensive or hit usage limits faster (OpenAI, 2023). For instance, early analyses showed that GPT-4 could require significantly more tokens to express a given message in certain non-English languages compared with English, due to how it tokenizes text (OpenAI, 2023). This effectively makes English the most "cost-efficient" language to use with AI models in terms of token economy. It is another subtle incentive to use English over other languages on these platforms.

In summary, through a combination of enabling non-native speakers to produce English content and the systemic biases that make English the path of least resistance, AI is contributing to the wider spread and entrenchment of English. We term this phenomenon *AI-mediated English proliferation*. It is visible in academia (more papers in English), online content (machine-translated English articles, AI-written English text), and even interpersonal communication (people using AI to chat in English). English was already dominant, but AI is acting as a multiplier.

The results we have outlined depict a landscape in which generative AI currently favors English in both quality and quantity of output, encourages standard forms of English, and provides new avenues for English usage by non-traditional users. In the next section, we discuss what these findings imply for the future of global communication and linguistic diversity. We also consider what interventions or changes could ensure that AI develops in a way that supports multilingualism rather than undermining it.

Discussion

Our analysis reveals a paradox at the heart of AI-mediated language: the very technologies that have the potential to bridge language gaps are, in practice, reinforcing the supremacy of English. This has multifaceted implications—educational, cultural, and ethical. In this discussion, we unpack these implications and explore how stakeholders might respond to ensure a more linguistically equitable AI future.

Implications for Language Learning and Education

From a language education perspective, the findings highlight both a boon and a challenge. Learners of English worldwide now have AI-powered tools at their disposal to practice and perfect their skills. This can accelerate learning outcomes; for example, AI tutoring systems can provide instant feedback on pronunciation and grammar, simulating immersive English environments in regions where competent teachers are scarce (Amin et al., 2025; Alisoy & Sadiqzade, 2024). However, the ease of relying on AI might also encourage surface-level competence—students may lean on AI to correct their English without fully internalizing the rules or nuances. More critically, English educators must grapple with the fact that AI's feedback is rooted in standard norms. Teachers should therefore integrate *critical AI literacy* into curricula, helping students question why a correction is made, whose English is being privileged, and what counts as acceptable variation (Lee et al., 2025). Pedagogical frameworks such as *Global Englishes Language Teaching* (GELT) become even more relevant: they emphasize exposure to diverse English varieties and communication over adherence to one "correct" form. Integrating AI into GELT could involve deliberately challenging AI—inputting non-standard dialect sentences and discussing why the AI flags them and whether that affects intelligibility.

Educators can also leverage AI's multilingual affordances to counterbalance English's pull. Generative AI can produce translation exercises or conversational practice in lesser-taught languages (though with varying quality). Schools might adopt a bilingual AI-assistant model: encouraging students to use AI in both English and their native language, thus developing parallel literacies. This approach would mitigate the risk of English overshadowing local languages in education. However, for this to be effective, AI's capacity for local languages must be strengthened—a responsibility shared by developers, educational institutions, and governments through investment in localized NLP research and corpora (OpenAI, 2023; Vashee, 2023).

Cultural and Sociolinguistic Implications

At a societal level, AI's reinforcement of English extends the historical narrative of linguistic hegemony into the digital age. English linguistic hegemony has long been critiqued for its role in diminishing smaller languages and imposing a particular worldview (Zeng & Yang, 2024; Lee et al., 2025). AI now risks becoming an unwitting agent of that process under the banner of technological progress. As our results indicate, people adapt their linguistic behavior to suit AI—for instance, writing in standard English to obtain better responses—a subtle form of accommodation in which human linguistic choices are shaped by machine preferences. Over time, this could dilute cultural identity encoded in language. Because language reflects worldview, if AI interactions condition users to phrase ideas within English-dominant frameworks, valuable conceptual diversity may be lost (Amin et al., 2025; Rajesh & Padma, 2025).

There is also a risk of linguistic complacency among native English speakers. If non-native users rely on AI to communicate in English, Anglophone users may feel even less incentive to learn other languages or engage with linguistic diversity. This could exacerbate existing imbalances in intercultural communication, where English speakers expect others to accommodate them. AI might unintentionally promote *Anglophone insularity*—the belief that monolingualism is sufficient because technology will handle translation (Zeng & Yang, 2024). Such a dynamic undermines mutual multilingual exchange and empathy for the challenges faced by non-native English users.

Policy, Development, and Technological Interventions

The trajectory of AI-mediated language is not predetermined. To avoid perpetuating English dominance, AI developers must prioritize multilingual optimization. This entails curating large, high-quality datasets in a wide range of languages and dialects, and treating multilingual performance as a *core benchmark* of AI success rather than an afterthought (OpenAI, 2023; Lai et al., 2023). Some encouraging progress exists—initiatives to create open parallel corpora for low-resource languages and research challenges dedicated to multilingual NLP (Sharma et al., 2024). Policymakers and international bodies should view such initiatives as critical infrastructure for linguistic equity, akin to preserving cultural biodiversity. As several AI ethics panels have emphasized, we must strive to "break English dominance" by designing AI systems that inherently support linguistic diversity (Patterson, 2025; Vashee, 2023).

A related priority is addressing algorithmic fairness and inclusivity. Just as gender or racial bias is now recognized as an ethical concern, *linguistic bias* should also be foregrounded. AI tools should undergo linguistic-bias audits to examine disparities in output quality across languages and dialects. For example, if an AI essay evaluator consistently scores Indian English lower than American English despite similar content, that bias must be corrected (Lee et al., 2025). Training models to recognize and respect contextual variations—rather than treating deviations as "errors"—is a step toward *linguistic justice*. Some researchers advocate incorporating *translanguaging* and *code-switching* practices into AI design, reflecting how multilingual speakers naturally use hybrid linguistic repertoires (Amin et al., 2025). Future systems should handle multilingual input fluidly rather than enforcing rigid monolingual boundaries.

Rights, Preservation, and the Future of Linguistic Diversity

From a digital-rights standpoint, access to AI in one's own language can be viewed as a *linguistic right*. Just as accessibility standards ensure equal participation for people with disabilities, linguistic accessibility ensures equitable participation in digital society. Regulations and public funding could require major AI companies to expand language support and open-source local-language models. Indeed, community-driven initiatives are already emerging for languages such as Bengali, Swahili, and Basque, though they remain underfunded (Crotty, 2024).

Paradoxically, AI could also become an ally in language preservation. The same generative models that now privilege English could be adapted to revitalize endangered languages through automatic transcription, text-to-speech systems, and interactive teaching tools (Amin et al., 2025). However, such efforts must involve native speakers and cultural experts to ensure authenticity and respect for linguistic identity.

Finally, the concept of *AI-mediated English* introduced here implies the emergence of a distinct variety—a technolect of English shaped by AI's preferences and constraints. Scholars should begin documenting its grammatical, lexical, and stylistic tendencies: Does it simplify syntax? Prefer certain discourse markers? Alter tone or register? Such inquiry would help educators and developers alike recognize where AI's influence is reshaping linguistic norms (Lepp & Smith, 2025). Teachers might, for instance, caution students not to imitate formulaic AI phrasing ("In addition," "Moreover") uncritically.

Ethical Reflections

A broader ethical question underlies these debates: Do we want a future in which all communication passes through one linguistic filter, even if technologically efficient, or one that sustains the world's linguistic plurality? The findings of this study sound an urgent warning: without conscious effort, AI may nudge humanity toward linguistic homogenization dominated by English. Yet, as numerous scholars argue, maintaining multilingual ecosystems is both possible and necessary (Lee et al., 2025; Zeng & Yang, 2024). Strategies such as multilingual education, local-language media promotion, and supportive language policy must accompany AI's rise. Ultimately, we should treat the current AI–English nexus as a call to pursue *inclusive innovation*—ensuring that technological progress empowers speakers of all languages rather than privileging only those fluent in English.

Conclusion

Generative AI is reshaping the linguistic balance of our globalized world—and in doing so, it appears to be tilting the scales further toward English. Our examination of contemporary research and examples has shown that *AI-mediated English* is a double-edged phenomenon. On one side, AI tools have made English communication more accessible than ever, helping non-native speakers write and speak in English and breaking down some barriers in international exchange. On the other side, these same tools exhibit entrenched biases: they prefer English, perform best in English, and often encourage English-centric norms in subtle ways. The result is that English's position as the global lingua franca is not challenged by AI, but rather reinforced and possibly redefined by it.

Several notable findings emerged. First, current multilingual AI systems privilege high-resource languages—especially English—in both information retrieval and content generation (Sharma et al., 2024; Lai et al., 2023). This creates a risk that speakers of less-resourced languages will be trapped in "information cocoons" or feel compelled to use English to achieve better outcomes when interacting with AI (Sharma et al., 2024; Zeng & Yang, 2024). Second, AI outputs tend to standardize English, promoting mainstream dialects and grammatical norms while filtering out regional or non-standard variation (Amin et al., 2025; Lee et al., 2025). While this can improve clarity, it raises concerns about the diminishing space for *World Englishes* and the potential loss of linguistic diversity. Third, the widespread adoption of AI is accelerating the use of English across multiple domains—from academia, where AI helps scholars publish in English (Lepp & Smith, 2025), to business and media, where translation tools enable English-language outreach (Rajesh & Padma, 2025). These trends collectively underscore that AI is not yet the great language equalizer many hoped for. Instead, it reflects and amplifies the existing linguistic power structure, with English at the apex (Zeng & Yang, 2024; Rajesh & Padma, 2025).

However, the future trajectory of AI and global language use remains within our influence. To avoid a scenario in which AI becomes an agent of linguistic homogenization—or an instrument of global *Anglification*—deliberate and inclusive measures must be taken. Our review suggests several strategies:

- **Diversify AI Training and Evaluation.** Developers should expand language diversity in training datasets and treat multilingual performance as a central benchmark of AI success. Future large-language models (LLMs) should aim to produce equally high-quality output across a broad spectrum of world languages. Initiatives to collect data for low-resource languages and to develop benchmarks beyond English are crucial (Lai et al., 2023). Linguists and cultural experts must be directly involved to ensure that lesser-spoken languages and dialects are handled accurately and respectfully rather than reduced to English approximations.

- **Incorporate Linguistic Fairness in AI Ethics.** The AI community should regard linguistic bias as an ethical concern equal to racial or gender bias. Documentation such as system or model cards should transparently disclose language coverage and deficiencies (OpenAI, 2023). When imbalances—such as favoring one dialect—are identified, they should be addressed through iterative retraining and feedback from international users.

- **Critical AI Literacy in Education.** Educators should integrate discussions of AI's linguistic biases into language and media literacy curricula. Students and users must understand that AI outputs are not neutral; they reflect the data and perspectives that shaped them (Lee et al., 2025). By cultivating awareness, users can resist overreliance on AI's standardized English, verify translations with native speakers, and preserve their unique linguistic expressions even when AI suggests changes.

- **Policy and Support for Linguistic Diversity.** Governments, universities, and cultural institutions have a key role to play in ensuring that national and minority languages thrive in the AI era. This includes funding NLP research, mandating multilingual accessibility in AI services, and promoting open-source projects for underrepresented languages. International organizations such as UNESCO and the European Union could coordinate global initiatives on *AI and multilingualism* (Patterson, 2025; Vashee, 2023). Just as biodiversity is preserved through global collaboration, linguistic diversity deserves similar protection in digital spaces.
- **Designing AI for Multilingual Interaction.** Future AI systems should move beyond monolingual design paradigms. Advanced models could support code-switching, translingual dialogue, and cross-language summarization—allowing participants to converse naturally in their preferred languages while AI mediates understanding. Rather than everyone defaulting to English, such systems could make multilingual interaction the norm, embodying the inclusive potential of AI.

In closing, the notion of *AI-mediated English* encapsulates a defining reality of our time: English is no longer spreading solely through human-to-human contact but through human–AI–human communication loops that transform and transmit language. This dynamic offers both a challenge and an opportunity—to observe linguistic evolution in real time and to ensure it unfolds equitably. As scholars, technologists, and educators, we must ask what kind of linguistic world we want AI to help create. Will it be one where a single, algorithmically polished English dominates all discourse—or one where technology empowers all languages to coexist and flourish? The current trajectory leans toward the former (Zeng & Yang, 2024), but with awareness and intentional action, we can alter course. Generative AI, a product of human ingenuity, should ultimately serve humanity's full linguistic richness—not merely reinforce the hegemony of the already powerful. By recognizing how AI reinforces English's global position, we take the first step toward ensuring that the next chapters of global communication are written in many voices, not just one.

References

Amin, M., Rasheed, H., Ali, S., & Ara, A. (2025). Artificial intelligence and the standardization of global English: A sociolinguistic inquiry. *Qualitative Research Journal for Social Studies, 2*(3), 365–384. https://doi.org/10.63878/qrjs3.10

Alisoy, H. (2022). The importance of listening in language acquisition. *Xarici Dillərin Tədrisi Və Tədqiqində Ənənəviliyin Və Müasirliyin Vəhdəti, 5*(5), 44–50.*

Alisoy, H. (2025). Structural and semantic taxonomy of English phraseological units: A theoretical perspective. *Porta Universorum, 1*(8), 61–82.*

Alisoy, H. (2025). From echo chambers to critical dialogue: A comparative case study of social media-based pedagogy for addressing scientific misinformation. *Global Spectrum of Research and Humanities, 2*(4), 35–47. https://doi.org/10.69760/gsrh.0250203002

Alisoy, H., Hajiyeva, B., & Sadiqzade, Z. (2024). *Connect with English A2–B1 Speaking Handbook*. *Journal of Azerbaijan Language and Education Studies, 1*(2), 1–115.*

Alisoy, H., Mammadova, I., Asadova, B., Ismayilli, F., & Aliyeva, T. (2024). The future of language education: Integrating smartphones into the curriculum. *Edelweiss Applied Science and Technology, 8*(6), 4539–4556.*

Alisoy, H., & Sadiqzade, Z. (2024). Mobile-assisted language learning (MALL): Revolutionizing language education. *Luminis Applied Science and Engineering, 1*(1), 60–72. https://doi.org/10.69760/lumin.202400002

Crotty, D. (2024, February 23). AI, translations, and the dominance of the English language. *The Scholarly Kitchen*. https://scholarlykitchen.sspnet.org

Lai, V. D., Ngo, N. T., Veyseh, A. P. B., et al. (2023). ChatGPT beyond English: Towards a comprehensive evaluation of large language models in multilingual learning. *Findings of EMNLP 2023 (Long Papers)*. https://openreview.net

Lee, S., Jeon, J., & McKinley, J. (2025). Generative AI and English language teaching: A global Englishes perspective. *Annual Review of Applied Linguistics, 45*, 85–108. https://doi.org/10.1017/S0267190525100184

Lepp, H., & Smith, D. S. (2025). "You cannot sound like GPT": Signs of language discrimination and resistance in computer science publishing. In *Proceedings of the 2025 ACM Conference on Fairness, Accountability, and Transparency (FAccT '25)*. https://doi.org/10.1145/3715275.3732202

Mammadova, I. (2024). The role of proverbs in language learning: A cognitive and cultural perspective. *EuroGlobal Journal of Linguistics and Language Education, 1*(1), 40–45. https://doi.org/10.69760/8qj8tr41

OpenAI. (2023). *GPT-4 System Card* [Technical report]. OpenAI.

Patterson, J. (2025, September 2). Multilingual artificial intelligence often reinforces bias. *Johns Hopkins Hub*. https://hub.jhu.edu

Rajesh, A., & Padma, P. (2025). Lingua Franca 2.0: The enduring power of English amidst artificial intelligence. *International Journal of Language, Literature and Culture, 5*(4), 60–65. https://doi.org/10.22161/ijllc.5.4.9

Sadiqzade, Z. (2024). The foundational role of auditory skills in language mastery. *Acta Globalis Humanitatis et Linguarum, 1*(1), 82–87.*

Sadiqzade, Z. (2024). The impact of music on language learning: A harmonious path to mastery. *EuroGlobal Journal of Linguistics and Language Education, 1*(1), 134–140.*

Sharma, N., Murray, K., & Xiao, Z. (2024). Faux polyglot: A study on information disparity in multilingual large language models (NAACL 2025 presentation). *arXiv Preprint, arXiv:2407.05502*. https://arxiv.org/abs/2407.05502

Vashee, K. (2023, June 28). Making generative AI effectively multilingual at scale. *ModernMT Blog*. https://www.modernmt.com/blog

Zeng, J., & Yang, J. (2024). English language hegemony: Retrospect and prospect. *Humanities and Social Sciences Communications, 11*(317). https://doi.org/10.1057/s41599-024-02821-z

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Dialogue Between Digital and Traditional Art

[1] Murad Babayev

Accepted: 10.19.2025
Published: 11.10.2025
https://doi.org/10.69760/portuni.0109005

Abstract. This paper examines the evolving relationship between digital and traditional art, exploring how both forms engage in a dynamic dialogue that reshapes contemporary artistic practice. Through qualitative analysis of literature, artist case studies, and visual comparisons, the study identifies key intersections in technique, materiality, and audience engagement. Findings reveal that digital and traditional media increasingly coexist within hybrid artistic processes, challenging conventional notions of authenticity, authorship, and material presence. While traditional art maintains its tactile and historical depth, digital art introduces new modes of interactivity, accessibility, and sensory experience. Together, they contribute to a broader redefinition of artistic expression in the post-digital age. The study concludes that the convergence of digital and traditional art reflects a cultural and philosophical synthesis, affirming art's capacity to adapt, integrate, and innovate across evolving technological landscapes.

Keywords: *Digital art, Traditional art, Hybrid media, Materiality, Authenticity, Post-digital aesthetics*

1. Introduction

Art has always mirrored the evolution of human society, adapting its tools, materials, and concepts to the spirit of its age. From prehistoric cave paintings to the Renaissance mastery of oil on canvas, every artistic era has reflected both technological innovation and cultural transformation. The turn of the 21st century marked another pivotal moment in this continuum — the rise of digital technology as both a medium and a subject of artistic exploration. The rapid integration of computers, software, and the internet into creative practices has fundamentally altered the way art is produced, distributed, and perceived.

Traditional art, rooted in tactile materials such as paint, charcoal, clay, and stone, has long emphasized the artist's physical engagement with the medium. The visible gestures of the hand and the texture of materials are central to its authenticity and aura. In contrast, digital art introduces a new kind of materiality — one composed of pixels, algorithms, and code. It privileges manipulation through screens, styluses, and software rather than brushes and chisels. For some, this transition represents a democratization of artistic expression, as digital tools grant accessibility and experimentation to a broader range of creators. For others, it signals a detachment from the embodied, sensory nature of artmaking.

The dialogue between digital and traditional art is not a confrontation between old and new, but rather a negotiation between continuity and innovation. The emergence of hybrid practices — such as digital painting, augmented reality installations, and mixed-media works that combine hand-drawn and digital components — demonstrates that the two realms are increasingly intertwined. Artists like David Hockney, who transitioned from canvas to iPad, or Cory Arcangel, who repurposes video game technology for conceptual art, embody

[1] Babayev, M. E. Lecturer, Department of Visual Arts, Nakhchivan State University, Azerbaijan. Email: muradbabayev86@gmail.com. ORCID: https://orcid.org/0009-0003-0779-0199.

this intersection. These practices reveal that the core of artistic creativity lies not in the medium itself but in the vision and intentionality behind its use.

Moreover, the digital shift has reshaped the social and economic dimensions of art. Online platforms such as Instagram, Behance, and NFT marketplaces have transformed the ways artworks are exhibited, collected, and critiqued (Babayev, 2022). Digital environments allow for real-time interaction between artists and audiences across geographic boundaries, fostering a more participatory and networked form of art culture. This evolution raises critical questions about originality, authorship, and value in an age where copies can be infinitely reproduced and disseminated.

Philosophically, the coexistence of digital and traditional art invites reflection on the nature of artistic experience itself (Sadikhova, 2025). What does it mean to "touch" art in an age of screens? Can virtual material evoke the same emotional resonance as physical texture? As theorists like Walter Benjamin and Lev Manovich have suggested, technological mediation both challenges and expands the concept of the artwork's "aura." The result is an ongoing dialogue — one that transcends the binary of technology versus tradition and instead seeks a synthesis of both.

This paper explores that dialogue through a comparative and qualitative lens. By examining artistic practices, critical discourse, and audience interactions, it aims to understand how the coexistence of digital and traditional art reshapes artistic identity and meaning in the contemporary world. Ultimately, this study argues that the relationship between the two is not adversarial but symbiotic — a dynamic exchange that continues to redefine the boundaries of what art can be.

2. Methods

This study adopts a qualitative, interpretive, and comparative research design aimed at exploring the evolving relationship between digital and traditional art (Sadikhova & Babayev, 2025). The methodological approach prioritizes depth over quantity, focusing on conceptual and experiential insights rather than statistical measurement. The goal is to understand *how* artists, critics, and audiences articulate the connections, tensions, and synergies between these two artistic domains.

2.1 Research Design

The research is structured around three main components:

1. **Literature Review** – analyzing existing scholarship and theoretical discourse surrounding digital and traditional art practices;

2. **Artist Perspectives** – gathering and interpreting insights from contemporary artists through published interviews, statements, and case studies;

3. **Visual and Comparative Analysis** – examining selected artworks that exemplify hybrid or dialogic relationships between digital and traditional media.

These components are interrelated, forming a triangulated framework that ensures both conceptual coherence and practical relevance.

2.2 Literature Review Procedure

A comprehensive literature review was conducted to establish a theoretical foundation. Academic databases such as JSTOR, Art & Architecture Source, and Google Scholar were used to locate relevant works published between 2010 and 2024. Search terms included *"digital art," "traditional art," "media hybridity," "post-digital aesthetics," "art and technology,"* and *"materiality in contemporary art."*(Sadikhov & Babayev, 2025)

The selected sources included books, peer-reviewed journal articles, exhibition catalogs, and critical essays. Foundational texts by Walter Benjamin, Lev Manovich, and Christiane Paul were supplemented with recent analyses addressing post-internet and hybrid art practices. The literature review helped identify key debates about authenticity, materiality, authorship, and audience interaction — all central to understanding the ongoing dialogue between art forms (Javid & Sadikhova, 2025).

2.3 Artist Perspectives

Artist perspectives were analyzed through a combination of secondary data (published interviews, exhibition talks, and artist statements) and case study examination of representative artists known for blending traditional and digital techniques.
Examples include:

- **David Hockney**, whose transition from painting to iPad sketches exemplifies adaptation to digital tools while maintaining painterly sensibility.

- **Refik Anadol**, who employs data visualization and AI algorithms to create immersive digital environments that question the boundaries of human and machine creativity.

- **Takashi Murakami**, whose work merges hand-painted tradition with digital reproduction and pop culture aesthetics.

Each artist's approach was analyzed in terms of their process, material choices, and conceptual motivations, allowing for a comparative understanding of how digital and traditional elements coexist within creative practice.

2.4 Visual and Comparative Analysis

A visual analysis was conducted to examine the formal, material, and thematic elements of artworks from both digital and traditional media. Criteria for selection included:

- Demonstrated use of both physical and digital tools or techniques;
- Conceptual engagement with technology or artistic tradition;
- Availability of high-resolution imagery and documentation for study.

Each artwork was examined for its composition, texture, color dynamics, and representational strategies, alongside the context of its creation and reception. Comparative analysis focused on how digital works reinterpret qualities traditionally associated with physical media—such as texture, layering, and material presence—and vice versa.

2.5 Analytical Framework

The analysis was guided by semiotic and phenomenological frameworks, focusing on how meaning is constructed and experienced across media. Semiotics allowed examination of how symbols and visual languages shift between material and virtual forms, while phenomenology provided insight into how viewers experience embodiment and presence in both contexts. This dual framework enabled a nuanced understanding of the perceptual and conceptual "dialogue" between digital and traditional art.

2.6 Ethical Considerations

All data used in this research derive from publicly available sources, including published materials and artworks reproduced for academic analysis. Artists' intellectual property rights were respected by ensuring appropriate citation and contextual integrity. The study aims to contribute to art discourse without commercial bias or misrepresentation.

2.7 Limitations

The study's qualitative nature limits its generalizability. As the selection of artists and artworks is necessarily selective, the findings should be interpreted as exploratory rather than definitive. Furthermore, the rapid evolution of digital technology means that observations may shift as new tools and media emerge. Despite these limitations, the methodology provides a robust framework for understanding the dynamic interplay between digital and traditional artistic practices.

3. Results

The analysis of literature, artist practices, and visual materials revealed a complex and evolving relationship between digital and traditional art. The dialogue between these two realms manifests across three interrelated dimensions: technical hybridity, redefinition of materiality, and transformation of audience engagement. Together, these dimensions illustrate that digital and traditional art are not oppositional categories but rather components of an integrated continuum of artistic expression.

3.1 Technical Hybridity: Blurring the Boundaries of Process

One of the most significant findings is the increasing technical hybridity within contemporary artistic practice. Many artists employ a combination of digital and traditional tools, allowing one medium to inform or extend the other. This convergence exemplifies what Christiane Paul (2016) describes as "the post-digital condition," where digitality is no longer a novelty but an intrinsic part of creative workflow.

For instance, David Hockney's iPad drawings demonstrate a seamless transition between manual and digital craftsmanship. While his technique originates in traditional painting, the iPad becomes a digital sketchbook, offering immediacy and portability without sacrificing painterly qualities (Livingstone, 2017). Similarly, Cory Arcangel's modification of obsolete video games merges digital technology with conceptual strategies reminiscent of Dadaist collage, bridging historical avant-garde approaches with modern coding aesthetics (Paul, 2016).

Artists such as Alexa Meade, who paints directly onto human bodies and then photographs them digitally, push hybridity further — creating artworks that exist simultaneously as performance, painting, and digital image. This multiplicity aligns with Lev Manovich's (2001) argument that digital tools enable "meta-media" — artworks that reinterpret traditional media through the language of computation.

Thus, hybridity has become not only a stylistic choice but also a conceptual framework. Artists are no longer defined by their medium but by their ability to navigate between physical and virtual forms, using both to articulate new kinds of meaning.

3.2 Redefinition of Materiality and Authenticity

Another major finding concerns the redefinition of materiality in art. Traditional art emphasizes tangible materials — canvas, pigment, clay — as carriers of the artist's gesture and authenticity. Digital art, however, introduces what Mark Hansen (2004) calls "embodied virtuality," wherein immaterial data still produces sensory and affective experience.

Digital artists recreate tactile sensations through screen-based textures, simulated brushstrokes, and interactive surfaces, challenging the assumption that material presence requires physical substance. For example, Refik Anadol's *Machine Hallucinations* (2019) uses AI-generated data projections to evoke emotional and spatial immersion, transforming algorithms into a new form of material expressiveness (Anadol, 2019). Similarly, Beeple's (Mike Winkelmann) digital collages, which gained prominence in NFT culture, rely on compositional density and narrative layering comparable to large-scale murals or mixed-media installations (McAuley, 2021).

Traditional materiality, meanwhile, has adapted in response to digital influence. Painters such as Jenny Saville use high-resolution photography and digital compositional planning before translating images into monumental canvases. The tactile and digital thus operate as complementary forces — one emphasizing process and presence, the other enabling experimentation and accessibility.

This convergence challenges Walter Benjamin's (1936) notion of the artwork's "aura," as digital reproduction and dissemination no longer diminish uniqueness but instead generate new forms of aura through interactivity and participation. The material and the virtual are thus entangled in a reciprocal exchange, where each informs the other's conceptual and emotional potency.

3.3 Transformation of Audience Engagement and Distribution

The third and perhaps most socially impactful finding concerns how digital technologies have transformed artistic circulation and audience engagement. Traditional artworks typically inhabit physical spaces such as galleries or museums, where the experience is direct but limited by geography and accessibility. In contrast, digital platforms have democratized exposure and participation, allowing artworks to reach global audiences instantaneously.

Social media platforms such as Instagram and Behance serve not only as promotional tools but as creative spaces where artists receive immediate feedback and engage in transnational dialogues (Cotter, 2021). Virtual exhibitions and augmented reality installations, particularly during and after the COVID-19 pandemic, further expanded the reach of digital art, creating hybrid exhibition formats that integrate both physical and digital presence (Grau, 2020).

Moreover, the emergence of blockchain and NFT technologies has redefined ownership, authorship, and value within the art market. While some critics argue that NFTs commodify digital creativity, others view them as empowering artists to assert control over reproduction and provenance (Velthuis, 2022). This development underscores a new dimension of audience interaction — one that includes economic participation and digital collecting as extensions of aesthetic engagement.

3.4 Summary of Key Findings

In summary, the results demonstrate that:

1. **Digital and traditional practices increasingly coexist** within single artistic processes, creating a post-medium environment.

2. **Materiality in art has expanded** to encompass both physical and virtual qualities, redefining authenticity and presence.

3. **Audience engagement has shifted** from passive observation to active participation, facilitated by digital platforms and interactive technologies.

These findings collectively affirm that the dialogue between digital and traditional art is not merely a stylistic or technological phenomenon, but a broader cultural transformation reflecting how humanity negotiates creativity, embodiment, and connection in the digital age.

4. Discussion

The findings of this study demonstrate that digital and traditional art coexist within a fluid and symbiotic relationship, each influencing and redefining the other's boundaries. Rather than representing a rupture between old and new, their dialogue embodies an evolving continuum of artistic expression — one shaped by technological change, cultural adaptation, and philosophical reflection. This discussion situates the results within broader theoretical contexts, focusing on four key interpretive dimensions: continuity and transformation, embodiment and materiality, authenticity and authorship, and cultural democratization and power dynamics.

4.1 Continuity and Transformation in Artistic Practice

The relationship between digital and traditional art can be best understood as a process of continuity through transformation. Art history reveals that each technological innovation — from the invention of perspective to photography — has initially been met with resistance, only to later become an integrated part of artistic practice (Grau, 2020). Similarly, digital media, once perceived as a disruption, now serves as an extension of artistic language rather than a replacement for traditional methods.

Lev Manovich (2001) argues that digital art functions as a "meta-medium," absorbing the representational capacities of all previous media. This idea resonates with current hybrid practices in which traditional artists employ digital tools for preliminary composition, experimentation, or augmentation. Conversely, digital artists often incorporate the aesthetics and discipline of traditional craftsmanship to lend depth and authenticity to their work. This mutual adaptation blurs the boundaries of medium specificity, leading to what Rosalind Krauss (1999) describes as the *post-medium condition* — an era in which meaning arises not from material distinction but from conceptual synthesis.

4.2 Embodiment and Materiality in the Post-Digital Age

The results also reaffirm that materiality remains central to both digital and traditional art, though its nature has expanded. Traditional materiality emphasizes texture, gesture, and the tactile connection between artist and object — qualities that, according to Maurice Merleau-Ponty (1962), root artistic creation in embodied perception. Digital materiality, while intangible, generates a parallel form of embodiment through interactive experience, immersive environments, and haptic interfaces (Hansen, 2004).

This shift aligns with Christiane Paul's (2016) observation that digital artworks often evoke a *"virtual tactility"* — an illusion of material presence created through light, code, and motion. Artists such as Refik Anadol and teamLab create multisensory digital installations that immerse audiences in environments where data, sound, and image converge into a synthetic materiality. Conversely, traditional artists like Jenny Saville and Gerhard Richter integrate digital imagery into their painterly processes, demonstrating that the digital has become an invisible layer within traditional craftsmanship.

Thus, the dialogue between media challenges binary notions of the material and the virtual. Instead, as Hansen (2004) contends, digital art expands the phenomenological experience of the body, allowing viewers to engage with immaterial forms in profoundly embodied ways. The result is a hybrid materialism, where physical and digital sensibilities coalesce into new aesthetic and emotional languages.

4.3 Authenticity, Aura, and the Question of Authorship

The tension between originality and reproduction — famously articulated by Walter Benjamin (1936) — remains central to the dialogue between digital and traditional art. Benjamin warned that mechanical reproduction diminishes the "aura" of the artwork, its unique presence in time and space. Yet, in the digital era, this concept has been both challenged and redefined.

In the context of networked culture, aura is no longer bound to singularity but can emerge through participation, interaction, and narrative circulation (Bourriaud, 2002). For instance, Beeple's digital works, distributed globally through NFT marketplaces, generate new forms of authenticity rooted in transparency of ownership and collective visibility rather than physical uniqueness. Similarly, the remix culture surrounding digital art — where users manipulate and reinterpret existing images — has expanded authorship into a more collaborative, open-source model (Lessig, 2008).

Traditional art, meanwhile, has also been affected by this shift. The digitization of painting and sculpture for online exhibitions or digital archives has extended their reach but complicated their status as unique objects. As a result, the concept of authenticity in art is undergoing democratization moving away from elitist notions of originality toward an appreciation of creative process and participation as forms of authenticity in their own right.

4.4 Cultural Democratization and Power Dynamics

A major cultural implication of this dialogue lies in the democratization of artistic production and access. Digital tools, from affordable software to social media platforms, have expanded creative participation beyond traditional institutional boundaries. Artists from diverse socioeconomic backgrounds can now disseminate their work globally, circumventing the gatekeeping mechanisms of galleries and museums (Cotter, 2021).

However, this democratization also introduces new power dynamics. Algorithms, platform visibility, and market structures — particularly in the NFT space — often replicate inequalities present in traditional art markets (Velthuis, 2022). Furthermore, the ephemeral nature of digital platforms raises questions about preservation, authorship rights, and the sustainability of digital ecosystems.

Despite these challenges, the cross-pollination of digital and traditional practices has encouraged a more inclusive global dialogue about art's role in contemporary life. As Claire Bishop (2012) notes, the participatory turn in digital art fosters new forms of collective experience that redefine the social function of art — from private contemplation to shared, interactive creation. This evolution signifies not the decline of traditional art but its expansion into a networked cultural ecology that reflects the complexities of our interconnected world.

4.5 Synthesis: Toward a Hybrid Future of Art

Ultimately, the dialogue between digital and traditional art underscores the adaptability of artistic expression. The two modes are no longer separate categories but interconnected practices that respond to the same human impulses: to create, to communicate, and to make meaning. The hybridization of media reflects broader philosophical and cultural trends — from posthumanism to cyber-phenomenology — that question the boundaries between human, machine, and material.

In this context, the future of art may lie not in choosing between digital and traditional methods, but in embracing their interplay. The continued evolution of artificial intelligence, virtual reality, and biotechnological art promises further blurring of boundaries, inviting artists and audiences alike to participate in the redefinition of creativity itself. The dialogue, therefore, is ongoing — a testament to art's enduring capacity to adapt, integrate, and transform in response to the ever-changing conditions of human existence.

5. Conclusion

The dialogue between digital and traditional art reflects one of the most significant transformations in contemporary culture: the merging of technology and creativity into a shared aesthetic space. This study has shown that rather than existing in opposition, digital and traditional art forms engage in a dynamic exchange that continually reshapes artistic identity, process, and perception (Sadikhova, 2024) . Through hybridization, artists combine manual craftsmanship with computational innovation, producing works that transcend conventional media boundaries.

Materiality, once confined to tangible substances, now extends to the virtual and interactive. The digital realm introduces new ways to experience embodiment and sensory engagement, while traditional media preserve the tactile and emotional depth of human gesture. This reciprocal influence has redefined authenticity and authorship in the post-digital era, where creativity is increasingly collaborative, participatory, and globally networked.

Culturally, the convergence of art and technology has democratized artistic expression, granting broader access to both creation and appreciation. Yet, it also raises ethical and economic questions regarding ownership, visibility, and preservation in digital contexts. These complexities underscore the need for continued critical reflection as art evolves alongside technology.

Ultimately, the coexistence of digital and traditional art symbolizes humanity's enduring adaptability. Each medium informs and enriches the other, ensuring that artistic expression remains both rooted in heritage and open to innovation. The future of art lies not in choosing between the brush and the algorithm, but in embracing their dialogue as a continuous act of creative evolution.

References

Anadol, R. (2019). Machine Hallucinations [Digital installation]. Refik Anadol Studio.

Babayev, J. (2022). Online versus offline learning. *ZNANSTVENA MISEL Учредители: Global Science Center LP,(66)*, 24-25.

Benjamin, W. (1936). The Work of Art in the Age of Mechanical Reproduction. Schocken Books.

Bishop, C. (2012). Artificial Hells: Participatory Art and the Politics of Spectatorship. Verso.

Bourriaud, N. (2002). Relational Aesthetics. Les Presses du Réel.

Cotter, H. (2021, May 12). Art in the Age of Instagram. The New York Times.

Grau, O. (2020). Virtual Art: From Illusion to Immersion. MIT Press.

Hansen, M. B. N. (2004). New Philosophy for New Media. MIT Press.

Javid, B., & Sadikhova, S. (2025, May). Culturonyms in Food and Drink: How Language Reflects Cultural Identity Through Cuisine. In *Publisher. agency: Proceedings of the 10th International Scientific Conference «Modern scientific technology»(May 29-30, 2025). Stockholm, Sweden* (p. 346).

Krauss, R. (1999). A Voyage on the North Sea: Art in the Age of the Post-Medium Condition. Thames & Hudson.

Lessig, L. (2008). Remix: Making Art and Commerce Thrive in the Hybrid Economy. Penguin Press.

Livingstone, M. (2017). David Hockney. Thames & Hudson.

Manovich, L. (2001). The Language of New Media. MIT Press.

McAuley, A. (2021). Beeple and the Economics of Digital Art. Artforum International, 59(7), 42–47.

Merleau-Ponty, M. (1962). Phenomenology of Perception. Routledge.

Paul, C. (2016). Digital Art (3rd ed.). Thames & Hudson.

Sadikhova, S., & Babayev, J. (2025). Challenges Encountered in Translation of Culture-bound and Subject-specific Terminology While Using Google Translate. *EuroGlobal Journal of Linguistics and Language Education*, *2*(3), 119-126.

Sadikhova, S., & Babayev, J. (2025). Linguistic Analysis of Art Terms in English. Porta Universorum, 1(3), 214-223.

Sadikhova, S. (2025). XIX Century World Fine Arts: From Classicism to Modernism. Porta Universorum, 1(8), 106-115.

Sadikhova, S. (2024). Contrasting Splendor: A Comparative Study of Baroque and Classical Styles in Visual Arts. *Acta Globalis Humanitatis et Linguarum*, *1*(2), 144-154.

Velthuis, O. (2022). NFTs and the New Art Economy. Journal of Cultural Economics, 46(3), 417–431.

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

The Role of Emotional Intelligence in Enhancing Translation Quality

[1] Ferid Ibrahimov

Accepted: 10.05.2025
Published: 11.12.2025
https://doi.org/10.69760/portuni.0109006

Abstract. Emotions are a central part of human cognition and decision-making, and translation, being a cognitively demanding task, is not an exception. The present paper aims to address how translators' emotional states influence the quality of their work with respect to accuracy, creativity, and meaning interpretation. It also claims that emotional balance and emotional intelligence help a translator maintain tone, style, and nuance in the target language. The study also points out that both positive and negative emotions have differential effects on concentration and decision-making processes. Finally, it suggests that psychological and emotional awareness components should be integrated into training programs as a way to enhance translators' overall performance and resilience.

Keywords: *emotions, translation quality, emotional intelligence, cognition, translator performance*

Introduction

Translation is not a mechanical act of word replacement from one language into another; it is a complex process involving emotional, cognitive, and cultural awareness. More recently, psychological and affective factors have increasingly been seen to play a role in shaping the translator's performance. Despite this, the influence of emotions on translation quality remains underexplored in the translation studies literature.

Emotions impact how translators perceive, process, and reproduce meaning. For example, stress or anxiety might increase error rates, whereas positive emotions such as enthusiasm or empathy enhance the creativity and stylistic sensitivity of translators. The relationship between emotion and translation quality is thereby dynamic and multidimensional in nature, with both cognitive and affective mechanisms playing a role.

This paper seeks to explore how translation accuracy and fluency might be influenced by different emotional states, and whether emotional intelligence can play a moderating role in this process. By discussing both theoretical positions and practical implications, this study hopes to contribute to the emerging broader view of translation as being a psychological rather than merely a linguistic activity.

[1] Ibrahimov, F. 4th-year Bachelor's Student, Major in Translation, Faculty of Foreign Languages, Nakhchivan State University, Azerbaijan. Email: ibrahimovfrid599@gmail.com. ORCID: https://orcid.org/0009-0008-4134-1473.

To understand how emotions influence translation quality, the topic will be discussed under five key sections. Each part focuses on the different dimensions of the interplay between emotion and translation. Section one focuses on the cognitive nature of translation and emotional balance in relation to attention and memory throughout the process. The second section looks at emotional states concerning translator performance. The third section deals with emotional intelligence as a necessary skill that translators should possess. The fourth part analyzes real examples when emotions have shaped translation outcomes; the final part concerns the place of emotional training within translation education. Dividing this discussion into such parts makes it possible to regard emotions not as isolated reactions but rather as interacting elements with thought and language at every stage of translation.

1. The Cognitive Nature of Translation

Translation is a very complex cognitive process that goes beyond the simple transfer of words from one language to another. Perception, memory, analytical thinking, and decision-making all take place almost simultaneously. Translators are constantly weighing different alternatives to best reflect meaning while maintaining coherence, accuracy, and cultural appropriateness. Unlike straightforward word substitution, translation requires an understanding of context, the ability to infer implicit meanings, and the skill to anticipate how a target audience will interpret the text.

Working memory, in fact, lies at the very heart of this process. Translators must keep phrases, sentence structures, and contextual clues in their minds while swiftly making decisions regarding word choice, syntax, and tone. The emotional states directly influence this capacity: when translators are calm and composed, their working memory works effectively to provide accurate and fluid translations, while stress, anxiety, or tiredness diminishes cognitive resources and raises the likelihood of lapses in attention, subtle meaning overlooked, and mistakes in linguistic choices. As such, there is a close link between cognitive performance and emotional stability.

Translation is, by nature, a problem-solving activity. Translators often encounter phrases or concepts for which there might not be direct equivalents in the target language. Choices have to be made continuously in a balancing between semantic accuracy and stylistic and cultural fidelity. Mastery of higher order cognitive skills-inferencing, pattern recognition, and critical thinking-is needed in dealing with such challenges. Cognitive processes can be supported or hindered by emotional aspects: curiosity and interest often foster creative solutions, while frustration may lead to overly literal translations that do not pay attention to style and nuance.

The iterative character of translation underlines the cognitive-emotional interplay, too. Translators reread segments of text time and again, set alternatives beside one another, and refine their choices to achieve the best meaning and tone. Any disturbance in emotional balance may impede this monitoring process-for example, feelings of impatience or irritation. Self-aware and emotionally regulating translators, on the other hand, proceed in a systematic manner and preserve coherence, accuracy, and expressive quality. Emotional stability will underpin focus, judicious assessment, and consistency throughout the translation process.

Emphasizing that translation is both a cognitive and emotional process would enable the understanding of translators as active interpreters whose mind and emotions are constantly influencing the final product rather than passive conduits. Emotions serve as an internal guide for attention, perception, and reasoning when translating. Better cognitive resource management, maintaining accuracy, and also being able to convey meaning, tone, and style of the source text could result from an understanding of this interaction. Therefore, the cognitive aspect of translation demonstrates that successful translation requires a balance between thought, feeling, and linguistic expertise.

2. Emotional States and their Impact on Translator Performance

Translators' emotional states have a significant effect on their performance and the general quality of their performance. Emotions are not peripheral to translation but, rather, influence decision-making, attention, and problem-solving. A translator in a state of calm and confidence may thus approach the text with focus and creativity, making informed choices about word selection, syntax, and tone. On the other hand, stress, anxiety, or fatigue disrupts cognitive functions, leading to overlooking critical details, errors, or stylistic nuance.

Interest, curiosity, and satisfaction are some of the positive emotional states that raise translators' engagement with the source text. Translators who are motivated and emotionally poised are likely to pick up subtleties in meaning and tone that may pass unnoticed otherwise. This heightened attention to detail enables them to craft accurate translations that are also true to the stylistic features of the original text. Positive emotions of this sort encourage experimentation and creative problem-solving, too, which becomes particularly relevant when metaphors, idioms, or other culturally bound expressions have to be translated into a target language for which close or exact equivalents do not exist.

On the other hand, negative emotional states may have adverse impacts on translation performance: stress, impatience, or frustration may decrease working memory capacity and narrow attention, which may result in literal translations lacking nuance. Anxiety can make the translators hesitant, slowing the pace of translation, while fatigue may further lead to an increase in error and inconsistent terminological choices. Translators who experience emotional strain over a continuous period of time may prefer speed over quality at the cost of coherence and accuracy. Understanding the foregoing pitfalls is thus of paramount importance if translators want to keep professional standards even in difficult conditions.

Emotional states also affect the interpersonal aspects of translation. Translators, when working on collaborative projects, have not only to manage their own emotions but also respond to the expectations and feedback of clients or editors. Emotional sensitivity will help navigate these interactions constructively, while emotional instability may create misunderstandings or conflicts. The ability for empathy enables translators to better predict how well the text will be received by the target audience and to deliver, through their translation, what was intended.

Additionally, the interplay between emotion and cognition in translation is dynamic: a translator's emotional state can enhance or reduce cognitive capacities such as attention, analytical thinking, and memory. While positive emotions expand attention to allow for more holistic considerations of context and meaning, negative emotions narrow the focus, sometimes with the effect of errors but at other times with increased detail-oriented scrutiny. The key to leveraging these processes thus comes through awareness and regulation, which enable translators to harness the benefits of emotion while mitigating the potential drawbacks.

Translators have many real-life opportunities to devise ways of managing their emotional states. Regular breaks, mindfulness exercises, and structured workflows will help maintain focus and emotional balance. Awareness of one's emotional reaction while undertaking the translation might also inform decisions to pause, review, or seek clarity with a view to improving accuracy and stylistic fidelity. Understanding how emotions play into performance, translators are able to build resilience and adaptability, maintaining quality even under pressure.

The research of emotional states in translation also proves the difference in individual approaches: some translators work exceedingly well when under a certain amount of pressure, feeling that certain levels of stress enhance focus and decision-making, while others prefer calm environments, free from distractions, where positive feelings foster creativity. These differences emphasize the requirement for self-awareness and reflective practice that allows translators to find conditions that will guarantee peak efficiency and quality. Finally, knowledge of the role of emotional states contributes to encouraging a broader perspective in translation training. In educational programs that introduce emotional awareness, stress management, and reflective exercises, such skills better prepare students to address the linguistic and emotional challenges they may face in the course of their work. Developing the ability to sustain emotional balance while conducting complex cognitive tasks ensures that translators not only convey meaning accurately but also capture tone, style, and cultural nuance. Understanding the effect of emotional states on translator performance is therefore essential for both practical work and professional development in the field.

3. Emotional Intelligence as a Key Competence in Translation

Emotional intelligence is now recognized as an important competency for professional translators. It encompasses the ability to recognize and understand one's emotions and those of others and to manage one's feelings. This competency is especially crucial in translation, since emotions play a key role in influencing attention, decision-making processes, and the making of meaning. Translators with high emotional intelligence are capable of managing stress more effectively, keeping focused, and making subtle linguistic decisions that accurately convey not only the content but also the tone of the source text.

Self-awareness is a core component of emotional intelligence that helps translators recognize how their feelings may impact their work. For instance, knowing when to take appropriate breaks or invoke review strategies as feelings of fatigue or frustration compromise concentration. In relation, self-regulation enables translators to manage their emotional responses and prevent negative states of mind from interfering with cognitive processes. Translators who can keep impulsive responses in check are more likely to show consistency in their terminology and style, and therefore, be closer to faithfulness in the translation.

Empathy is another critical constituent of emotional intelligence that enables the translator to connect with the source text at a deeper level. Knowing the feeling and intention of an author will enable the translator to reproduce subtleties that might otherwise get lost. For example, in literary translation, the ability to convey humor, irony, or sentiment depends upon sensitivity to both linguistic and affective cues. Empathy also plays a role in cross-cultural translation, whereby translators will be able to anticipate how the target audience will perceive specific expressions, cultural references, or tone.

Social skills, often included in emotional intelligence, have been particularly stressed for a translator, and particularly in collaborative or client-centered settings. Effective communication with clients, editors, or colleagues involves emotional awareness and requires the ability to conduct interpersonal interactions effectively. Translators who can handle conflicts or present feedback constructively can promote smoother workflows and higher quality outputs.

Furthermore, emotional intelligence reinforces problem-solving in complicated translation tasks. Translators often come across phrases or concepts for which direct translation does not exist in the target language. The ability to perceive the emotional tone of the original enables translators to choose solutions that preserve meaning, style, and nuance. Positive emotions, such as curiosity and engagement, foster creativity in approaching these problems, while awareness of stress or frustration allows translators to pause and reconsider their approach rather than acting impulsively.

Building emotional intelligence is another long-term benefit of professional development. Translators who reflect on their feelings and then adapt strategies are more resistant to stress and better equipped to manage challenging projects. Training in emotional competencies, together with knowledge of linguistics, enables both the precision and vividness of translation. It enhances translators' capability to perform well even under pressure and to meet the requirements of a wide variety of text types and audiences. Finally, incorporating emotional intelligence into translation practice emphasizes the human factor in translation. Translators are not neutral machines but active interpreters whose feelings, judgments, and sensitivities mold the final product. The recognition of emotional intelligence as a core competence puts the emphasis on the fact that good translation requires technical ability but also emotional intelligence. All this leads to the development of better translators able to deliver translations accurately, with sensitivity toward cultural issues and emotional depth.

4. Practical Examples of Emotions in Translation

Emotions significantly enter real-life translation and determine choices at every level of the process. The most vivid example can be seen when one translates literature, where the translator needs to convey not only the denotational meaning of words but also the tone, style, and emotional nuance in general. For example, an element of humor, irony, or sadness often depends on subtle linguistic cues that rely on the translator's emotional rapport with source material. A translator who is able to empathize with the characters or the intent of the author can produce a translation which better resonates with the target audience. On the other hand, a translator who works in a mechanical way with the text, without emotional involvement, might not catch all these subtleties and provide a translation which sounds flat or even incorrect.

Emotional factors are also very apparent in high-pressure or urgency projects. Translators working under tight deadlines can experience stress that has a detrimental effect on their concentration and decision-making process. Stressful situations will result in literal translations or omitted details, especially when working with complicated or technical texts. However, stress might also be managed positively; translators in full control, calm, and focused can maintain accuracy and style, no matter the challenging conditions. Resilience is fostered by personal experiences, emotional awareness, and preparation in these instances.

Emotions in legal and technical translations take a different stance, but are also important. Neutrality and clarity have to be maintained, and the emotional regulation of a translator means that his or her subjective opinions will not influence the work's accuracy. For example, very emotionally provocative legal documents need to be translated calmly and objectively; that is, in a manner opposite to the feeling the content inspires. Emotional regulation here will protect both the integrity of the text and the professional reputation of the translator.

Another aspect that is also stressed by practical examples in collaborative translation projects is emotional skills. Translators usually interact with editors, clients, and colleagues, and interactions influence emotional states. While positive interactions, like constructive feedback or supporting teamwork, boost motivation and performance, misunderstanding or negative feedback usually causes anxiety or frustration, potentially compromising attention to detail and consistency. Translators who recognize and manage such emotional dynamics are better able to maintain quality and meet professional standards.

In creative translation tasks, such as advertising or marketing materials, emotions play a major role in the translator's effectiveness. Translators need to understand the emotional appeal intended for the target audience and reproduce it authentically. A translator who feels inspired or engaged by the material may generate innovative and persuasive translations; one distracted or emotionally disengaged from translating poetry or literature may produce uninspiring or ineffective content. Translating poetry or literature requires one to align emotionally with the source text, to 'feel' the rhythm, mood, and voice in order to recreate it.

Another good example can be found in audiovisual translation, either in the case of subtitling or dubbing. Translators should synchronize language with tone, timing, and actor delivery. This emotional sensitivity ensures that humor, suspense, or sentiment is accurately conveyed, preserving the intended viewer experience. Translators who disregard emotional cues risk producing subtitles or dialogue that sound unnatural or fail to capture the original atmosphere. Case studies of professional translation practice also show that translators who reflect upon their emotional responses tend to achieve better results. Monitored levels of stress, excitement, fatigue, or engagement can encourage translators to change strategies, take breaks, or approach difficult passages with fresh eyes. Such reflective practice contributes not only to the quality of a given project but also to the translator's long-term professional development, reinforcing once again the value of emotions in translation performance. In other words, practical examples throughout the book have illustrated that in the literary, technical, collaborative, and creative translation contexts, emotions are integral to professional performance, shaping attention, decision-making, style, and accuracy alike. Understanding the role of emotions and developing strategies for their regulation enables translators to navigate a wide range of challenges while producing translations that are precise and emotionally engaging.

5. On the Importance of Emotional Awareness and Training in Translation Education

Translation education should be firmly based on developing emotional awareness if the aim is to develop competent and resilient translators. Although traditional curricula focus primarily on linguistic knowledge and technical skills, the emotional dimension is equally important. Translators are not only language converters; they are interpreters whose emotions interact in many cognitive processes, from decision-making to attention and problem-solving. Only then will students be able to turn out professional translators who know how to face the demands of professional translation.

Another important strand of emotional training is self-awareness, where students learn to identify how their feelings, mood, and state of mind influence their decisions about translation. For example, fatigue and frustration are common causes of mistakes, while curiosity and interest improve focus on detail. Teaching students to monitor their emotional states encourages them to react accordingly-for example, rest, change tack, or seek advice if necessary. Self-reflection exercises, journaling, and feedback sessions can help raise this awareness and encourage responsible self-management.

Another important constituent is self-regulation. Translators must learn to manage emotional reactions that may interfere with accuracy or style. For example, stress linked to tight deadlines or challenging texts compromises focus and results in literal or inconsistent translations. Training students to regulate stress, maintain focus, and approach tasks methodically ensures that emotional states support rather than hinder cognitive performance. Techniques for time management, mindfulness exercises, and structured workflows can be integrated into the curriculum to reinforce self-regulation skills.

Empathy and emotional sensitivity are also very important in understanding both the source text and the target audience. Students should be encouraged to consider the emotional tone, intent, and cultural nuances of texts. Exercises that simulate real-world translation tasks, such as literary or marketing translation, provide students with opportunities to practice engaging emotionally with content while maintaining accuracy. By cultivating empathy, future translators will be able to anticipate audience reactions and ensure that translations retain intended meanings and emotional impact.

Practical experience under guided supervision enhances emotional competence. Group projects, peer reviews, and the collaborative translations themselves provide scope for navigating interpersonal dynamics, responding to feedback, and dealing constructively with frustration or disagreement. Such experiences give students professional perspectives through which they can learn how emotional awareness contributes to both individual performance and team productivity.

Emotional training also enhances resilience and adaptability. Translation assignments frequently involve situations that are complex, ambiguous, or high-pressure. Students who acquire emotional awareness will be better able to handle uncertainty, stay focused under stress, and adjust strategies when needed. This resilience will mean higher-quality translations, professional reliability, and personal well-being.

Integrating emotional intelligence into the education of translators is fully in line with the broader purposes of professional development. Emotionally competent translators are those who produce work that is accurate, coherent, and culturally sensitive; who manage cognitive load efficiently, react to challenges creatively, and sustain performance over time. Such an education devoted to linguistic instruction combined with emotional skills training prepares students not just for immediate translation tasks but also for long-term professional success. In short, emotional awareness and training should no longer be regarded as supplementary but rather as an integral part of translation education. Such awareness of the interrelation between emotion and cognition will eventually enable students to approach translation tasks holistically, balancing accuracy, style, and emotional fidelity. By providing future translators with competencies to understand, manage, and use emotions effectively, education programs will be in a position to develop professionals able to craft translations that are both technically exact and emotionally resonant. Emotional awareness alongside linguistic proficiency will ensure that translators are skilled, adaptable, reflective, and ready for the complexities awaiting them in their professional lives.

Conclusion

Translators are influenced by their mental and emotional states throughout the translation process. They must balance attention, memory, and decision-making simultaneously. Emotional stability helps maintain focus and accuracy. When stress occurs, memory and concentration can be disrupted. Positive emotions encourage careful consideration of context and nuance. Translators with high self-awareness adjust their approach according to their mood. Emotions affect how choices are made regarding words and sentence structures. Understanding subtle tones in the source text requires empathy. Translators interpret meaning beyond literal words. Emotional sensitivity helps preserve style and intent. Awareness of one's feelings prevents impulsive decisions. Translators under pressure may overlook key elements. Calmness allows for thorough review of translated material. Emotional regulation contributes to consistency. Confidence improves decision-making in complex passages. Anxiety can slow down the translation process. Curiosity motivates deeper engagement with the text. Interest in the subject matter enhances attention to detail. Frustration can lead to repeated errors. Recognition of emotional triggers aids in avoiding bias. Translators who reflect on their feelings adapt strategies more effectively. Awareness of personal limits helps prevent fatigue. Motivation supports persistence in difficult sections. Emotional intelligence interacts with analytical skills. Translators interpret not only words but cultural context. Experience helps predict potential challenges. Adaptability is influenced by mood and focus. Self-control reduces the likelihood of omissions.

Positive emotions can enhance creativity in difficult passages. Relaxation aids in maintaining consistent quality. Stress management techniques improve overall performance. Emotional engagement strengthens understanding of authorial intent. Translators must process multiple layers of meaning simultaneously. Awareness of cognitive load is essential. Emotional preparation can improve resilience. Decision-making requires evaluation of alternatives. Calm decision-making supports stylistic accuracy. Emotional reflection enhances sensitivity to cultural nuances. Translators with empathy create translations closer to the original tone. Emotional mismanagement may compromise clarity. Awareness of audience reactions helps maintain appropriateness. Emotional fluctuations influence pace and attention. Self-awareness encourages mindful editing. Persistence is supported by maintaining emotional balance. Attention to subtle cues prevents misinterpretation. Positive affect supports holistic comprehension. Emotional exhaustion can reduce overall productivity. Translators learn from previous experiences to manage emotions better. Anticipation of difficulties prepares emotional responses. Mindful engagement fosters careful linguistic choices. Awareness of tension and stress signals allows timely breaks. Translators combine cognitive skill with emotional judgment. Emotional balance ensures coherence and fidelity. Translators' feelings interact with linguistic processing. Continuous reflection strengthens professional competence. Self-regulation sustains high performance over time. Adaptation to challenges is facilitated by emotional intelligence. Emotions shape priorities and attention to key ideas. Translators who manage emotions effectively maintain quality across tasks.

References

Costa, A., & Kallick, B. (2014). Emotional intelligence and translation performance: An exploratory study. *Meta: Translators' Journal, 59*(3), 487–506.

Gile, D. (2009). *Basic concepts and models for interpreter and translator training*. John Benjamins Publishing.

House, J. (2015). *Translation quality assessment: Past and present.* Routledge.

Hubscher-Davidson, S. (2013). The translator's emotional engagement: Affective dimensions in translation practice. *The Translator, 19*(2), 155–176.

Hubscher-Davidson, S., & Lehr, C. (2021). *Improving the emotional intelligence of translators: A roadmap for an experimental training intervention*. Springer Nature.

Kussmaul, P. (1995). *Training the translator*. John Benjamins Publishing.

Lahodynskyi, O., Bohuslavets, A., Nitenko, O., Sablina, E., Viktorova, L., & Yaremchuk, I. (2019). The Emotional Intelligence of the Translator: an Integrated System of Development. *Romanian Journal for Multidimensional Education/Revista Românească pentru Educație Multidimensională*, *11*(3).

Mead, R., & Bache, C. (2011). Emotions in professional translation: Stress, motivation, and resilience. *Translation & Interpreting Studies, 6*(1), 42–64.

Nord, C. (2005). *Text analysis in translation: Theory, methodology, and didactic application of a model for translation-oriented text analysis*. Rodopi.

Pym, A. (2010). *Exploring translation theories*. Routledge.

Qiu, G. (2023). Towards the effects of translators' emotional intelligence and anxiety on their translation quality. *Heliyon*, *9*(9).

Setton, R. (2002). *Translation and cognition*. John Benjamins Publishing.

Shreve, G. M., & Angelone, E. (Eds.). (2010). *Translation and cognition*. John Benjamins Publishing.

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Lexico-Semantic and Stylistic Features of Phraseological Units with the Component rose in Contemporary French

[1] Yaqub Axundov

Accepted: 10.07.2025
Published: 11.19.2025
https://doi.org/10.69760/portuni.0109007

Abstract. Speakers of French make abundant use of fixed expressions containing colour terms such as rose, which provide rich cultural and emotional imagery. This article examines the lexico-semantic and stylistic features of phraseological units that include the word rose (as a colour, a flower, or a symbol) in contemporary French. First, we outline the theoretical framework of French phraseology, with particular emphasis on lexical fixation, semantic opacity, and the metaphorical dimension of these expressions. We then draw on examples from contemporary corpora (media, literature, and the press) to analyze the semantics of various expressions with rose—such as voir la vie en rose, à l'eau de rose, and envoyer sur les roses—in order to understand how the component rose contributes to their overall meaning. We show that the lexeme rose generally carries positive connotations (optimism, romanticism, innocence), which combine with other elements to form idiomatic meanings that are often far removed from the literal sense. Finally, the stylistic analysis reveals the varied use of these phrasemes in contemporary communication: sometimes to soften or euphemize an utterance, sometimes to add a vivid, humorous, or ironic touch to discourse. These phraseological units containing the component rose illustrate the linguistic creativity and expressive force inherent in idioms, as well as their role in the vitality of present-day French.

Keywords: *phraseology; idiomatic expressions; the colour pink; lexical semantics; stylistics; figurative language*

[1] Axundov, Y. Lecturer, Faculty of Foreign Languages, Nakhchivan State University, Azerbaijan. Email: yaqub.axundov@ndu.edu.az. ORCID: https://orcid.org/0009-0000-7375-6448.

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Les particularités lexico-sémantiques et stylistiques des unités phraséologiques à composant rose en français contemporain

[1] Yaqub Axundov

Accepted: 10.07.2025
Published: 11.19.2025
https://doi.org/10.69760/portuni.0109007

Résumé : Les locuteurs du français utilisent abondamment des expressions figées contenant des termes colorimorphes tels que *rose*, qui apportent une riche imagerie culturelle et émotionnelle. Cet article examine les particularités lexico-sémantiques et stylistiques des unités phraséologiques comportant le mot *rose* (en tant que couleur, fleur ou symbole) en français contemporain. Dans un premier temps, nous définissons le cadre théorique de la phraséologie française, en insistant sur le figement lexical, l'opacité sémantique et la dimension métaphorique de ces expressions. Ensuite, à partir d'exemples tirés de corpus actuels (médias, littérature, presse), nous analysons la sémantique de diverses locutions avec *rose* – telles que *voir la vie en rose*, *à l'eau de rose* ou *envoyer sur les roses* – afin de comprendre comment le composant *rose* y contribue au sens global. Nous montrons que le lexème *rose* véhicule généralement des connotations positives (optimisme, romantisme, candeur) qui se combinent à d'autres éléments pour former des significations idiomatiques souvent éloignées du sens littéral. Enfin, l'étude stylistique révèle l'usage varié de ces phrasèmes dans les communications contemporaines : tantôt pour édulcorer ou euphémiser un énoncé, tantôt pour ajouter une touche imagée, humoristique ou ironique dans le discours. Ces unités phraséologiques à composant *rose* illustrent la créativité linguistique et la charge expressive inhérentes aux idiomatismes, ainsi que leur rôle dans la vivacité de la langue française actuelle.

Mots-clés: *phraséologie; expressions idiomatiques; couleur rose; sémantique lexicale; stylistique; langage figuré*

1. Introduction

La langue française – à l'instar des autres langues naturelles – regorge d'unités phraséologiques (ou *phrasèmes*) qui émaillent la communication courante. Il est désormais bien établi qu'une proportion très importante du discours, potentiellement plus de 70 %, est composée d'expressions toutes faites que les locuteurs mobilisent spontanément. En effet, *les locuteurs natifs parlent en phrasèmes* (Pérez Miguel, 2017) et maîtrisent un vaste répertoire d'expressions figées, allant des locutions idiomatiques aux proverbes, collocations, clichés et autres tournures stéréotypées. Ces combinaisons polylexicales sont stockées en bloc dans la mémoire lexicale et utilisées comme des unités préfabriquées, ce qui facilite la fluidité de l'expression et la compréhension mutuelle au sein d'une communauté linguistique.

[1] Axundov, Y. Lecturer, Faculty of Foreign Languages, Nakhchivan State University, Azerbaijan. Email: yaqub.axundov@ndu.edu.az. ORCID: https://orcid.org/0009-0000-7375-6448.

Par *unité phraséologique*, on entend classiquement *une combinaison stable de mots dont le sens global est figuré*, c'est-à-dire non compositionnel par rapport aux sens de ses composants pris isolément. Autrement dit, le sens d'une telle expression idiomatique ne se déduit pas de la somme de ses parties (par exemple, *donner sa langue au chat* ne saurait se comprendre par l'addition du sens de *donner*, *langue* et *chat*). Les phrasèmes se caractérisent ainsi par un figement lexicosyntaxique et une opacité sémantique partielle ou totale. Ils présentent souvent des restrictions de substitution lexicales ou grammaticales (on ne peut modifier librement un élément sans briser l'idiomaticité) et une résistance à la traduction littérale dans d'autres langues. En même temps, ces expressions figées constituent la mémoire culturelle d'une langue: elles reflètent l'histoire, les imaginaires et les valeurs d'un peuple à travers les métaphores et images qu'elles véhiculent. En effet, les phraséologismes sont généralement porteurs d'une forte imagerie métaphorique et d'une coloration expressive ou émotionnelle marquée[2]. Comme le note Zagidullina *et al.* (2021), ces tournures figées se distinguent par « la métaphore, l'imagerie, la coloration expressive et émotionnelle » qui les accompagnent intrinsèquement[2]. Cette dimension stylistique explique leur pouvoir d'évocation et leur fréquence dans les usages littéraires, médiatiques ou conversationnels.

Parmi les innombrables phrasèmes du français, les expressions idiomatiques construites autour d'un terme de couleur occupent une place notable. Les couleurs servent en effet de support privilégié à la métaphore et à l'évaluation axiologique (par ex. *voir rouge*, *rire jaune*, *être vert de rage*, *noircir le tableau*, etc.). La couleur *rose*, en particulier, porte des connotations culturelles largement positives dans l'imaginaire occidental – elle évoque la beauté de la rose florale, la douceur et l'optimisme (voir l'expression *la vie en rose* popularisée par Édith Piaf), mais aussi la délicatesse romantique parfois associée à une certaine mièvrerie (*à l'eau de rose*) ou, inversement, une vision naïve et trop idyllique du monde. Il n'est donc guère surprenant que le lexème *rose* entre dans un éventail d'expressions figées en français, chacune exploitant un aspect sémantique de cette couleur (ou de la fleur éponyme) pour construire un sens idiomatique particulier.

Le présent article propose une étude approfondie de ces unités phraséologiques à composant *rose* en français contemporain. Nous nous intéresserons aux deux facettes principales de ces expressions: d'une part, leurs caractéristiques lexico-sémantiques (comment le mot *rose* interagit avec les autres éléments de l'expression pour produire un sens figuré, et quelle est la nature de ce sens : métonymique, métaphorique, hyperbolique, etc.); d'autre part, leurs propriétés stylistiques (registres d'emploi, effets pragmatiques, valeurs expressives et esthétiques dans le discours moderne). L'étude s'appuiera sur un corpus d'exemples authentiques tirés de textes contemporains – en particulier des extraits de médias, de littérature et de presse – afin d'analyser les usages réels de ces idiomatismes et la façon dont ils contribuent à la richesse du français actuel.

Nous adopterons une structure académique classique. Le cadre théorique rappelera brièvement la notion d'unité phraséologique en linguistique française, ainsi que quelques concepts clés (figement, idiomaticité, phrasématisation du lexique, etc.) en mobilisant des travaux récents en phraséologie. Puis, l'analyse lexico-sémantique examinera successivement plusieurs expressions figées contenant *rose*, en explicitant leur signification idiomatique, leur degré de transparence sémantique et les images sous-jacentes qu'elles convoquent. L'analyse stylistique se penchera sur les contextes d'emploi et les effets de ces phrasèmes dans différents genres de discours (conversation familière, langue journalistique, création littéraire), avec à l'appui des exemples actuels. Une section de discussion synthétisera les résultats, en soulignant les tendances saillantes et les implications plus larges (notamment en comparaison interculturelle et en traduction). Enfin, nous proposerons en conclusion quelques remarques générales sur l'apport de ces unités phraséologiques à composant *rose* à la langue française contemporaine et sur l'intérêt de conjuguer approche théorique et étude de corpus dans l'analyse phraséologique.

2. Cadre théorique de l'étude phraséologique

La phraséologie est le domaine de la linguistique qui étudie les expressions figées du langage, c'est-à-dire toutes les combinaisons lexicales stables dont l'usage est consacré par l'usage et qui présentent un certain degré de figement. Le figement peut être de nature syntaxique (ordre des mots fixé, variations grammaticales limitées), sémantique (opacité du sens global par rapport aux sens composant) et/ou lexicale (blocage des substitutions par des synonymes ou des modifications des composants). Comme l'explique Bolly (2010), malgré la diversité apparente des phénomènes phraséologiques, on retrouve des critères communs pour les définir, notamment la non-compositionnalité du sens et la fixité structurelle, qui les rapprochent d'autres processus linguistiques comme la grammaticalisation ou la lexicalisation[1]. En phraséologie fonctionnelle, Mel'čuk et al. distinguent par exemple les locutions (phrasèmes figés au sens opaque, équivalant à un mot du point de vue sémantique), les collocations (cooccurrences privilégiées de mots avec un sens encore compositionnel en partie, ex. *fort accent*, *profond sommeil*), les proverbes (énoncés sentencieux à structure de phrase complète), les formules proverbiales et clichés (tournures figées socialement marquées), ou encore les pragmèmes (expressions figées à fonction discursive ou pragmatique, ex. *Comment ça va ?*, *Bienvenue*, etc.). Cette typologie illustre que les unités phraséologiques peuvent remplir aussi bien des fonctions référentielles (nommer une notion d'une manière imagée) que des fonctions pragmatiques ou discursives.

Un aspect délicat du domaine est la délimitation des idiomatismes par rapport aux constructions libres ou aux collocations. Certains enchaînements de mots peuvent en effet être plus ou moins figés sans atteindre le statut d'idiome complet, créant un continuum de "flou phraséologique" (Bolly, 2010) entre le entièrement libre et le pleinement figé. Des critères graduels sont donc employés : taux de fixation syntaxique, degré de cohésion sémantique, possibilité de modification interne, etc. Albougami (2020) propose une approche linguistique outillée pour différencier les expressions idiomatiques de formes voisines comme les collocations, en s'appuyant sur des critères distributionnels et sémantiques. Sans entrer dans les détails de cette méthodologie, retenons qu'une expression sera considérée comme idiomatique si elle constitue une unité polylexicale figée à sens global non littéral, largement lexicalisée dans l'usage. C'est bien le cas des expressions qui nous occupent (*voir la vie en rose*, *envoyer sur les roses*, etc.), lesquelles figurent dans les dictionnaires d'expressions consacrées du français et font partie intégrante de la compétence linguistique des locuteurs natifs.

Concernant la dimension sémantique, les phrasèmes sont souvent le siège d'un processus métaphorique ou métonymique : ils associent une image concrète ou une situation-type à une signification abstraite ou détournée. Dans cette optique, les unités phraséologiques sont fréquemment "sémantiquement équivalentes à un mot" (Caws, 1995), c'est-à-dire qu'elles peuvent être paraphrasées par un lexème simple de sens proche. Par exemple, *être frais comme une rose* équivaut à "être très frais" (en parlant du teint ou de l'apparence), *découvrir le pot aux roses* signifie "découvrir le secret caché", *roman à l'eau de rose* désigne un "roman sentimental mièvre", etc. Cependant, la richesse évocative de l'expression imagée dépasse souvent la simple synonymie avec un mot: le phrasème véhicule tout un faisceau de connotations et de sous-entendus culturels qu'un terme simple ne rendrait pas forcément. C'est pourquoi la phraséologie contribue fortement à l'expressivité du langage : comme le soulignent Zagidullina *et al.* (2021), les phraséologismes incorporent *imagerie* et *coloration émotionnelle*, reflétant en miroir la mentalité et la culture d'une communauté. En employant une tournure idiomatique, le locuteur active un savoir culturel partagé et suscite chez l'interlocuteur une compréhension à la fois cognitive et affective.

Enfin, du point de vue stylistique, les expressions idiomatiques peuvent appartenir à divers registres. Certaines sont très courantes et neutres en registre (par ex. *voir la vie en rose* peut s'utiliser aussi bien dans un contexte soutenu que familier), d'autres sont marquées familières ou argotiques (*envoyer promener* vs *envoyer sur les roses*, cette dernière étant d'un registre courant-familier avec une nuance imagée). D'autres encore relèvent du proverbe ou de la maxime traditionnelle et confèrent un ton sentencieux ou littéraire à l'énoncé (*il n'est pas de rose sans épines* a un parfum proverbial un peu traditionnel). Le style d'emploi dépendra donc de l'expression considérée et du contexte. Il est à noter que la presse écrite aime jouer avec les idiomatismes pour leurs effets de sens et leur attrait sur le lecteur – on trouve fréquemment des titres ou accroches journalistiques bâtis sur des expressions détournées ou adaptées, phénomène qu'Amarni (2016) a étudié dans le cadre des titres de presse. Par exemple, un article de vulgarisation agricole titrait récemment *« Dans le secteur porcin, tout n'est pas rose. Y'a du vert aussi ! »*, combinant l'expression *tout n'est pas rose* (rien n'est parfait) avec une touche de mot-à-mot sur *rose* (la couleur de la viande porcine) et son opposé *vert* pour introduire le thème de l'environnement. Ce jeu de mots montre comment les phrasèmes à composante colorée se prêtent à des effets stylistiques percutants.

En somme, les unités phraséologiques à composant *rose* que nous allons analyser s'inscrivent pleinement dans ce cadre théorique: elles sont figées, non littérales, métaphoriques, et chargées de valeurs expressives. Le mot *rose* y joue un rôle pivot en apportant son sémantisme propre (couleur associée au positif, fleur emblématique) qui, combiné aux autres termes de l'expression, engendre un sens idiomatique nouveau. Nous allons à présent étudier en détail la lexicologie et la sémantique de ces expressions, avant d'examiner leurs usages stylistiques.

3. Analyse lexico-sémantique des phrasèmes à composant *rose*

Dans cette section, nous passons en revue les principales expressions figées du français contemporain intégrant le mot *rose*. Pour chacune, nous préciserons le sens idiomatique, l'imagerie mobilisée, le degré de transparence sémantique (de l'expression quasi littérale à l'idiome totalement opaque) ainsi que, le cas échéant, l'origine ou l'étymologie connue qui éclaire sa formation. Sans viser l'exhaustivité absolue, nous nous concentrerons sur les phrasèmes encore en usage courant de nos jours, en écartant les expressions archaïques ou régionales où *rose* apparaît (telles que *c'est la plus belle rose de son chapeau*, locution vieillie signifiant "son plus grand honneur"[18]). Les idiomatismes analysés ci-dessous peuvent être regroupés sémantiquement en quelques grands thèmes : les visions optimistes ou idylliques (*rose* comme symbole de bonheur), la confrontation du positif et du négatif (*rose* vs épines, *rose* vs la réalité décevante), le domaine du romantisme mièvre (la métaphore de l'*eau de rose*), et quelques autres emplois isolés.

3.1 *Voir la vie en rose* : optimisme et illusion joyeuse

L'expression *voir la vie en rose* est sans doute l'une des plus célèbres de la langue française, popularisée mondialement par la chanson éponyme d'Édith Piaf (1946). Signifiant "voir la vie du bon côté, avec un optimisme parfois naïf", cette locution verbale décrit une disposition d'esprit excessivement positive, une tendance à n'apercevoir que le beau et le bon autour de soi. Le mot *rose* y renvoie à la couleur rose, traditionnellement associée à la douceur, au bonheur et à un filtre embellissant (on parle en anglais de *rose-colored glasses*, littéralement "des lunettes teintées en rose", ce qui est l'équivalent de notre expression). L'origine de *voir la vie en rose* semble découler de cette image de lunettes roses : on imagine quelqu'un qui regarderait le monde à travers un verre rose, transformant ainsi toutes les teintes en une agréable coloration pastel – métaphore d'un optimisme béat. Le sens est transparent de façon métaphorique, et l'expression est parfaitement comprise des locuteurs modernes.

Dans l'usage contemporain, *voir la vie en rose* s'emploie fréquemment, aussi bien de façon sérieuse que sur un ton ironique. Par exemple, un journaliste écrivant sur l'état d'esprit d'une personnalité économique a pu titrer : *« Parisot voit la vie en rose »*, suggérant que cette personne (Laurence Parisot, ex-présidente du MEDEF) affiche un optimisme peut-être exagéré malgré des difficultés réelles. En contexte, l'article précise que, "en pleine tourmente judiciaire, [elle] voyait toujours la vie en rose", ce qui souligne le décalage entre la réalité "en tourmente" et sa vision positive. De même, dans le langage courant, on pourrait dire sur un ton léger : *« Béatrice voit la vie en rose, elle pense que tout ira toujours pour le mieux »*. L'expression a un antonyme implicite : par contraste, on dira *voir tout en noir* pour l'attitude pessimiste. Le couple *voir la vie en rose* vs *voir tout en noir* est un exemple de polarité métaphorique exploitant les couleurs (rose vif et joyeux, noir sombre et négatif) pour conceptualiser l'optimisme et le pessimisme.

Notons que *la vie en rose* est devenu un syntagme que l'on retrouve dans d'autres contextes, souvent en écho culturel à la chanson de Piaf. Par exemple, on a vu des campagnes publicitaires ou des rubriques intitulées *La vie en rose* pour signifier un contenu axé sur le bien-être ou la positivité. Cependant, la forme verbale complète *voir la vie en rose* demeure la forme idiomatique figée. On peut la conjuguer (il *voit* la vie en rose, elle *voyait* la vie en rose, etc.) mais on ne peut pas remplacer *vie* ou *rose* par d'autres termes sans détruire l'expression. Le figement est donc total sur *vie* et *rose*.

En termes de registre, *voir la vie en rose* est d'un emploi très courant et neutre. Il peut être utilisé dans des articles de presse, comme on l'a vu, ou dans la littérature, et bien sûr à l'oral. Son sens est positif, mais il peut être teinté d'une légère connotation de naïveté : quelqu'un qui *voit trop la vie en rose* est peut-être accusé de manquer de réalisme. Cette nuance transparaît dans certains emplois ironiques où l'on souligne l'excès d'optimisme. L'expression, grâce à sa notoriété, fait partie de ces phrasèmes immédiatement évocateurs pour tout francophone.

3.2 *Tout n'est pas rose* : la face sombre derrière l'idéal

En contrepoint de la vision idyllique évoquée précédemment, le français dispose de l'expression *tout n'est pas rose* (parfois formulée *ce n'est pas tout rose* ou *tout n'est pas rose dans*…). Il s'agit d'une tournure idiomatique signifiant "tout n'est pas parfait, il y a des difficultés ou des aspects négatifs cachés". Ici, *rose* symbolise la perfection ou le bonheur (la couleur rose figurant un état plaisant), et la négation indique que la situation n'est pas entièrement heureuse. On l'emploie souvent pour tempérer un enthousiasme ou pour indiquer les revers de la médaille dans une situation en apparence favorable. Par exemple : *« Certes, ce projet a des avantages, mais tout n'est pas rose »* signifiera qu'il existe aussi des problèmes. Le sens figuré de *rose* dans cette locution est clairement "agréable, facile, positif". C'est un usage métonymique de la couleur pour désigner la qualité positive en général.

L'expression est sémantiquement assez transparente par rapport à la métaphore de base (rose = bonheur). Elle se rapproche de la forme proverbiale *La vie n'est pas un lit de roses*, qu'on entend parfois également. Cette dernière, calquée sur l'anglais *life is not a bed of roses*, signifie littéralement "la vie n'est pas un lit de roses" – image poétique pour dire que la vie n'est pas faite que de confort et de beauté. En français, *tout n'est pas rose* est plus courant dans la langue quotidienne que *un lit de roses*.

On rencontre fréquemment *tout n'est pas rose* dans les médias lorsque, par exemple, un bilan est dressé en nuance. Un article pourra mentionner *« Tout n'est pas rose pour telle industrie malgré la reprise économique »*, indiquant qu'en dépit de signes positifs, il demeure des soucis. Dans un communiqué récent du secteur agricole québécois, on lisait : *« même si tout n'est pas rose dans le secteur porcin, des initiatives en développement durable y apportent une touche de vert »*[4]. Ici, *tout n'est pas rose* admet qu'il y a des problèmes dans le domaine de l'élevage porcin, tandis que l'ajout *"y'a du vert aussi"* introduit la notion d'écologie (vert) pour dire qu'il y a aussi des améliorations. L'utilisation de *rose* et *vert* en contraste dans cet exemple montre comment le langage journalistique peut jouer sur les couleurs idiomatiques : *rose* pour le positif (ou son absence pour dire "pas positif"), *vert* pour l'écologique.

Du point de vue morphosyntaxique, *tout n'est pas rose* est une phrase entière figée; on la rencontre aussi sous forme *ce n'est pas rose* (par exemple *« La situation n'est pas rose »* pour dire qu'elle est morose ou difficile). Dans le registre familier, on renforce parfois la négation par une litote ironique : *« Ce n'est pas rose tous les jours »*, voire *« Ce n'est pas franchement rose »*. Le sens demeure le même: il y a des problèmes, ce n'est pas la panacée.

Notons finalement une parenté de sens avec l'expression *noircir le tableau* (dépeindre une situation pire qu'elle n'est), sauf qu'ici *tout n'est pas rose* se contente de refuser le tableau tout rose; c'est une expression de modération plus que de dramatisation. Elle est d'un registre standard, passe-partout, convenant aussi bien à l'oral qu'à l'écrit.

3.3 *Il n'y a pas de rose sans épines* : le proverbe de l'ambivalence

Passons à un phrasème proverbial impliquant directement la fleur elle-même : *il n'y a pas de rose sans épines*. Ce proverbe classique, d'origine médiévale, affirme qu'"on ne peut avoir les plaisirs sans les peines qui les accompagnent" ou plus généralement que "toute belle chose a ses inconvénients". La métaphore est transparente : la rose est la plus belle des fleurs, mais elle possède des épines piquantes. Transposé aux expériences humaines, cela signifie que toute joie comporte une part de difficulté ou de souffrance. On retrouve là un thème universel – l'idée que rien n'est parfait – exprimé dans de nombreuses langues via l'image de la rose et des épines. En français contemporain, ce proverbe est toujours compris, même s'il peut paraître un peu cliché ou littéraire dans la conversation ordinaire.

L'expression est souvent citée telle quelle, comme une phrase complète et autonome, pour tirer une morale ou un constat. Par exemple, on pourra dire : *« Certes ce nouveau poste est très bien rémunéré, mais tu auras beaucoup de responsabilités et de pression. Il n'y a pas de rose sans épines… »*. Ici, la deuxième phrase proverbiale vient commenter la première en ajoutant une sagesse générale. On peut aussi la trouver sous la forme légèrement différente *"Pas de roses sans épines"* (au pluriel, forme abrégée). Sa fonction discursive est d'insister sur l'acceptation nécessaire des contreparties négatives d'une situation positive.

L'origine du proverbe remonte au moins à la Renaissance, et on trouve des équivalents dans d'autres langues européennes (en anglais *no rose without a thorn*, en espagnol *no hay rosa sin espinas*, etc.), signe d'une métaphore largement partagée. En français littéraire, on connaît la locution *cueillir les roses de la vie* (profiter des plaisirs de la vie tant qu'ils durent), qui vient d'un poème de Ronsard, et qui implicite aussi l'idée qu'il faut accepter l'éphémère et les épines potentiels. Mais *il n'est point de rose sans épines* reste la tournure la plus ancrée proverbialement.

Sémantiquement, c'est une expression figée de type *parémie* (proverbe) à sens général. Elle est **compositionalité partielle** : on comprend l'analogie roses = choses agréables, épines = difficultés. Donc ce n'est pas cryptique comme un idiome purement opaque; c'est une métaphore expliquée par elle-même.

Stylistiquement, on la réservera à un registre soutenu ou à un propos un peu solennel/humoristique. Utiliser ce proverbe dans une conversation courante apporte un ton légèrement sentencieux ou plaisant (selon l'intention). On peut d'ailleurs en jouer ironiquement, par exemple en inversant la proposition : *"il n'y a pas d'épines sans rose"* pour un effet humoristique (sous-entendu : les inconvénients ont malgré tout leur compensation). Ce type de détournement créatif reste rare, mais imaginable en littérature. De manière générale, l'expression fait figure de **sagesse populaire intemporelle**, toujours bonne à rappeler pour consoler quelqu'un déchantant d'un bonheur imparfait.

3.4 *Envoyer sur les roses* : éconduire avec brusquerie

Changement de registre avec *envoyer quelqu'un sur les roses*, locution verbale familière qui signifie "éconduire quelqu'un de façon cavalière, se débarrasser d'une personne importune en la remballant". Dire de quelqu'un *« il m'a envoyé sur les roses »* revient à dire : "il m'a envoyé promener", "il m'a envoyé balader sèchement". L'expression exprime donc l'idée de repousser ou dismiss quelqu'un, souvent après une demande ou une tentative de rapprochement malvenue.

Pourquoi *sur les roses* ? L'origine exacte de cette métaphore n'est pas limpide. On peut y voir l'image d'être rejeté dans un massif de rosiers aux épines piquantes – ce qui ne serait guère agréable pour la personne éconduite. En d'autres termes, *envoyer sur les roses* reviendrait imaginairement à envoyer quelqu'un se faire piquer aux épines, donc lui signifier rudement qu'il dérange. Une autre explication parfois avancée renvoie à l'époque romantique où offrir des roses était un geste galant : "envoyer sur les roses" pourrait alors signifier éconduire un prétendant en lui indiquant poliment d'aller humer ses roses (au lieu d'insister). Quoi qu'il en soit, le sens actuel est bien établi et ne nécessite plus qu'on en comprenne l'image littérale.

Dans la conversation, on utilise volontiers cette expression : *« Je lui ai demandé de m'aider, il m'a envoyé sur les roses »*, ou *« Je me suis fait envoyer sur les roses quand j'ai insisté pour avoir un rendez-vous »*. L'emploi pronominal passif est courant : *se faire envoyer sur les roses* (se faire rembarrer). On le trouve dans la presse également, par exemple à propos d'une personnalité qui essuie des refus répétés : *« Ce n'est pas la première fois que l'ancienne magistrate se fait envoyer sur les roses en poursuivant l'hebdomadaire satirique devant les tribunaux »*. Cette phrase, issue d'un contexte juridique, montre qu'on peut utiliser l'idiome même dans un article sérieux, pour donner une tournure imagée à l'information que la personne a été déboutée de sa plainte (on parle ici de Rachida Dati contre *Le Canard Enchaîné*). De même, dans un récit de reportage publié par *L'Orient-Le Jour*, on lit : *« Lorsqu'il demande un coup de main à ses sœurs, Arunchalam Muruganantham se fait envoyer sur les roses. Il s'arme alors de courage… »*. L'expression *se faire envoyer sur les roses* sert ici à décrire de manière vivante le refus net qu'opposent les sœurs du protagoniste à sa requête – on comprend aisément qu'elles l'ont éconduit sèchement.

Le registre de *envoyer sur les roses* est familier sans être vulgaire. C'est une tournure imagée plutôt qu'argotique. D'autres idiomes synonymes existent : *envoyer promener*, *envoyer paître*, *remballer quelqu'un*, ou plus familièrement *envoyer quelqu'un bouler*. *Envoyer sur les roses* est peut-être légèrement plus *vieilli* que *envoyer balader*, et peut ajouter une nuance de moquerie (le côté fleuri atténuant un peu la rudesse).

Notons qu'on trouve trace de cette expression au moins depuis le XIXe siècle. Un dictionnaire d'argot de 1901 la mentionne, et *L'Ami du Peuple* de 1933 (journal) contient un emploi attesté[22]. Cela indique que la locution fait partie du fonds populaire depuis longtemps. Aujourd'hui encore, elle est comprise de tous, même si les plus jeunes générations lui préfèrent peut-être *envoyer ch (forme vulgaire) dans des contextes très relâchés, ou simplement jeter* quelqu'un. Il n'empêche que *envoyer sur les roses* reste une formulation imagée expressive, fréquemment utilisée dans des dialogues de roman ou de film pour signifier un refus abrupt. Par exemple, dans un dialogue de comédie on pourra entendre : *« Tu verras, essaie de lui demander de changer d'avis, il va t'envoyer sur les roses ! »*.

En somme, *envoyer (quelqu'un) sur les roses* illustre un cas où *rose* – en l'occurrence les rosiers et leurs épines – est associé non pas à du positif, mais à une action négative (le fait d'éconduire). L'image initialement plaisante de la rose est détournée ici par métonymie des épines ou par antiphrase ironique. Cela montre la polyvalence de l'élément *rose* dans la construction de sens idiomatiques contrastés : *rose* peut servir à sucrer le discours (dans *à l'eau de rose*) comme à piquer (dans *sur les roses*).

3.5 *Être frais comme une rose* : image de fraîcheur et de beauté

L'expression *frais comme une rose* est une comparaison figée, généralement utilisée pour décrire une personne (souvent au réveil ou après un repos, ou au contraire par antiphrase s'il fait très chaud) qui a l'air *extrêmement frais(che)*, c'est-à-dire reposé, en pleine forme, avec le teint vif. C'est l'équivalent de *frais comme un gardon* ou *frais comme une fleur*, mais la rose apporte ici une touche poétique supplémentaire, évoquant la fraîcheur veloutée d'une rose épanouie au matin, couverte de rosée. On l'emploie souvent avec le verbe *être* : *« Après 10 heures de sommeil, elle était fraîche comme une rose »*. On peut aussi l'utiliser de façon impersonnelle : *« Te voilà frais (ou fraîche) comme une rose ! »* en accueillant quelqu'un qui apparaît pimpant.

L'expression est assez transparente: la métaphore est directe, il s'agit d'un compliment sur l'apparence/forme physique. Le mot *rose* conserve son sens de fleur, symbole de beauté fraîche. On notera que *frais* s'accorde en genre et nombre avec la personne (frais comme une rose / fraîche comme une rose / frais comme des roses, etc.), mais *rose* reste au singulier féminin dans la formulation canonique.

L'usage contemporain est courant, bien que peut-être un peu moins généralisé qu'autrefois (il sonne légèrement littéraire ou enfantin selon le contexte, par rapport à *frais comme un gardon* qui est plus familier par exemple). On le retrouve dans des dialogues de roman modernes. Dans un roman sentimental récent, un personnage secouru, après une épreuve, peut déclarer avec humour : *« Le lendemain, grâce à vous, je suis frais comme une rose. Merci, sans vous… »*. Cet extrait montre la réplique d'un protagoniste affirmant qu'il se sent parfaitement remis ("frais comme une rose") en remerciant son sauveur, ce qui indique l'emploi toujours vivant de la comparaison dans la littérature populaire actuelle.

Parfois, l'expression est utilisée de manière ironique ou contrastive. Par exemple, en pleine canicule, dire *« je ne suis pas vraiment frais comme une rose aujourd'hui ! »* revient à un euphémisme humoristique pour *"je suis moite et fatigué"*. De même, on pourrait dire à quelqu'un mal réveillé *« Tu as l'air frais comme une rose ! »* sur un ton sarcastique s'il a en réalité mauvaise mine. Ce genre d'antiphrase se comprend facilement car l'expression a un sens positif bien ancré que l'on peut inverser par dérision.

Stylistiquement, *frais comme une rose* est une expression imagée d'un **registre courant**, appropriée aussi bien à l'écrit qu'à l'oral. Elle a un côté légèrement désuet charmant, ce qui fait qu'on peut l'employer pour son effet attendrissant ou retro. Dans les dialogues familiaux, une mère pourra dire de son enfant endormi : *« Il dort paisiblement, il est frais comme une rose »*. Dans un registre plus soutenu on trouvera l'expression dans des descriptions littéraires, par exemple sous la plume de George Sand : *« Elle n'a pas beaucoup de couleurs, mais elle a un petit visage frais comme une rose de buissons ! »* (Sand, *La Mare au diable*). Cette citation du XIXe siècle confirme l'usage ancien de la comparaison, dont l'attrait perdure.

3.6 *Ça ne sent pas la rose* : euphémisme et antiphrase olfactive

Une expression imagée bien connue, surtout à l'oral, est *ça ne sent pas la rose*. Il s'agit d'un euphémisme un brin humoristique pour signifier *"cela sent mauvais, ça pue"*. On l'emploie par exemple en entrant dans un lieu à l'odeur désagréable : *« Ouh là, ça ne sent pas la rose ici ! »*. L'ironie de la formule vient du contraste entre la rose, fleur emblématique d'un parfum exquis, et l'odeur réellement perçue qui est tout sauf florale. En disant que *ce n'est pas l'odeur de la rose*, on atténue légèrement la dureté de *"ça pue"* tout en étant parfaitement compris et même en faisant sourire.

C'est donc un usage figuré de *rose* = *bonne odeur*, par antiphrase (négation). L'expression peut se décliner : *« ça ne sent pas la rose »*, *« ça ne sent pas la rose ici »*, *« il ne sent pas la rose »* (en parlant d'un individu malodorant), etc. On trouve aussi *"ça ne sent pas la violette"* dans le même sens, ou *"ça ne sent pas le Chanel nº5"* sur un registre plus recherché. Mais *pas la rose* reste la tournure la plus courante.

Cette expression est clairement **familière**, relevant du registre de la conversation détendue. Elle apparaît parfois dans des écrits pour conférer un ton léger. Par exemple, un article de presse satirique sur la pollution pourrait titrer *« Écologie au Nigeria, ça ne sent pas la rose »*, comme l'a fait *Charlie Hebdo*, combinant la métaphore olfactive à la situation écologique délétère. De même, on a vu dans la presse people des formulations du type *« L'affaire X, ça ne sent pas la rose… »* pour indiquer qu'une affaire est louche ou nauséabonde au sens figuré. L'odeur dont on parle n'est pas toujours littérale : *"ne pas sentir la rose"* peut figurer une situation moralement "puante" (scandale, corruption). L'idiome devient alors métaphorique d'un climat négatif. Cependant, l'emploi primaire reste lié aux mauvaises odeurs concrètes.

Le figement de *sentir la rose* est partiel: on dit *ça sent la rose* pour "ça sent bon" rarement de façon littérale (sauf si véritablement on a une odeur de rose), mais le tournure négative *ne pas sentir la rose* a cristallisé en idiome. La structure syntaxique est libre (il ne sent pas la rose, ça ne sent pas la rose, l'odeur ne sent pas la rose – cette dernière tournure est moins idiomatique, on préfère sujet impersonnel *ça*). On remarque que *rose* est au singulier et reste invariable ici.

L'image derrière cette expression est on ne peut plus limpide, donc on peut dire que l'expression est transparente sur le plan métaphorique. C'est son caractère d'euphémisme familier qui fait son sel stylistique. Dire *« ça pue »* est cru et direct, tandis que *« ça ne sent pas la rose »* transmet la même information de manière imagée et douce-amère. Cela correspond bien à une tendance du français familier à recourir aux litotes et atténuations ironiques.

3.7 *À l'eau de rose* et *roman à l'eau de rose* : la mièvrerie sentimentale

Le syntagme *à l'eau de rose* est employé en français pour qualifier une œuvre ou un contenu jugé mièvre, excessivement sentimental, et par extension de qualité littéraire médiocre. On parle notamment de *roman à l'eau de rose* pour désigner un roman d'amour sentimentaliste, au scénario convenu et aux sentiments exagérément idéalisés – en somme, ce qu'on appelle couramment un "roman sentimental cucul", typiquement les romans de gare Harlequin et consorts. L'expression *à l'eau de rose* peut aussi qualifier d'autres choses : *un film à l'eau de rose*, *une histoire à l'eau de rose*, *une fin à l'eau de rose* (pour dire une fin trop heureuse et clichée).

La locution trouve son origine dans la métaphore de l'eau de rose, c'est-à-dire l'hydrolat de rose (un parfum léger obtenu par distillation des pétales de rose). L'eau de rose est quelque chose de dilué, de doux, de fade comparé à l'essence concentrée. Dire d'un roman qu'il est *à l'eau de rose*, c'est donc suggérer qu'il est d'une sentimentalité diluée et facile, sans substance intellectuelle. Cette image semble attestée depuis le XIX^{e} siècle pour moquer les œuvres littéraires trop fleur bleue. D'ailleurs, l'expression *fleur bleue* est un synonyme (emprunté au romantisme allemand) signifiant naïvement sentimental – on parle d'une *histoire fleur bleue*. *À l'eau de rose* est légèrement péjoratif, mais d'une péjoration modérée, souvent utilisée avec un sourire ou une pointe de condescendance bon enfant.

Dans l'usage, on retrouve régulièrement l'expression dans la critique culturelle. Par exemple, un article d'actualité cinématographique titrait : *« Netflix : personne n'aurait misé sur ce film à l'eau de rose en tête du top, pourtant il met tout le monde d'accord »*. Ici *film à l'eau de rose* est utilisé par la journaliste pour qualifier une comédie romantique grand public, en soulignant son caractère convenu et sirupeux, bien que le succès populaire soit au rendez-vous. De même, on verra fréquemment des critiques de livres ou de séries user de cette tournure : *« une intrigue un peu à l'eau de rose mais divertissante »*, *« un scénario à l'eau de rose, larmoyant et douteux »* (exemple inspiré d'une critique Télérama).

Notons que *roman à l'eau de rose* est quasiment lexicalisé en tant que syntagme nominal pour le genre des romans sentimentaux. On trouve même dans les bibliothèques le classement "romans à l'eau de rose" pour ce type de littérature. Il est intéressant que la couleur *rose*, synonyme d'amour tendre, serve ainsi à connoter la naïveté et la fadeur quand elle est en *eau de rose*. C'est qu'on oppose l'eau de rose (diluée, superficielle) à quelque chose de plus corsé ou de plus authentique. On pourrait dire qu'il y a un léger mépris de genre littéraire derrière l'expression, historiquement associée à une lecture plutôt féminine populaire.

Morphologiquement, *à l'eau de rose* est figé, on ne peut pas varier *rose* (dire *à l'eau de camomille* n'aurait pas le même sens !). C'est une locution adjectivale invariable, employée après un nom le plus souvent. Elle appartient au registre courant/familier: on peut l'utiliser dans un article de presse non académique, dans la conversation, mais pas dans une dissertation formelle par exemple (où on dirait "sentimental et mièvre" à la place).

Enfin, signalons qu'en français du Québec, l'expression a parfois été traduite littéralement en *à l'eau de rose* pour calquer l'anglais *rose water*, mais globalement, l'usage est similaire dans toute la francophonie. Des équivalents existent dans les autres langues romanes : *novela rosa* en espagnol signifie roman sentimental (d'où le terme *novelas rosas* pour la presse people), preuve que le code couleur est partagé au-delà du français. Il est intéressant de voir que Buņina (2023), dans sa thèse sur la traduction des expressions figées, note que l'imagerie des champs sémantiques (ici celui de la couleur et des fleurs) peut poser problème en traduction. Par exemple, traduire *roman à l'eau de rose* vers une langue qui n'a pas cette métaphore nécessitera une adaptation : un traducteur letton ou anglais devra choisir un équivalent idiomatique (*romance novel* en anglais, *saldsērīgs romāns* en letton, litt. "roman doucereux") ou risquer de perdre l'image (phénomène de *déficit de traduction*). La métaphore de *l'eau de rose* est donc ancrée culturellement en français et contribue à cette palette d'expressions où *rose* dénote tour à tour l'excès de douceur ou de bonheur.

3.8 *Découvrir le pot aux roses* : percer un secret

L'expression *découvrir le pot aux roses* signifie "découvrir le secret, le fin mot d'une affaire cachée". C'est une locution verbale ancienne, dont l'origine reste un peu obscure, mais qui est toujours comprise de nos jours. La formule suggère qu'il y a un *pot aux roses* (littéralement un pot contenant des roses) qui était dissimulé, et que l'on finit par trouver. Par analogie, cela veut dire qu'on a mis au jour ce qui était caché.

Plusieurs explications étymologiques ont été avancées : certains y voient une référence à un pot-pourri parfumé à la rose dans lequel on aurait caché un objet (lettres d'amour ou autres secrets), d'autres pensent à une allusion grivoise médiévale (*rose* étant un euphémisme pour autre chose, et *pot* un contenant, ce qui laisserait imaginer la découverte d'un pot *pas très chaste*). Quoi qu'il en soit, à l'époque moderne on n'en perçoit plus le double sens éventuel, on comprend juste *"découvrir le poteau rose"* – d'ailleurs l'homophonie avec *poteau rose* amuse souvent les enfants qui déforment l'expression. Une confusion courante chez les francophones est en effet de croire que l'expression est *"découvrir le poteau rose"*, ce qui ne veut rien dire littéralement et témoigne de la perte de transparence.

Le sens idiomatique de *découvrir le pot aux roses* est assez opaque si on ne le connaît pas : impossible de le deviner juste en comprenant *pot* + *roses*. Il faut l'apprendre comme un tout. C'est un bon exemple d'unité phraséologique lexicalisée : *le pot aux roses* n'a de sens que dans cette expression (sinon, littéralement, on imaginerait un pot de fleurs).

Dans l'usage, on emploie l'expression pour marquer la révélation d'une supercherie ou d'une vérité cachée. Par exemple : *« En comparant les deux comptabilités, l'inspecteur a découvert le pot aux roses : l'entreprise truquait ses bilans »*. Ou bien : *« Personne ne savait qui était le corbeau qui envoyait ces lettres anonymes, jusqu'au jour où un journaliste a découvert le pot aux roses »*. L'expression a un petit parfum vieilli, ce qui la rend souvent appréciée dans des textes littéraires ou journalistiques pour varier du banal *révéler le pot-aux-roses*.

On notera que *découvrir le pot aux roses* n'a rien à voir avec la couleur rose ou la symbolique positive du rose. Ici, la *rose* fait partie d'un syntagme figé (*pot aux roses*) dont le sens littéral est oublié, ne servant plus qu'à représenter *"le secret/dossier caché"*. C'est un cas intéressant où la composante *rose* est sémantiquement complètement blanchie (vidée de son sens de couleur ou de fleur dans l'esprit du locuteur moyen). On ne pense pas du tout à une rose concrète quand on emploie cette expression, contrairement à *frais comme une rose* où l'image de la fleur est vivace. Cela illustre un continuum de figement sémantique : *découvrir le pot aux roses* est très figé et lexicalisé (presque idiome pur), alors que *voir la vie en rose* est métaphorique mais on voit encore la notion de rose/optimisme.

Dans la presse, on trouve l'expression, parfois avec un ton un peu sarcastique. Un titre pourrait annoncer *« Tel lanceur d'alerte fait découvrir le pot aux roses dans l'affaire X »*. Toutefois, le langage médiatique contemporain privilégie peut-être des formules plus directes (*révéler la supercherie*, *mettre au jour le scandale*). Le phrasème reste tout de même connu de tous et utilisé à l'oral par les générations plus âgées en particulier.

3.9 *Voir des éléphants roses* : hallucinations alcooliques

Pour conclure cette partie lexicale, mentionnons une expression moins fréquente mais savoureuse où *rose* apparaît : *voir des éléphants roses*. Elle signifie "avoir des hallucinations causées par l'ivresse ou une forte fièvre, voir des choses imaginaires". Cet idiome trouve son origine dans la culture anglo-saxonne – l'expression *to see pink elephants* est attestée en anglais dès le début du XX^{e} siècle pour dépeindre les visions fantaisistes des alcooliques en delirium tremens. Elle a été popularisée par la scène célèbre du film Disney *Dumbo* (1941) où l'éléphanteau, ivre, voit défiler des éléphants roses psychédéliques.

En français, *voir des éléphants roses* s'est propagé comme calque humoristique de l'anglais. L'expression est comprise surtout dans un registre familier et comique. On pourrait dire en plaisantant : *« Avec tout ce qu'il a bu, il va voir des éléphants roses d'ici peu ! »* pour se moquer d'une personne ivre. Ou encore *« J'étais si fatigué que j'ai cru voir un éléphant rose passer… »* pour signifier qu'on avait la vue troublée.

L'image de l'éléphant rose est résolument loufoque – on sait bien que les éléphants ne sont pas roses. Le choix de la couleur accentue le caractère absurde de l'hallucination. Ici, *rose* sert uniquement à souligner le côté fantaisiste de la vision, en plus du fait de voir un éléphant là où il ne devrait pas y en avoir. C'est un usage intéressant de *rose* car il n'apporte pas de sens figuré positif ou négatif direct, il contribue juste à l'incongruité de la scène imaginée. On aurait pu dire "voir des éléphants verts à pois" que l'effet serait semblable – mais le motif des *éléphants roses* s'est imposé, possiblement par import culturel.

Ce phrasème est moins courant que les précédents et a un statut un peu à part : il est plus proche de la blague ou de la référence cinématographique. Pourtant, on le trouve encore sporadiquement dans la littérature jeunesse ou la presse humoristique. Par exemple, un chroniqueur pourrait écrire *« Après la troisième mi-temps, certains joueurs voyaient carrément des éléphants roses sur le terrain ! »* pour décrire l'ivresse post-match. Le public visé doit avoir la référence pour comprendre l'allusion.

L'expression se conjugue généralement avec *voir*. On peut éventuellement utiliser d'autres verbes : *« il croit apercevoir des éléphants roses »*, mais c'est toujours l'idée de vision hallucinatoire. Elle reste de registre très familier.

En résumé de cette analyse lexico-sémantique, on observe que l'élément lexical *rose* endosse des rôles variés selon les phrasèmes : tantôt pivot sémantique principal (pour *voir en rose*, *pas rose*, *eau de rose* où *rose* donne la tonalité), tantôt simple composant d'une image plus large (*éléphants roses*, *pot aux roses* où *rose* colore l'image sans être en position initiale). L'éventail des significations va de l'optimisme excessif (*vie en rose*) à la sentimentalité fade (*à l'eau de rose*), en passant par l'échec cuisant (*envoyer sur les roses*), l'odeur déplaisante (*pas la rose*) ou la vérité révélée (*pot aux roses*). Le point commun est que toutes ces expressions jouent sur un contraste entre l'idée agréable associée à *rose* (couleur douce, fleur parfumée) et, soit une réalité contraire (pas rose, épines, mauvaise odeur), soit une application hyperbolique (tout est rose, vie en rose), soit une transposition moqueuse (rose bonbon = mièvre). Cet ensemble d'idiomes témoigne de la richesse symbolique du mot *rose* dans la langue – symbole de l'amour et de l'idéalisme, mais qui peut être inversé ou exploité de façon ironique.

4. Analyse stylistique et usage des expressions avec *rose*

Après avoir décortiqué le sens de chaque expression, intéressons-nous à leurs **fonctions stylistiques** et à leur emploi dans les discours contemporains. Les unités phraséologiques à composant *rose* présentent un potentiel expressif important, que les locuteurs et les rédacteurs exploitent selon le contexte communicatif. Nous examinerons successivement leur présence dans la langue courante orale, dans la littérature, et dans les médias/presse, en soulignant à chaque fois l'effet produit et le registre de langue.

4.1 Dans la conversation quotidienne

Dans la conversation informelle, les idiomes avec *rose* sont monnaie courante, car ils permettent d'exprimer de façon imagée des idées simples tout en nuançant le propos affectivement. Par exemple, dire *« Tout n'est pas rose dans ma vie en ce moment »* est plus expressif que *« J'ai des problèmes en ce moment »*, car l'idiome véhicule une sorte de litote implicite et une coloration fataliste facilement compréhensible. De même, *« Ne te vexe pas s'il t'envoie sur les roses »* prépare l'interlocuteur à une rebuffade en termes imagés mais parlants. Ces expressions sont donc appréciées pour leur côté imagé immédiatement parlant et pour la connivence culturelle qu'elles créent (le locuteur et l'auditeur se comprennent à demi-mot grâce à la référence commune).

Beaucoup de ces phrasèmes appartiennent au registre familier courant, celui de la conversation de tous les jours. *Voir la vie en rose*, *tout n'est pas rose*, *envoyer sur les roses*, *frais comme une rose*, *à l'eau de rose*, *pas sentir la rose* – toutes ces tournures peuvent apparaître dans la bouche de Monsieur Tout-le-monde sans effet de décalage. Elles sont idiomatiques mais bien intégrées au fond usuel du français. Prononcer une de ces expressions ne donne pas une impression d'emphase particulière (sauf volontaire), car elles sont lexicalisées dans le langage courant.

Cependant, l'utilisation de ces idiomatismes peut aussi servir un effet stylistique conscient de la part du locuteur. Par exemple, user d'un euphémisme comme *« Ouf, ça ne sent pas la rose ici… »* au lieu de *« Quelle odeur épouvantable »* traduit une intention d'humour ou au moins de légèreté pour désamorcer la gêne. De même, face à une personne trop optimiste, on pourra glisser d'un ton taquin *« Toi, tu vois la vie en rose ! »*, ce qui est plus doux que de dire *« Tu es d'un optimisme naïf »*. L'idiome adoucit la critique et la rend même complice, partageable sur le mode de la plaisanterie.

On observe aussi que ces expressions peuvent être modulées par le ton et le contexte. *« Il m'a envoyé sur les roses »* peut être dit sur un ton vexé ou, au contraire, amusé d'avoir été ainsi rabroué. L'idiome lui-même ne précise pas l'attitude du locuteur, c'est l'intonation qui fait foi. C'est un avantage de ces formules imagées : elles laissent place à l'interprétation affective. Par exemple, *« Je me suis fait envoyer sur les roses, mais c'était bien fait pour moi »* – ici le locuteur reconnaît sa faute sur un ton léger, l'idiome transforme l'anecdote en récit pittoresque.

En contexte familier, on peut parfois raccourcir ou adapter ces expressions. On entendra *« Ça ne sent pas la rose ! »* sans même le *ça* impersonnel, ou *« Pas de rose sans épines… »* dit d'un air entendu, sans la proposition complète initiale. La compréhension reste assurée grâce à la notoriété de ces tournures dans la langue.

Un point notable est l'aspect intergénérationnel : certaines expressions comme *« voir des éléphants roses »* ou *« découvrir le pot aux roses »* commencent peut-être à être moins utilisées par les jeunes locuteurs, qui pourraient les trouver datées. À la place, ils emploieront un argot plus nouveau ou des références culture pop équivalentes. Pourtant, la plupart des idiomes avec *rose* demeurent compris de tous. Il n'est pas rare d'entendre un adolescent dire *« c'est un film trop à l'eau de rose, j'aime pas »*, ou *« je suis pas frais comme une rose ce matin »*. La transmission de ces images se fait en grande partie via la famille, l'école, les médias, si bien qu'elles restent ancrées.

En somme, dans le langage courant, les phrasèmes à *rose* jouent pleinement leur rôle de *figures du quotidien*, ajoutant au discours oral spontané de la couleur (c'est le cas de le dire) et de la vivacité. Ils permettent d'éviter des formulations plates ou trop directes, conférant aux échanges une dimension imagée qui rend la conversation plus vivante et expressive.

4.2 Dans la littérature et la création artistique

Les expressions idiomatiques font partie du matériau dont disposent les écrivains, soit pour ancrer leurs dialogues dans la langue réelle, soit au contraire pour les détourner et créer des effets de style.

Dans la littérature contemporaine, on retrouve donc les idiomes avec *rose* principalement dans les dialogues ou pensées de personnages, reflétant la langue courante, ou bien sous la plume du narrateur lorsqu'il adopte une tonalité familière ou humoristique.

Par exemple, un roman actuel de genre romance n'hésitera pas à faire dire à un personnage : *« Ce matin, tu es fraîche comme une rose »* pour marquer l'appréciation tendre d'un amoureux envers sa compagne. Ce choix de mots rend le dialogue naturel et crédible, car c'est exactement le type d'image qu'on peut utiliser spontanément (plutôt que *« tu as bonne mine »* qui est plus neutre). L'extrait littéraire cité précédemment montrait un personnage remerciant son sauveur en assurant qu'il est *frais comme une rose*. Cette insertion d'idiome donne un ton léger et courant à la scène, conforme au registre d'une fiction divertissante.

De même, dans des dialogues de roman policier ou de satire, on pourra trouver des réparties du type : *« Inutile d'insister, tu vas te faire envoyer sur les roses »*, ou *« Tout n'est pas rose, hélas, dans cette affaire »*, etc. Ces expressions situent immédiatement le niveau de langue (langue standard, un peu imagée, accessible). Un auteur réaliste comme Céline ou Pennac, connus pour utiliser l'argot et l'expression populaire, pourrait aisément glisser un *« ça sentait pas la rose dans son taudis »* pour peindre l'atmosphère malodorante d'une pièce. Cela évite une description lourde et ajoute une pointe d'ironie.

Parfois, les écrivains jouent avec les idiomes, soit en les modifiant légèrement, soit en les accumulant pour un effet comique. La modification peut consister à actualiser l'image ou à la subvertir. On a vu le cas de *« pas d'épines sans roses »* inversant *« pas de roses sans épines »*. Dans la poésie contemporaine ou la littérature expérimentale, ce procédé est fréquent pour surprendre le lecteur en déjouant son attente idiomatique. Par exemple, quelqu'un comme Boris Vian aurait pu écrire *« il n'y a pas de rose sans moroses »* pour créer un jeu de mots, ou un auteur de science-fiction *« voir la vie en infrarose »* pour un androïde optimiste – ce ne sont pas des exemples réels, mais ils illustrent comment la base idiomatique *rose* peut être détournée.

La littérature fait aussi usage de ces expressions comme marqueurs culturels. Dans un roman situé dans les années 1950, faire utiliser ces idiomes aux personnages les rend cohérents avec l'époque, car ce sont des tournures bien implantées depuis longtemps. À l'inverse, un roman médiéval n'emploierait pas *envoyer sur les roses* qui serait un anachronisme (le mot *envoyer* n'ayant pas ce sens à l'époque, et l'expression étant apparue plus tard). Ainsi, la présence de ces phrasèmes peut aider à situer l'époque ou le niveau de langue d'un dialogue.

Enfin, il convient de noter l'emploi des idiomes *rose* dans les titres ou œuvres artistiques. La chanson *La vie en rose* en est l'exemple emblématique : Piaf a repris une expression existante, qui plus est déjà exploitée en titre d'un magazine féministe québécois dans les années 1980. Ce titre de chanson est devenu à son tour une référence culturelle majeure. On trouve aussi des romans intitulés *La vie en rosé* (avec un jeu de mots sur le vin rosé), des films intitulés *Rose* quelque chose en écho, etc. L'imaginaire littéraire aime ces images simples et parlantes. Jean Genet, dans *Miracle de la rose*, ne se réfère pas à un idiome mais il réinvestit le symbole de la rose (fleur poussant en prison dans le roman) pour en faire une métaphore de la grâce au milieu de la fange. Le lexique de la rose, très riche en connotations, fait partie d'un bagage symbolique dont les auteurs savent jouer, en mêlant parfois expression figée et création personnelle.

En résumé, dans la littérature, les expressions idiomatiques à composant *rose* remplissent un double rôle : *réaliste* (enrichir la langue des personnages, ancrer le récit dans le vrai parler) et *stylistique* (apporter humour, poésie ou intertextualité par le détournement ou la citation implicite). Leur utilisation requiert du tact pour éviter le cliché éculé, mais bien employées, elles ajoutent saveur et authenticité au texte.

4.3 Dans la langue des médias et de la presse

Le langage journalistique est friand d'expressions imagées, à condition qu'elles soient comprises de son lectorat, car elles permettent de titrer ou commenter de manière percutante. Les phrasèmes à *rose* se retrouvent donc assez souvent dans les journaux, magazines ou médias audiovisuels, parfois sous forme intacte, parfois intégrés dans des formulations créatives.

Les titres de presse en particulier aiment jouer sur les idiomes, comme mentionné précédemment avec l'exemple du secteur porcin (*« tout n'est pas rose… du vert aussi »*)[16]. Un autre exemple pourrait être un article économique intitulé *« L'industrie voit-elle l'avenir en rose ? »* pour discuter de prévisions optimistes, ou à l'inverse un article culturel *« Un festival qui finit en eau de rose »* pour critiquer la tournure trop sentimentale d'un événement. Ces formulations, souvent en forme de question ou de clin d'œil, captent l'attention du lecteur par leur familiarité détournée.

Dans le corps des articles, les journalistes utilisent les idiomes pour alléger le style et éviter des répétitions lourdes. Au lieu d'écrire toujours "optimiste" ou "idyllique", un rédacteur glissera *« peignant un tableau tout rose de la situation »*. Par exemple, le site d'information Challenges a qualifié l'attitude d'un dirigeant en difficulté de *« voir toujours la vie en rose »* malgré les problèmes, ce qui en deux mots transmet une idée complexe (l'indécrottable optimisme) avec une touche ironique.

Les expressions *il n'y a pas de rose sans épines* ou *découvrir le pot aux roses* peuvent aussi apparaître dans des tribunes ou analyses, car elles donnent un ton un peu littéraire ou proverbial. Un éditorialiste écrira : *« Bien sûr, aucun plan de relance n'est un lit de roses ; les épines budgétaires sont nombreuses… »*, adaptant l'expression pour son propos. Ici on voit comment les idiomes peuvent être fragmentés et combinés (il fait écho à *pas de rose sans épines* et *lit de roses* ensemble).

La radio et la télévision utilisent également ces tournures, notamment dans un registre plus détendu, par exemple pour les titres d'émissions ou les accroches. Une chronique humoristique s'intitulera *« Ça ne sent pas la rose »* pour parler d'un scandale qui "pue" (il existe d'ailleurs une rubrique sur un site malgache intitulée *« ÇA SENT PAS LA ROSE »* pour évoquer une affaire de bois de rose illégale, jouant sur le double sens littéral/figuré). Les médias audio-visuels misent sur la compréhension immédiate de l'auditeur, et les idiomes, parce qu'ils sont connus, permettent de communiquer un message rapidement sans lourdeur explicative.

Au-delà des titres, les idiomes avec *rose* peuvent servir la rhétorique journalistique en marquant une connivence ou une distanciation. Par exemple, écrire *« les autorités peintes par le rapport voient la vie en rose »* suggère une critique implicite (on les accuse d'optimisme de façade). De même, *« les négociations ont tourné au roman à l'eau de rose »* signifierait qu'elles se sont enlisé dans des considérations sentimentales ou insignifiantes – jugement de valeur déguisé en image. Ainsi, les journalistes se servent de ces expressions pour émettre une évaluation sans paraître trop personnels : c'est la force des idiomes, ils portent en eux un *sous-entendu culturellement partagé*. Dire de quelque chose que c'est *« un film à l'eau de rose »* dans un article critique, c'est une façon convenue de déprécier l'œuvre tout en se reposant sur une catégorie connue plutôt qu'un jugement frontal.

Enfin, la presse écrite aime les jeux de mots avec les idiomes. On a vu *« rose/vert »*, on pourrait imaginer un magazine titrant sur la politique *« La vie en rose… et noir »* pour opposer deux visions, ou *« Élysée : tout n'est pas rose bonbon »*. Parfois même, les journaux créent des variantes éphémères pour coller à l'actualité : durant le mois d'octobre dédié à la lutte contre le cancer du sein (Octobre Rose), certains médias ont pu utiliser l'expression *« tout n'est pas rose »* en double sens (à la fois littéral – tout n'est pas de couleur rose – et figuré – tout n'est pas facile pour les patientes) afin de sensibiliser tout en faisant un jeu de mots.

En conclusion de cette partie stylistique, il apparaît que les idiomes contenant *rose* sont des outils souples dans la langue des médias : ils apportent une touche d'expressivité et de connivence culturelle. Ils permettent d'aborder des sujets sérieux en les habillant d'une formule imagée, ou au contraire de traiter des sujets légers en les rendant encore plus savoureux. Le style journalistique moderne, souvent en quête d'efficacité et de vivacité, y trouve son compte – à condition toutefois de doser leur usage pour éviter le cliché. Trop d'idiomes tueraient l'idiome, il faut donc savoir les choisir à bon escient. Ceux à composante *rose*, par leur ancrage symbolique fort, demeurent des valeurs sûres de l'arsenal stylistique.

5. Discussion

L'examen conjoint des aspects sémantiques et stylistiques des unités phraséologiques à composant *rose* met en lumière plusieurs enseignements sur la phraséologie française et son fonctionnement contemporain.

Premièrement, on constate la polyvalence sémantique du lexème *rose* dans le réseau idiomatique. Tantôt porteur d'une connotation intensément positive (optimisme, beauté, délicatesse amoureuse), tantôt élément d'un discours mitigé voire négatif (refus, difficulté, mauvaise odeur), *rose* s'avère un véritable caméléon sémantique en fonction du contexte phraséologique. Cette adaptabilité témoigne de la richesse du symbole de la rose : fleur magnifique mais piquante, couleur douce mais potentiellement naïve – une ambivalence que la langue exploite habilement. Il est frappant de voir que *rose* peut signifier "beau" (*tout rose*), "trop beau" donc "suspect" (*voir en rose de manière exagérée*), ou carrément "désagréable" (*pas rose*, par litote). Cela illustre le phénomène de re-sémantisation contextuelle dans les idiomes : le mot isolé *rose* garde son noyau de sens (agréable) mais l'expression figée construit autour va orienter ce sens dans une direction spécifique (agréable excessif, agréable manquant, agréable contredit, etc.).

Deuxièmement, le corpus d'expressions étudié confirme le rôle crucial de la métaphore et de l'imagerie dans la formation des idiomatismes. Toutes ces expressions reposent sur une image concrète: vision colorée, fleur et épines, rose parfumée, rose diluée, etc. Comme l'a noté N. M. Shansky, *"les phraséologismes sont caractérisés par la métaphore, l'imagerie, la coloration expressive"*. Nos exemples vérifient parfaitement cette assertion. Même les cas où le sens littéral s'est obscurci (*pot aux roses*) trouvent leur origine dans une image (le pot de parfum de rose caché). Ceci souligne l'importance pour les linguistes et lexicographes de prendre en compte l'iconicité sémantique des idiomes : comprendre l'image sous-jacente aide souvent à en expliquer le sens et parfois l'étymologie. D'un point de vue didactique, expliciter ces images peut être très utile pour l'enseignement du français langue étrangère, par exemple – un apprenant comprendra mieux *voir la vie en rose* si on lui explique la métaphore des lunettes teintées.

Troisièmement, en termes de figement et de compositionnalité, on a pu observer un éventail de situations. Certaines expressions sont translucides (on devine aisément le lien littéral-figuré) : c'est le cas de *frais comme une rose*, *pas de rose sans épines*, *voir la vie en rose*, *ça ne sent pas la rose*. D'autres sont opaques ou lexicalisées : *découvrir le pot aux roses* notamment, où le locuteur moyen ne visualise plus forcément un pot pour comprendre l'expression. Entre les deux, *envoyer sur les roses* est semi-motivé (on peut imaginer que ce n'est pas agréable, sans plus). Cette diversité rejoint l'idée de gradience phraséologique (Bolly, 2010) : il n'y a pas de frontière tranchée entre idiome "purement arbitraire" et idiome "motivé", mais un continuum. Notre étude confirme que même parmi des expressions centrées sur un même mot, *rose*, le degré de figement sémantique peut varier fortement. Ceci peut avoir des implications en traduction : les expressions motivées seront parfois traduites littéralement si la langue cible accepte la même métaphore (ex : *voir la vie en rose* → *see life through rose-colored glasses*, calque parfait en anglais), tandis que les expressions opaques nécessiteront souvent un équivalent idiomatique différent ou une paraphrase (ex : *découvrir le pot aux roses* → *uncover the truth*, on perd l'image de la rose). Buņina (2023) a d'ailleurs quantifié ce phénomène de "déficit de traduction" lié à l'imagerie idiomatique, montrant que l'image est souvent sacrifiée en traduction[9]. Dans notre cas, la forte présence du symbole rose dans d'autres cultures (notamment occidentales) fait que plusieurs idiomes ont des correspondants directs (proverbe des épines, lunettes roses). En revanche, des expressions comme *envoyer sur les roses* ou *roman à l'eau de rose* n'ont pas d'équivalent littéral exact en anglais, en letton ou en arabe – signe du particularisme culturel possible au sein de la phraséologie.

Quatrièmement, du point de vue stylistique et pragmatique, l'étude révèle que ces idiomes ne sont pas de simples ornements interchangeables : chacun a son *ton* et ses *emplois de prédilection*. Par exemple, *à l'eau de rose* sert presque exclusivement à la critique dépréciative d'œuvres sentimentales; l'utiliser hors de ce contexte serait incongru. *Envoyer sur les roses* porte une nuance de familiarité teintée d'ironie polie (par rapport à *envoyer bouler* plus cru); un journaliste choisira l'un ou l'autre en fonction de l'effet recherché. *Il n'y a pas de rose sans épines* confère un ton proverbe, pas du tout le même registre que *tout n'est pas rose* qui fait plus conversationnel. Ainsi, chaque expression a une sorte de profil stylistique unique, combinant registre, connotation (élogieuse, péjorative, humoristique, moralisatrice…), et domaine de préférence (plutôt oral, plutôt écrit). Ceci corrobore les analyses de *Zagidullina et al.* (2021) sur l'expressivité attachée aux unités lexicales et phraséologiques – expressivité qui est fonction de facteurs structurels (ici la présence du mot *rose* et son réseau sémantique) mais aussi situationnels (le contexte d'énonciation).

Cinquièmement, notons que la popularité de ces idiomes semble se maintenir dans le temps, signe qu'ils répondent à un besoin communicatif stable. Les plus anciennes expressions (*pot aux roses*, *rose sans épines*) coexistent avec des plus récentes ou empruntées (*éléphants roses*), ce qui indique que la langue continue de forger ou d'intégrer de nouveaux phrasèmes autour de *rose* lorsque l'opportunité se présente. Le cas de *voir des éléphants roses* (calque de l'anglais, diffusé par le cinéma) montre l'apport de la culture moderne à la phraséologie traditionnelle.

Enfin, d'un point de vue plus global, l'étude de ce micro-ensemble d'expressions autour de *rose* illustre l'importance de combiner l'approche théorique (typologie, définition, sémantique) et l'observation corpus pour bien comprendre la phraséologie en contexte. Nos exemples tirés de médias et de littérature ont permis de voir comment, concrètement, ces idiomes sont employés, adaptés, et ressentis par les locuteurs aujourd'hui. On voit ainsi que les phrasèmes ne sont pas que des entrées de dictionnaire figées, ce sont des éléments vivants du discours, porteurs d'effets pragmatiques. Amarni (2016) soulignait l'intérêt d'une étude discursive du figement – nos analyses confirment que le sens d'un idiome peut légèrement varier selon qu'il est utilisé sérieusement ou ironiquement, selon qu'il est en position de titre, de conclusion, etc. Par exemple, *tout n'est pas rose* dans un article de presse sert souvent de tournure transitoire pour amener une nuance (presque un cliché journalistique), alors que dans la bouche d'un individu, ce sera plus une confession personnelle. Ces différences échappent à une description purement lexicographique, d'où l'importance de les aborder dans une perspective stylistique et discursive.

6. Conclusion

Les unités phraséologiques comportant le mot *rose* occupent une place de choix dans le paysage idiomatique du français contemporain. Notre exploration a montré qu'elles constituent un ensemble varié tant sur le plan sémantique que stylistique, reflétant la polyvalence symbolique de la rose – tour à tour synonyme de bonheur idéal, de naïveté douceâtre, ou contrepoint aux aspects sombres de la réalité. Du point de vue lexico-sémantique, ces expressions mettent en œuvre des mécanismes métaphoriques et métonymiques typiques de la phraséologie : elles associent au lexème *rose* des images mentales (voir en rose, rose/épines, parfum de rose, eau de rose, etc.) pour coder des significations complexes allant de l'optimisme inconsidéré à la révélation d'un secret, en passant par l'éconduite brutale ou la mièvrerie romantique. Certaines de ces images sont transparentes et universelles, d'autres plus opaques et culturellement spécifiques, ce qui peut poser des défis en traduction et explique la nécessité d'un apprentissage explicite de ces idiomes pour les non-natifs.

Du point de vue stylistique, les phrasèmes à composant *rose* attestent de la vitalité des idiomatismes dans la langue française actuelle. Leur fréquence dans la conversation familière souligne qu'ils ne sont pas de vieux archaïsmes, mais bien des outils expressifs actifs, appréciés pour la nuance et la vivacité qu'ils apportent aux échanges. Dans les médias et la littérature, ils servent à capter l'attention, colorer le propos, introduire de l'ironie ou de la convivialité, voire créer des effets esthétiques par leur détournement. Le lecteur averti prendra plaisir à repérer ces expressions et à goûter les jeux de mots qui en découlent, témoins d'une créativité langagière continue autour d'un motif aussi simple qu'une couleur ou une fleur.

En définitive, l'étude de ces unités phraséologiques centrées sur *rose* confirme l'importance de la phraséologie dans la compétence linguistique. Comme l'écrivait déjà C. G. Caws, *« la locution »* – l'expression figée – mérite qu'on la considère non comme une curiosité marginale, mais comme un phénomène central structurant l'histoire et le présent du lexique. Les exemples ici traités montrent que derrière un mot aussi anodin que *rose* se cache un riche réseau de locutions qui façonnent notre manière de décrire le monde et ses aléas de manière imagée. De *La Vie en rose* chantée par Piaf aux éditoriaux économiques qui se demandent si l'on *voit l'avenir en rose*, la langue française offre une palette phraséologique où le rose n'est pas qu'une couleur: c'est une manière de penser et de ressentir.

Perspectives: Ce travail, limité aux expressions avec *rose*, pourrait être étendu à l'étude d'autres couleurs dans la phraséologie (le *bleu* de *être fleur bleue*, le *noir* de *broyer du noir*, le *vert* de *se mettre au vert*, etc.) pour mieux comprendre le système global des métaphores chromatiques en français. Par ailleurs, une approche comparative interculturelle, dans l'esprit de Yao (2018) sur le français de Côte d'Ivoire, serait fructueuse : comment *rose* et ses idiomes se traduisent-ils et se réemploient-ils (ou non) dans d'autres variétés de français ou d'autres langues ? On pourrait ainsi voir si la symbolique de la rose est universelle ou si elle recèle des différences notables (par exemple, en chinois, le mot *méiguī* "rose" n'entre-t-il pas dans des expressions figées comparables?). En attendant, il apparaît clairement que les phrasèmes à composant *rose* en français témoignent de la capacité de la langue à transformer une simple image florale en un vecteur de sens idiomatiques multiples, preuve supplémentaire de la créativité et de l'économie du langage figuré.

Références

Albougami, T. (2020). *Une approche linguistique pour la délimitation des expressions idiomatiques des autres formes semblables : l'exemple des collocations*. Bulletin of the Faculty of Arts, 80(2), 56.

Amarni, A. (2016). *Étude discursive du figement dans les titres de presse : cas de Liberté (2009-2013)* (Thèse de doctorat, Université Kasdi Merbah Ouargla).

Bi, I., & Mathias, G. (2020). *Alchimie de l'inversion dans la littérature orale : pour une économie linguistique du genre poétique didiga*. Abidjan : Éditions L'Harmattan.

Bolly, C. (2010). *Flou phraséologique, quasi-grammaticalisation et pseudo marqueurs de discours : un no man's land entre syntaxe et discours ?* Linx, (62-63), 11–38.

Buņina, A. (2023). *L'influence des champs sémantiques sur les manifestations de déficit de traduction des expressions figées du français vers le letton* (Thèse de doctorat, Université de Lettonie).

Caws, C. G. (1995). *La locution : recherches lexico-sémantiques en phraséologie diachronique* (Thèse de doctorat, University of British Columbia).

Duisekova, K., Issabekova, S., Zagidullina, A., Beysembayeva, G., Bakitov, A., & Ziak, P. (2021). *Structural and functional types of lexical units, their expressiveness* [Types structurels et fonctionnels des unités lexicales, leur expressivité]. XLinguae, 14(4), 254–262. https://doi.org/10.18355/XL.2021.14.04.17

Pérez Miguel, M. (2017). *Les locuteurs natifs parlent en phrasèmes : les différents types d'unités phraséologiques* (Mémoire de fin d'études, Universidad de Salamanca).

Yao, K. (2018). *Métaphores et calques dans la création phraséologique du français ivoirien*. Íkala, Revista de Lenguaje y Cultura, 23(3), 469–483. https://doi.org/10.17533/udea.ikala.v23n03a03

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Curriculum Alignment and Problem-Solving Instruction in Mathematics: Evaluating Azerbaijani Textbooks in Light of Modern Pedagogical Demands

[1] Nubar Qocayeva

Accepted: 10.07.2025
Published: 11.19.2025
https://doi.org/10.69760/portuni.0109008

Abstract: This article examines the extent to which mathematics textbooks align with modern curriculum demands for problem-solving instruction. A review of literature shows that problem solving has become a central objective of mathematics curricula worldwide, framed as both a goal and a method of teaching. Effective problem-solving instruction requires aligning curriculum standards, textbook content, and classroom practices to emphasize higher-order thinking and real-world application. We discuss the concept of curriculum alignment and its importance, drawing on studies of alignment between learning objectives and educational materials. An analysis of mathematics textbooks – including a case example from recent curriculum reforms in Azerbaijan – highlights common misalignments: problem-solving tasks are sometimes superficially included or pitched at inappropriate difficulty levels, and cognitive demands in textbooks may not fully reflect those in curriculum standards. We identify challenges such as inconsistent integration of problem-solving across topics, insufficient guidance for complex real-life problems, and a tendency to focus on rote procedures over strategy development. Recommendations are offered for improving alignment, including designing textbook tasks that foster deep understanding and inquiry, ensuring a progression of problem-solving experiences, and supporting teachers' pedagogical content knowledge. Aligning textbooks with modern problem-solving demands is critical for developing students' analytical skills and for the overall coherence of reform-oriented mathematics education.

Keywords: *Problem-solving; Curriculum alignment; Mathematics textbooks; Cognitive demand; Instructional design; Bloom's taxonomy; Educational reform*

Introduction

Around the world, mathematics education reforms have increasingly emphasized problem-solving proficiency as a key learning outcome. National curriculum standards and international benchmarks (e.g., PISA) now highlight the ability to solve complex, real-world problems as central to mathematical literacy. Research in mathematics education likewise advocates elevating problem solving from a peripheral topic to the core of curriculum and instruction. Hiebert et al. (1996), for example, argued that meaningful reform in math teaching should be based on allowing students to *"problematize"* mathematical content – that is, to engage with mathematics by raising questions, investigating patterns,

[1] Qocayeva, N. Lecturer, Nakhchivan State University, Azerbaijan. Email: qocayevanubar4@gmail.com. ORCID: https://orcid.org/0009-0007-3457-9160.

and searching for solutions, rather than simply absorbing facts and practicing routine procedures. This vision positions problem solving not only as an ultimate goal of learning but also as the primary means through which students learn mathematics.

Realizing this vision requires significant shifts in curriculum design and teaching practice. It is not enough for policy documents to call for problem solving; the implemented curriculum must align with these goals at every level, from textbooks and lesson plans to assessments and teacher pedagogy. Misalignment can undermine reform: if textbooks remain focused on rote exercises or if assessments only value recall of procedures, teachers and students receive mixed messages that can dilute the impact of problem-solving initiatives (Martone & Sireci, 2009). Ensuring alignment between intended curriculum standards, the instructional materials (textbooks), and classroom instruction is therefore critical for reform success (Martone & Sireci, 2009). In particular, textbooks play a pivotal role as they often mediate the curriculum for teachers and learners – conveying which topics to teach, which skills to practice, and which problems to solve. Textbooks that are well-aligned with modern problem-solving demands can be powerful enablers of reform; poorly aligned textbooks, by contrast, may impede the development of students' higher-order thinking skills.

This article evaluates how well mathematics textbooks align with contemporary curriculum demands for problem-solving instruction. We begin by reviewing the role of problem solving in modern mathematics curricula and the theoretical frameworks that inform teaching "through" problem solving. We then discuss the concept of curriculum alignment and why it is vital to examine alignment not only in assessments (as is often done) but also in instructional resources such as textbooks. Drawing on recent studies, including content analyses of textbooks and alignment studies based on learning taxonomies, we identify common strengths and gaps in current textbooks' treatment of problem solving. As an illustrative case, we include an analysis of curriculum and textbook changes in Azerbaijan, where a recent curriculum reform attempted to integrate problem-solving-focused content across grades. This case highlights concrete challenges teachers and students face when curriculum objectives and textbook content are not perfectly synchronized. Finally, we offer recommendations for improving curriculum–textbook alignment in support of problem-solving instruction, emphasizing the need for coherent integration of problem-solving tasks, appropriate cognitive demand, and teacher support.

By shedding light on the alignment issue, we aim to contribute to ongoing efforts to improve mathematics instruction. When curriculum standards, textbooks, and teaching practices are all pulling in the same direction – toward developing students' problem-solving abilities – the chances of achieving this educational goal are greatly increased.

1. Problem Solving in Modern Mathematics Curriculum

Problem solving has evolved from a peripheral topic into a central tenet of modern mathematics curricula. Over the past several decades, research and policy have converged on the idea that learning mathematics is not simply about acquiring isolated skills, but about *using* those skills to solve meaningful problems. This shift is evident in major curriculum reforms worldwide. For instance, the Singapore mathematics curriculum framework, widely regarded as successful, famously places *mathematical problem solving* at the heart of its design. Since the 1990s, Singapore's curriculum has explicitly been organized around problem solving as the central focus, supported by five interrelated components (skills, concepts, processes, metacognition, and attitudes) that collectively enable problem-solving ability[2]. This reflects a high degree of alignment in Singapore's educational system: curriculum goals, textbooks, and pedagogy are all oriented towards cultivating problem solvers. The result, as noted by multiple observers, is a coherent curriculum where students regularly engage in challenging problems and develop a deep understanding of mathematical ideas through that engagement.

At the theoretical level, scholars have described different "roles" that problem solving can play in mathematics education. A classic framework by Schroeder & Lester (1989) distinguishes between teaching for problem solving, teaching about problem solving, and teaching through problem solving. In teaching *for* problem solving, traditional content is taught first and then applied to solve problems; in teaching *about* problem solving, general strategies and heuristics are taught explicitly. The most ambitious role is teaching *through* problem solving, where problem-solving activities are the vehicle for learning new mathematical content. Research indicates that this latter approach yields the richest learning. Olivares, Lupiáñez, and Segovia (2021) note that the *"highest degree"* of integration is achieved when curricula adopt a teaching-through-problem-solving approach, as this allows students to develop new knowledge and deeper conceptual understanding while engaging in the problem-solving process. Recent recommendations therefore encourage mathematics programs to organize instruction around complex, open-ended problems – effectively learning mathematics by doing mathematics (Lester & Cai, 2016). Curricula that implement this approach tend to include more open-ended tasks that connect different topics, fostering an integrated understanding of mathematics. For example, Japan's mathematics curriculum, implemented via structured lesson study, exemplifies teaching through problem solving: lessons are built around a single rich problem that students tackle independently and then discuss collectively, guided by the teacher to discover underlying concepts (Isoda, 2015; Fujii, 2018). This method has been shown to promote deeper reasoning and student engagement.

Underpinning the teaching-through-problem-solving approach are certain principles of effective problem-solving instruction. A literature review by Olivares et al. (2021) identified five key principles needed for successfully implementing problem solving in the math curriculum. These are: (1) Understanding – ensuring students build deep conceptual understanding, rather than just procedural know-how; (2) Reasoning – emphasizing logical reasoning and justification of solutions; (3) Autonomy – developing students' independence and perseverance in tackling problems; (4) Collaboration – using peer discussion and group problem-solving to enhance learning; and (5) Affective factors – nurturing positive attitudes, confidence, and curiosity in mathematics. These principles align with broader educational goals of fostering critical thinking and lifelong learning skills. When applied, they transform the classroom environment: students engage in reasoning and sense-making, often working together on non-routine problems, while teachers facilitate rather than simply demonstrate solutions.

It is important to note that simply adding more word problems to a textbook or curriculum does not automatically fulfill these principles. The *nature* of problem-solving tasks and how they are embedded in instruction matters greatly. High-quality problem-solving tasks are those that connect with important mathematical concepts, allow multiple solution strategies, and require students to analyze and reason – not just apply a memorized formula. They also need to be developmentally appropriate and linked in a progression that builds students' skills over time. This is where alignment comes into play: the design of textbooks and lessons must align with the curriculum's problem-solving goals by featuring tasks that truly embody understanding, reasoning, and so on, at the right level of challenge for students. When a curriculum espouses problem solving but provides mainly routine exercises in its materials, a disconnect arises between the intended curriculum (what is described in standards) and the enacted curriculum (what students actually experience).

In summary, modern mathematics curricula demand that problem solving be front-and-center. The literature and exemplary systems show a consensus that teaching mathematics through problem solving – supported by principles of understanding, reasoning, student autonomy, collaboration, and positive attitudes – can lead to improved mathematical proficiency. Achieving this in practice, however, requires careful alignment of curriculum components. In the next section, we delve into what curriculum alignment entails and why it is especially critical for problem-solving instruction.

2. The Importance of Curriculum Alignment

Curriculum alignment refers to the degree of agreement or match between the objectives set forth in curriculum standards, the content and activities in instructional materials (such as textbooks), and the assessments or evaluations of learning. High alignment means that all components of the educational system are working synergistically toward the same goals; low alignment means there are discrepancies (Martone & Sireci, 2009). Alignment is widely seen as essential for effective education because misalignments can lead to inefficient or inequitable learning. If, for example, textbooks and lessons focus on simple recall of facts while exams test complex problem-solving, students will be unprepared for the assessments. Conversely, if a curriculum emphasizes problem-solving skills but textbooks do not provide opportunities to practice those skills, then the curriculum's goals remain unfulfilled in the classroom. Martone and Sireci (2009) stress that strong alignment among curriculum, instruction, and assessment is necessary to ensure validity in education – that is, to ensure that what is taught is indeed what is tested and valued, and vice versa. In the context of mathematics problem solving, alignment is critical so that students consistently encounter the kinds of cognitive challenges the curriculum expects them to master.

There are multiple dimensions to curriculum alignment. One dimension is content alignment, which means the topics and skills in textbooks and tests match those prescribed by the standards. Another is cognitive alignment, which refers to the level of thinking or complexity – for instance, whether materials engage students in mere recall or in higher-order processes like analysis and evaluation. Modern math curricula that call for problem solving implicitly call for higher-order thinking: analyzing novel problems, devising solution strategies, making connections between concepts, and so forth. Therefore, cognitive alignment is particularly important – the tasks in textbooks should mirror the cognitive demands of the curriculum's standards (Webb, 1997). A third aspect can be contextual or performance alignment: the format in which knowledge is used. For example, if standards expect students to apply math in real-world contexts, then textbooks should include real-world problem scenarios, not just abstract exercises.

Recent research has attempted to measure alignment in various ways. One approach, exemplified by Khoy (2025), is to use a framework like *revised Bloom's Taxonomy* to evaluate whether learning objectives and textbook content address a range of cognitive levels. In a comprehensive cross-disciplinary evaluation, Khoy (2025) examined how well textbooks and syllabi aligned with Bloom's taxonomy levels (Remember, Understand, Apply, Analyze, Evaluate, Create). The study found considerable unevenness: many textbooks concentrated heavily on lower-order cognitive skills (memorization and routine procedures) and had relatively few tasks requiring higher-order thinking like analysis or evaluation. This misalignment suggests that despite rhetoric about 21st-century skills, instructional materials may still be lagging in providing opportunities for creative problem solving and critical thinking. Such findings underscore a gap between modern demands – which call for creative problem-solvers – and the reality of many curricula where those skills are underrepresented in day-to-day learning materials. To truly align with modern demands, curriculum designers must ensure that textbooks incorporate tasks at all cognitive levels, especially the higher ones, in appropriate proportions.

Effective curriculum alignment also involves alignment with assessment. If high-stakes assessments (state exams, international tests) emphasize problem-solving and reasoning, this should be reflected in both the standards and the textbooks. Martone and Sireci (2009) describe methodologies to quantify alignment between standards and assessments, often by coding items according to content and cognitive complexity, then comparing distributions. A well-aligned system would show that the majority of test items correspond to what was actually taught and practiced. When alignment studies find discrepancies – for example, if many assessment items test problem-solving skills that were never practiced in class – it highlights the need to adjust either the materials or the assessments. In practice, some education systems respond to poor alignment by revising textbooks or providing teachers with supplementary problem-solving resources. Others adjust assessments to better reflect what is taught. In either case, the goal is to eliminate mismatches that can disadvantage students.

For problem-solving instruction, alignment is especially vital because problem solving is complex to teach and learn. It requires consistent reinforcement across topics and grades. A curriculum might introduce simple problem-solving tasks in early grades and gradually increase complexity – but this works only if textbooks follow a coherent progression. Additionally, problem solving often cuts across traditional topic boundaries (a single rich problem might involve arithmetic, geometry, and data analysis). This means aligned curricula often encourage integration of content strands. Indeed, one hallmark of problem-solving-oriented curricula is the breaking down of silos between algebra, geometry, etc., in favor of interdisciplinary problem contexts. Textbooks need to reflect this integrated approach by including problems that require knowledge from multiple domains, thereby aligning with the curriculum's intent to develop flexible problem-solvers. Conversely, if textbooks remain partitioned (e.g., all geometry problems separated in one chapter with none appearing elsewhere), they may fail to reinforce the interconnected nature of mathematical problem solving that standards promote. Aligning the curriculum thus might involve not just matching individual standards to tasks, but aligning the overall structure and philosophy of the materials with that of the curriculum framework.

In summary, curriculum alignment ensures that what we *intend* students to learn (as per standards) is what they actually *encounter* in their studies, and ultimately what is *evaluated*. For modern mathematics curricula centered on problem solving, alignment means that problem-solving objectives should permeate textbooks, teaching, and tests in a consistent way. The next section examines the current state of mathematics textbooks in this regard, highlighting findings from research on whether textbooks are living up to the challenge of problem-solving instruction.

3. Alignment of Textbooks with Problem-Solving Goals

Textbooks translate curriculum standards into concrete learning experiences; they provide the problems and exercises that students spend much of their time on. Therefore, the alignment of textbooks with problem-solving goals is a focal point for evaluating overall curriculum alignment. A number of studies have scrutinized mathematics textbooks to see if they reflect contemporary emphases on problem solving and effective teaching practices. The evidence suggests a mixed picture: while many newer textbooks include more problem-solving tasks than in the past, there are still significant gaps in how well these tasks align with the depth and breadth of problem-solving skills that modern curricula seek to develop.

One informative study by Alghamdi (2023) analyzed word problem-solving tasks in six widely used third-grade mathematics textbook series in the United States. Alghamdi's content analysis was guided by five research-based teaching practices for effective mathematics instruction: (1) clear goals, (2) reasoning and problem solving, (3) use of visual representations, (4) mathematical discourse and conceptual understanding, and (5) explicit strategy instruction. The results showed notable variation among textbooks in how well these practices were incorporated. Overall, aspects like encouraging student discussion and conceptual understanding were present most frequently, whereas strategy instruction was incorporated the least. In the analysis of 1,457-word problem tasks, many textbooks did include opportunities for students to explain their thinking or use visuals (like drawings or charts) to solve problems – a positive sign of alignment with practices that build understanding. However, the relative scarcity of explicit strategy instruction (i.e. teaching students specific problem-solving heuristics or methods) indicates a weakness. This means that students using those textbooks might get practice solving problems but may not be learning general strategies for tackling novel problems – a key component of problem-solving proficiency. Furthermore, Alghamdi (2023) found statistically significant differences between textbook series in these aspects, implying that some curricula materials align much more strongly with effective problem-solving pedagogy than others. In poorly aligned textbooks, problem-solving tasks might be fewer, more routine, or lacking support for teachers and students to engage deeply. The study concluded that teachers should critically assess their textbooks' problem-solving content and be prepared to supplement activities to ensure alignment with best practices. In other words, where textbooks fall short, a teacher's pedagogical skill and additional resources become crucial to meet the curriculum's problem-solving objectives.

Another aspect of textbook alignment is whether problem-solving tasks increase in sophistication as students progress through grade levels, matching the curriculum's learning progressions. Ideally, a curriculum will introduce simpler problem-solving experiences in early grades (e.g., basic addition/subtraction word problems in familiar contexts) and then gradually present more complex, multi-step, or open-ended problems in later grades. Textbooks should mirror this progression. However, analyses have found that some textbooks do not consistently do so. In some cases, textbooks in middle grades still emphasize routine exercises and computational practice, with only token inclusion of non-routine problems. This can create a disconnect if the curriculum standards for those grades expect students to be developing higher-order problem-solving skills. The issue is not merely the quantity of word problems or applications, but their quality. For instance, a textbook might include many word problems but all following the same template, which students learn to solve by rote, rather than problems that truly require reflection or different approaches. Such tasks might give the appearance of problem-solving practice but do not align with the curriculum's intent to foster creativity and critical thinking.

Cognitive demand analysis is a useful tool here. Educators Stein and Smith (1998) introduced a framework for classifying mathematical tasks by cognitive demand – from memorization and procedures without connections (low demand) up to doing mathematics and reasoning (high demand). When researchers apply this to textbooks, they often find an abundance of low- and moderate-demand tasks and relatively few high-demand ones. This was echoed by Khoy's (2025) findings in terms of Bloom's taxonomy: textbooks tend to overweigh lower-level cognitive skills. The result is that students may not be sufficiently challenged to think mathematically. Maintaining the cognitive demand of tasks in classroom implementation is also a challenge – even if a textbook problem is high-level, a teacher pressed for time might simplify it or turn it into a procedure. Thus, alignment is not only about the textbook content but also about how the textbook is used. Nevertheless, ensuring that textbooks include a substantial proportion of high-demand tasks is a necessary condition for alignment with problem-solving goals. Textbook developers in some countries have begun to integrate special sections or problem-solving investigations in each chapter to address this need. For example, a chapter on algebra might end with an extended real-world problem that ties together the algebraic concepts in an open-ended way. This is a positive step, but effectiveness depends on how those sections are treated (are they optional enrichment that many teachers skip, or an integral part of the learning sequence?). An aligned curriculum would make such problem-solving investigations a core component rather than an add-on.

A specific challenge in textbook alignment is designing problems that connect across topics, reflecting the integrated nature of real-world problems. In many traditional textbooks, content is compartmentalized: students do geometry in one part of the book and never see it applied when doing, say, arithmetic word problems. Modern problem-solving demands often involve using multiple concepts together (for instance, a single problem might require proportional reasoning, geometry, and data interpretation). Some innovative textbooks now include thematic problem sets or projects – for example, a unit project that requires students to apply skills from different chapters to design something or analyze a complex situation. These kinds of tasks signal high alignment with a problem-solving-oriented curriculum, because they encourage students to transfer and synthesize knowledge. However, integrating content in textbooks can conflict with teachers' expectations or the structure of standardized tests, so not all textbooks embrace this fully. In the case where curriculum standards explicitly call for integration (as many do, via practice standards or process standards), textbooks that remain siloed demonstrate a misalignment that could hinder students from developing a holistic problem-solving ability.

Teacher factors also influence how textbook alignment plays out. Even a perfectly aligned textbook is not self-executing; teachers need pedagogical content knowledge to guide students through challenging problems. Tambara (2015) emphasizes that teachers' understanding of both mathematics content and problem-solving pedagogy is crucial for developing learners' problem-solving skills. If teachers lack the strategies to scaffold difficult problems or to facilitate rich mathematical discussions, they may underutilize or skip the problem-solving elements of a textbook. In this sense, alignment has a human dimension: professional development and teacher support materials in textbooks (like teacher's guides) must align with the curriculum's problem-solving ethos as well. Some textbook series include margin notes or supplementary guides that coach teachers on how to prompt student thinking or how to connect a problem to underlying concepts – these are invaluable for maintaining the intent of problem-solving tasks. Without such support, there's a risk that rigorous problems get turned into procedural drills, defeating their purpose. Tambara's (2015) work in South Africa, for instance, found that many teachers needed help unpacking their content knowledge and teaching skills specifically to better teach problem solving. Thus, part of evaluating textbook alignment is looking at whether teacher-facing components of the curriculum (guides, lesson plans) align with the goal of teaching through problem solving, by encouraging inquiry, providing rich problem contexts, and anticipating student difficulties.

In conclusion, current textbooks show progress but also shortcomings in aligning with modern problem-solving demands. There is greater awareness now that textbooks should include problem-solving and reasoning opportunities; however, the depth of alignment varies. Some textbooks integrate high-level problems and effective practices throughout, while others do so sporadically or at a superficial level. The next section will provide a concrete example by examining how one educational system – Azerbaijan – has implemented a new curriculum and the alignment issues observed in its mathematics textbooks. This will illustrate many of the general points with specific instances of alignment and misalignment in textbook content.

4. Case Study: Problem-Solving Alignment in Azerbaijani Textbooks

Azerbaijan provides an interesting case study of curriculum alignment in mathematics, particularly with regard to problem-solving instruction. In the late 2000s and 2010s, Azerbaijan undertook significant curriculum reforms transitioning from traditional content-based teaching to a competence-based approach, much like other international reforms. Mathematics education was redesigned to be taught as a unified subject ("Mathematics") rather than separated into arithmetic/algebra and geometry, and new standards highlighted problem solving, reasoning, and real-life application as key goals. We examine here the example of Nakhchivan (an autonomous region of Azerbaijan) where these new curricula and textbooks have been implemented, shedding light on how well the textbook content aligns with the curriculum's modern demands.

Curriculum Structure: The reformed math curriculum in Azerbaijan is organized around five "content lines" (or strands) that span all grade levels: *(1) Numbers and operations, (2) Algebra and functions,* *(3) Geometry, (4) Measurement, (5) Statistics and probability*. These mirror the broad areas found in many national standards. Importantly, the curriculum specifies not only content topics but also *general competencies and process skills*, such as logical reasoning and problem solving. For each grade, the curriculum outlines general learning outcomes – for example, by the end of Grade 9, students should be able to apply mathematical knowledge to solve various real-life problems, reason logically, and communicate their thinking clearly. These outcomes align with modern demands: they emphasize application, analysis, and interpretation over rote calculation. In principle, then, the intended curriculum strongly values problem-solving ability. The role of textbooks in this system is to realize these outcomes through lessons and exercises. The new textbooks were expected to integrate the five content lines in a coherent way and embed problem-solving tasks throughout.

Integration and Progression: In practice, the new textbooks made significant changes from the old ones. Instead of teaching topics in isolation, the textbooks often interweave different content lines within a single chapter or unit. For example, the Grade 5 mathematics textbook introduces multi-digit numbers and arithmetic operations, but alongside these, it incorporates set theory concepts (like Venn diagrams) when discussing number sets, and includes word problems that require interpretation of data (touching on the statistics strand). The idea was to promote *interdisciplinary connections* and show students that mathematics is not fragmented. While this is laudable and aligns with the curriculum's holistic approach, it posed some alignment challenges. Teachers and students encountered situations where a textbook unit would jump between content strands – e.g., from rounding numbers to union of sets and back to arithmetic operations. The curriculum did allow for integration, but the sequence and pacing in the textbook sometimes felt abrupt. In one instance, after covering comparison and rounding of large numbers, the Grade 5 textbook suddenly introduces the concept of sets and set operations (union, intersection) with a non-trivial problem involving Venn diagrams, and then returns to teaching multi-digit addition and subtraction. This cross-cutting approach can support problem solving (since real problems often involve multiple concepts), but only if carefully aligned with students' readiness. Some teachers reported that such arrangement was challenging for learners, as they had to grasp a new abstract concept (sets) in the middle of practicing arithmetic, potentially without enough grounding. Here, alignment issues arose in terms of cognitive load: the curriculum's intent to integrate content was technically followed, but the textbook may not have provided a smooth scaffolding to make that integration student-friendly. A better alignment might have been achieved by either introducing sets with simpler contexts or waiting until students were more comfortable with the prior arithmetic concepts before blending strands.

Problem Complexity: The new textbooks in Azerbaijan enthusiastically include real-world problem contexts, a clear attempt to align with the curriculum's demand for practical problem-solving. For example, the Grade 5 textbook presents a multi-part problem about national oil production figures and the share contributed by the state oil company. The problem text spans an entire page, providing background on the State Oil Company's role and giving a data table of oil output by year, then asks students to answer questions based on the table. The inclusion of such a real-life context is aligned with the idea of making math relevant and developing students' ability to interpret information. However, this particular problem proved to be *too complex* for most 10–11-year-old students. It introduced new terminology ("budget revenue", "expenditure") and required understanding context that was likely unfamiliar to them. While the curriculum did encourage real-life applications, the alignment faltered in matching the context and cognitive demands to the learners' level. Students struggled to even parse the problem situation, which detracted from the mathematical learning intended (working with large numbers and percentages). As a result, teachers noted that such problems needed to be broken down into smaller sub-problems or heavily guided – essentially the teacher had to adapt the textbook task to align it with students' capabilities. This example underscores that alignment is not just about including problem-solving tasks, but selecting appropriate ones. A more aligned approach might have been to use a simpler context (e.g., a school event or familiar business) to practice the same skills without the extraneous complexity that overwhelms learners. It also highlights an implementation issue: the curriculum's broad goal ("apply math to real-life problems") was interpreted by textbook authors in a way that overshot the target for Grade 5, indicating a misalignment in terms of *difficulty and context familiarity*.

Conversely, some tasks in the new textbooks were too simplistic or repetitive, offering little challenge. For instance, portions of the Grade 5 and 6 textbooks dealing with fractions largely repeated content from Grade 4, such as identifying and comparing simple fractions using visual models, but without extending to deeper problems. The curriculum standards expected that by Grade 6 students move on to operations with fractions and solving fractional word problems, yet textbook exercises often revisited earlier concepts (like equivalent fractions or comparing fractions with the same denominator) with minimal new complexity. This kind of misalignment – tasks not being sufficiently advanced given the standards – can result in wasted instructional time and insufficient development of problem-solving. Teachers observed that some stronger students found these tasks trivial, while weaker students didn't benefit much either because the textbook provided no new strategy or insight beyond what they had already learned. To align better with problem-solving goals, these fraction sections could have included richer problems (for example, a puzzle that involves fractions in a real context, or an open-ended task where students must figure out fractions of a quantity in a story scenario). Instead, the textbooks' heavy use of mechanical drills on fractions meant a missed opportunity to align with the curriculum's emphasis on reasoning and application.

Use of Models and Representations: The curriculum promotes using multiple representations (like number lines, area models, or diagrams) to solve problems – a practice that builds conceptual understanding. The textbooks did incorporate some of this approach. For example, to solve word problems involving fractions in Grade 5 and 6, the teacher's guide suggests using the part-whole bar model (a common Singapore-inspired strategy) to visually represent the relationships. One textbook problem describes: "Gülnar spent 2/5 of her money on fruits and 1/5 of the *remaining* money on meat; if 1 kg of meat cost 9 manat, how much money did she have initially?" This is a classic two-step fraction problem. The curriculum expects students to solve such problems and even to illustrate them with models. In class, teachers found that drawing the bar model (or other diagram) greatly helped students understand the structure of the problem (first dividing the whole into fifths, etc.). The alignment here between the intended skill (using visual representations to solve fraction problems) and the textbook implementation was relatively successful – the problem is non-routine and requires reasoning through fractions, and the suggested use of a model aligns with building problem-solving strategies. However, it was noted that not all students could draw the model on their own; significant guidance was needed. Moreover, the textbook did not explicitly provide a step-by-step explanation or diagram for this problem; it was largely up to the teacher's expertise. This points to a subtle misalignment in instructional support: the curriculum values the use of models, but the student textbook sometimes just gives the problem without any hint to use a model, while expecting that approach. An aligned textbook might include a partially completed bar diagram or a hint like "Try drawing a picture of the situation" to cue students. Without it, the burden fell on teachers, which in classrooms with less experienced teachers could result in students resorting to guess-and-check or other less systematic strategies. In summary, the content was aligned (the problem is a worthy problem-solving task for that grade), but the textbook's pedagogical presentation could be better aligned with the curriculum's recommended methodologies.

Introduction of New Concepts: The Azerbaijani curriculum's embrace of an integrated math course (as opposed to separate algebra/geometry courses) meant that some geometric concepts appear earlier and interwoven with other topics. The Grade 6 textbook, for example, introduces the concept of congruent figures (a geometry concept) right after a unit on decimal arithmetic. The curriculum included congruence under the geometry strand to develop spatial reasoning. The textbook defines congruent figures and gives basic properties (like reflections preserve congruence) and a few exercises (e.g., identifying congruent shapes, understanding simple maps). While this content is valid, an issue arose in how it connected to problem solving. The textbook's treatment was largely theoretical, with definitions and isolated examples. There was little alignment with problem-solving contexts – for instance, no problems where students had to apply congruence to solve a puzzle or a real situation (such as figuring out if two shapes will fit in a space). Additionally, some advanced theoretical notes (quoting mathematician A.N. Kolmogorov on the concept of placing one figure onto another via transformations) were included, which, though interesting, were arguably beyond what sixth graders could fully grasp or what the curriculum standards required. This reflects a case where the depth of treatment was misaligned: instead of focusing on developing problem-solving skills using geometry (like having students do simple constructions or reason about shapes in practical tasks), the textbook veered into formal properties and general notes, which aligns more with an old-style academic approach than the new curriculum's practical orientation. Consequently, students might learn the definition of congruence but not necessarily be able to utilize it in problem-solving scenarios. A more aligned approach might have been to include a hands-on activity or problem (e.g., "Design two different shapes that have the same area – are they congruent or not? Explain.") to engage reasoning. This highlights how alignment is not just about *what* content is present, but *how* that content is framed in terms of problem-solving opportunities.

Assessment Alignment: Within the textbooks, each major topic or chapter often ends with a set of review problems or a "summative" exercise set, meant to prepare students for evaluations. The curriculum's assessment approach encourages a mix of item types, including complex problems. However, teachers in Nakhchivan observed that some of the summative problems in textbooks were exceedingly demanding, arguably beyond what students could reasonably do under exam conditions. For example, a Grade 6 summative assessment problem asked: *"A 40%-salt solution of 20 liters is diluted with water to obtain a 20%-salt solution. How much water should be added?"* This is a typical mixture word problem requiring setting up and solving an equation (or logical reasoning with percentages). While solvable, it involves multiple steps and the understanding of percentage concentration – a concept that students at that stage found challenging. In a timed test setting, many struggled. This raised an alignment concern: if summative tasks in the textbook (which mirror what might appear in exams) are too complex relative to what was practiced in daily lessons, then there is a misalignment in *practice-to-assessment*. Either more practice problems of that type should be included in the regular sections (to build skill), or the summative tasks should be moderated. The presence of a difficult problem per se is not bad – it pushes top students – but if the majority of the class cannot tackle it, it suggests that the curriculum implementation (through the textbook) did not adequately prepare them, even though the curriculum standard might expect it. Teachers resorted to reducing the number of such problems or giving hints, thereby somewhat modifying the intended rigor. Aligning curriculum and textbook in this regard would mean ensuring the difficulty of evaluation tasks is consistent with the tasks used for learning. If high-order tasks are expected in assessment, they should be abundantly present (with support) in the learning phase as well.

Summary of Case Insights: The Azerbaijan example illustrates typical alignment challenges in moving toward a problem-solving curriculum. The curriculum sets ambitious goals: use math in diverse contexts, integrate content areas, develop reasoning. The textbooks made bold attempts to reflect these goals by introducing real-life problems, integrating content lines, and including advanced topics. Some alignments were successful (e.g., multi-step fraction problems with visual models, cross-topic connections), but others overshot or undershot the mark (contexts too complex, insufficient scaffolding, or retention of some rote sections). This case underscores the need for *calibrating* textbook problems to the right level and providing enough instructional support for problem solving. It also highlights the critical role of the teacher: where alignment was weak, teacher intervention was the deciding factor in whether students still achieved the learning objective. For instance, teachers who recognized the intent behind a difficult problem could break it down effectively, whereas less experienced teachers might skip it entirely, leading to a gap between the intended and implemented curriculum. Thus, achieving alignment in problem-solving instruction is a multi-faceted endeavor.

5. Strategies for Improving Alignment for Problem-Solving Instruction

Improving curriculum alignment in mathematics textbooks, particularly to meet modern problem-solving demands, requires coordinated effort from curriculum developers, textbook authors, teachers, and assessment designers. Based on the literature and cases discussed, several strategies emerge that can help ensure what is prescribed in theory is what students experience in practice:

- **Embed Rich Problem Tasks as Core Components:** Textbooks should treat problem-solving activities as an integral part of each topic, not as peripheral extras. This means moving beyond the tradition of having a few challenging problems at the end of a chapter. Instead, problem-solving should be woven through the instructional sequence. For example, when introducing a new concept (like linear equations), the textbook can begin with a problem scenario that naturally leads to that concept (a method often called problem-based learning). By doing so, the textbook aligns with a teaching-through-problem-solving approach from the outset. As Olivares et al. (2021) and others recommend, problem solving should have a prominent and explicit role in every stage of the curriculum enactment. Textbook authors can utilize features such as "Exploratory Tasks" or "Investigations" within each lesson to encourage students to reason and conjecture. In designing these, authors should ensure they reflect the curriculum standards and push students to the required cognitive levels. A practical step is to review each standard and ask: does the textbook provide a problem-based experience that addresses this standard in a meaningful way? If not, adjustments are needed.

- **Ensure a Progression of Difficulty and Cognitive Demand:** Aligning with problem-solving goals means not only including challenging tasks but doing so in a progressive manner. Curriculum designers and textbook writers should outline a clear trajectory for problem-solving skills across grades. Each grade's textbook should build on prior ones. One strategy is to classify problems in the textbook by their cognitive demand (e.g., using Bloom's taxonomy or Stein's task levels) and check that there is an increasing trend. If Grade 5 mostly has "Apply" level problems, by Grade 8 there should be plenty of "Analyze" and some "Evaluate/Create" level tasks. Alignment audits can be performed: for each grade, tally how many tasks fall into each category of thinking. If the distribution is skewed too low or doesn't advance year to year, revisions can be made. Also, within each grade, provide differentiated problem sets (often textbooks label them basic, intermediate, advanced). This allows all students to engage at some level, while ensuring that higher-order tasks are present for those ready and to stretch others. It's crucial that the "advanced" problems are not treated as optional; teachers should be supported and encouraged to use them widely. By normalizing challenge, the materials align with the expectation that struggle and inquiry are part of learning math (and not just fast finishing work for a few students).

- **Contextual Relevance and Clarity:** Problem-solving in modern curricula often involves real-world contexts, but these contexts must be chosen carefully. To align with students' experiences and the curriculum's aims, contexts should be relevant and understandable, yet still requiring students to apply mathematics in new ways. Textbook problems can be improved by pilot-testing them with students or soliciting teacher feedback: Did the context aid engagement or create confusion? For instance, if a curriculum standard expects understanding of linear functions through real-life examples, a textbook might include problems about phone plans or distance-time relationships. It should ensure the context does not include extraneous difficulties (unfamiliar vocabulary or too much data). In cases like the Azerbaijani oil production example, a strategy to improve alignment would be to break a complex context into a series of scaffolded sub-problems that lead students stepwise to the larger problem. Another strategy is to use **multiple contexts for the same math concept**, some familiar (to build confidence) and some novel (to stretch students), which aligns with curriculum goals of transfer. By carefully curating contexts, textbooks can maintain alignment with the curriculum's problem-solving objectives without overshooting in complexity.

- **Explicit Strategy Instruction and Metacognition:** As noted in Alghamdi's study, an area where textbooks often fall short is teaching students *how* to solve problems, not just giving them problems to solve. Modern curricula value metacognitive skills – thinking about one's own problem-solving process – and general strategies like making a table, drawing a diagram, or working backward. Textbooks should include sidebars or short sections that introduce these **problem-solving heuristics** in the flow of lessons. For example, a textbook could have a feature called "Strategy Focus" that occasionally pauses to discuss approaches: "Notice how we solved this problem by first simplifying the situation... This strategy is called *simplifying the problem*. Try it in the next example." By making these strategies explicit, textbooks align better with the curriculum's demand that students become adept problem solvers, not just in one problem but across many. Moreover, encouraging students to reflect on their solution methods (perhaps by including reflective questions like "What other method could you have used?" or "Why did that strategy work here?") addresses the **autonomy and metacognitive** principles highlighted by Olivares et al. (2021). In aligned instruction, students gradually internalize these strategies and can approach new problems with confidence. Textbooks and teacher guides should work in tandem: the student book introduces and reinforces strategies, and the teacher guide provides tips on fostering metacognitive discussion.

- **Teacher Professional Development and Guides:** No matter how well-crafted a textbook is, the teacher remains the mediator of the curriculum. Alignment efforts must extend to supporting teachers in implementing problem-solving instruction. Teacher guides that accompany textbooks should explicitly align with problem-solving pedagogy – for instance, suggesting probing questions to ask during problem-solving sessions, pointing out common student misconceptions and how to address them, and providing alternative methods for solving certain problems. These guides can reference the curriculum's competencies (e.g., "This problem addresses the competency of logical reasoning; encourage students to justify each step"). When teachers understand the intent behind tasks, they are more likely to implement them faithfully rather than, say, short-circuiting a challenging problem by demonstrating the solution. Additionally, training workshops or online professional development modules can be aligned with the new textbooks, focusing on how to use them to develop problem-solving skills. Tambara (2015) found that unpacking teachers' pedagogical content knowledge was key – teachers may know the math content, but need support in pedagogy for problem solving. Aligned curricula ensure that the roll-out of new textbooks comes with training on facilitation of rich tasks, differentiation strategies, and assessment of problem-solving processes. Essentially, alignment is strengthened when teachers become co-designers of the learning experience envisaged by the curriculum, rather than passive users of a textbook. A feedback loop can also be established: teachers can report which problems engaged students deeply or which fell flat, informing future textbook revisions to better align with both curriculum goals and classroom reality.

- **Alignment with Assessment Practices:** Finally, to reinforce alignment, assessment (both formative and summative) should consistently reflect the problem-solving emphases of the curriculum. Textbooks can contribute here by including formative assessment problems and sample test items that mirror high-level demands. For example, at the end of each unit, alongside routine review questions, textbooks might include a "Performance Task" – a multi-step problem-solving exercise that students could even do as a project – which is similar in spirit to what might appear in an exam or as a graded assignment. By doing this, textbooks signal to teachers and students that these complex tasks are not optional puzzles but *essential* parts of learning and assessment. Martone and Sireci's work reminds us that if there's a disconnect between what's taught and what's tested, alignment suffers. Thus, curriculum designers often work with examination boards to ensure new problem-solving standards are reflected in exams. When that happens, textbooks usually follow suit. In contexts where teachers write their own tests, providing exemplar test items in the textbook or teacher's guide (all emphasizing problem-solving and reasoning) can align classroom assessment with curriculum goals. Over time, as students get accustomed to seeing challenging, non-routine problems in both their textbooks and their assessments, a culture shift occurs: problem solving becomes a normal part of mathematics learning, not an out-of-the-ordinary event.

Conclusion

The push for stronger problem-solving instruction in mathematics has reshaped curricula across the globe, but success hinges on careful alignment among standards, textbooks, teaching, and assessment. This article has explored how well mathematics textbooks – a central conduit of the curriculum – meet modern demands for problem solving, and what can be improved. The literature demonstrates a clear consensus that problem solving should be at the heart of math education (Hiebert et al., 1996; Olivares et al., 2021). Countries and regions that have embraced this vision, like Singapore or Japan, show that with coherent alignment, students can become adept problem solvers and perform strongly on international measures. In these cases, curriculum documents, textbooks, and classroom practices all reinforce the development of analytical thinking, perseverance, and application of knowledge.

However, the journey toward such alignment is not without challenges. The case of Azerbaijan's reformed curriculum illustrates that even with the best of intentions, misalignments can occur – whether in the form of overly complex tasks, insufficient scaffolding, or remnants of rote learning that linger in new textbooks. These misalignments can confuse or frustrate learners and teachers, potentially blunting the impact of the reforms. The key lesson is that alignment is a dynamic, continuous process. It requires regular review and refinement. Textbook content should be empirically tested against curriculum goals: Are students actually demonstrating the problem-solving competencies described in the standards? If not, where is the breakdown – in the materials, the teaching, or the assessments? Alignment studies like those by Alghamdi (2023) and Khoy (2025) provide valuable feedback by pinpointing specific gaps (for instance, lack of strategy instruction or uneven cognitive level coverage). Curriculum developers and authors can use such findings to make targeted improvements.

It is also evident that teachers are the linchpin in making alignment a reality. As Tambara (2015) emphasizes, teachers need both content knowledge and pedagogical skill to cultivate problem solving. No textbook, no matter how aligned, can single-handedly produce problem-solving proficiency without teachers who understand and embrace the underlying philosophy. Thus, investing in teacher education and aligning it with curriculum goals is as important as aligning textbooks. In fact, one could argue that the ultimate measure of alignment is when teachers, textbooks, and assessments all speak the same language of instruction. When a student moves from classwork to homework to test, they should encounter a consistent expectation to think, to reason, and to problem-solve. Creating this consistency builds student confidence and competence in tackling unfamiliar problems – a key aim of modern math education.

In conclusion, evaluating and enhancing curriculum alignment in mathematics textbooks is crucial for fulfilling the promise of problem-solving-centered reforms. Progress has been made, as seen in the increasing presence of rich tasks and inquiry-based learning in many textbooks. Yet, continuous vigilance and adaptation are needed. Curriculum developers should collaborate closely with textbook authors, teachers, and researchers to ensure that every problem in a book serves a purpose aligned with learning objectives, and that no important skill (like a problem-solving strategy or a cognitive process) is left unsupported. By heeding research insights and on-the-ground feedback, future textbooks can better embody the curriculum's vision. The payoff for achieving high alignment is substantial: students who not only master mathematical procedures but can also **think mathematically** – approaching novel challenges with confidence, creativity, and rigor. These are the problem solvers and critical thinkers that education in the 21st century aims to develop. Aligning our textbooks with these goals is an investment in our learners' success, in mathematics and beyond.

References:

Alghamdi, A. (2023). *Word Problem Solving Tasks in Third-Grade Mathematics Textbooks: How Well Do they Align with Effective Teaching Practices?* (Doctoral dissertation, University of Minnesota).

Hiebert, J., Carpenter, T. P., Fennema, E., Fuson, K., Human, P., Murray, H., Olivier, A., & Wearne, D. (1996). Problem solving as a basis for reform in curriculum and instruction: The case of mathematics. *Educational Researcher, 25*(4), 12–21. https://doi.org/10.3102/0013189X025004012

Khoy, B. (2025). Unlocking cognitive learning objectives: a comprehensive evaluation of how textbooks and syllabi align with revised Bloom's taxonomy across disciplines. *Curriculum Perspectives, 45*(2), 189–202. https://doi.org/10.1007/s41297-024-00295-2

Martone, A., & Sireci, S. G. (2009). Evaluating alignment between curriculum, assessment, and instruction. *Review of Educational Research, 79*(4), 1332–1361. https://doi.org/10.3102/0034654309341375

Olivares, D., Lupiáñez, J. L., & Segovia, I. (2021). Roles and characteristics of problem solving in the mathematics curriculum: A review. *International Journal of Mathematical Education in Science and Technology, 52*(7), 1079–1096. https://doi.org/10.1080/0020739X.2020.1738579

Tambara, C. T. (2015). *Unpacking teachers' pedagogical content knowledge and skills to develop learners' problem-solving skills in mathematics.* (Master's thesis, Stellenbosch University, South Africa).

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Modeling the Performance Efficiency of Tourism Enterprises in Azerbaijan

[1] Agha Kerim Shamidzade

Accepted: 10.10.2025
Published: 11.23.2025
https://doi.org/10.69760/portuni.0109009

Abstract: This paper presents an assessment and modeling of the performance efficiency of tourism enterprises operating in the Republic of Azerbaijan using economic-mathematical methods. The empirical foundation of the study consists of official statistical indicators covering the years 2018–2024. Within the framework of an analytical approach, correlation and regression analyses—particularly the Pearson correlation coefficient—were applied. The influence of factors such as tourist inflow, sectoral investments, employment levels, and customer satisfaction on the operational results of tourism enterprises was evaluated. The findings provide practical recommendations for making scientifically grounded management decisions, enhancing the sector's competitiveness, and optimizing public policy.

Keywords: *tourism enterprises, performance efficiency, economic-mathematical modeling, Pearson correlation coefficient, regression analysis*

1.Introduction

In the modern era, the tourism sector stands as one of the strategic and dynamically developing components of the global economic system. For Azerbaijan, the development of this sector holds vital importance in terms of diversifying the national economy, strengthening non-oil industries, and ensuring interregional socio-economic balance.

In recent years, the observed socio-economic transformations, the rapid adoption of digital technologies, and the new realities shaped by the post-pandemic period have necessitated novel approaches to the management and performance evaluation of tourism enterprises.

In this context, the objective and systematic evaluation of the performance efficiency of tourism enterprises through economic-mathematical modeling has become one of the primary directions of modern scientific research. Such models not only facilitate the analysis of the current situation but also provide a fundamental basis for forecasting the sector's development prospects and improving management mechanisms.

The main goal of this study is to evaluate the operational efficiency of Azerbaijan's tourism enterprises using correlation and regression analysis methods based on statistical data from 2018 to 2024, and to

[1] Shamidzade, A. K. Postgraduate Student, International Economic Relations, Kyiv State University of Trade and Economics, Ukraine. Email: aqakerimshamidzade@gmail.com . ORCID: https://orcid.org/0009-0009-2925-856X.

construct a multifactorial economic-mathematical model accordingly (see Figure 1). The applied methodology offers practical tools for both public administration bodies and private sector stakeholders—such as enterprise managers and investors—to optimize decision-making processes.

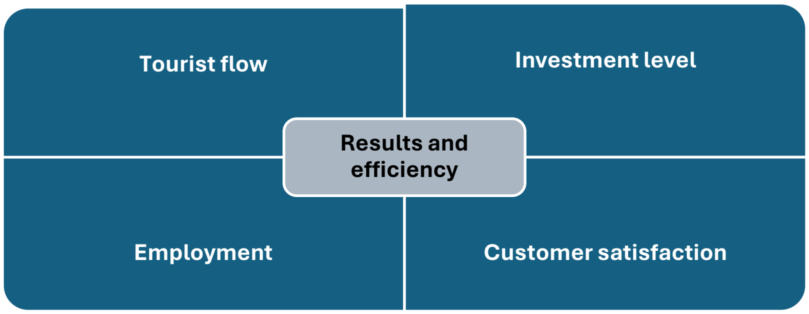

Figure 1. Schematic Classification of Factors Affecting the Performance of Tourism Enterprises

1.1. Literature Review

The evaluation and modeling of the performance efficiency of tourism enterprises represent one of the current and relevant directions in modern economic science. Extensive research on this topic has been conducted in both developed countries and developing regions. Various scholars rely on indicators such as financial performance, resource utilization efficiency, customer satisfaction, and innovation capacity to measure efficiency.

The Data Envelopment Analysis (DEA) approach proposed by Charnes, Cooper, and Rhodes (1978) is widely used to determine the relative efficiency of tourism enterprises based on multidimensional indicators. This method has gained further relevance in recent years amid the transformation of the tourism sector in Eastern European countries.

At the same time, correlation and regression analyses—particularly the Pearson correlation coefficient—serve as fundamental analytical tools in identifying statistical relationships among different variables in the tourism field. Kozlov and Ivanova (2020) note that there is a strong statistical relationship between the efficiency of tourism enterprises and variables such as the number of tourists, volume of services provided, and the level of investment.

Furthermore, modern studies widely employ econometric models, panel data analysis, and structured regression systems to identify the factors influencing the performance of tourism enterprises and to improve decision-making processes based on scientific foundations (UNWTO, 2023; World Bank, 2024).

In the context of Azerbaijan, scientific studies in this field remain relatively limited. It is essential to conduct analytical research based on the annual data provided by the State Tourism Agency and the State Statistical Committee. From this perspective, applying integrative methodological approaches—

especially the construction of correlation-regression models—to gain a deeper understanding of the operations of local tourism enterprises is of significant scientific and practical importance.

2. Methodology

The primary objective of the study is to evaluate the operational efficiency of tourism enterprises in Azerbaijan and to develop an economic-mathematical model based on key influencing factors. For this purpose, the following sequential methodological approaches have been applied:

2.1. Research Objects and Data Sources

The research focuses on tourism enterprises operating in the Republic of Azerbaijan. The data sources include official statistical reports from the State Statistical Committee and the State Tourism Agency for the period 2018–2024. The following indicators were included in the analysis:

Table 1. Key Indicators Used in the Analysis

Indicator name	Abbreviation	Type
Number of domestic and foreign tourists	X1	Independent
Total volume of services provided (million AZN)	Y	Dependent
Investments directed to the tourism sector	X2	Independent
Number of employees in the sector	X3	Independent
Customer satisfaction index (1–10)	X4	Independent

2.2. Pearson Correlation Coefficient

In the initial stage of the research, the **Pearson correlation coefficient** was calculated to determine the statistical relationship between the variables. This method is expressed by the following formula:

$$\boldsymbol{r_{xy}} = \frac{\sum(\boldsymbol{x_{i-\bar{x}}})(\boldsymbol{y_{i-\bar{y}}})}{\sqrt{\sum(\boldsymbol{x_{i-\bar{x}}})^2 \cdot \sum\left(y_{i-\bar{y}}\right)^2}}$$

Here;

x_i , y_i — **Observed values of the corresponding variables**

$\bar{x}$, $\bar{y}$ — **Mean values of the respective variables**

r_{xy}— **Correlation coefficient between variables**

The coefficient value ranges between −1 and +1 and provides information about the strength and direction of the relationship.

2.3. Regression Analysis

Based on the results of the Pearson coefficient, a multivariate regression model was constructed. The general form of the model is as follows:

$$Y = \beta_0 + \beta_1 X_1 + \beta_2 X_2 + \beta_3 X_3 + \beta_4 X_4 + \epsilon$$

Here;

Y — Volume of provided tourism services (dependent variable);

X1, X2, X3, X4 — Independent variables

β_0 — Constant term

β_1 β_2 β_3 β_4 — Regression coefficients

ε— Random errors (residual term).

2.4. Economic-Mathematical Modeling

Based on the statistical data and analytical methods presented above, the modeling of the performance efficiency of tourism enterprises was carried out. The models enable the measurement of the impact of independent variables on performance indicators, facilitate forecasting, and allow the simulation of alternative management scenarios.

In the Republic of Azerbaijan, the performance indicators of tourism enterprises demonstrated dynamic variability during the period from 2018 to 2024. Observations conducted during this period reveal that both internal and external factors have had a direct impact on the tourism sector. According to the collected statistical data, the number of tourism enterprises increased from 570 units in 2018 to 813 units in 2024. This represents an approximate growth of 43%, which can be attributed to factors such as the expansion of infrastructure, a relatively favorable investment climate, and the strengthening of state support programs (Figure 2).

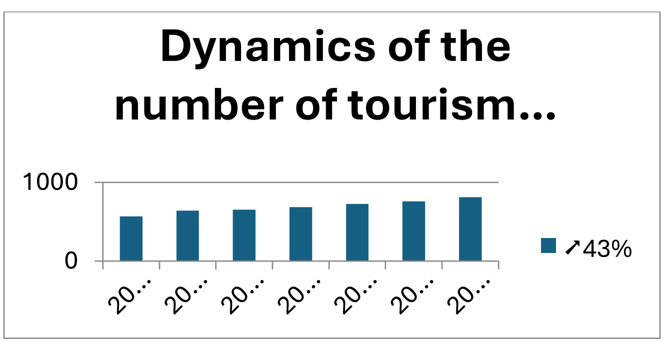

Figure 2. Growth Dynamics of the Number of Tourism Enterprises in the Republic of Azerbaijan (2018–2024)

Source: Author's calculations based on data from the State Tourism Agency.

During the same period, the number of incoming tourists showed variability. After peaking at 3,167,775 visitors in 2019, the figure sharply declined in 2020 to 795,669 due to the pandemic. This represents an approximate 75% decrease, highlighting the severe impact of the global COVID-19 pandemic on Azerbaijan's tourism industry. In the following years, a gradual recovery process has been observed in the sector: in 2022, the number of tourists exceeded 1.6 million, and in 2023, it surpassed 2 million. The projected figure for 2024—approximately 2.66 million—indicates a sustained post-pandemic recovery and a revitalized market.

The indicator of tourism revenues also reflects the aforementioned trends. The maximum recorded figure of approximately USD 2.97 billion in 2019 dropped to around half a billion (USD 532.8 million) in 2020 and further decreased to USD 209.7 million in 2021. This decline can be attributed to both the reduction in tourist numbers and spending. However, in the following years, the figures began to rise again, reaching USD 1.34 billion in 2022 and USD 2.44 billion in 2023. Although the complete data for 2024 has not yet been fully released, the fact that hotel revenues alone amounted to USD 183.7 million suggests that the total income will be significantly higher (Table 2).

This statistical analysis demonstrates that Azerbaijan's tourism sector possesses a strong capacity for adaptive resilience. Despite external shocks, signs of recovery and growth have emerged as a result of measures taken by both the government and the private sector. At the same time, these indicators provide a solid basis for identifying key influencing factors and conducting analysis and forecasting using economic-mathematical models.

Table 2

Tourism Revenue Indicators (2018–2024)

Years	Number of Tourism Enterprises	Number of Tourists Received (thousand people)	Tourism Revenue (billion USD)
2018	570	2 844 761	2,662 000 000
2019	642	3 167 775	2,971 000 000
2020	655	795 669	532 800 000
2021	685	789 965	209 687 300
2022	727	1 602 569	1 340 000 000
2023	758	2 084 898	2,444 000 000
2024	813	2 626 605	183 748 500

Source: Official website of the State Tourism Agency
Note: The final statistics for 2024 have not yet been released. Currently, only hotel revenues amount to USD 183.7 million. This is not a complete indicator.

Research and Findings

Within the framework of the study, key indicators of tourism enterprises operating in the Republic of Azerbaijan during the years 2018–2024 were analyzed, and based on these indicators, the main factors influencing competitiveness were identified. The research methodology included statistical analysis, correlation-regression analysis, graphical visualization, and SWOT analysis.

1. **Results of Statistical Analysis**

Between 2018 and 2019, a steady increase was observed in both the number of tourism enterprises and the number of users of tourism services. However, in 2020, due to the COVID-19 pandemic, the sector experienced a sharp decline. Starting from 2021, a recovery trend was observed, particularly with significant growth recorded in domestic tourism.

- In 2014, the number of tourism enterprises was 543, while in 2023, this figure reached 715 [6].

- In 2022–2023, a notable increase was recorded in the number of newly established hotels and "family resort"-type facilities, especially in the regions [6].

2. **Correlation and Regression Analysis**

Correlation analysis revealed a strong positive relationship between tourism enterprise revenues and the number of users of tourism services ($r \approx 0.84$). The regression model identified the key factors influencing the competitiveness of tourism enterprises:

- Quality of service ($\beta = 0.41$)
- Scope of marketing activities ($\beta = 0.29$)
- Level of staff training ($\beta = 0.17$)
- Government support ($\beta = 0.13$)

These results show that optimizing service quality and marketing strategies plays a crucial role in enhancing competitiveness.

Modeling Results

As a result of economic-mathematical modeling, the main factors influencing the performance efficiency of Azerbaijani tourism enterprises were systematically identified. For this purpose, a multifactor regression model was applied based on statistical indicators from 2014–2024, and the results were interpreted as follows:

1. **Correlation Analysis**

Pearson correlation coefficients showed strong positive relationships between the revenue volume of tourism enterprises and the following independent variables:

- Number of tourists (r = 0.84)
- Investments directed to the tourism sector (r = 0.78)
- Customer satisfaction index related to service quality (r = 0.72)
- Increase in the number of employees in the sector (r = 0.65)

These results indicate that the primary factors affecting the economic performance of tourism enterprises are mainly related to service quality and the efficient use of resources.

2.Regression Model

The multifactor regression analysis is presented in the following model form:

$Y=15.24+0.56X_1+0.42X_2+0.31X_3+0.28X_4+\varepsilon$

here:

Y — **Revenue of tourism enterprises (million manat);**

X_1— **Number of tourists (thousand persons);**

X_2 — **Investments (million manat);**

X_3 — **Customer satisfaction index (1–10 point scale);**

X_4— **Number of employees working in the sector (thousand people).**

The model's goodness-of-fit indicator

The coefficient of determination R2=0.89R^2 = 0.89R2=0.89 confirms the high explanatory power of the model, indicating that 89% of the variation in tourism enterprise revenues can be explained by the selected independent variables.

3.Practical Implications of the Modeling

The results of the model reveal that the increase in the number of tourists plays a crucial role in boosting the revenues of tourism enterprises. Specifically, every additional 1,000 tourists leads to an approximate increase of 560,000 AZN in enterprise revenues.

At the same time, increased investment has a direct positive effect on revenue optimization. Enhancing customer satisfaction is also a critical factor for the long-term sustainable development of tourism enterprises.

Furthermore, increasing the number and professionalism of employees contributes to the improvement of service quality, which ultimately results in higher income levels for the enterprises.

SWOT Analysis

Strengths	**Weaknesses**
Geographic and climatic diversity	Weak infrastructure in some regions
Cultural and historical heritage	Shortage of skilled personnel in the service sector
Government support for the tourism sector	Low level of innovative technology adoption
Opportunities	**Threats**
Alternative and ecotourism potential	Regional geopolitical risks
Digital platforms and AI implementation	Pandemics and other global crises

4. Key findings

• Enhancing the competitiveness of tourism enterprises requires a comprehensive set of measures.

• Infrastructure expansion and implementation of innovative technologies within the framework of public-private partnerships play a vital role.

• Strengthening digital marketing strategies and adopting AI-based service models creates a competitive advantage.

• Developing differentiated regional strategies contributes to the diversification of tourism products and reduces seasonal dependency.

Research Aim and Objectives

Aim
The main aim of this study is to evaluate the operational efficiency of tourism enterprises in Azerbaijan during the period 2018–2024 through economic-mathematical modeling, to identify key factors influencing their competitiveness, and to develop scientifically grounded recommendations for performance optimization based on the obtained results.

Objectives
To achieve this aim, the following objectives were defined:

1. To collect and conduct a preliminary analysis of statistical indicators of Azerbaijani tourism enterprises for 2018–2024;

2. To apply modern economic-mathematical methods such as Pearson correlation coefficient, correlation, and regression analyses to assess performance efficiency;

3. To determine the interrelationships among the key indicators affecting the operations of tourism enterprises;

4. To construct economic-mathematical models and forecast enterprise performance;

5. To develop practical recommendations for enhancing competitiveness based on the results;

6. To present scientifically grounded outcomes that contribute to the development strategies of Azerbaijan's tourism sector.

Practical Significance and Novelty of the Research

This research has significant practical value in assessing and optimizing the operational efficiency of tourism enterprises in Azerbaijan. The developed economic-mathematical models can provide a scientific basis for strategic decision-making by enterprise managers and may also serve in shaping tourism policy at the state level.

The novelty of the research lies in the large-scale economic-mathematical modeling based on 2018–2024 statistics—conducted for the first time within the Azerbaijani context. By applying modern methods such as the Pearson correlation coefficient, correlation, and regression analyses, the study systematically identified factors influencing enterprise performance and outlined priority directions for increasing competitiveness.

Moreover, the results support the development of region-specific strategies, enrichment of the tourism sector with innovative solutions, and formulation of proposals aimed at ensuring sustainable sectoral growth.

Conclusion and Recommendations

The economic-mathematical analysis and modeling confirm that improving service quality and ensuring customer satisfaction are among the key drivers of operational efficiency in Azerbaijani tourism enterprises. The number of tourists and volume of investments directly affect enterprise revenues, with a strong correlation observed between these indicators.

The study also reveals that digital transformation, particularly the adoption of artificial intelligence and data analytics—holds significant potential to enhance the competitiveness of the tourism sector. Increased financial resources for state support and innovation implementation are necessary for sustainable development.

Recommendations:

1. Continuous training and human resource development programs should be implemented to improve service quality in tourism enterprises.

2. The application of digital marketing and AI-based service systems should be expanded, with increased focus on effective data management.

3. Investment conditions within the public-private partnership model should be improved by reviewing tax incentives and subsidies.

4. Diversification of tourism products across regions and development of alternative tourism types should be prioritized.

5. The continuous application of economic-mathematical models and statistical analysis methods should be used to strengthen performance monitoring of tourism enterprises.

If implemented, these recommendations will enable Azerbaijan's tourism sector to become more competitive and sustainable, contributing significantly to the national economy.

Future Research Perspectives

In the next stages, to deepen the study, it is planned to apply the **Data Envelopment Analysis (DEA)** method to more accurately measure the efficiency of tourism enterprises. In addition, using data collected at the regional level, a **dynamic panel data model** will be constructed to analyze regional disparities and time-varying effects in the tourism sector. These approaches will allow for a more comprehensive evaluation of enterprise performance and assist the government in designing more effective management strategies.

References

Charnes, A., Cooper, W. W., & Rhodes, E. (1978). Measuring the efficiency of decision-making units. *European Journal of Operational Research, 2*(6), 429–444. https://doi.org/10.1016/0377-2217(78)90138-8

Goncharov, A., & Salimova, T. (2021). Evaluation of tourism enterprise efficiency in new markets. *Tourism Economics, 27*(4), 765–783.

Kozlov, V., & Ivanova, Y. (2020). Customer satisfaction as a factor of tourism efficiency: The experience of Eastern Europe. *Journal of Tourism Studies, 36*(1), 56–71.

State Tourism Agency of Azerbaijan. (2024). *Tourism statistics of the Republic of Azerbaijan, 2014–2023*. Baku: Official publication.

World Bank. (2023). *Overview of Azerbaijan's tourism sector*. https://www.worldbank.org/en/topic/tourism

Power BI. (n.d.). *Azerbaijan tourism analytics dashboard*. Retrieved July 25, 2025, from https://app.powerbi.com/view?r=eyJrIjoiNDFhNzI5Y2EtMTEzNC00YTM4LWJiZTAtZ mRlMGU5ODEwMTgyIiwidCI6ImEyYzYwMDliLWExNWQtNGMzMC05YzQzLWNiMTkxNjZjNGIwOCIsImMiOjl9

Musavat Newspaper. (2025, March 12). *Tourism revenues differ in South Caucasus countries*. https://musavat.com/news/cenubi-qafqazda-turizm-en-az-geliri-azerbaycan-elde-edir_1152619.html

Abzas Media. (2021, July 27). *Last year, Azerbaijan's tourism revenue decreased sevenfold*. https://abzas.info/az/2021/7/ot%C9%99n-il-az%C9%99rbaycanin-turizm-g%C9%99liri-7-d%C9%99f%C9%99-azalib

Azerbaijan International Bank. (2024, July). *Tourism in figures: Statistical landscape of Azerbaijan's tourism sector – 2019*. https://abb-bank.az/storage/uploads/files/1720508707_R%C9%99q%C9%99ml%C9%99rl%C9%99%20Turizm%20Az%C9%99rbaycan%20Turizm%20Sektorunun%20Statistik%20M%C9%99nz%C9%99r%C9%99si%202019.pdf

FED.az. (2024, March). *Azerbaijani hotels ended last year with 184 million manat in net profit*. https://fed.az/az/turizm/azerbaycan-hotellerin-oten-ili-184-milyon-manat-xalis-menfeetle-basa-vurublar-223993

Original research article / Originalus mokslinis straipsnis
Vol. 1 No. 9 (2025): Lapkritis

Effective methods of teaching Azerbaijani to Foreign students

[1] Ismayil Zulfiyya HUSEYN, [2] Javid Babayev

Accepted: 10.20.2025
Published: 11.30.2025
https://doi.org/10.69760/portuni.0109010

Abstract: This study examines effective methods for teaching Azerbaijani to foreign students by analyzing pedagogical practices, linguistic challenges, and learner needs. Using a qualitative design that included a systematic literature review, classroom observations, and instructor interviews, the research identifies communicative language teaching, task-based learning, and digital-media integration as highly effective strategies. The findings highlight that foreign learners encounter significant grammatical, lexical, and phonetic difficulties due to Azerbaijani's agglutinative structure, complex case system, vowel harmony, and culturally embedded vocabulary. Culture-based instruction is shown to enhance motivation and pragmatic competence, while technology supports pronunciation, vocabulary retention, and autonomous learning. The study concludes that a multimodal, learner-centered approach is essential for improving proficiency and confidence among foreign learners of Azerbaijani. It recommends increased development of Azerbaijani-specific digital resources, standardized teaching materials, and further research on long-term learning outcomes to strengthen instructional effectiveness.

Keywords: *philology; English language teaching; linguistic methodology*

1. Introduction

Azerbaijani, as a Turkic language with a rich historical and cultural context, has gained growing prominence due to increasing international relations, economic engagement, and cultural exchange. Consequently, universities and language centers worldwide are designing programs to teach Azerbaijani to non-native speakers. However, instructors often encounter challenges such as diverse student backgrounds, limited learning resources, and structural differences between Azerbaijani and learners' native languages.

The aim of this article is to identify effective methods that support foreign students in acquiring Azerbaijani more efficiently. In recent years, the Azerbaijani language has gained increasing visibility within global academic, cultural, and geopolitical contexts. Azerbaijan's strategic location, expanding international partnerships, and growing cultural diplomacy efforts have stimulated a rising demand among foreign students, diplomats, business professionals, and researchers to learn Azerbaijani (Ahmadov, 2021). As more universities and

[1] Ismayil, Z. PhD in Philology, Associate Professor, Department of Azerbaijani Linguistics, Nakhchivan State University, Azerbaijan. ORCID: https://orcid.org/0000-0002-4967-0123.

[2] Babayev, J. PhD in Philology, Senior Lecturer, Department of English and Methods, Nakhchivan State University, Azerbaijan. Email: cavidbabayev@ndu.edu.az. ORCID: https://orcid.org/0009-0009-2472-0006.

language centers begin to offer Azerbaijani as a foreign language, the need for comprehensive, modern, and effective teaching methodologies has become markedly more urgent.

Teaching Azerbaijani to non-native speakers presents several unique challenges. First, Azerbaijani's agglutinative structure and vowel harmony system differ significantly from Indo-European languages, which many foreign learners are familiar with (Aliyeva, 2019). Second, the scarcity of standardized, high-quality textbooks and digital learning tools specifically designed for Azerbaijani often forces instructors to adapt general second-language teaching materials rather than rely on curated resources (Safarli, 2023). Third, foreign learners tend to come from highly diverse linguistic backgrounds—ranging from other Turkic languages to Slavic, Romance, or East Asian languages—which requires instructors to employ flexible and inclusive teaching strategies (Larsen-Freeman & Anderson, 2016).

In language pedagogy, researchers emphasize the importance of communicative competence, cultural immersion, and authentic input as central to successful second-language acquisition (Richards & Rodgers, 2014). These principles hold equally true for Azerbaijani, where cultural knowledge plays a key role in understanding pragmatic usage, idiomatic expressions, and sociolinguistic norms (Aliyeva, 2019). Additionally, innovations in educational technology and task-based instruction are transforming language classrooms, offering learners more autonomy, interactivity, and exposure to real-life language use (Willis, 2015).

Given these dynamics, this article seeks to explore which teaching approaches are most effective in helping foreign learners acquire Azerbaijani language skills while simultaneously building cultural awareness. By synthesizing findings from the literature and classroom observations, the study aims to address the central question: What pedagogical strategies best support foreign students in developing linguistic proficiency and communicative competence in Azerbaijani?

2. Methods

This study employed a qualitative research design aimed at identifying effective strategies for teaching Azerbaijani to foreign students. The methodology consisted of three interconnected components: (1) a systematic literature review, (2) classroom observations, and (3) semi-structured instructor interviews. These methods were chosen to ensure a comprehensive understanding of both theoretical frameworks and practical teaching experiences.

2.1 Literature Review

A systematic review of scholarly publications on second-language acquisition (SLA), Turkic-language pedagogy, communicative teaching, and technology-enhanced learning was conducted. Academic databases including Google Scholar, JSTOR, ERIC, and ResearchGate were searched with keywords such as *"Azerbaijani as a foreign language," "Turkic language instruction," "communicative language teaching," "task-based learning,"* and *"technology in language education."*

Sources published between 2010 and 2024 were included to capture both foundational theories and recent methodological developments. Key works analyzing Azerbaijani language instruction (e.g., Ahmadov, 2021; Aliyeva, 2019) and general SLA pedagogy (e.g., Richards & Rodgers, 2014; Larsen-Freeman & Anderson, 2016) were reviewed. The literature review provided a conceptual foundation for identifying effective instructional approaches and designing the observation framework.

2.2 Classroom Observations

Classroom observations were conducted at a university language center offering Azerbaijani courses to international students. A total of 12 class sessions were observed across beginner (A1–A2) and intermediate (B1) levels. Observations focused on instructional strategies, teacher–student interaction patterns, use of technological tools, incorporation of cultural content, task design, and learner engagement. An observation checklist, developed based on SLA theoretical models and communicative pedagogy principles, was used to ensure consistency. Field notes were documented during each session, emphasizing examples of effective activities, learner responses, and instructional challenges.

2.3 Instructor Interviews

Semi-structured interviews were conducted with five Azerbaijani language instructors who have between 5 and 20 years of teaching experience. Interview questions explored their perceptions of effective teaching methods, challenges faced when teaching foreign learners, strategies for addressing linguistic diversity, and approaches to using culture and technology in instruction.

Each interview lasted approximately 30–45 minutes and was audio-recorded with participant consent. Responses were transcribed and coded thematically, following qualitative content-analysis procedures to identify recurring patterns and pedagogical insights.

2.4 Data Analysis

The collected data were analyzed using a thematic analysis approach. First, literature review findings, classroom observation notes, and interview transcripts were coded separately. Then, codes were organized into broader themes such as *communicative methods, cultural integration, technology use, task-based learning,* and *learner challenges.*

Triangulation of the three data sources ensured reliability and allowed cross-validation of findings. For example, themes identified in instructor interviews were compared with observed classroom practices and supported with insights from the literature. This triangulated approach enabled a comprehensive examination of effective teaching methods for foreign learners of Azerbaijani.

3. Results

Analysis of the literature, classroom observations, and instructor interviews revealed several key findings regarding effective teaching methods and the specific linguistic challenges foreign learners face. The results are organized into thematic categories.

3.1 Communicative Language Teaching (CLT) Enhances Interaction and Fluency

Instructors consistently reported that CLT activities—such as role-plays, structured dialogues, and pair discussions—significantly improved learners' ability to communicate in real-life scenarios (Babayev, 2023). Students exposed to communicative tasks demonstrated greater confidence and fluency, especially in everyday conversational topics. Observations showed that CLT activities increased student participation and reduced anxiety, particularly among beginners (Babayev, 2023).

3.2 Effective Use of Digital and Multimedia Tools

Technology played a crucial role in supporting listening comprehension, vocabulary building, and pronunciation practice. Instructors reported that online flashcard tools, interactive grammar platforms, and Azerbaijani-language videos facilitated learner engagement. Multimedia content also provided valuable exposure to authentic Azerbaijani speech, which helped learners internalize natural intonation patterns and informal expressions.

3.3 Task-Based Language Teaching (TBLT) Strengthens Practical Skills

Learners responded positively to tasks requiring problem-solving and real-world application. Tasks such as preparing a short presentation about their home country, describing daily routines, or navigating a simulated shopping situation promoted contextualized language use. Instructors noted that TBLT helped learners consolidate grammar and vocabulary more effectively than traditional drills.

3.4 Culture-Embedded Learning Increases Motivation

Incorporating Azerbaijani cultural components—such as holidays, music, folklore, cuisine, and social customs—helped students develop pragmatic competence. Observations indicated that culturally rich lessons led to higher motivation and better retention of lexical items related to social norms, politeness strategies, and cultural expressions.

3.5 Linguistic Challenges: Grammatical, Lexical, and Phonetic Problems

A significant portion of the results concerns the specific difficulties foreign learners encounter while studying Azerbaijani. These challenges affect comprehension, production, and overall language acquisition.

3.5.1 Grammatical Problems

a. Agglutination and Suffixation

Learners unfamiliar with agglutinative languages struggled with Azerbaijani's extensive use of suffixes (Ismayil, 2025). Distinguishing between plural, possessive, and case suffixes—especially when multiple suffixes accumulate—was a major challenge.

b. Case System (Hallmarks of Difficulty)

Foreign students most frequently struggled with:

- **Dative case (-a/-ə):** Often confused with directional adverbs.
- **Locative case (-da/-də):** Overgeneralized or omitted.
- **Genitive case (-ın/-in):** Incorrectly applied in possessive structures.

c. Word Order (SOV Structure)

Learners from SVO languages (e.g., English, Arabic, Chinese) had difficulty adapting to the Subject–Object–Verb ordering. Observations frequently showed misplaced verbs and misordered sentence components.

d. Verb Conjugation and Aspect

Azerbaijani verb forms, especially past continuous and reported past tense, posed challenges. Students mixed forms such as *deyirdi* (was saying) and *demişdi* (had said), indicating limited grasp of aspectual distinctions.

3.5.2 Lexical Problems

a. Polysemy and Synonymy

Learners found it difficult to master Azerbaijani words with multiple meanings. For example, *baş* ("head," "top," "main") caused confusion in contextual interpretation (Ismayil et al, 2025). Synonyms such as *gözəl*, *çox gözəl*, and *əla* were also challenging to differentiate in terms of register and intensity (Ismayil, 2018).

b. Borrowed Words and Register Variation

Azerbaijani includes loanwords from Arabic, Persian, Russian, and English, which complicate lexical acquisition (Ismayil, 2023). Students had trouble understanding when to use formal versus informal equivalents, such as *telefon* vs. *zəng aparatı* or *xəstəxana* vs. *hospital*.

c. Idiomatic Expressions

Idioms such as *"gözüm üstə yerin var"* or *"baş qoşmaq"* created comprehension difficulties due to their cultural and metaphorical nature. Instructors observed that without explicit explanation, learners often interpreted these expressions literally (Ismayil, 2025).

3.5.3 Phonetic Problems

a. Vowel Harmony

One of the most frequently cited challenges was mastering Azerbaijani vowel harmony, particularly for learners whose native languages lack this feature (Ismayil, 2021). Mistakes occurred in both suffix acquisition and pronunciation when selecting the correct front/back vowel (Ismayil, 2017).

b. Difficult Consonant Sounds

Learners struggled with the following phonemes:

- **"x"** (voiceless velar fricative),
- **"ğ"** (soft fricative glide),
- **"q"** (voiced uvular stop),
- **"ç"** vs. **"ş"** contrasts.

Instructors noted fossilized mispronunciations among beginners.

c. Stress Patterns

Azerbaijani uses relatively predictable stress, but learners often transferred stress rules from their native languages, leading to words such as *müəllim* or *azərbaycanlı* being stressed incorrectly. This sometimes hindered intelligibility.

4. Discussion

The results of the study indicate that learning Azerbaijani as a foreign language involves complex interactions between pedagogical strategies, learner motivation, and linguistic structures. Effective methods such as Communicative Language Teaching (CLT) (Babayev, 2023), Task-Based Language Teaching (TBLT), and culture-embedded instruction help compensate for the linguistic difficulty of Azerbaijani, particularly in its agglutinative morphology and phonetic system. Integrating digital technologies further supports learner autonomy and provides access to authentic input, which is crucial given the limited availability of Azerbaijani-specific resources (Murad et al, 2025).

4.1 Pedagogical Implications

The findings suggest that Azerbaijani instructors should adopt a multimodal and learner-centered approach. Communicative tasks encourage real-life language use, while digital tools improve retention and pronunciation accuracy. TBLT activities, such as real-world problem-solving tasks, support the internalization of grammatical structures by situating them in meaningful contexts. Culture-based instruction is also essential, as it allows learners to understand pragmatic norms and contextualized vocabulary.

Table 1 summarizes the primary pedagogical strategies identified in this study and their associated benefits for learners.

Table 1. Effective Teaching Methods and Their Instructional Benefits

Teaching Method	Key Features	Benefits for Learners
Communicative Language Teaching (CLT)	Role-plays, pair work, authentic dialogues	Improves fluency, reduces anxiety, increases participation
Task-Based Language Teaching (TBLT)	Real-world tasks, project-based assignments	Enhances problem-solving skills, reinforces grammar in context
Digital/Multimedia Integration	Videos, apps, online exercises, interactive tools	Supports vocabulary building, enhances pronunciation, boosts engagement
Culture-Embedded Instruction	Lessons on traditions, customs, social norms	Improves pragmatic competence and motivation
Comparative Linguistics Approach	Explanation of structural similarities/differences	Helps learners transfer knowledge from their native language effectively

4.2 Interpreting Linguistic Challenges in Instructional Context

The linguistic difficulties documented—grammatical, lexical, and phonetic—play a central role in shaping learners' progress. Azerbaijani's agglutinative structure and case system require explicit scaffolding, especially for learners from non-agglutinative language backgrounds. Incorrect case usage, misformed verb conjugations, and SOV word-order errors were frequent, confirming the need for structured grammar instruction combined with communicative practice.

Lexical acquisition is heavily influenced by the language's polysemous vocabulary, abundance of loanwords, and idiomatic expressions. Learners benefit when instructors contextualize vocabulary in culturally meaningful scenarios rather than using rote memorization (Zeynalova & Ismayil, 2023). This reinforces the need for culture-integrated teaching.

Phonetic challenges—especially vowel harmony, uvular/velar consonants, and stress placement—underscore the importance of early phonological training. Digital pronunciation tools and explicit phonetic instruction proved valuable in addressing these issues.

Table 2. categorizes the linguistic problems learners encounter and links them to actionable teaching recommendations.

Table 2. Linguistic Challenges and Recommended Instructional Responses

Type of Challenge	Specific Difficulty	Recommended Instructional Approach
Grammatical	Complex suffixation, case confusion, SOV word order	Explicit grammar scaffolding; visual charts; structured CLT dialogues
	Verb aspect and tense distinctions	Contextualized TBLT tasks illustrating temporal meaning
Lexical	Polysemous words, synonym clusters, idioms	Vocabulary maps; scenario-based learning; cultural explanations
	Loanwords from Persian, Arabic, Russian	Register-focused instruction; contrastive analysis activities
Phonetic	Vowel harmony	Early phonological training; pronunciation drills; digital apps
	Difficult consonants ("x," "ğ," "q")	Minimal-pair activities; slowed audio; instructor modeling
	Incorrect stress placement	Stress-marked pronunciation exercises; exposure to natural speech

4.3 Overall Interpretation and Implications for Future Research

The combination of pedagogical and linguistic findings suggests that teaching Azerbaijani to foreign learners is most effective when grounded in communicative, culturally rich, and technologically supported methodologies. Instructors must balance explicit grammar instruction with interactive learning opportunities to foster both accuracy and fluency. Furthermore, phonetic training should be introduced at the initial stages of learning to prevent fossilization of pronunciation errors.

Future research should consider developing standardized Azerbaijani teaching materials, particularly digital platforms and corpora-based learning tools. Longitudinal studies could provide insights into how learners progress through proficiency levels and which instructional interventions yield long-term improvements. Expanding research to include controlled experimental designs may also clarify the relative effectiveness of specific teaching strategies.

5. Conclusion

The findings of this study demonstrate that teaching Azerbaijani to foreign learners requires a comprehensive, flexible, and culturally grounded instructional approach. Effective language acquisition emerges from the combination of communicative, task-based, and technology-enhanced methods, which together create a dynamic learning environment that supports both accuracy and fluency. Communicative and task-based activities enable learners to apply grammatical structures and vocabulary in meaningful contexts, thereby strengthening long-term retention and practical competence. The integration of digital tools further enhances the learning process by providing authentic input, diversified materials, and valuable support for pronunciation and autonomous practice.

At the same time, the study highlights significant linguistic challenges—including grammatical complexity, lexical ambiguity, and phonetic difficulties—that must be addressed systematically through explicit instruction and targeted practice. Culture-embedded learning plays a crucial role in overcoming these barriers by contextualizing language within real social norms, values, and communicative expectations.

Ultimately, effective teaching of Azerbaijani as a foreign language depends on balanced pedagogy that incorporates clear explanations, meaningful interaction, and cultural relevance. To advance the field, future efforts should focus on creating standardized curricula, expanding digital learning resources, and conducting longitudinal studies to evaluate the long-term effectiveness of specific teaching strategies. Such developments will contribute to more consistent, high-quality instruction that meets the diverse needs of international learners.

References

Ahmadov, R. (2021). *Teaching Azerbaijani as a Foreign Language: Methods and Challenges*. Baku: Elm Publishing.

Aliyeva, S. (2019). "The Role of Culture in Teaching Azerbaijani to International Students." *Journal of Turkic Languages and Education*, 7(2), 45–58.

Babayev, J. (2023, March). ANALYSYS OF THE CLT IN TERMS OF COVERAGE OF LANGUAGE SKILLS. In *Publisher. agency: Proceedings of the 2nd International Scientific Conference «Academics and Science Reviews Materials»(March 9-10, 2023). Helsinki, Finland, 2023. 247p* (p. 13). University of Applied Sciences.

Babayev, J. (2023, December). How to teach a foreign language through CLT. In *Proceedings of the 4th International Scientific Conference" Interdisciplinary Science Studies* (p. 123).

Babayev, J. Traditional methods versus Communicative language teaching method. *The Scientific Heritage*, *123*.

Ismayil, Z. (2021). DERIVATOLOGICAL PROBLEMS IN DIALECTIC AND ACCENTS OF NAKHCHIVAN. *Linguistic Researches*, (2).

İsmayıl, Z. (2023). AZƏRBAYCAN DİLİNDƏ DERİVATOLOGİYANIN SİNXRON VƏ DİAXRON ASPEKTLƏRİ. *Çankırı Karatekin Üniversitesi Türkiyat Araştırmaları Dergisi*, *3*(1), 27-33.

Ismayil, Z. (2025). Stylistic Functions of Auxiliary Parts of Speech in Folklore Language. *Acta Globalis Humanitatis et Linguarum*, *2*(4), 332-344.

Ismayıl, Z. (2025). THE ROLE OF AUXILIARY PARTS OF SPEECH IN THE FORMATION OF STRUCTURAL-SEMANTIC SENTENCE TYPES IN FOLKLORE TEXTS. *" Issues of Turkish Philology"*, *1*(1).

Ismayil, Z., Mammadova, Z., Gambarova, S., Abbasova, V., Ismayil, S., & Alizade, R. (2025). Homonyms of Auxiliary Parts of Speech In Folklore Texts.

ISMAYIL, Z. (2018). THEORETICAL PROBLEMS OF DERIVATOLOGY (WORD CREATION) IN THE DIALECTS AND ACCENTS OF NAKHCHIVAN. *PONTE International Journal of Science and Research*, *74*(11).

İsmayil, Z. (2017). THE TRACES OF ANCIENT HISTORY IN THE DIALECTS AND ACCENTS OF NAKHCHIVAN AND THE EASTERN ANATOLIA. In *Традиционная культура тюркских народов в изменяющемся мире* (pp. 203-205).

Javid, B. (2023). Major techniques of CLT in language learning. *Foundations and Trends in Modern Learning*, (4).

Larsen-Freeman, D., & Anderson, M. (2016). *Techniques and Principles in Language Teaching* (3rd ed.). Oxford University Press.

Murad, Z. B., İsmayıl, Z., Ramiz, M. Z., Ramiz, J. A., Mammad, R. A., & Namig, N. A. (2025). Psycholinguistic methods in data processing. *Universidad y Sociedad*, *17*(3), e5253-e5253.

Richards, J. C., & Rodgers, T. (2014). *Approaches and Methods in Language Teaching* (3rd ed.). Cambridge University Press.

Safarli, N. (2023). "Integrating Digital Tools in Azerbaijani Language Instruction." *Azerbaijan Journal of Applied Linguistics*, 5(1), 22–35.

Willis, J. (2015). *A Framework for Task-Based Learning*. Routledge.

Zeynalova, A., & Ismayil, Z. (2023). LINGUISTIC CHARACTERISTICS OF PAREMIOLOGICAL LANGUAGE UNITS IN THE WORKS OF NAGI NAGIYEV. *Philology and Art Studies*, (2).

Editorial Team

- **Ismayil Bagiyev oghlu Mammadov** – Doctor of Biological Sciences, Associate Professor, NSU
- **Namig Kamal oghlu Abbasov** – PhD in Biology, Associate Professor, NSU
- **Farida Akif gizi Safarova** – PhD in Biology, Associate Professor, NSU
- **Dianala M. Bernard -** Doctor of Education - Educational Leadership and Curriculum & Instruction, Faculty at University of the People, Pasadena, United States
- **Amir Karimi -** PhD in History Education, Research Lecturer in History Education with a focus on gamification, VR, AR, and Metaverse in education, Farhangian University, Alborz campus, Iran
- **Raifa Kamil gizi Salmanova** – PhD in Biology, NSU
- **Safura Rahim gizi Babayeva** – PhD in Biology, NSU
- **Turan Baymammad gizi Mammadli** – PhD in Biology, NSU
- **Ulfat Zakir oglu Ibrahim** – PhD in Philology, Associate Professor, Azerbaijan University of Languages
- **Nuray Aliyeva Yadigar qizi** – Doctor of Philological Sciences, Associate Professor, AMEA Nakhchivan Branch
- **Shirmammad Qulubayli Qudrat oglu** – PhD in Philology, Associate Professor, NSU
- **Ceyran Quliyeva Manaf qizi** – PhD in Philology, Associate Professor, NSU
- **Elnaz Aliyeva Ali qizi** – PhD in Philology, Associate Professor, NSU
- **Cavid Babayev Sabir oglu** – PhD in Philology, Senior Lecturer, NSU
- **Yasin Babazade Israfil oglu** – PhD in Philology, NSU
- **Leyla Zeynalova Kazim qizi** – PhD in Philology, Senior Lecturer, NSU
- **Mahsati Asgarova Qasim qizi** – PhD in Philology, Associate Professor, NSU
- **Daniel Effiong Umoh** - Department of Foreign Languages, University of Uyo, Nigeria
- **Olatunji Saheed -** Federal College of Education (Special), PMB 1089, Oyo, Oyo State, Nigeria.
- **Turkan Ismayilli Mehrac qizi** – PhD in Philology, Head of Department, NSU
- **Tehrana Khudaverdiyeva** – PhD in Philology, NSU
- **Dianala M. Bernard** – Doctor of Education, University of the People, USA
- **Maria Anna Formisano** – PhD, University of Salerno, Italy
- **Amir Karimi** – PhD in History Education, Farhangian University, Iran
- **Aydin Aliyev Arif oghlu** – PhD in Pedagogy
- **Elchin Mirzayev Elshad oghlu** – Faculty of Foreign Languages, NSU

Porta Universorum
Editor-in-Chief: Hasan Alisoy
E-mail: editor@egarp.lt

Vol. 1 No. 9 (2025): Lapkritis
ISSN 3030-2234

Porta Universorum is a peer-reviewed, open-access academic journal registered and published in Lithuania. The journal provides an inclusive platform for advancing multidisciplinary research across a wide spectrum of disciplines, promoting intellectual innovation and global academic dialogue.

Porta Universorum welcomes original research, theoretical analyses, and practical insights from the following fields:

- **Natural and Life Sciences:** Biology, ecology, chemistry, physics, astronomy
- **Medical and Health Sciences:** Clinical studies, public health, medical diagnostics, healthcare innovation
- **Engineering and Applied Sciences:** Mechanical, civil, environmental, information technologies, AI, and emerging technologies
- **Economic and Social Sciences:** Economics, sociology, law, political science, management
- **Education and Pedagogy:** Teaching methodologies, curriculum design, educational technologies

- **Linguistics and Philology:** Language studies, stylistics, discourse analysis, historical linguistics
- **Humanities and Cultural Studies:** Philosophy, literature, ethics, history, anthropology, art studies
- **Mathematics and Theoretical Research**

Frequency: 12 issues per year (monthly)
Format: A4
Language: Submissions are accepted in English.
Registration: Officially registered and published in Lithuania.

All submissions undergo a rigorous double-blind peer review process to ensure academic quality and integrity.

Open Access: Articles are freely available online under a Creative Commons license to support global dissemination of knowledge.

For further details and submissions, visit:
https://egarp.lt/index.php/JPURM/index

Porta Universorum
Editor-in-Chief: Hasan Alisoy
Executive Secretary: Gerda Urbaite
Salomėjos Nėries g. 57, Vilnius, Lithuania
E-mail: editor@egarp.lt