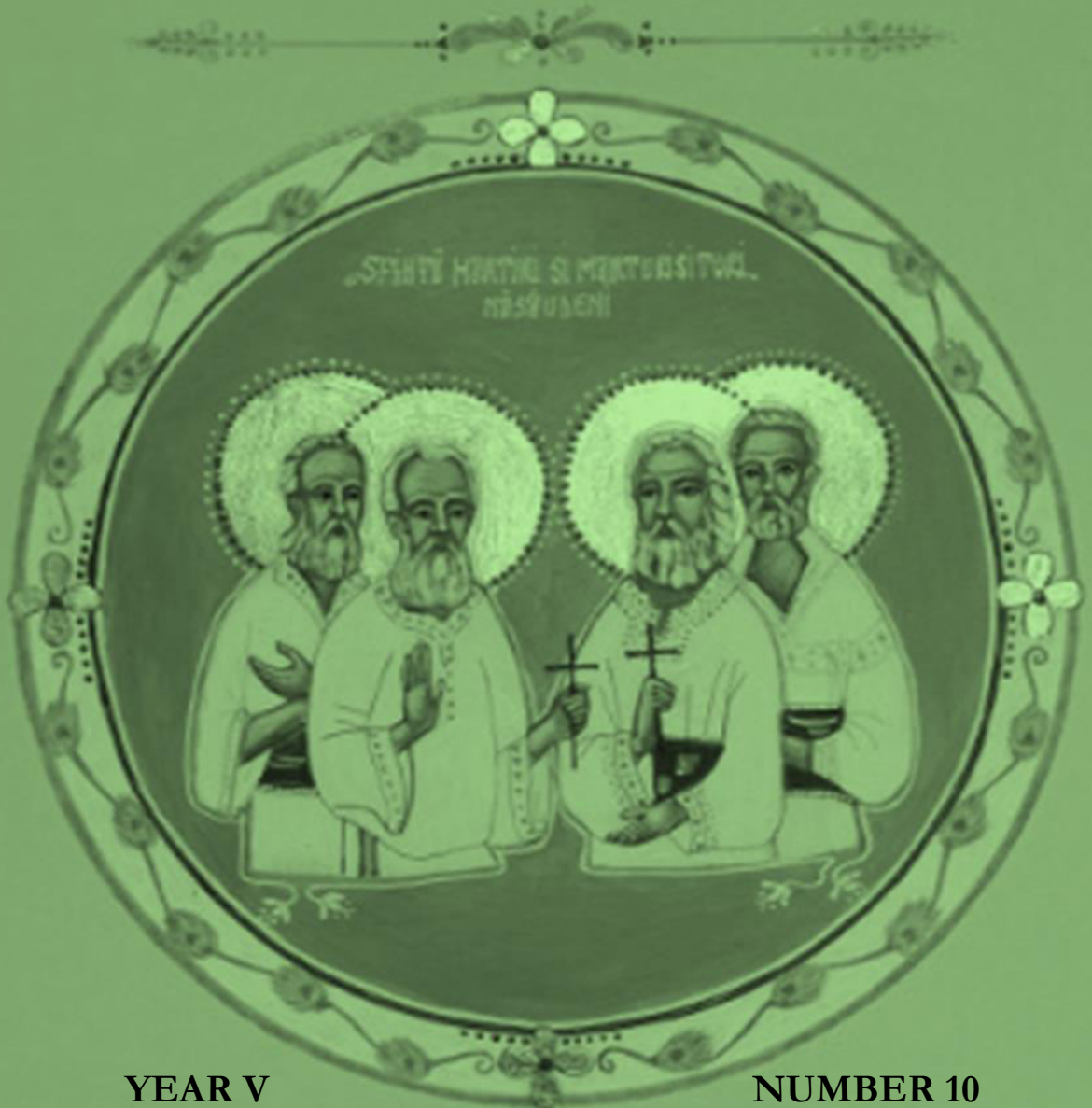


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## Editorial

Held on the 10<sup>th</sup> and of the 11<sup>th</sup> of January 2017, in Istanbul, Turkey, the 1<sup>st</sup> edition of the international conference *Psychology, Education and Social Sciences* brought together researchers from different cultural and geographical spaces like Iran, Turkey, Russia, Kazakhstan and s. o. that debated topics from areas like: art, history, ecology and engineering, economics, education and pedagogy, psychology, politics or law. Interesting presentations and meetings have pigmented the high-level manifestation that created new friendships, strengthen links between people, or constituted the start of new collaborations and projects.

Now, at almost one year after this important and interesting cultural moment, the first part of the proceedings of this scientific event finally went into fruition. Double-blind peer-reviewed by the specialists, the works from there bring new and interesting approaches on topics like law, politics, theology, history and art, or education, but also trans disciplinary ones, from spaces like the relationship between law and religion, political theology or relationship between psychology and pedagogy. And it is just the first part of a bigger series of proceedings planned to be published in *Astra Salvensis* journal! As soon as it will be possible, we will collect the other reviewed texts, send them to authors for eventual corrections and offer it both to the specialised public and to the interested reader and to the scientific environment.

A first visible thing of this number of the review is the diversity of the approaches and of the authors. Interesting researches dedicated to specific aspects of legislation, history, culture or education from local contexts where the authors live, written by professors of local universities, students or researchers, offer to the reader not only an interesting overview of spaces like the one of Kazakhstan Republic, Islamic Republic of Iran or Russian Federation, but also useful information that can be compare with the situation of their own context in future researches. Also, if somebody take a look of their affiliation, he will find there professors from: the "L. N. Gumilyov" Eurasian National University from Astana (Kazakhstan), Turan University, Almaty (Kazakhstan), Kazan State Federal University (Russian Federation), Lomonosov Moscow State University from Moscow (Russian Federation), Academy of law enforcement agencies at the General Prosecutor's Office of the Republic of Kazakhstan from Astana (Kazakhstan), University of Urmia (Islamic Republic of Iran), and s. o.

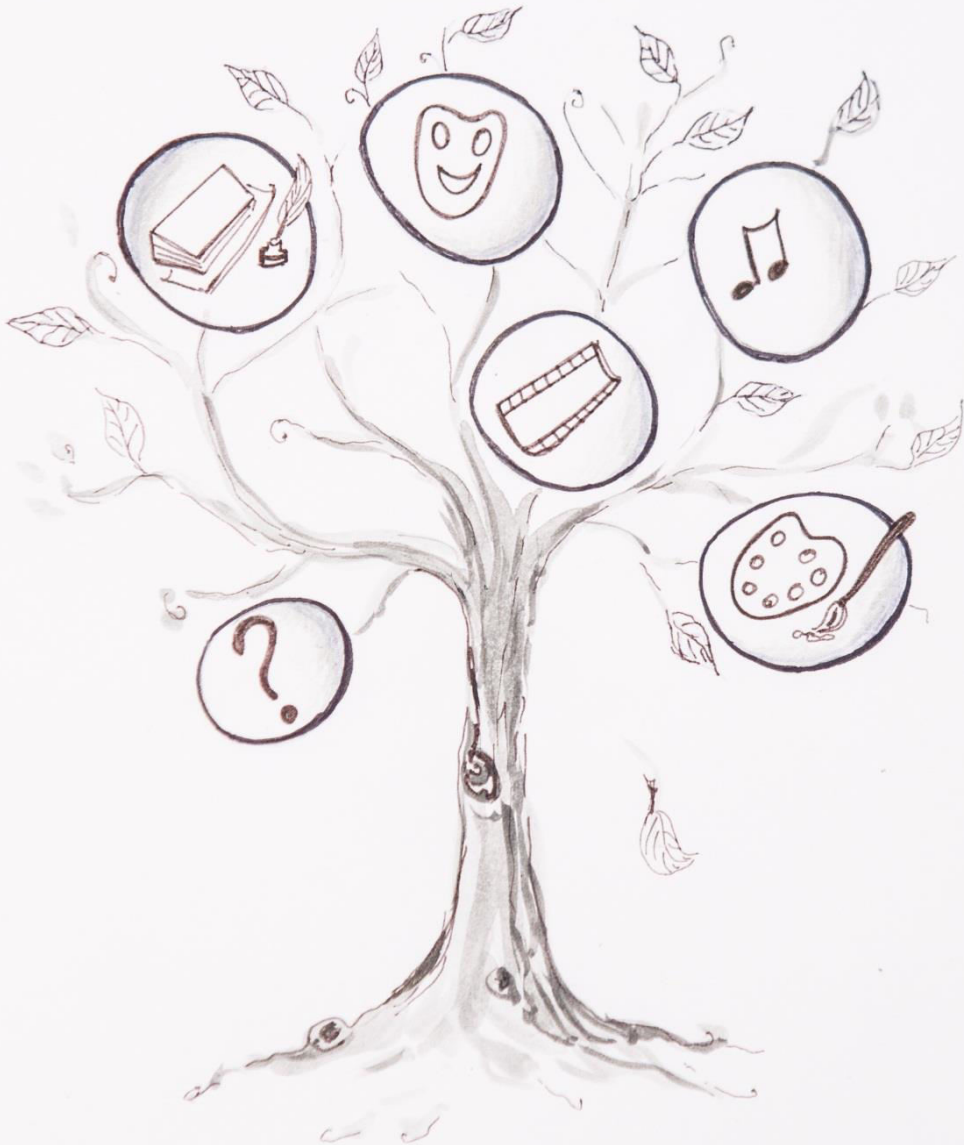
Also, because the book reviews section contains both presentations of Romanian and English books, written specially by Romanian researchers (namely Anca-Ioana Rus, Mihai-Octavian Groza, Lucian-Zenoviu Bot, Andrei Păvălean or Iuliu-Marius Morariu), the reader can found in the list authors from "Babeş-Bolyai" University from Cluj-Napoca, or from University of Craiova and presentation of important books for the Theological, Historical or Philological research of nowadays.

Having noticed all these, we wish to the reader to enjoy this number of *Astra Salvensis* journal, a jubilee one, because by its publication the review marks its 5<sup>th</sup> years of existence and work on the cultural area, to find interesting and diverse

approaches of problems from different areas of science and culture from all around the world, to read and quote and to see also, starting from this number, the previous and the future one. On the same time, we wish to the aforementioned publication to reach more numbers, more collaborators in its existence and to become more and more a representative voice for the cultural space of Romania and other countries and an ambassador of the scientific research and cultural performance under the coordination of Năsăud Department, Salva Circle of Transylvanian Association for Romanian Culture and Literature of Romanian People (ASTRA), and of "Vasile Moga" Department of the same institution, from Sebeș. *Vivat, crescat, floreat, ASTRA!*

Iuliu-Marius MORARIU  
Mehdi MAHMOODI

*Politics and Law*







## Political Manipulation Of The Media (On The Example Of Mass Media Of The Republic Of Tatarstan)\*

Ramis R. GAZIZOV, Tatiana A. NAGOVITSYNA  
Kazan Federal University

**Abstract.** *Modern social processes are characterized by the growth of media influence, the accretion of media power, called the mediocracy. The social, political, and power impact of various state institutions are increasingly replaced by the information and psychological influence. In the system of social relations there is an increase in the information component, received from the press. However, along with the advantages of information exchange, there are complexities, objectively appearing from this issue, one of which is manipulation in the mass media. It is known, that the activation of these processes occurs during the pre-election period. In this regard, there is a profound social and scientific need to study the practices of media manipulation. This allows to have a new perspective look at the specifics of presentation of politicized facts, events, and to evaluate them. In this respect, the regional system of mass media remains an understudied segment. The analysis of leading mass publications of the Republic of Tatarstan shows, that their authors do not create fundamentally new events, but place emphasis on the ongoing processes. Despite the differences in the typology of publications (state and commercial media), they use similar manipulative technologies: differences are only in the combination of technologies and the frequency of their use. The goals of media manipulation are the promotion of candidate, the formation of the necessary image characteristics (positive and/or negative), the fixation of pre-set stereotypes in the public consciousness. The specifics of information support of the political campaign for the election of the President of the Republic of Tatarstan in 2015, on the basis of the analysis of forms, methods of its essential features, in the leading periodicals of the region, were defined in this study, in the time and content continuum.*

**Keywords:** mass media, manipulative technologies, political discourse, election campaigns, the Republic of Tatarstan.

### Introduction

Manipulative technologies are a common phenomenon in the Russian mass media. Necessity to convince the audience of the conclusiveness nature of certain ideas, to bring the right candidate into power, is the reason for the subtle influence on the mass audience. Manipulative mechanisms, used by the regional press in the reflection of political events, are investigated. Such concept of manipulation is used, which is considered as the most universal term, characterizing the process of hidden influence on the human psyche.<sup>1</sup> The authors consider the manipulation as the process of hidden information and psychological influence from the sidelines of mass media structures on the mass audience, with the aim of changing the views, positions, desires, the overacting objective - beliefs and values, carried out through the media.<sup>2</sup>

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> R. R. Gazizov T. A. Nagovitsyna, "Features of manipulative technologies in Russian political discourse (on the example of the Tatarstan republic mass media)", in *Journal of Organizational Culture, Communications and Conflict*, XX (2016), Special Issue no. 2, p. 14-14.

<sup>2</sup> R. R. Gazizov R.R., "Practice of participation of periodicals of the Republic of Tatarstan in election campaigns," in *Bulletin of the Chuvash State Pedagogical University named after. I. Ya. Yakovlev*, II (2014), no. 82, p. 89-94.

It is known, that the activation of the use of manipulative technologies occurs during the period of coverage of political processes.<sup>3</sup> Political campaign for the election of the President of the Republic of Tatarstan, one of the most economically developed regions of Russia, was investigated. The elections were held on September 13, 2015 on a single voting day. According to the official data, 2,932,564 voters were registered in the Republic of Tatarstan as of January 1, 2015.<sup>4</sup> The President of the Republic of Tatarstan is the head of the republic and the highest official, who heads the system of executive State government bodies of the subject of the Russian Federation - the Republic of Tatarstan.

The study is based on the materials of journalistic texts, published in the publications of the Republic of Tatarstan - a region with a developed and ramified media system.<sup>5</sup> The leading publications of the region have been selected for the analysis: printed ones based on their circulation, electronic ones – on the number of unique visitors, on a number of parameters. So, the following media were used in the work: print media (newspapers “Respublika Tatarstan”, “Vechernyaya Kazan”), electronic online media (“BUSINESS Online”, “e-Kazan”). They differ in form of ownership as state (“Respublika Tatarstan”) and commercial (“Vechernyaya Kazan”, “BUSINESS Online”, “e-Kazan”), respectively - on information policy: pro-state and opposition.<sup>6</sup> Thus, the research of technologies in the practice of Russian media is relevant and significant both in the scientific-theoretical and practical-applied aspects.

### **Materials and methods**

The research is based on a systematic approach to the study of media texts in the unity of their structural and functional components. General scientific methods were applied: observation, comparison. Specific methods, peculiar to philological sciences and mass media were used: content analysis, problem-chronological, structural, typological, which revealed the essential features of manipulation in the mass media. Political problematic of the above-mentioned publications were considered with a view of manipulation. The sections, headings, and individual publications, corresponding to the main problem-thematic area, were investigated: the regional elections of 2015 for the post of the President of the Republic of Tatarstan. The existence of these indicators in the title, the text, their relevance to the topic and the material problem were the basis for the analysis.

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<sup>3</sup> T. A. Nagovitsyna, R. R. Gazizov, "Mass media of the Republic of Tatarstan penal system: Social, psychological and communicative aspects," in *Journal of Organizational Culture, Communications and Conflict*, XX (2016), Special Issue 2, p. 9-13.

<sup>4</sup> Central Election Commission of the Republic of Tatarstan [http://izbirkom.tatarstan.ru/eng/forma4\\_1riur.htm](http://izbirkom.tatarstan.ru/eng/forma4_1riur.htm), accessed in 07.07.2017.

<sup>5</sup> V. Z. Garifullin, L. R. Sabirova, "The anniversary of the Tatar Journalism: Its progress and losses," in *Journal of Language and Literature*, VI (2015), Issue 2, p. 132-135.

<sup>6</sup> V. Z. Garifullin, R. C. Garifullin, L. R. Sabirova, "The rise and development of economic journalism in the republic of Tatarstan," in *Journal of Language and Literature*, VI (2015), no. 3, p. 214-217.

The work is based on the scientific research, devoted to the contemporary problems of mass media development. The elements of the terminological apparatus of leading international scientists in the field of media manipulation were used: Ya.N. Zasursky, I.M. Dzyaloshinsky, E.L. Dotsenko, S.G. Kara-Murza.

### **Results and discussions**

The elements of media system of the Republic of Tatarstan during the elections have specific methods of influencing the public consciousness, the effectiveness of which is determined, based on the principle of publication establishment and the degree of freedom of the editorial board from the authorities. Manipulation can take many forms: violation of temporary and logical connections, confusion of slander with the truth, substantiation of the thesis with false arguments, purposeful page assembly, and combination of materials and headings for the purpose of misinformation. In connection with these reasons, it becomes necessary to study and evaluate these phenomena.

In the process of coverage by journalists of political issues, communicative technologies, influencing the mass consciousness of the audience, are used, forming it in the given direction.

It has been established, that emotional issues played an appreciable role in the processes of hidden influence on readers. Solving the problem of representation of political discourse, the studied publications use the available information and technical tools for the purpose of concealing the audience's consciousness, forming it in a pre-determined direction. This feature is characteristic for all the studied publications: the newspapers "Respublika Tatarstan", "Vechernyaya Kazan", "BUSINESS Online", "e-Kazan". The analysis shows that the use of such methods as comparisons, historical analogies, truisms, "anchors" allows to influence on information flows, making their argumentation more convincing and clear. The methods, used in the studied periodicals, are based on the considerations of peculiarities of perception, psychology, and intellectual activity of the audience.<sup>7</sup> For example, the method of using the words, relating to the basic values of society, is convincing without additional information, that shows the convenience of its use. Applying this technology, the media focuses on issues of democracy, family, health, and home.

The study of problem-thematic lines and information priorities of publications revealed the following facts. The newspaper "Respublika Tatarstan", which is a typical model of a pro-state publication, pays the most attention to the coverage of the activities of political elites (46% of the total number of newspaper publications on the topic), the individual as a political subject (35%), and the state as a political institution (19%). The newspaper "Vechernyaya Kazan" demonstrates a predominant commitment to the issues of the individual as a subject of politics (62%) and party pluralism (38%). The newspaper "BUSINESS Online" is also focused on the coverage of figures of regional political establishment, as well as

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<sup>7</sup> V. Z. Garifullin, L. R. Zakirov, "Functioning of civic/citizen journalism in the media space of the Republic of Tatarstan," *The Turkish Online Journal of Design, Art and Communication. TOJDAC*, Special Edition (2016), p. 2322-2326.

individual subjects (56% and 44% of materials). The focus of attention of the newspaper "e-Kazan" –is a person, as a subject of politics. The incumbent President of the Republic of Tatarstan R. Minnikhanov had the largest caliber among the figures of candidates. Then, with a noticeable difference in both the number of mentions and the scale of their submission, are other candidates in the elections: R. Bilgildeeva, H. Mirgalimov, R. Yusupov. Undoubtedly, in the pre-election period, the greatest attention to individual candidates and, accordingly, more active coverage, are marked by a certain manipulative effect.<sup>8</sup>

Thus, the conducted analysis showed that in the information agenda of the researched publications the figure of the acting leader of the region was brought to the forefront. In printed versions, this feature predetermined the layout of issues (mostly headline materials, that emphasizes their special significance), and in the general information picture, drawn by the publication. In electronic mass media (especially - in the newspaper "BUSINESS Online") materials are published in a certain detailing of time - every 7-9 hours).<sup>9</sup>

The practice of participation of the researched publications in political processes has shown that the main directions in their activity were coverage of issues, related to the renewal and development of electoral legislation; solution of organizational and technological issues, resolvable in the lead-up to the elections; promulgation of their results and so on.

Characterizing the approaches of publications to the issue of thematic preferences, it should be noted, that the newspaper "Respublika Tatarstan" is characterized by the ignoring of news about the opposition, political outsiders, and other similar topics. The content analysis shows, that its interest is aimed at reflecting the most important political events. In the newspaper "Vechernyaya Kazan", top leaders have numerically lower figures, but they exceed the mentions of other candidates for elections in 2015. In our opinion, this indicates the need to take into account the popularity of candidates. The publication "e-Kazan" revealed an increase in the importance of microstructures (for example, party leaders, candidates - outsiders, etc.) over macrostructures (state) .

The media practice has revealed the presence of "authorities" (influence groups). In the studied publications, the method is implemented in the form of approval or condemnation of a particular person or fact, by a generally recognized authority. It was established, that the method of "authority transfer" was actively used in the newspaper "Respublika Tatarstan". Speaking about the majority, in media practice there is also the method "winning side", which appeals to the unconscious desire of a person to be together with the "winner", "with all".

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<sup>8</sup> V. Z. Garifullin, R. G. Mingalimov, "Tatar journalism transformation vectors," *Journal of Language and Literature*, VI (2015), no. issue 1, p. 192-194.

<sup>9</sup> Elena S. Doroschuk, Tatiana S. Staroverova, "Online Representations of Media in Modern Information Space of Russia Region," in *International journal of humanities and cultural studies*, Special Issue (2016), p.174-180.

In a direct connection with the previous method, the technique “common platform” can also be considered. Using this method, the authors of the materials emphasize, that all members of the group to which they belong, share the proposed solution to the issue, and therefore the audience should join the others. As practice shows, the most often this method is a selection of letters to the editorial office, when the representatives of mass media purposefully indicate the membership of the respondent in a particular social community.

In the system of manipulative influence on the mass media audience, other effective methods has been established: truisms - obvious statements, which are in accordance with reality, applying them, the manipulator can mask certain constructions as reasoning; the technique of anchoring - when faced with “an anchor” (established associative flow), a person begins to experience certain feelings, each time the same; the use of words, relating to the basic values of society - emotionally colored words, closely related to the basic values, opinions of society, and convincing without additional information .<sup>10</sup>

### **Summary**

1. Manipulation in the political discourse of mass media is a process of hidden information and psychological influence to mass audience, with the aim to change attitudes, positions, beliefs and values, carried out through the media.

2. Manipulation is determined by a combination of technologies. The research revealed some technologies, the most widely used by regional mass media, in covering political events of 2015: selective choice, authority transfer, use of words, related to the basic values of society, historical analogies.

3. The use of manipulative technologies, their specificity and intensity are determined at two levels: federal-regional, represented by general political conditions in the country and the region; local, represented by the information policy of the mass media, its founder, their desire and ability to influence the socio-political situation.

4. The increase of microstructures importance (for example, party leaders, candidates-outsiders, etc.) has been revealed over macrostructures (state).

### **Conclusion**

The studied publications are characterized by: prevalence of information genres, reprints from other publications, interest in individual subjects of politics, publication of politicians' appeals, use of the method “authority transfer”. The activity of mass media representatives in the process of political campaign representation consists in serving as a channel for informing the audience - potential voters, as the means of election propaganda and as a tool for civil control. The need for quick response to events determined the prevalence of information genres of presentation the reality. This feature also depends on the level of training of modern journalists, weak knowledge of traditionally complex - especially

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<sup>10</sup> M. G. Bogatkina, E. S. Doroschuk, R. R. Gazizov, "Converging Innovations in the Modern Humanitarian Science", in *The Social Sciences*, X (2015), no. 7, p. 1932-1934.

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analytical - genres of journalism, as well as the influence of Western trends, defined as "fact-based journalism".



Ruslan Shavkatovich GARIPOV

## Indigenous Peoples' Rights Providing By International Legal Tools\*

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**Abstract.** *According to the UN data, more than 300 million people in the world today are indigenous people in more than 70 countries, many of which are on the verge of extinction. Being heirs of unique cultures and having a different social, economic and political lifestyle, they try to preserve their way of life in a society dominated by a completely different culture. Throughout history, their rights were constantly violated in the crudest way; they were exterminated, deprived of their land and resettled in areas unsuitable for life. Now times have changed, and international law recognizes the right of indigenous peoples to restore historical justice and protect their traditional way of life.*

*The paper analyzes the main international documents on the protection of the rights of indigenous peoples, the author traces the dynamics of the establishment and development of international standards in this field, which makes it possible to trace the evolution of international law, determine its role in the modern system of protecting the rights of indigenous peoples and assess the potential for the future.*

**Keywords:** international law, human rights, indigenous people, aborigines, International Labor Organization Convention No. 107, International Labor Organization Convention No. 169.

### Introduction

Many in their youth were fond of reading the novels of James Fenimore Cooper, Mein Reed, Karl May. They played Indians with friends in the yard and wanted to be like the main characters of Western movies. Despite the romantic image of the Indians, cultivated by the media, filmmakers and writers, we are aware of their difficult relationship with the white settlers, of the numerous crimes committed during the colonization and settlement of new territories. Only a small part of once numerous and powerful tribes and peoples of the North American continent has remained. Nevertheless, they are unique peoples and are distinguished by the diversity of cultures, beliefs and traditions that the international community today is urging to preserve and develop.

The rights of indigenous peoples and their protection today are both international and domestic issue. International public law is the main guideline for the development of domestic legislation, and the norms enshrined by it must be taken into account by the national law of states.

International law establishes the principle that absolutely all people have equal rights and freedoms. It does not depend on their religious, racial, linguistic or national affiliation. Representatives of aboriginal peoples should fully have the same rights that are guaranteed to everyone else, regardless of their place of residence and numbers. The status of representatives of indigenous peoples should in no way be inferior to the legal status of other peoples and citizens in these countries. Every nation has its own identity, the right to develop and preserve its language, culture and identity.

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\*The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

### **Methods**

The methodological basis of the research was comparative-legal, historical, systemic and other general scientific methods. When developing the topic, the author relied on the main theoretical positions and conclusions contained in the writings by domestic and foreign authors, both of general theoretical nature, and concerning the problems that directly constitute the subject of research. The complex nature of the problems under study presupposes the need to address not only the various branches of law, but also the work in the field of philosophy, history, and ethnography. In this connection, the theoretical basis of the research was not only special legal literature, but also ethnographic and historical research.

### **Results and discussion**

The main means of international legal protection of the rights of aboriginal peoples are the normative documents developed by the international community that consolidate the rights of indigenous peoples, as well as the activities of international intergovernmental and non-governmental organizations, aimed at the implementation of these norms. Before proceeding to the study of the provisions of the Convention of the International Labor Organization on Indigenous and Tribal Peoples in Independent Countries and the implementation of its norms in practice, it is advisable to review briefly other international instruments affecting the rights of indigenous peoples.

Today, the international law has a number of universal and regional acts aimed specifically at protecting the rights of indigenous peoples. Some of them contain provisions that directly or indirectly address indigenous issues. First of all, it is necessary to name the Charter of the United Nations, which requires governments to "promote human rights and fundamental freedoms for all without distinction as to race, sex, language and religion".<sup>1</sup> The Charter of the United Nations for the first time enshrined the right of peoples to equality and self-determination, as one of the basic principles of international law. And if all other principles and norms speak of the legal personality of states, then this principle is based on the legal personality of peoples.<sup>2</sup> On its basis, a whole system of norms has formed and developed in the international law – the international law of nations,<sup>3</sup> an integral part of which is also the right of indigenous peoples.

The Universal Declaration of Human Rights of 1948, which calls on states to guarantee the effective recognition and observance of the rights of each person for equality, participation in the political and cultural life of the society, non-discrimination, etc., is also of great importance. Article 2 of the Declaration proclaims: "Everyone must have all the rights and freedoms set forth in this

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<sup>1</sup> V. A. Kartashkin, E. A. Lukasheva (eds.), "Charter of the United Nations. San Francisco, June 26, 1945," in *International acts on human rights. Collection of documents*, Second edition, supplemented, Moscow, Norma Publishing House, 2002.

<sup>2</sup> L. V. Andrichenko, "International legal protection of indigenous peoples," in *Journal of Russian Law*, V (2001).

<sup>3</sup> R. A. Tuzmukhamedov, *Rights and freedoms of peoples in modern sources of international law*, Kazan, Almaty, 1995.

Declaration, without distinction of any kind, such as race, color, sex, language, religion, political or other views, national or social origin, property, birth or other status".<sup>4</sup>

The International Covenants on Economic, Political, Social, Civil and Cultural Rights 1966, which establish the inadmissibility of discrimination on grounds of color, race, social and national origin, can also be singled out. The right of peoples to self-determination and to dispose of their natural resources is proclaimed. Article 27 of the International Covenant on Civil and Political Rights states: "in countries where ethnic, religious and linguistic minorities exist, persons belonging to such minorities cannot be denied the right, together with other members of the same group, to enjoy their culture, profess their religion and perform its rites, as well as use their native language".<sup>5</sup>

The International Convention on the Elimination of All Forms of Racial Discrimination, 1966, is also aimed at protecting the rights of aboriginal peoples. This convention was a continuation of the UN Declaration on the Elimination of All Forms of Racial Discrimination, adopted in 1963. It was designed to implement the principles outlined in it and to ensure the speedy implementation of practical measures. The problems of implementing this Convention were discussed at a number of world conferences within the framework of the United Nations. For example, in 1978, the problems of indigenous peoples were considered and recommendations were developed for States. In particular, the right of aboriginal peoples to identify themselves with their own names and freely express their cultural, ethnic and other characteristics was enshrined. The right to the official status and the right to create own representative organizations, the right to preserve the traditional economic structure and traditional way of life within the boundaries of the settlement areas, and the right to preserve and use one's own language in the education and management system, etc. were enshrined. Then a similar conference in 1983 returned to the problems of indigenous peoples, where special attention was paid to their special relation to the land. It was pointed out that territories, as well as the right to natural resources and land, should not be confiscated from these peoples.

According to the Convention, the Committee on the Elimination of Racial Discrimination was established, consisting of 18 experts who should be impartial and highly moral.

The 1989 Convention on the Rights of the Child then referred to the rights of indigenous people. Article 30 enshrines that, "in those States where ethnic, religious or linguistic minorities or persons of indigenous origin exist, a child belonging to such a minority or who is indigenous shall not be denied the right, in community with other members of his or her group, to enjoy his or her own

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<sup>4</sup> V. A. Kartashkin, E. A. Lukasheva (eds.), "Charter of the United Nations. San Francisco, June 26, 1945".

<sup>5</sup> V. A. Kartashkin, E. A. Lukasheva (eds.), "International Covenant on Civil and Political Rights, 1966," in *International acts on human rights. Collection of documents*. Second edition, supplemented, Moscow, Norma, 2002.

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culture, to profess and practice his or her own religion, or to use his or her own language”.

The Convention on Biological Diversity, 1992, also in turn expresses the interests of indigenous peoples; the document refers to the need to preserve and respect, and to support indigenous knowledge reflecting their traditional way of life. This knowledge is relevant to the preservation and sustainable use of biological diversity in many countries.

The international instruments reflecting the rights of aboriginal peoples should also include the International Labor Organization Convention on Discrimination in Respect of Employment and Occupation No. 111 of 1958, the United Nations Convention against Discrimination in Education, 1960, the Declaration of the United Nations General Assembly on the Rights of Persons Belonging to Non- belonging to national or ethnic, religious and linguistic minorities of 1992, and other documents.

Documents that were specifically aimed at protecting the rights of aboriginal people play an important role in securing the international legal status of indigenous peoples. The beginning of such specialized protection of indigenous peoples was made by the adoption in 1957 of ILO Convention No. 107 "On the Protection and Integration of Indigenous and Other Tribal and Semi-Tribal Population in Independent Countries".<sup>6</sup> With the adoption of this international document, the term "indigenous population" first entered the international legal lexicon.

ILO Convention No. 107 was the first international legal instrument aimed solely at the problems of Aboriginal peoples. This document consists of thirty-seven articles, united in 8 sections. The document is devoted to such issues as land ownership, vocational training, rural crafts, working conditions, social security, health care, education, etc. This document was the first international document recognizing the right of collective ownership of land.

Simultaneously with this convention a Recommendation on the Protection and Integration of Indigenous and Other Population with Tribal and Semi-Tribal Life in Independent Countries (ILO Recommendation No. 104)<sup>7</sup> was adopted. This document is not legally binding. The proposals outlined there were directed towards the implementation of Convention No. 107, and in some cases supplemented the content of the document. For example, in the sphere of land legal relations, the Recommendation stipulated that the direct or indirect lease of lands belonging to the aboriginal population by individuals or legal entities that are not their members should be subject to restrictions. In addition, the document calls for issuing low-interest loans to the indigenous population and providing them with technical, monetary and other assistance in the cultivation of their territories.

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<sup>6</sup> \*\*\*, *Indigenous people: global aspiration for justice: Report to the Independent Commission on International Humanitarian Affairs*, Moscow, International Relations, 1990, p. 206.

<sup>7</sup> V. A. Kartashkin, E. A. Lukasheva (eds.), "ILO Convention No. 169 on Indigenous and Tribal Peoples in Independent Countries, 1989," in *International acts on human rights. Collection of documents*. Second edition, supplemented, Moscow, Norma, 2002.

This recommendation was also devoted to recruitment and working conditions, handicrafts and rural crafts, vocational training, social security, education, health, language use, etc.

ILO Convention No. 107 was ratified by twenty-seven countries. At the same time, many states where representatives of the indigenous population (including the former USSR and the USA) live, did not join it. This convention was more focused on "integration" (as it already follows from the name of the convention) of the indigenous population in the dominant society and on its development from the position of the majority. Representatives of the indigenous population themselves completely disagree with this provision. As under the guise of the term "integration", the indigenous population was actually assimilated. As a result, the convention was considered obsolete, and many experts considered it to restrict the rights and freedoms of the indigenous population, recognized it as "harmful" and "lenient" towards indigenous peoples.<sup>8</sup>

This thesis can be considered quite justified, since, reading in the text of the convention, it seems that the indigenous and other tribal or semi-tribal population are at a low level of socio-economic, cultural and social development, they must be "attached" and "accustom" to the benefits of "civilization", made similar to other citizens of the state. The third article of the convention says: "As long as the socioeconomic and cultural status of the concerned population<sup>9</sup> does not allow it to enjoy the benefits of the general legislation of the country, to which it belongs, special measures shall be taken to protect its institutions, identity, property and labor" (ILO Convention No. 107 "On the Protection and Integration of Indigenous and Other Tribal and Semi-Tribal Population in Independent Countries", 1957, p. 30). In this regard, the question arises, how can the socio-economic and cultural way of life prevent the population concerned from using the general legislation of the country? The legislation, access to which must be absolutely the same for all segments of the population.

The use of the native language by the population concerned as a means of communication and in the field of education does not have clear legal guarantees. The Convention establishes a provision according to which a gradual transition from the native language or local dialect to the national language or to one of the official languages of the country should be ensured. And only as far as possible measures should be taken to preserve and develop their native language or the most common local dialect. Such an approach will lead to the loss of the native language, which is one of the most important conditions for preserving culture and identity.

In order to improve the norms of Convention No. 107 and the need to develop provisions for the protection of indigenous rights, in 1985, the International Labor Organization began the process of its revision. And in 1986,

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<sup>8</sup> Lee Swepston "Indigenous and Tribal Peoples and International Law: Recent Developments," in *Current Anthropology*, XXX (1989; no. 2).

<sup>9</sup>According to Article 1 of the Convention, the indigenous and other tribal or semi-tribal populations mentioned in paragraphs 1 and 2 of this Article are referred to hereinafter as "the populations concerned".

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the ILO organized an expert meeting, which involved representatives of indigenous organizations. Following the meeting it was recognized that the integration approach of the Convention does not meet the needs of indigenous peoples and does not reflect modern thinking. The possibility of self-determination of these peoples in economic, social and cultural fields, and the need to consolidate this right in the new norms of the International Labor Organization were especially emphasized.

It was also concluded that the competence of the State to seize the territories of indigenous or tribal populations or to evict these peoples from their territories should be limited to exceptional circumstances and should only be carried out with their clear consent. In the future, this rule was confirmed in Article 16 of ILO Convention No. 169 "On Indigenous Peoples and Tribal Peoples in Independent Countries".<sup>10</sup>

The ILO Convention No. 169 was adopted in June 1989 and entered into force on September 5, 1991. This document includes a preamble and 44 articles in 10 sections. These sections include: general policy, land, training, employment and working conditions, social security and health, education and communication, management, international contacts and cooperation, general provisions, and final provisions. This document became the successor to ILO Convention No. 107. However, many states that have ratified Convention No. 107 but have not ratified Convention No. 169 remain participants in the first of them (the Russian Federation and the United States have not ratified either the first or the second convention).

The preamble of the new Convention states the need to adopt new international regulations aimed at changing the legal status of aboriginal peoples in order to eliminate the orientation to assimilation that existed in the previously valid norms. The world community recognized that the distinct socio-economic development, culture and language of indigenous peoples constitute a significant part of the cultural heritage of humanity and need to be protected.

According to the opinion of leading international experts, the ILO Convention No. 169 best reflects the provisions that will to a greater extent ensure the survival, preservation and development of the indigenous peoples, their traditional way of life, culture and languages. The Convention has enshrined: ownership of lands they traditionally occupy; the right to participate in the preparation, implementation and evaluation of plans and programs that affect their interests; the right to choose one's own priorities in the course of its development; the right to preserve their own customs and institutions; the right to establish their own educational institutions, etc.

In addition to the rights granted to indigenous peoples, the Convention reflects the responsibilities of the governments of the countries participating therein. They are responsible for ensuring these rights. The governments of these countries are obliged to promote the fullest implementation of the economic, cultural and social rights of indigenous peoples. States must consult in cases of

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<sup>10</sup> *Bulletin of the Ministry of Foreign Affairs of the USSR*, no. 17, 1989.



adoption of legislative acts that affect the rights and interests of indigenous peoples. States are obliged to create conditions for the development of their institutions, together with them to implement measures to protect and preserve the environment and territories that are inhabited by indigenous peoples. States are obliged to provide them with adequate medical care and with the means to implement it, as well as take measures to preserve national languages.

Great attention is paid to the issues of land legal relations of indigenous peoples in the Convention. Article 14 states: "The rights of ownership and possession of the peoples concerned over the lands which they traditionally occupy shall be recognized. In addition, measures shall be taken in appropriate cases to safeguard the right of the peoples concerned to use lands not exclusively occupied by them, but to which they have traditionally had access for their subsistence and traditional activities. Particular attention shall be paid to the situation of nomadic peoples and shifting cultivators in this respect".<sup>11</sup> Thus, such types of legal relations as property and ownership with respect to traditionally occupied lands are confirmed, as well as the right to use and traditional access to lands. Governments are under an obligation to take measures to determine the territorial boundaries of lands traditionally occupied by representatives of indigenous peoples.

In accordance with the Convention, the rights to natural resources relating to the lands of indigenous peoples are regulated. They have the right to participate in the use, management and conservation of these resources. Where the Government intends to mine or explore resources on indigenous lands, it is obliged to consult with indigenous peoples in order to ascertain the consequences of such activities. It is necessary to find out whether the interests of these peoples will be damaged. And if so, then resolve the issue of paying fair compensation.

The main innovation of the ILO Convention No. 169 was also a change in the very concept of "indigenous peoples and tribal and semi-tribal peoples".

According to Article 1, the Convention covers:

(a) tribal peoples in independent countries whose social, cultural and economic conditions distinguish them from other sections of the national community, and whose status is regulated wholly or partially by their own customs or traditions or by special laws or regulations;

(b) peoples in independent countries who are regarded as indigenous on account of their descent from the populations which inhabited the country, or a geographical region to which the country belongs, at the time of conquest or colonization or the establishment of present State boundaries and who, irrespective of their legal status, retain some or all of their own social, economic, cultural and political institutions.<sup>12</sup>

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<sup>11</sup> R. A. Tuzmukhamedov (ed.), "ILO Convention No. 107 "On the Protection and Integration of Indigenous and Other Tribal and Semi-Tribal Population in Independent Countries", 1957," in *Rights and freedoms of peoples in modern sources of international law (a collection of documents)*, Kazan, Knizhnyi dom, 1957.

<sup>12</sup> The ILO Convention No. 107 of 1957 applied, on the one hand, to persons being part of the tribal and semi-tribal population in independent countries and those at a lower socioeconomic development stage than the rest of the nationwide collective whose legal status is regulated in part

Emphasis is made that self-identification of such peoples as indigenous or tribal shall be regarded as a fundamental criterion for determining the groups to which the provisions of this Convention apply. The use of the term "peoples" in this Convention shall not be construed as having any implications as regards the rights which may attach to the term under international law.

### **Summary**

Unlike the Convention of 1957, which emphasized that indigenous peoples are at a lower socio-economic stage of development, the Convention of 1989 does not set itself the task of integrating these peoples into a dominant society and does not give rise to the division of peoples into "civilized" and "backward".

The International Labor Organization Convention No. 169 plays a key role in the development of the legal status of indigenous peoples and their protection at the international and national levels. An important provision is also the duty of ratifying states to provide reports on the application of this Convention. This allows the International Labor Organization to monitor its compliance. Today, Convention No. 169 serves as the basis for the ILO's work in protecting the rights of indigenous peoples and providing them with technical, legal or other assistance.

Only ILO Convention No. 169 is binding for the ratifying states and is a comprehensive act to cover the basic rights of Aboriginal peoples. The analysis of the listed documents allows saying that interstate cooperation in the field of protection of the rights of indigenous peoples has already developed and is actively developing within the framework of the UN. Formation of international standards and specific obligations of states of an international legal nature in this sphere continues. International mechanisms and procedures for resolving disputes and conflicts between indigenous peoples and governments continue to develop.

In 2006, the UN Human Rights Council adopted the Declaration on the Rights of Indigenous Peoples, which in September 2007 was approved by the UN General Assembly.<sup>13</sup> This document is another breakthrough towards the establishment of international standards for the protection of the rights of indigenous peoples.

### **Conclusions**

We should note finally that this is not enough yet to solve all the problems of indigenous peoples. So far, no position has been worked out on such rights as

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or in full by their own customs, traditions or special legislation. As well as to persons who are part of the tribal or semi-tribal population in independent countries and are considered as indigenous people because they are descendants of the inhabitants who inhabited the country or the geographical area of which this country is a part, at the time of its conquest or colonization, and regardless of its legal status, a leading way of life that is more in keeping with the socio-economic and cultural system of those times than the structure of the country to which they belong.

<sup>13</sup> R. Sh. Garipov, "The United Nations Declaration on the Rights of Indigenous Peoples and the Legislation of the Russian Federation," in *Current Status and Development Paths of Indigenous Peoples of the North, Siberia and the Far East of the Russian Federation*, Second edition, revised and supplemented, Moscow, Publication of the Council of Federation of the Federal Assembly of the Russian Federation, 2013.

the right to self-government, self-determination and, most importantly, the right to land, mineral and natural resources. Problems remain in the field of preserving languages, culture, traditions and social sphere. So far, the indigenous population has the lowest standard of living and the highest level of alcoholism, drug abuse, crime and unemployment. All this serves as a powerful incentive for the international community to continue engaging in the development of international rights and standards in this field. Modern international law and national legislation should contribute not only to the survival, but to the development and prosperity of indigenous peoples throughout the world.

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## **Legal Regulation Of Commercial Concessions (Franchising) In Accordance With Russian And Foreign Law\***

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**Abstract.** *The purpose of this work is to define the legal systems on commercial concession (franchising) regulation in the world practice, and also identification of the specifics of commercial concession contractual regulation in Russia, and analysis of all changes in civil legislation regulating the institution of commercial concession and the identification of trends in its development within the framework of the ongoing legal reform.*

*The general scientific basis was formed by the general scientific (dialectical) method of obtaining knowledge, and also comparative legal and logical methods, which allowed us to consider the problems of the civil legislation development in the field of commercial concession.*

*The analysis of civil legislation reveals the directions of its development and improvement in the field of commercial concession. Using the example of a comparative analysis of foreign experience in regulating commercial concessions, trends in the development of Russian civil legislation are shown. Particular attention is paid to changes in Chapter 54 of the Civil Code of the Russian Federation as part of the civil legislation reform. A scientific study of the legal regulation system for commercial concession (franchising) abroad was carried out, as well as trends of changes in the norms of Russian civil legislation in the field of commercial concession were analyzed.*

*The theoretical provisions formulated in the article can be useful for determining the effectiveness of civil legislation that enshrines the contractual regulation of commercial concession, and they can be used in law enforcement practice, as well as in the course of "Civil Law" study.*

**Keywords:** commercial concession, franchising, intellectual property, license agreement; contract law; The Civil Code of the Russian Federation.

### **Introduction**

The use of commercial concession (franchising) in practice has caused many problems, the main cause of which is the imperfection of legal regulation. The shortcomings of legal regulation, as well as the spontaneous nature of the development of the Russian market, compel foreign franchisors to either refuse to use franchising in Russia or demand the development of new conditions for the introduction of a franchising business scheme to the Russian market, what prevents the inflow of foreign investments into our country.

Proceeding from an objective and real assessment of relations in the field of commercial concession, an attempt is made to solve the problem of improving the legal regulation of these social relations based on a combination of a fundamental approach and specific methods, relying on doctrinal conclusions, sources of legal regulation and law enforcement practice on the basis of the theory of civil and enterprise law.

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\*The work is carried out according to the Russian Government's Program of Competitive Growth of Kazan Federal University.

### **Methods**

Commercial concession (franchising) is developing quite actively not only abroad, but also in Russia. The use of commercial concession (franchising) entailed the need for its legislative settlement.

There are several ways to regulate franchise relationships in the world:

1) by adopting special legislation on franchising;

2) by enshrining the institution of franchising in civil law which regulates exclusively contractual relations;

3) by regulation of franchising relations with general provisions on contracts within the framework of civil legislation and proceeding from the principles of "good faith", "justice", "reasonableness", "freedom of contract", etc.

The first type of legal regulation of franchising relationships, for example, is the United States, where there are two levels of special legislation on franchising:

- Federal: Decree of the US Federal Trade Commission (FTC) No. 436 "Requirements for disclosure of information, prohibitions on franchising, and favorable franchising conditions" of October 21, 1979; The Uniform Rules for the Sale of a Franchise (UFOC).<sup>1</sup>

- Own legislation of 21 states, such as Washington, Virginia, Hawaii, Indiana, Illinois, New York, North and South Dakota, Minnesota and others..<sup>2</sup>

### **Results**

The latest innovations envisaged by the lawmaker reflect its policy in changing the approach to state registration, that is, registration of the rights transferred over it rather than the contract itself.

The process of reforming civil legislation on commercial concession continues. The legal regulation of the commercial concession is complicated, it also causes a lot of contradictions and ambiguities which require further development and their elimination through law enforcement practice.

Analysis of sources of commercial concession legal regulation, trends and patterns of its development in Russia and abroad allows us to identify the shortcomings of legal regulation, as well as to form main directions of its development in our country.

If to consider the legal regulation of commercial concession in Russia in compare with the international regulation of franchising relations, then the legislator needs to include in Chapter 54 of the Civil Code of the Russian Federation the norms detailing this institution and excluding the possibility of applying general provisions of civil legislation that will promote a uniform interpretation of such relations. Moreover, when considering this civil law institute,

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<sup>1</sup> Irmgard Schillgalis, "Pronuptia de Paris GmbH v. (1998)", in *Franchising. Law and Practice*, London, John Hamilton Pratt, 1998, p. A23001-A23030.

<sup>2</sup> S. A. Sosna, E. N. Vasilieva, *Franchising. Commercial concession (Text)*, Moscow, ICC "Academic Book", 2005.



it is necessary to develop a new method for analyzing the ways of legal regulation of commercial concession in Russia.

### Discussion

The Law "On Franchising" No. 1335-XIII dated January 1, 1997, and related Chapter 21 of the Civil Code were issued in the Republic of Moldova.

In the Republic of Kazakhstan, Law No. 330-II dated June 24, 2002, "On the Integrated Entrepreneurial License (Franchising)" defines the subjects of franchising relationships, the principles and measures of state support for franchising relationships, the general contractual provisions of the franchising agreement, its types, etc.

In the UK there are: the Restrictive Trade Act of 1976; The Competition Act of 1980; The Retail Prices Act of 1976; The Law "On Fair Contract Conditions" of 1977; The Fair Trade Act of 1973; The Law "On Consumer Protection" of 1987.<sup>3</sup>

The countries of the former Yugoslavia (Slovenia, Croatia, Bosnia) apply to the franchise three groups of legislative acts: antitrust regulations; Acts regulating foreign trade, and general civil legislation on contracts (acts that establish rules of internal trade).<sup>4</sup>

The need to establish the legal basis for this type of business is not in doubt. At the same time, some authors argue that franchising does not need special legislative regulation due to the self-sufficiency of the terms of the franchising agreement, which in turn feeds on the richest contractual and judicial practice of common law, that is, it is established for the self-regulation of franchising, in particular, in the USA.

Thus, according to the experts of the World Intellectual Property Organization, from a legal point of view, franchising is sufficiently regulated by contract law, so its development does not require special laws and special structures.<sup>5</sup>

Countries that follow the way of consolidating the institution of franchising in civil law and regulating exclusively contractual relations include, for example, Belarus and Russia.<sup>6</sup>

In the Republic of Belarus, franchising relations are regulated by Chapter 53 of the Civil Code of the Republic of Belarus dd. December 7, 1998, No. 218-3.

The basis for the legal regulation of commercial concessions in Russia is Chapter 54 of Part Two of the Civil Code of the Russian Federation "Commercial

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<sup>3</sup> A. M. Doherty, (2009). "Market and partner selection processes in international retail franchising," in *Journal of Business Research*, LXII (2009), no. 5, p. 528-534.

<sup>4</sup> A. A. Duissembayev, A. M. Ibrayeva, "Franchising as a form of business running," in *Eastern European Scientific Journal*, II (2014), p. 114-117.

<sup>5</sup> J. Moon, A. Sharma, "Franchising effects on the lodging industry: optimal franchising proportion in terms of profitability and intangible value," in *Tourism Economics*, XX (2014), no. 5, p. 1027-1045.

<sup>6</sup> N. B. Binh, A. Terry, "Meeting the challenges for franchising in developing countries: the Vietnamese experience," in *Journal of Marketing Channels*, XXI (2014), no. 3, p. 210-221.

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Concession", which enshrines exclusively contractual relations: the concept, subject, conclusion and execution of the contract.

However, Chapter 54 of Part Two of the Civil Code of the Russian Federation has undergone several changes since the moment of its introduction into effect. Let's consider them.

The first significant changes were introduced by the Federal Law dated December 18, 2006 "On the implementation of Part Four of the Civil Code of the Russian Federation" in connection with the adoption of Part Four of the Civil Code.

Firstly, the legislator outlined in the new wording the concept of a commercial concession agreement. So, according to item 1, Article 1027, of the Civil Code of the Russian Federation, under a commercial concession agreement, one party (the right holder) undertakes to provide to the other party (user) a fee for a term or without indication of the term the right to use in the entrepreneurial activity of the user a set of exclusive rights belonging to the rightholder, including a right to a trademark, service mark, as well as rights to other objects of exclusive rights provided for by the contract, in particular for commercial designation, and a secret of production (know-how).

Secondly, item 1 of Article 1027, paragraph 2 of Article 1032, paragraph 3 of Art. 1037, art. 1039, Part 2 of Art. 1040 of the Civil Code of the Russian Federation clarified and expanded the object of the commercial concession contract. In particular, Articles 1538-1541, Part 4, of the Civil Code of the Russian Federation provided legal protection for a new type of individualization means for legal entities: commercial designation.

Thirdly, the legislator refused to execute double registration of a commercial concession agreement.

Fourth, with regard to paragraph 2, item 1, Art. 1031 of the Civil Code of the Russian Federation, the mandatory obligation of a right holder to grant a user the licenses provided by the contract is excluded, having established their order of registration.

Fifth, the introduced item 4, Article 1027, of the Civil Code of the Russian Federation establishes that the rules of Section VII, Part Four, of the Civil Code of the Russian Federation on the license contract are applied to a contract on commercial concession if this does not contradict the provisions of Chapter 54, the Civil Code of the Russian Federation and the substance of the commercial concession contract.

Thus, it can be said that the legal regulation of commercial concession in the light of the adopted Fourth Part of the Civil Code is complicated and causes many contradictions and ambiguities that require further elimination by means of law enforcement practice.

However, there are opinions on the possibility of applying to the settlement of the commercial concession relations, the provisions of the Civil Code of the

Russian Federation on agency and distributor agreements, and in some cases a distribution agreement is identified as a commercial concession agreement.<sup>7</sup>

Clear position on this issue is held by E.A. Sukhanov and V.V. Vitriansky, who believe that the commercial concession contract (franchising) does not belong to the number of mixed (complex) contracts in the sense of cl. 421 of the Civil Code of the Russian Federation. In accordance with the Civil Code of the Russian Federation, this agreement is of a completely independent type of civil law contracts, which excludes the use of any other rules designed to regulate other contractual obligations. In this case, only general provisions on obligations and contracts are subject to subsidiary application.<sup>8</sup>

Thus, it is possible to conclude agency or distribution contracts as separate contracts, but only if it is necessary to organize a franchise system<sup>9</sup>, while the inclusion of the norms of Chapters 49, 51 and 52 of the Civil Code of the Russian Federation in a commercial concession contract is not allowed.

The following changes in Articles 1030, 1033, 1035, 1037 of the Civil Code of the Russian Federation were introduced by the Federal Law dated July 18, 2011 No. 216-FZ "On Amendments to Part Two of the Civil Code of the Russian Federation". The basis for the adoption of these changes was laid by the Decree of the President of the Russian Federation dated July 18, 2008 No. 1108 "On the Improvement of the Civil Code of the Russian Federation" and the Concept of the Development of Civil Legislation of the Russian Federation prepared on its basis.

So, in its initial version, remuneration under a commercial concession agreement could be paid by a user to the right holder in the form of fixed one-time or periodic payments. Now the legislator has envisaged the possibility of including in a commercial concession contract of a combined system of one-time and (or) periodic payments.

Restrictions on the rights of the parties under a commercial concession contract provided for in Article 1033 of the Civil Code of the Russian Federation, are completely stated in a new edition.

A significant innovation of Article 1035 of the Civil Code of the Russian Federation was the attribution to the user of not just the right to renew the contract for a new term, but the preemptive right, which, although it was supposed from paragraph 2 of the previous version of the Article, was not immediately distinguished in the law.<sup>10</sup>

The right of a user to enter into a new agreement with a rightholder after the expiry of the term of the previous agreement on the same conditions as set

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<sup>7</sup> Decree of the Federal Arbitration Court of the Moscow District dated 4.11.(1999). No. KG-A40 / 3549-99. - URL: <http://www.Consultant.ru/cons/cgi/online.cgi?Req=doc>, accessed 12. 07. 2017.

<sup>8</sup> M. I. Braginsky, V. V. Vitriansky (eds.), *Contract law. Book #3: Agreements on the performance of work and the provision of services (Text)*, Moscow, Publishing house "Statut", 2002.

<sup>9</sup> R. Levickaite, R. Reimeris, "Franchise business model: theoretical insights," in *Business: Theory and Practice*, XI (2010), no. 2, p. 134-142.

<sup>10</sup> M. Müller, S. Gaudig, "An empirical investigation of antecedents to information exchange in supply chains," in *International Journal of Production Research*, IL (2011), no. 6, p. 1531-1555.

forth in Article 1035 of the Civil Code of the Russian Federation has been canceled. Paragraph 2, item 1 of Article 1035 establishes that when concluding a commercial concession agreement for a new term, the terms of the contract may be changed as agreed by the parties.

The consequences of non-conclusion of a commercial concession contract for a new term with the previous user have been changed. In particular, the term of ban on conclusion a commercial concession contract on the same terms has been reduced to 1 year. Also, a user has the right to demand at its choice in court to perform transfer of its rights and obligations under the concluded contract and compensation of losses caused by refusal to renew a commercial concession contract with it, or only to receive compensation of such losses.

Now, in paragraph 2 of item 1, Article 1037 of the Civil Code of the Russian Federation, the right of each party to a contract concluded for a certain period or without specifying a period has been enshrined to withdraw from a contract at any time within one month with notification of the other party, provided that the contract provides for the possibility of its termination by the payment of a monetary amount established as compensation.

There has been introduced the item 1.1, article 1037 of the Civil Code of the Russian Federation, which established for the right holder the right to unilaterally withdraw from a contract for a number of reasons being violations by a user. At the same time, the unilateral refusal of the right holder to perform the contract is possible if the user, after giving the right holder the written request to eliminate a violation, did not eliminate it within a reasonable time or committed again such violation within one year from the date of sending the specified demand.

### **Conclusions**

Analyzing such changes, it is possible to come to a conclusion about strengthening the legal status of a right holder as a less protected party in the commercial concession contract.

To date, the latest changes were introduced by the Federal Law dated 12.03.2014, No. 35-FZ "On Amendments to Parts One, Two and Four of the Civil Code of the Russian Federation and Certain Legislative Acts of the Russian Federation", which will enter into force on October 1, 2014.

The new version is set forth for the item 2, Article 1028 of the Civil Code of the Russian Federation containing the following: "Granting the right to use in the entrepreneurial activity of a user of exclusive rights belonging to the rightholder under a commercial concession agreement is subject to state registration with the federal executive authority on intellectual property. If the requirement for state registration is not complied with, the granting of the right to use is considered to have failed".

In turn, the paragraph 2, item 2, Article 1031 of the Civil Code provides that if the commercial concession contract does not provide otherwise, the rightholder is obliged to ensure state registration of the granting the right to use in the entrepreneurial activity of a user of the complex of exclusive rights owned by

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the rightholder under a commercial concession agreement. The legal consequences of non-compliance with the requirement for state registration have been changed. Thus, if the requirement for state registration is not complied with, the granting of the right to use is considered to have failed.

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## Control And Supervision Over Penitentiary Systems In France And The USA\*

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**Abstract.** *This article is devoted to the study of the institution of control and supervision over penitentiary systems in France and the USA. It is noted that this institution, especially in the European penitentiary systems, in general, is similar to the institution of control and supervision over institutions and bodies implementing criminal penalties in Russia. Firstly, this is due to belonging to two most recognized legal systems in the world - Anglo-Saxon (USA) and Romano-German (Russia, France). Secondly, this is due to using the international law in their domestic legal systems, although the forms of implementing the international norms have their own peculiarities. Thus, foreign specialists in the field of international law singled out two models in the mechanism of implementing the international legal norms within the national legal system - transformational (implementational) and adoptive (incorporative) (Vaneek, 1949; Brownlie, 2003), which were used in the countries of the Anglo-Saxon legal system.*

*A distinctive feature of the US legal system is the priority of US national legislation over the international treaties involving the USA.*

*Thirdly, the relative uniformity of control and supervision over the penitentiary systems of France and the USA is due to the sufficient identity of the systems of criminal penalties and types of correctional facilities. Punishment in the form of deprivation of liberty forms the backbone of the system in almost all civilized countries of the world, and prisons are the eternal companions of almost any state in the world.*

*Fourthly, the effectiveness of the institution of control and supervision over penitentiary system depends to a large extent on the institutional model of penal system existing in a given country both abroad and in Russia. The effectiveness of the institution of control and supervision over penitentiary system makes impact on the effectiveness of penitentiary system itself. The indicators of the system effectiveness are represented by the level of post-penitentiary relapse, that is, the number of persons having committed crimes after serving their sentence. The statistics, unfortunately, indicate that more than half of former prisoners commit the crimes again in the USA (Bykov, 2015), and the post-penitentiary relapse is up to 60% in the prisons in France (Utkin, 2016).*

*From our point of view, the efficiency of penitentiary system is influenced by the institution of pardon, which is stipulated by French law (Articles 133-7, 133-8 of the Criminal Code of France) (Bakulina, Bakulin, 2015) and the US law. As a rule, pardons commit secondary offenses fewer times than just those released or amnestied.*

**Key words:** penitentiary system of France; penitentiary system of the USA; effectiveness; departmental control; judicial review; prosecutor supervision; release on parole.

### Introduction

There are several different institutional models of correctional systems in the world. According to the correctional system belonging to a particular state agency, N. P. Kovalyov points out five models of organization of such systems:

1) the model in which the correctional system is fully accountable to the Ministry of Internal Affairs or its equivalent (Spain, Israel, Kuwait, Lebanon, Belarus, Uzbekistan, Turkmenistan, Singapore, Egypt, Mexico, Uruguay, England - until 2007, Russia - until 1988, etc.).

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2) the model in which the correctional system is fully administered by the Ministry of Justice (Russia, USA, Austria, Belgium, Germany, Italy, France, Czech Republic, Sweden, Japan, Chile, Turkey, Morocco, Liberia, etc.)

3) the model in which the correctional system is administered by the joint Ministry of Justice and Internal Affairs (Police) - it usually includes the countries with a small population - Andorra, Malta, Norway, Panama, El Salvador, Suriname and Switzerland.

4) a model in which the correctional system is under the jurisdiction of a separate state department that is not under the control of the Ministry of Justice or the Ministry of Internal Affairs, but is directly accountable to the head of the government or state. South Africa and Ukraine are among such countries.

5) a mixed model in which different types of punishments or coercive measures are under the jurisdiction of various departments: the penitentiary institutions, holding the convicted persons, are under the jurisdiction of the Ministry of Justice - China, Iraq, Kazakhstan .

Accordingly, the penitentiary systems are more accessible for the control and supervision, especially for the public, referring not to the militarized, but to the civil department, i.e. the Ministry of Justice.

## **Methods**

As already noted, the French penitentiary system is under the jurisdiction of the Ministry of Justice, which includes a special Penitentiary Administration Directorate (an analogue of the Russian Federal Penitentiary Service).

The structural penitentiary system of France, according to Sleptsov I.V., consists of 8 regional directorates; missions of overseas territories; 188 penitentiary institutions (detention houses, central prisons, detention centers, penitentiary centers, semi-free autonomous centers); 102 rehabilitation and probation services; service of penitentiary employment and the National School of Penitentiary Administration.

It should be assumed that the departmental control over penitentiary institutions is administered by the Directorate of the Penitentiary Administration of the Ministry of Justice of France.

The penitentiary institutions of France are also available for public control, and in particular for the non-governmental organizations such as the National Association of Prison Visitors, the French Red Cross, Catholic Relief, etc., which monitor the observance of human rights and assist the administration in working with prisoners.

The visit to prisons by way of charity was the only form of public participation in the affairs of penitentiary institutions until 1945. According to Kalinin Yu.V., the so-called social prison service was created in 1945. Its staff provides assistance to the families of prisoners (working with children, applying for various payments to a prisoner or his family, etc.) and contributes to the preservation of family ties. Another form of public participation in the re-socialization of prisoners is the visit to prison facilities by the members of various



mutual social aid societies.<sup>1</sup>

According to the reports of the European Committee for the Prevention of Torture, there are no problems with prison overcrowding in France in general, but there are such problems as excessive violence against prisoners on the part of personnel, violence among prisoners, a high percentage of prisoners with drug addiction and AIDS.

It is no coincidence that in 2010 the General Controller of detention facilities, Jean-Marc Delarue, described a French prison with such words that have become world-famous: "Anarchy, cruelty, poverty and humiliation of dignity".<sup>2</sup>

Great attention is paid to judicial control over the execution of sentences in France. Prisoners are the persons with limited legal status due to a court verdict, but at the same time they are the holders of a whole range of rights not subject to deprivation and restriction by national legislation. In this case, the role of judicial control is not to allow excessive infringement of the rights and freedoms of prisoners and especially not to violate the rights and freedoms that have not been deprived and restricted by the state.

A state that dominates a person deprived of liberty also cares about the need for public security, so a person is placed in unequal conditions with regard to the protection of his rights. Ultimately, the purpose of judicial control is to restore the protection of this individual and his rights, primarily by examining the complaints of prisoners.<sup>3</sup>

A distinctive feature of the French penitentiary system is the presence of a judge, executing punishments (penitentiary judge), who, on the basis of the Criminal Procedure Code of France, has the authority to intervene in the process of serving and executing criminal penalties and security measures.

He resolves the issue of changing the regime for holding convicts to deprivation of liberty, granting leave, release on parole, etc.

The right to apply the release on parole is imposed on the penitentiary prisoner and the Minister of Justice of France. If the convict is sentenced to imprisonment for a term of up to five years, the decision is taken by the judge, and if the appointed term exceeds five years, the release on parole is provided by the Minister of Justice. However, in the latter case, the proposal on the release on parole is submitted by the judge taking into account the opinion of the penitentiary commission, and then all the necessary documents are sent to the Minister. In any case, it should be asked the prefect's opinion of that department, in which the convict intends to move after release. After the expiration of the established term, the serving of which may be the basis for the release on parole, "the situation of each convict is investigated at least once a year (Article 730 of the Criminal

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<sup>1</sup> Yu. V. Kalinin Yu.V. 1978. "The Prison System of France," in *Jurisprudence*, V (1978), p. 59.

<sup>2</sup> P. V. Teplyashyna, "The French Type of European Penitentiary Systems," in *Bulletin of the Samara Juridical Institute of the Federal Penitentiary Service of Russia*, I (2016), no. 19, p. 68.

<sup>3</sup> S. M. Zubarev, *Control over the Personnel Activities of the Penitentiary System in Russia*, Moscow, Monograph, 2005, p. 89.

Procedure Code of France).<sup>4</sup>

On the basis of the foregoing, we can make a conclusion on the peculiarities of the control and supervisory functions over the French penitentiary system, which is characterized by a combination of two types of control - judicial and departmental - when applying the release on parole. In this regard, we consider this practice to be cumbersome, inexpedient and corrupt, since the issue of release on parole should be solved by the body prescribing punishment, which should, in addition, release from it, rather than the Minister of Justice reporting for the penitentiary system. Moreover, this statement is consistent with Article 110 of the Rome Statute of the International Criminal Court, which states that only the International Criminal Court has the exclusive right to decide on any reduction in the term of punishment imposed.<sup>5</sup>

The Russian Federation signed the Rome Statute, but did not approve it. And France both signed and ratified the Rome Statute. Of course, the International Criminal Court considers a certain category of criminal cases (genocide, crimes against humanity, war crimes, etc.), but the French justice cannot ignore the provisions of permanent institute of international criminal justice. According to A. Ashves, the unified European law has a greater legal force than the national law. The reason for this is the fact that the International Criminal Court has been formed precisely for the implementation of this right and on the basis of respect for fundamental human rights.<sup>6</sup>

The French prosecutor's office is attached to the courts and is supervised by the Minister of Justice. The judges and prosecutors are called magistrates in France. The prosecutor's powers include the investigation of criminal cases, maintenance of prosecution in court, issuance of opinions, as well as supervision over legality in the places of their subordinate territories.

So, the control over the activities of penitentiary institutions is carried out by the higher authorities of the penitentiary system, - the court, the prosecutor's office, the local authorities (special supervision commissions chaired by the prefects), and the non-governmental (public) organizations.

The penitentiary system of the USA is under the jurisdiction of the Ministry of Justice, which is headed by the US Attorney General, since 1872.

The structure of the US Department of Justice includes, in addition to other law enforcement agencies, the Federal Bureau of Prisons, the Marshals Service, the Department of Punishment, Control, Detention, Registration and

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<sup>4</sup> R. M. Zhylyayev, E. V. Pavlova, I. N. Medvedeva, 2014. "A Brief Analysis of the Legislation of Foreign Countries Governing the Issues of Parole", in *Criminal-Executive System in the Modern Society and Prospects for its Development (dedicated to the 135th Correctional System and the 80th Anniversary of the Academy of the Federal Penitentiary Service of Russia): Collection of the Speaking Notes of the Participants of the International Scientific and Practical Conference (Ryazan, November 2014): In 2 Volumes*, vol. 1, Ryazan, Academy of the Federal Penitentiary Service of Russia, 2014, p. 399.

<sup>5</sup> The Rome Statute of the International Criminal Court. – URL: [http://www.un.org/ru/law/icc/rome\\_statute\(r\).pdf](http://www.un.org/ru/law/icc/rome_statute(r).pdf), accessed on 12. 07. 2017.

<sup>6</sup> A. Ashworth, *Principles of Criminal Law*, 3<sup>rd</sup> edition, New York; Oxford, Oxford University Press, 1999, p. 63.

Tracing of Persons Committed Sexual Offenses, etc.<sup>7</sup>

The law enforcement activities of the US Department of Justice and its agencies are comprehensively regulated by the federal legislation.

There are about 2.3 million prisoners in the USA, i.e. each 99th adult resident. More than 60% of prisoners are the representatives of racial and ethnic minorities. The terms of imprisonment are 5 times higher in the USA than in Canada and 10 times higher than in Japan. 25% of prisoners in the world are in the USA. According to the American Bar Association, the problem of the US penitentiary system is the overpopulation of prisons. Lack of independent supervision, excessively severe sanctions against racial minorities, violation of prisoners' rights, especially in private prisons, problems of solitary confinement in cells, rapes, which led the US Congress to adopt a law on the prevention of rapes in prisons and establish the National Commission on Eradication of Rapes in Prisons in 2003.<sup>8</sup>

Nevertheless, the total epidemic of rapes continues in the American prisons. In 2012, the US Department of Justice released a report, according to which 20,900 people were raped in the US prisons in 2008.<sup>9</sup>

On the basis of this characteristic, it can be concluded that there is no proper attention and, consequently, control over the penitentiary system in a highly developed, legal and democratic state.

At the same time, it should be noted that after all the control and supervisory activities over penitentiary system are carried out in several forms (types) in the USA.

The departmental control over the US penitentiary system, and in particular over the federal prisons, is exercised by the Federal Bureau of Prisons and a special department under the General Inspector of the US Department of Justice. Control over the state and county prisons and observance of prisoners' rights is carried out by the Department of Special Civil Processes of the US Ministry of Justice, established in 1980.

The US Marshals Service (an analogue of the Bailiff Service of Russia) makes searches, arrests, secures the participants in the judicial process, transports prisoners and arrested persons, controls the observance of the rights and freedoms of these people before they are placed in a correctional institution on the basis of court orders.

The US Parole Board reviews and resolves the issues of parole for the persons serving sentences for violation of federal laws.<sup>10</sup> Therefore, the court examines and resolves the issues of parole for the persons serving sentences for

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<sup>7</sup> US Department of Justice. [ru.wikipedia.org/wiki/Министерство\\_юстиции\\_США](http://ru.wikipedia.org/wiki/Министерство_юстиции_США), accessed 12. 07. 2017.

<sup>8</sup> A. V. Babushkin, 2011. US Legal System. [av-babuskin.livejournal.com/5590.html](http://av-babuskin.livejournal.com/5590.html), accessed 12. 07. 2017.

<sup>9</sup> Sexual Violence in Prison: Global Crisis of the Human Rights. [\justdetention.org/wp-content/uploads/2015/11/international.Summary/Russian.pdf](http://justdetention.org/wp-content/uploads/2015/11/international.Summary/Russian.pdf)., accessed 12. 07. 2017.

<sup>10</sup> V. N. Dodonov, E. N. Primova, T. A. Reshetnikova, S. P. Shcherba, *Organization and Activities of the Prosecution Authorities of Foreign Countries. Informational and Analytical Reference Book*, Moscow, Yurlitinform, 2010, p. 180.

violation of state laws.

The Civil Rights of Institutionalized Persons Acts (CRIPA Act, 1980) establishes the possibility of exercising judicial control over the US penitentiary institutions in the event of inadequate conditions of detention and violation of the rights and freedoms of prisoners. But at the same time, the CRIPA Act limits the prisoners to file complaints directly with the court. Before exhausting the methods of administrative settlement, according to Babushkin A.V., the prisoners have no right to bring an action to court, and inaction or negligence of the state to the procedure of handling complaints is not a ground for filing an action.<sup>11</sup>

According to the Federal Bureau of Prisons, 11% of prisoners served sentences in the private prisons as of October 2016.<sup>12</sup> The control and supervisory bodies are experiencing rather large difficulties when visiting these institutions.

The so-called prosecutor's supervision is exercised by the US Attorney General and his office, which supervises the execution of court decisions in criminal cases of federal jurisdiction.

The financial control over the expenditure of funds is entrusted to the US General Supervision Office in the penitentiary system (an analogue of the Accounts Chamber of the Russian Federation). The groups of the General Supervision Office are available in many US ministries, including the US Department of Justice.

## **Conclusions**

A distinctive feature of the US legal system is the priority of US national legislation over the international treaties involving the USA.

Besides that the US legislation has primacy over the international law (by the way, in recent years the issue of supremacy of the international law has been revised in the Resolution of the Constitutional Court of the Russian Federation dated July 14, 2015), the USA does not particularly seek to sign and ratify the international human rights treaties.

As of 2012, the USA signed and ratified the Convention on Elimination of All Forms of Racial Discrimination, 1965, the International Covenant on Civil and Political Rights, 1966 and the Convention against Torture, 1984 out of a large number of international human rights treaties stipulating the supervision mechanisms. The International Covenant on Economic, Social and Cultural Rights, 1966, the Convention on the Rights of the Child, 1989, etc., were not ratified.<sup>13</sup>

## **Summary**

1) The effectiveness of the institution of control and supervision over penitentiary systems depends to a large extent on the institutional model of penal

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<sup>11</sup> A. V. Babushkin, "The Prison Supervisory System in the USA" \livejournal.com\4709.html, accessed 12. 07. 2017.

<sup>12</sup> Federal Bureau of Prisons. Official Web-Site of the FBI. URL: <http://www.bop.gov/about/agency/>, accessed 12. 07. 2017.

<sup>13</sup> Report of the Ministry of Foreign Affairs of the Russian Federation on the Situation on the Provision of Human Rights in the United States of America. Moscow, 2012. [www.gay.ru/miscldocs/o\105\\_938021.pdf](http://www.gay.ru/miscldocs/o\105_938021.pdf), accessed 12. 07. 2017.

system existing in a given country both abroad and in Russia. The Institute of Control and Supervision is more developed in those countries in which the penitentiary system is under the jurisdiction of the Ministry of Justice.

2) A special feature of the control and supervisory functions of the French penitentiary system is the combination of two types of control - judicial and departmental when applying the release on parole. The issues of release on parole should be solved by the authority prescribing punishment, i.e. the court.

3) The factual information established in the analysis of the US penitentiary system speaks of the weakness of both international and departmental and judicial control and the inability to ensure the convicts' right to personal security.

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**Custom In The System Of Sources Of Entrepreneurial Law Of The Russian Federation And International Practice  
(By The Example Of The Eeu)\***

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**Abstract.** *This article is devoted to a comparative analysis of the provisions of civil legislation of the member states of the EEU on custom regulation. The author concludes that the norms contained in the mentioned sources of law have a number of differences complicating the process of carrying out activities aimed at extracting profits within the framework of the integration association under consideration. The solution of the formulated problem is seen by the author in the rapprochement of corresponding norms of civil legislation of the member states of the Union. The first option of such rapprochement consists in the harmonization of the provisions of national civil legislation with regard to the norms on customs through the introduction of appropriate changes and amendments to it. The essence of the second option is reduced to the development and adoption of a unified codified certificate for the member states of the Union - the Fundamentals of Civil Legislation of the EEU. The document offers to strengthen the compulsory observance of the prevalence criterion in the territory of each member state of the Union in custom application.*

**Key words:** EEU, custom, entrepreneurship, custom of business turnover, harmonization.

### **Introduction**

In 2015, the territories of five states located in the Eurasian region were merged into the Eurasian Economic Union (hereinafter - the EEU, the Union), whose membership presupposed the deepest degree of integration - the rapprochement of the economies of its member countries. L. Metcalf Kendall rightly points out that the cooperation benefit depends on its depth.<sup>1</sup> Therefore, the interaction of the member countries of the EEU is potentially the most beneficial for each of them. The economic aims of integration within the Union are also considered by such foreign authors as.<sup>2</sup>

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> L. K. Metcalf L.K. 1997. "The (Re)Emergence of Regional Economic Integration In the Former Soviet Union," in *Political Research Quarterly*, L (1997), no. 3, p. 529-549.

<sup>2</sup> S. Balakishi, "Eurasian Economic Union: Russia's New Foreign Policy in the South Caucasus," Working Paper No. 2016/1. Available at: <https://www.msm.nl/resources/uploads//09/MSM-WP2016-1.pdf>, accessed 12. 07. 2017.

R. Dragneva R., K. Wolczu 2013. *Eurasian Economic Integration: Law, Policy and Politics*, Birmingham, University of Birmingham Publishing House; K. Czerewacz-Filipowicz, A. Konopelko, *Regional Integration Processes in the Commonwealth of Independent States: Economic and Political Factors*, London, Springer, 2016; A. Jarosiewicz, 2015, The Eurasian Economic Union – more political, less economic. Available at: <https://www.osw.waw.pl/en/publikacje/osw-commentary/2015-01-20/eurasian-economic-union-more-political-less-economic>, accessed 12. 07. 2017; S. Klimanskis, 2016, Eurasian Economic Union - reality or fiction? Available at: <http://en.delfi.lt/opinion/eurasian-economic-union-reality-or-fiction.d?id=72>, accessed 12. 07. 2017. N. Popescu, N. 2014. "Eurasian Union: the real, the imaginary and the likely," in *Chaillot papers*, VL (2014), 45 p; J. Sijbren, 2016, The Eurasian Economic Union and the European Union: Geopolitics, Geo-Economics and Opportunities for Europe. Available at:

The objectives of the Union creation are as follows: the formation of a single market space providing the right for unimpeded movement of goods on its territory. The embodiment of the idea of economic unification of states becomes possible only if the legal component is carefully worked through. This means the expediency of creating a legal framework that is the basis for a uniform regulation of business relations in each of the member states of the EEU. In our opinion, such uniformity is achieved by harmonizing sources of legal norms aimed at improving relations in the analyzed sphere.

A special role in regulating relations with the participation of entrepreneurs is given to customs. Undoubtedly, the customs are applied in the process of carrying out commercial activities between the business entities located on the territory of different member states of the EEU.

At the same time, the issues about applicability of customs formed in the domestic market to legal relations arising between the entrepreneurs located in the member states of the Union require an unambiguous answer. So, for example, can a Russian entrepreneur refer to a custom formed in the Russian law and formulated as follows: "may the claim be sent by any means of communication that allow providing proof of sending, and not only by paper mail (Regulations of the Federal Arbitration Court of the North-Western District dated June 17, 2011 in case No. A56-40156/2010) <sup>3</sup>" in the court located on the territory of any other member state of the EEU? Will this custom be considered applicable when considering a foreign economic dispute within the framework of the specified integration association? The development of answers to these questions is of fundamental importance because they determine the presence or absence of grounds for the onset of civil liability.

The foregoing allows us formulating the research objective: a comparative legal analysis of the rules of law of the member states of the EEU, establishing a legal status of the custom, aimed at forming the reader's view on the procedure for regulating the entrepreneurial relations with its help and making proposals for their harmonization.

At the time of the study, its relevance became particularly important due to an increase in the number of trade ties between the member states of the Union. So, for example, the import of manufactured goods and agricultural raw materials for their production from the Republic of Belarus to Russia grew from 2,100 mln. US dollars in January-August 2015 to 2,941 mln. US dollars in January-November 2016. In 2016 the figures showed a turnover increase between the countries noted, which was a prerequisite for the emergence of a greater number of disputable situations compared to the previous period and, as a consequence, the need for better entrepreneurship regulation.

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<http://www.sieps.se/en/publications/european-policy-analysis/the-eurasian-economic-union-and-the-european-union-geopolitics>, accessed 12. 07. 2017.

<sup>3</sup> V. Orobinsky, 2013, "Encyclopedia of Customs," in *EZh-Yurist*, IXL (2013). The document is provided by Consultant Plus.



## Materials and methods

The presented research was based on the data formulated in the doctrinal and legislative sources of the member states of the EEU. The methodological research base consists of the methods of analysis, synthesis<sup>4</sup> and comparative comparison.

## Results

The states being the EEU members are characterized by a Romano-German monistic system of law. This means that the leading role in the regulation of business relations is given to legislative acts, where the civil codes occupy the central place. The Civil Codes of the member states of the Union, being sources of norms that outline the legal framework for the entrepreneurship existence, contain the following provisions defining the legal status of custom:

1) the Civil Code of the Russian Federation<sup>5</sup>: Art. 5 is devoted to the custom in the specified codified regulatory legal act. A refusal of the Russian legislator to use the term "custom of business turnover" and the use of a more general "custom" concept is of fundamental importance. The following features of the custom are specified in the article:

a) it is a regulator of social relations arising in different spheres, including the implementation of entrepreneurial activities and activities of a different kind;  
b) it is not stipulated by law;  
c) the custom is to be applied irrespective of whether it is fixed in any document.

2) the Civil Code of the Republic of Armenia <sup>6</sup>(*hereinafter - the CC RA*): Art. 7 of the CC RA, which fixes the term "custom of business turnover", is devoted to the analyzed legal category. The custom characteristics reproduce its features fixed in the CC RF: similar to the provisions of Art. 5 of the CC RF, the Armenian legislator recognizes the custom as the rule of conduct that has been developed and widely applied in any area of business activity, which is not stipulated by law, regardless of its fixation in any document. Para.2 of Art. 7 of the CC RA establishes a restriction on the application of customs of business turnover, which contradict the mandatory provisions of the law and the contract.

3) *the Civil Code of the Republic of Kyrgyzstan* (The Civil Code of the Kyrgyz Republic dated 08.05.1996 No. 15 (Part One) (as amended on 16.12.2016)) (*hereinafter - the CC RKg*): the main custom characteristics are fixed in Art. 4 of the CC RKg. The Kyrgyz legislator, like the Armenian legislator, retained the term

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<sup>4</sup> E. Barnett-Page, J. Thomas, "Methods for the synthesis of qualitative research: a critical review". Available at: <http://eprints.ncrm.ac.uk/690/1/0109>, accessed 12. 07. 2017.

<sup>5</sup> \*\*\*, "The Civil Code of the Russian Federation (Part One) dated 30.11.1994 No. 51-FZ (as amended on 07.02.2017)," in *Official Gazette of the Russian Federation*, no. 32, 05. 12. 1994. p. 3301.

<sup>6</sup> The Civil Code of the Republic of Armenia dated 17.06.1998 (as amended on 30.12.2015). – Access mode: [http://online.zakon.kz/Document/?doc\\_id=31420016#pos=0;400](http://online.zakon.kz/Document/?doc_id=31420016#pos=0;400), accessed on 12. 07. 2017.

"custom of business turnover". The rest of the provisions of Art. 4 of the CC RKg reproduce the meaning of Art. 7 of the CC RA.

4) *the Civil Code of the Republic of Kazakhstan*<sup>7</sup> (hereinafter - *the CC RK*): the custom definition is given in Art. 3 of the CC RK and has a number of differences from the relevant provisions of codified regulatory legal acts that are the sources of private law of the above countries. The essence of differences is as follows:

a) the Kazakhstan legislator applies both terms - "custom" and "custom of business turnover". Using the word "including", the customs of business turnover are included in the number of customs. Thus, the CC RK allows using the custom to regulate the civil legal relations, while emphasizing the custom of business turnover in order to improve relations in the field of entrepreneurship;

b) the custom is not subject to application in the territory of the Republic of Kazakhstan, if it contradicts the current legislation. Contradiction to the contractual provisions as a restriction to the application of the analyzed legal category in the CC RK is not established.

5) *the Civil Code of the Republic of Belarus*<sup>8</sup> (hereinafter - *the CC RB*): The CC RB does not contain an independent article devoted to the legal regulation of custom. The term "local custom" is found in Art. 222 of the CC RB, which determines the appropriation procedure for the public property. By virtue of the norm laid down in the specified article of the CC RB, in cases when, along with other grounds, the local custom allows picking berries, catching fish in forests, water basins, etc., the ownership of things is acquired by a person, having carried out their picking or catching. In accordance with Art. 1093 of the CC RB, the international customs not contradicting the legislation of the Republic of Belarus, among other sources, may serve as a basis for determining the law that is subject to civil legal relations involving foreign citizens or foreign legal entities or complicated by another foreign element.

The foregoing testifies to the diversity of approaches to regulating custom in the member states of the integration association under consideration. The main differences are as follows:

a) the custom definition as an independent source of norms regulating private legal relations is not fixed at the level of the CC RB in the Republic of Belarus; custom is not a source of law in the Republic of Belarus;

b) heterogeneity of the terminological apparatus;

c) differences in the list of grounds excluding the use of the analyzed source of law.

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<sup>7</sup> \*\*\*, "The Civil Code of the Kyrgyz Republic dated 08.05.1996 No. 15 (Part One) (as amended on 16.12.2016)," in *Journal of the Jogorku Kenesh of the Kyrgyz Republic*, VI (1995), p. 80.

<sup>8</sup> \*\*\*, "The Civil Code of the Republic of Kazakhstan (General Part), adopted by the Supreme Council of the Republic of Kazakhstan on 27.12.1994 (as amended on 26.07.2016)," in *Journal of the Supreme Council of the Republic of the Republic Kazakhstan*, no. 23-24 (1994), Appendix, and no. 15-16 (1995), art. 109, no 20 (1994), art. 121.

In addition, attention should be paid to the differences in customs that have developed in different member states of the EEU and reflect their specificity (national, linguistic, conditioned by the population mentality, legislation specificity). So, for example, there is a reference to the custom of blood feud in the law of the Republic of Kazakhstan.<sup>9</sup>

The identification of formulated discrepancies raises a reasonable question: how much they interfere with the interaction between entrepreneurs registered in the member states of the Union. We believe that the described difference in approaches to the regulatory consolidation of custom may create certain difficulties in the process of implementing the interstate trade relations.

*Firstly*, in the case of indicating the use of custom to regulate relations arising from the contract concluded between the business entities located in the member states of the EEU, whose laws differ in terminology, it is not clear which concept should be used: "custom" or "custom of business turnover". The application of a category not contained in the state law of one of the parties to the contract will require clarification of its meaning in order to exclude the double understanding by this party.

*Secondly*, in case when the party to the contract is an entrepreneur registered in the Republic of Kazakhstan, the law of the given state is applicable; then it is possible to use a custom that is contrary to the contract. Such an approach may serve as a prerequisite for depriving the other party of the possibility of fully enjoying the rights granted to it by the contract.

*Thirdly*, the custom characterization as "prevailing and widely used" in some area is reflecting the custom essence, but hindering its use in practice at the same time. In this case, it is of fundamental importance to clarify whether the custom should be widely applied in each of the states where its subjects are located for recognizing it as a regulator of relations arising from a contract concluded by the entrepreneurs within the framework of the EEU. Or, in other words, when determining the applicability of custom to specific relations, it should be decided whether it should be widely used in the civil circulation of each country, which is the party to the contract. In our opinion, the expediency of finding the answer to this question is obvious and lies in the entrepreneur's responsibility, which can be imposed on him based on the content of the source of law under consideration.

The answer to the above question can be formulated based on two directions:

a) the principles of conscientiousness and reasonableness lying in the plane of positive law and forming the basis for carrying out activities aimed at making profit, in which it cannot be right to involve a person in civil liability in accordance with a custom that is not established in the legal order of his country from the moral and ethical point of view.

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<sup>9</sup> Regulatory Resolution of the Supreme Court of the Republic of Kazakhstan dated 11.05.2007 No. 1 "On Classification of Certain Crimes against Life and Health" (as amended on 21.04.2011). – Access mode: <https://www.zakon.kz/88024-normativnoe-postanovlenie-verkhovnogo.html>, accessed 12. 07. 2017.

For example, let us simulate the situation: the supply contract is concluded between the business entities registered in the Russian Federation and the Republic of Kazakhstan. In Kazakhstan, in view of the fact that Kazakh is the official language and Russian is used along with it as a language of interethnic communication, all official documents, including correspondence, have traditionally been executed in two languages. This approach can be characterized as a custom in the field not related to the implementation of functions by the organs of state apparatus. Based on the mentioned principles of business organization, in the event of a dispute, bringing a Russian entrepreneur to liability for the lack of contract translation into Kazakh cannot be considered reasonable, since this custom is inherent in Kazakhstan's reality and cannot be widely applicable in the Russian Federation, so it cannot be familiar to the entity created and operating on its territory.

b) Definitions of the rules governing contractual relations, following the content of the law applicable to the contract. In this case, the sources of law of the relevant state are subject to application, regardless of their common knowledge for the subjects of commercial turnover that are parties to the contract. Let us illustrate this thesis by the following example. If parties have chosen the right of the Russian Federation as the applicable one, the norms established in the relevant sources of the Russian law and order will be applied in the settlement of the disputed situation. This means that the customs formed during the implementation of activities aimed at extracting profits in the territory of the Russian Federation will be recognized as regulators of the contractual relations illustrated. So, in this case, regardless of whether the custom of the country-counterparty is properly executed, it will be applied the custom the essence of which is as follows: if the party evades to draw up of the act when performing the contract or causing damage outside the contract, the second party shall have the right to draw up the act unilaterally with the mark "refused to sign". And such an act will be appropriate.

Thus, in the first direction, a compliance with the sign of applicability in the territory of each of the states becomes mandatory for the custom. Within the second one, this criterion is not necessary, since the custom regulates business relations as part of other sources of law, integrated into its system.

### **Conclusions**

Summarizing the above, we note that the approaches to understanding the custom and the designation of its essence, formulated in the law of the member states of the EEU, need a rapprochement that can be carried out in two ways:

a) by the harmonization of the provisions of national civil legislation with regard to the norms on customs through the introduction of appropriate changes and amendments to it;

b) by the development and adoption of a unified codified certificate, being a private law source, for the member states of the Union - the Fundamentals of Civil Legislation of the EEU. We consider it expedient to write out clear characteristics of the "custom" concept, including "custom of business turnover" in

the document, where, in our view, should be indicated the mandatory observance of its prevalence criterion in the territory of each of the member states of the interstate association being analyzed. In this case, it will be possible to observe the principles of good faith and reasonableness when carrying out business activities within the framework of the EEU, which will entail the expansion of trade ties between its member states, due to the stability of commercial turnover and the predictability of the level of responsibility within it.

### **Summary**

The custom, along with other sources of legal norms, is the regulator of business relations between the entities registered in the member states of the EEU. The existing discrepancies in its regulation in the national legislations of these countries testify to the need to bring their provisions closer, since in this case it will be possible to avoid complicating the law enforcement practices creating obstacles to the further development of trade relations within the Union.

*Custom In The System Of Sources Of Entrepreneurial Law Of The Russian Federation And International Practice (By The Example Of The Eeu), Astra Salvensis, V (2017), no. 10, p. 43-49*

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## **Peculiarities Of Legal Status Of Civil Legal Communities In Housing Legal Relations\***

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**Abstract.** *This article represents and defines the concept and legal nature of the status of "civil legal communities" in a special socially significant sphere - housing legal relations, with the purpose of further effective application of this legal category in lawmaking and law enforcement activities.*

*The general methodological basis was formed by the general scientific (dialectical) method of cognition, comparative-legal, logical methods that allowed considering the problems of legislation development in the sphere of establishing the legal status of a special subject of housing legal relations.*

*We revealed the peculiarities of interbranch legal regulation of relations connected with the establishment of their legal status. We considered the approaches of Russian and foreign law enforcement practice on ensuring the protection of interests of the owners of multi-apartment buildings, their interests and some other aspects.*

*We made some attempts to formulate the concept of civil legal communities in the housing sphere, determine their legal nature, and find the ways to resolve existing theoretical and practical problems.*

**Keywords:** Civil legal communities, owners of multi-apartment building, multi-apartment building, maintenance of common property, decision of the meetings.

### **Introduction**

The legal entities are traditionally distinguished as entities designed to express the interests of a certain community of individuals in a clearly defined system of coordinates of the subjects of law. They are the collective subject of law endowed with the necessary tools for carrying out the activity objectives and expressing the private interests of their founders and participants. Meanwhile, the reality and requirements of civil turnover "demonstrate" the presence of subjects united by a common goal or condition, therefore forming a special formation, a "team" that does not fit, however, into the customary general theoretical understanding in the legal field. It is this fact that explains the appearance of legal consolidation of this phenomenon - the category of "civil legal society" in the updated version of the Civil Code of the Russian Federation.

This transformation was a response to the need to produce long-overdue changes. However, this formation is noted as existing only in several norms of the basic civil law and only within the framework of invalidating the decisions of such formations. In the same context, we gave a general understanding of this phenomenon based on the meaning of para. 2 of Art. 181.1 of the Civil Code of the Russian Federation. This is a group of persons authorized to take decisions at the meetings with which the law relates civil legal consequences binding on all persons entitled to participate in such a meeting, as well as on other persons, if it is

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

established by law or derived from the relationship substance.

At the same time, Art. 181.1 of the Civil Code of the Russian Federation does not define the civil legal community, does not name its characteristics, but only fixes an open list of communities, referring to them the participants of a legal entity, creditors in bankruptcy, and co-owners. From this textual filling of the norm it follows that, at a minimum, it is possible to single out the civil legal communities of participants of a legal entity, co-owners and creditors in bankruptcy.

Taking into account the developing principle of autonomy of the will of co-owners of multi-apartment buildings (hereinafter referred to as the "MAB") and the list of issues, which has been significantly increased in the recent past and resolved by them through the coordination of their wills, the need for studying the civil legal communities of the co-owners of real estate (apartment buildings) receives great importance in the housing sphere.

Given the obvious urgency and prevalence of this phenomenon, the set of problems encountered in judicial practice, as well as the "vital" issues about this formation in the housing law have not been resolved neither in theory nor in law. Moreover, a direct interpretation of current legislation makes it possible to raise the issue by the verge of the very possibility of considering the MAB co-owners as a community.

## **Methods**

There are some issues of managing the multi-apartment buildings absolutely in all countries of the world, if more than one owner (in own separate premises) resides in them. And this necessarily affects the regulatory material. Here it should be noted that the same design, in view of the wide distribution of housing leased, is also relevant for tenants who are legally entitled to solve certain issues of the general content of property of the whole building.

Foreign experience demonstrates a considerable scatter in the understanding and design of such formations. In general, the concept of "unification of homeowners" has become a kind of generalizing concept of various legal forms of housing cooperation existing in other countries. For example, such as: Planning Unit Developments (PUD), Condominium Associations, Housing Cooperatives in the USA and Canada; syndicates in France; apartment public companies in Finland; of multi-apartment building co-owner associations (MABCOA) in Ukraine; homeowner associations (HOA) and housing and construction cooperatives (HCC) in Russia law.<sup>1</sup>

However, despite such a significant extension of the legal entity's structure in the housing sector in foreign countries, it should be noted that the rule-making and law enforcement practice in the countries of the German-speaking legal circle of the Romano-German legal family reveals a tendency of the MAB co-owners to separate into a special group of participants in civil legal relations, with the

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<sup>1</sup> G. Buchda *Geschichte und Kritik der deutschen Gesamthandlehre*, Marburg, 2005, p. 294. \*\*\*, *European Condominium Law*, Cambridge, Cambridge University Press, 2015; B. Schneider, *Das schweizerische Miteigentumsrecht*, Bern, 1973, p. 209.



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attribution of the status of either a legal entity (Austria) or a quasi-legal person (Germany, Switzerland). The association of co-owners, which does not have the status of a legal entity, is called a legal community. The concept of "legal community" is not defined in the German Civil Code or the Swiss Civil Code, although these legal acts operate on them.

Thus, in order to develop an approach to the provision of housing and communal services, Russia can also apprehend the international experience, tested in decades, in this context.

### **Results and discussion**

The civil legal community is different from other subjects of law in the absence of a legal personality of this person inherent in other collective formations (for example, legal entities), therefore the community is characterized by a lack of legal capacity, inability to act as a plaintiff and defendant in court, etc. Therefore, at the moment the legal material does not represent any clear understanding of the very nature of this category, and, therefore, the concept of the civil legal community is rather conditional, taking into account also the fact that para. 1 of Art. 181.1 of the Civil Code of the Russian Federation does not make the list of community members closed. In this context, the community participants are the bearers of rights and obligations themselves. However, according to the provisions of the Housing Code of the Russian Federation, an essential set of rights and duties is vested with the general meeting of the MAB residents, the decision is made only in case of coordinating the wills of several subjects.

This kind of theory includes the theory of membership, the essence of which is that the common unified law can be implemented only through the community creation.<sup>2</sup> The community is an independent bearer of law, therefore it has legal capacity.<sup>3</sup> The legal community participants can only have the rights that are separate from this community.<sup>4</sup> Thus, participation in the community of owners is considered as the right to membership.

A. Sanger, highlighting the basic idea of the theory of membership, noted that "there is no division of law both in the community of shared and joined owners. A community is a subject of joint, full right. The right of a co-owner is not identical with common law, that is, the co-owner is not the owner".<sup>5</sup>

However, the theory of membership is more relevant for such collective subjects of law as legal entities, essentially specially and voluntarily initiated and created subjects of law. While the civil legal community of owners (officially mentioned in the Civil Code of the Russian Federation) is actually a forced combination of various subjects, since the decision on the common property

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<sup>2</sup> G. Buchda, G, *Geschichte und Kritik der deutschen Gesamthandlung*, Berlin, p. 294.

<sup>3</sup> F. Fabricius, *Relativität der Rechtsfähigkeit*, Bern, 2005, p. 139.

<sup>4</sup> N. Hilger, *Miteigentum der Vorbehaltslieferanten gleichartiger Ware*, Göttingen, Schwartz, 1983. p. 61.

<sup>5</sup> A. Saenger A, *Gemeinschaft und Rechtsteilung*, Giessen, 1913, p. 117.

maintenance is possible only with the coordination of the wills of all participants, its form is the community structure mentioned above.

The generally recognized distinctive features of the community from legal entities are the lack of legal capacity, the inability to act as a plaintiff and a defendant in court, as well as the fact that certain co-owners are responsible to third parties.<sup>6</sup>

The concept of "civil society" is actively used (and mentioned above more than once) with respect to the owners of apartments located in the same building in theory and practice. In fact, it is already a "popular stamp". But is everything so smooth in this case?

The Civil Code of the Russian Federation indicates that the community is formed by the real estate co-owners. A simple analysis of current legislation demonstrates that the MAB (namely, they are most often associated with the studied quasi-subject formations) is "deprived" of the legislator's attention: it does not give the MAB concept at all (with one not very successful exception), and does not either define its legal status. Consequently, it is not an object of law (especially immovable), and the apartment owners, making it up, cannot be the "co-owners" according to the Civil Code of the Russian Federation. It is impossible not to make a reservation that the Housing Code of the Russian Federation establishes their share ownership in respect of the MAB common property, but further the same regulatory document grants the community a competence related to the management of the whole MAB, and not a part of it, intended for the maintenance of all residential real estate.

We believe, in the context of this work, that we first of all need to understand the legal regime of the MAB. The study of special works gives us an idea of the categorical "scattering" of theories on the issue stated.

We support those researchers who rationally point out that if an object (building) is "split up" into other objects (premises), the building preservation as a single (whole) object is automatically excluded (Tsydenov;2010. p. 220). This approach is also used in court cases: according to para. 8 of the Resolution of the Plenum of the Supreme Arbitration Court of the Russian Federation dated July 23, 2009 No. 64 "On Some Issues of the Practice of Considering Disputes on the Rights of Premises Owners to the Common Property of the Building"<sup>7</sup>, "if the building owner decides on the allocation of one or more of the building premises, then the building ownership as a whole ceases because of the loss of property legal regime. If one person becomes the owner of all premises in the building, it has the right to elect the legal regime of the building as a single object". Based on these arguments, a number of authors insist on a complete MAB exclusion from the list of objects of law.

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<sup>6</sup> U. B. Filatova, "Civil Legal Community of Co-Owners: Comparative Legal Research," in *Russian Justice*, II (2015), p. 18 - 20.

<sup>7</sup> \*\*\*, "Resolution of the Plenum of the Supreme Arbitration Court of the Russian Federation dated July 23, 2009 No. 64 "On Some Issues of the Practice of Considering Disputes on the Rights of Premises Owners to the Common Property of the Building," in *Bulletin of the Supreme Arbitration Court of the Russian Federation*, IX (2009).

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Legally, this postulate, of course, is true, however, it is clear to any sane person that the MAB is a tangible and existing subject of material world, an autonomous structure, a building. Moreover, the Housing Code of the Russian Federation repeatedly refers to the MAB as an independent object of law.

The position expressed in the Concept of the Development of Civil Legislation on Immovable Property (Concept of Development of Civil Legislation on Real Estate // Legal Reference System "ConsultantPlus") is also interesting. The building becomes a set of structures after premises isolation, according to the authors of the Concept: "Bearing and enclosing structures, interfloor overlapping, roof, foundation, engineering equipment, as well as so-called common areas (stairs, corridors, halls, etc.), connecting several rooms with each other or with the external boundaries of the building" (Proceedings of the Conference "Improvement of Legislation Regulating Real Estate Turnover". Concept of Development of Civil Legislation on Real Estate). In fact, according to the idea of its authors, the building still continues to exist as an object "from a technical point of view", and ceases to exist only from a legal point of view.

In fact, this position is intermediate, since if we are guided only by the position according to which the MAB does not exist as an object of civil law, we can also assert that there are no (constructive) elements of this apartment building.<sup>8</sup> The consequence of this approach is the conclusion about the insignificance of transactions aimed at the reconstruction, overhaul of the MAB, due to the absence of the latter in legal nature. The lack of such a legal framework as the common property of the apartment building was addressed by.<sup>9</sup>

Without going into further needs, it should be noted that the MAB should be recognized as an independent object in particular, it should be an independent and autonomous object of management (we will examine this category in more detail below) for the convenience of regulatory regulation. This is indirectly confirmed by the Housing Code of the Russian Federation.

The validity of such a position can also be confirmed by a purely practical argument. Virtually, constructively any residential and non-residential premise is only a space, "air" between constructive elements of the building, that is, the MAB itself. It is impossible to ensure the proper state of these components with complete lack of attention to the condition of residential and non-residential premises.

However, bringing the MAB to "the forefront" as an object does not mean that we offer to completely eliminate the importance of premises as the objects of law. We believe that it is necessary to adhere to the concept of "coexistence" of the building's and premises' conveyance. In this case, any building (including MAB) is not deprived of the status of the object of civil rights - the real estate object, but

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<sup>8</sup> S. P. Tsydenov, "Multi-Apartment Building as a Complex Real Estate Object," in *Leningrad Legal Journal*, II (2010), p. 212-225.

<sup>9</sup> E. A. Sukhanov, E.A. (2006). "On the Notion and Types of Real Estate Rights in Russian Civil Law," in *Journal of Russian Law*, XII (2006), p. 48.

acquires a special characteristic - becomes the summary, the aggregate of premises and the OISP. In this sense, the MAB can be characterized in terms of the term of "complex real estate object" used in civil literature, which is now called (but in fact the same) a "single real estate complex" (Art. 133.1 of the Civil Code of the Russian Federation).

This rule establishes that: "A real estate object participating in the turnover as a single object may be represented by a single immovable complex - a set of buildings, structures and other things that are inseparably linked physically or technologically, including line objects (railways, power lines, pipelines and others), unified by designation, or located on the same land plot, if the ownership of the aggregate of these objects as a single property object in general is registered in the Unified State Register of the Real Estate Property".

As we can see, the MAB falls under this definition completely, excluding the sign of the presence of mandatory state registration. Elimination of this discrepancy with respect to the entire housing stock is not a realistic task, both for time and material costs.

### **Summary**

Thus, the circle of participants of civil legal communities is open, the most common are the housing co-owner communities within a single building.

Moreover, the Housing Code of the Russian Federation has already prepared a sufficient basis for establishing a legal status of the community, at least through the enumeration of their rights and obligations. However, it is impossible to be the co-owners of a non-existing legal entity.

It seems that in this case the legislator can apply known techniques of legal method: in addition to the theory of fiction with respect to the legal existence of the MAB, it is necessary to supplement Article 15 of the Housing Code of the Russian Federation with the concept of MAB (recognizing it as an independent object of law), and to indicate that the rules of Art. 133.1 of the Civil Code of the Russian Federation should be applied in this case, unless otherwise follows from the law or the relationship substance.

Only in this case an object, real estate owned by the apartment owners will be legally present. It is also difficult to determine the object, the field of activity of the community itself without it. Turning to foreign experience, it should be borne in mind that this approach is supported by a significant number of law and order and mediates the successful implementation of these relations.

### **Conclusions**

Recognition of a certain kind of legal personality and legal consequences of the decisions of such non-personable civil society communities in the legislation corresponds to the existing needs of theory and practice, but the development of the scientific basis for developing an understanding of the essence of civil legal communities is at an early stage. The solution of this task will contribute to further improvement of the regulatory framework in this area, the solution of complex issues in the common property management, the mechanism for coordinating the

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will of owners of residential and non-residential premises within a single real estate object, the establishment of a unified understanding of the essence and features of representation in relation to such formations.

Carrying out a full and comprehensive further study will allow drawing up the conclusions on the essence and components of the legal status of civil legal communities, as well as identifying the existing problems in the legal regulation of relations in this area, which leveling will ensure timely and full-fledged protection of the rights of ordinary citizens.

*Peculiarities Of Legal Status Of Civil Legal Communities In Housing Legal Relations, Astra  
Salvensis, V (2017), no. 10, p. 51-57*

## The Alienation Of The Rights To Life And Health: The Institutional Dimension\*

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**Abstract.** *The article deals with the property rights of the individual at different levels: physiological, intellectual and spiritual. The alienation of the rights of intangible property was considered as one of the criteria required for its commercialization. In this research the intangible rights and alienation of material objects of the individual property were explored. Authors examined income alienation of objects from the perspective of the concomitant alienation of rights. In the article there are scientific methods: analysis, synthesis, abstraction and analogy. In the study of somatic alienation of rights a systematic approach and classification were applied by authors. We have identified types of somatic alienation of rights, as well as discussed the boundaries of somatic rights in different countries, which made it possible to draw conclusions on the possibility of commercializing somatic rights. In the transition to the information society of alienation physiological level does not lose its relevance, but is transformed using new technologies.*

**Keywords:** health, intangible property, donation, transplantation, alienation of property rights.

### Introduction

From the point of view of the institutional economics, the individual has a number of rights to tangible and intangible objects. There is a certain bundle of property rights, which includes a number of powers in relation to each object: possession, use, disposal (legal approach) or a bundle of 11 rights (A. Onore's classification). As a rule, the commercialization of property rights is directly related to the possibility of their alienation.<sup>1</sup> The purpose of this work is to consider the alienation of rights directly related to the individual, that is, the human capital is the object of these rights, and the individual is the subject of property rights.

Labor activity is inevitably connected with the alienation of rights to intellectual capital (highly intellectual labor) or alienation of human (biological) capital (physical labor). The alienation of rights to intellectual capital and copyright is a separate area of study. We will dwell on the issue of alienation of physical capital and the emergence of an intangible right to it (The Average Salary of a

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> T. G. Belozeroва, D. V. Lugovsky, R. A. Thagapso "Intangible Assets: Problems of Identification, Evaluation and Classification," in *Bulletin of the Adyge State University*, Series 5 Economivs, V (2014), no. 3, p. 190; M. A. Bukhareva, "Economic behavior of the Individual as a Phenomenon of the Institutional Economics," in *Actual Problems of Economics and Law*, IV ((2009), p. 115; E. Fakhrutdinova, J. Kolesnikova, O. Yurieva, A. Kamasheva, "The commercialization of intangible assets in the information society," in *World Applied Sciences Journal*, XXVII (2013), Issue 13, p. 82-86; J. Kolesnikova, C. Ricaud, A. Kamasheva, Y. Zhao, "Current trends of realization of the intellectual capital and problems of intellectual migration," in *Procedia Economics and Finance*, XIV (2014), p. 130; V. Pavlov, "The Property Category in the Russian Civil Law," in *Economic Science of Modern Russia*, I (2000), p. 140; E. V. Popov, "Transactional Dimension of Institutions," in *Economic Science of Contemporary Russia*, II (2011), p. 32; O. Yu. Shcherbakova, "Specificity of Interaction between Human Resources and Labor Market," in *Vector of Science of Togliatti State University*, I (2015), no. 20, p. 126.

Football Player of the Russian Premier League Amounts to 66 Million Roubles per Year. Business Petersburg. The most vivid example of obtaining income from the alienation of rights to physical capital is professional sports. Thus, the average salary of a football player of the Premier League of Russia amounts to 66 million rubles per year.<sup>2</sup> However, the alienation of property rights at the physiological level can be associated not with the alienation of skills, but, directly, with the alienation of tissues, organs, biological material, etc.

### **Methods and course of study**

We used the general scientific methods of research, as well as the methods for selecting units of observation and collection of statistical information in this work. Comparative analysis and grouping were selected as the main research methods.

The issue of alienation of rights to organs, biological material, the right to death was more often considered from a legal point of view. Little attention was paid to the essential nature of the emergence, classification and alienation of these rights. The natural human rights include the right to have normal physiology (health) and psychology, the right to life and the right to natural death, as well as the right to reproduce and have a family.<sup>3</sup>

There is the concept of somatic (Greek "soma" - body) human rights in jurisprudence. It is based on the postulate of the inalienable right of citizens to independently dispose of their own body.<sup>4</sup> The somatic rights include: the right to death (including euthanasia), sex change, abortion, sterilization, free use of drugs, sexual rights (the right to freely choose a partner, skin trade - legalization of prostitution), as well as the rights in the field of transplantation (the right to the human body after death, the right to biological materials, etc.). According to E. Richardson and B. Turner, three points should be distinguished in the matter of the right to the body: 1) the right to whole bodies (that is, the right to people); 2) the right to purchase, sell or store a part of the body (at organ transplantations, donations and sale); 3) the right to "particles" of bodies (DNA codes, genetic material related to human reproduction, for example, the egg cell), that is, to the elements that are below the whole organism.<sup>5</sup> Having studied the existing classifications of somatic rights and applying a systemic approach, we have developed a classification of alienation of somatic rights depending on the degree of risk to the health of the individual. (Table 1.)

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<sup>2</sup> S. E. Wilson, "The Health Capital of Families: An Investigation of the Inter-spousal Correlation in Health Status," in *Social Science and Medicine*, LV (2002), no. 7, p. 1157-1172.

<sup>3</sup> P. Townsend, *Poverty in the United Kingdom: A Survey of Household Resources and Standards of Living*, London, Allen Lane, 2009, p. 29-31.

<sup>4</sup> E. N. Richardson B. S. Turner, "Sexual, Intimate or Reproductive Citizenship," in *Citizenship Studies*, V (2001), no. 3, p. 329-338.

<sup>5</sup> Surrogate Motherhood in Russia: Statistics Analysis for 5 years - URL: <http://www.sweetchild.ru/press/novosti-kompanii/surrogatnoe-materinstvo-v-rossii-analiz-statistiki-za-5-let#sthash.XYgrQEGu.dpuf> accessed 05. 01. 2016.



The state acts as an institution regulating the right to alienate somatic rights. Thus, the right to trade one's own body (prostitution) is permitted in a number of states, while in some cases it is permitted to organize "brothels" (Germany, Lebanon, Netherlands, New Zealand, Turkey, Switzerland, some counties of Nevada state in the USA). Euthanasia, as the right to the death of a person, is permitted only in the Netherlands, Belgium, Luxembourg, Canada and several US states. Using the general scientific methods of cognition: analysis, synthesis, abstraction and formalization, we have investigated and identified the boundaries of the alienation of somatic rights in various states.

**Study results**

Let us consider the somatic rights from the point of view of human health. There are a number of rights, the alienation of which does not entail a risk to the health of the subject of ownership, or the risk is associated solely with the violation of the alienation process technology (sperm donation, blood and plasma donation, sale of hair), alienation is associated with the medium-population risk (surrogate motherhood, egg cell donation) alienation leads to a decrease in the quality of life (donation of the liver, kidneys, bone marrow, etc.), postmortem alienation (donation of the heart, lungs, etc.), alienation of intangible rights (the right to life, the right to motherhood, the right to the existing sex, sexual rights).

Table 1 .Classification of alienation of the somatic rights

LOW-RISK ALIENATION		HIGH-RISK ALIENATION		ALIENATION OF RIGHTS
The rights, the alienation of which does not entail any risk to health or rights, in the event of the alienation of which the risk is related solely to the violation of the alienation process technology	The rights, the alienation of which is connected with the medium-population risk	The rights, the alienation of which leads to a decline in the quality of life	Postmortem alienation of rights	Alienation of intangible biological rights

Sale of hair donation, Sperm donation, Blood donation, Plasma donation	Egg cell donation, Surrogacy, Bone marrow donation	Live, Small intestine, Kidney, Pancreas	Lung donation, Heart donation, Bones of the cranial vault, Endocrine glands, etc.	Right to life (euthanasia), Right to maternity (abortion, sterilization), Right to an existing sex (sex change), Sexual rights (prostitution)
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Source: compiled by the authors

The cost of egg cells may vary from 35 to 50 thousand rubles. Surrogate motherhood may also be considered as one of the examples of the alienation of vital capital, as a woman, in fact, wastes her health for child bearing. The cost of surrogate motherhood services amounts to more than 500 thousand roubles, which is the compensation of monthly expenses. According to the Federal Service of State Statistics, the Russian Association of Human Reproduction, the Birth Formula Fund, the surrogate motherhood increased to 336 people/1 million inhabitants in 2012 compared to 282 people/1 million inhabitants in 2011.<sup>6</sup>

The alienation of intangible biological rights depends on the subject, time, country and specific situation. Thus, the alienation of the right to life is available to a physically healthy person in the form of suicide and is not available with medical assistance (in a number of countries). At the same time, the application of the death penalty (forcible alienation of the right to life by the state) is allowed in some countries.

The alienation of organs is possible in some countries on a commercial or non-reimbursable basis. The difference in the institutional aspects of regulation in different countries and the shortage of goods leads to the possibility of the emergence of "black markets" on the one hand and the development of medical tourism on the other hand (Korea, Turkey, Israel, etc.). At the same time, an important object of intangible property is the register of possible donors and their compatibility characteristics. In its

<sup>6</sup> A. Dreher, F. Schneider, 2009. "Corruption and the Shadow Economy: An Empirical Analysis," in *Public Choice*, CVIL (2009), no. 4, p. 67-78.

essential characteristic, it is the accumulated information without which the object of alienation (kidney) will not have any value.

The surgeries associated with postmortem transplantation are more often carried out in Russia. Since 2011, Russia has a presumption of consent to postmortem donation. The state monopolizes the right to dispose of the body after death based on humanistic goals. According to expert opinion, transplantation in China is developed due to the presence of donors for whom a death sentence has been imposed. To some extent, the implementation of this right by the state can be regarded as the deprivation of somatic rights.

There is a splitting of the right of alienation in a number of cases (alienation of the embryo, surrogate motherhood). For example, a surrogate mother, if there is the alienation of the right to reproduction, has right to a biologically alien child, in accordance with Russian legislation, that is, there is an expansion of property rights. Joint ownership of property arises in relation to embryos (artificial insemination). There is the question about the right to dispose of embryos deposited for storage in the sense of deferred parenthood.

Despite the trend of humanization of social development, when humanism acts as one of the progress factors, the state acts as the main regulator, including the natural human rights connected directly with his body. It is the state that monopolizes the right to alienate and dispose of physical rights. If we compare countries in terms of the extent to which the rights are exercised, then we come to the following regional picture. In a number of countries, euthanasia (the Netherlands, Belgium, Sweden, Switzerland, the United States (Oregon and Washington states)), surrogate motherhood (alienation of the right to motherhood) are completely permitted (in Russia, Ukraine, some US states, Kazakhstan). In a number of countries, the state monopolizes some of the natural rights and the possibility of alienating them, so the death penalty is applied (the right to life is alienated by the state) in the USA, Belarus, a number of Arab and Asian countries.

Table 2. The boundary of somatic rights in various states

	Euthanasia	Surrogacy	Death penalty	Unrelated donation on a commercial basis	Legal prostitution	Therapeutic cloning
Netherlands	+	-	-	-	+	-
Belgium	+	-	-	-	+	-

Sweden	+	-	-	-	-	-
Switzerland	+		-	-	+	-
USA	+	+	+	-	- (in most states)	+
Great Britain	-	-	-	-	-	+
Australia	-	-	-	-	-	+
Russia	-	+	-	-	-	-
Ukraine	-	+	-	-	-	-
Kazakhstan	-	+	-	-	-	-
Greece	-	-	-	-	+	-
Italy	-	-	-	-	+	-
Spain	-	Not regulated	-	-	+	-
France	-	-	-	-	-	-
China	-	-	+	+	-	
Belarus	-	-	+	-	-	-
Iran	-	-	-	+	-	-
Turkey	-	-	-	+	+	-
Brazil	-	-	-	+	-	-

Source: compiled by the authors

Thus, according to Table 2, we see what level of rights different states provide regarding the implementation of somatic rights. Thus, in most European countries, the right to motherhood is limited, euthanasia as an opportunity to alienate the right to life is prohibited, for example in China and Belarus, but the death penalty is allowed (deprivation of the right to life by the state). If we analyze the data of Table 2, we can make a conclusion about the level of monopolization of somatic rights at the state level. Thus, the death penalty and cloning can be regarded as a monopolized right of the state to dispose of the right to life and the alienation of the right to uniqueness. The experiments on therapeutic cloning are being carried out in a number of countries, including Great Britain, USA, Austria. The death penalty is imposed in the USA, China and Belarus. Thus, we believe that despite the recited observance of human rights and freedoms from the legal point of view, the somatic rights in these countries are monopolized by the state from the standpoint of the institutional theory. Switzerland, Turkey, Belgium and the Netherlands provide relatively large opportunities to manage the somatic rights. There was not a single country where the

euthanasia, surrogate motherhood and legalized prostitution were allowed at the same time. It is easier to realize the right to parenthood in the CIS countries.

### **Conclusions**

Thus, to obtain the right to income, the individual alienates some of the rights that he has. The principle of any work is built on this basis<sup>7</sup>. In the modern information society, the share of alienation of information and other types of intangible property is growing. The somatic rights can be attributed to natural rights, but not the alienation of the intellectual rights is developed, but there is also a new spiral of development in somatic property rights in modern society, with the growth of scientific and technological capabilities (transplantation). Those objects and rights that could not be alienated earlier, can be alienated now. There is splitting and development of property rights to somatic rights, which leads to the formation of new markets. The emergence of "black markets" indicates the development of the institution of intangible property (the institution of somatic property rights, the object of which is vital capital), which is not fully regulated by the state. The state institute acts as a regulator, and partly as a monopolist in access to the somatic rights, but the institution of law is not always able to keep pace with the scientific and technological progress and the development of the intangible property institution at the moment.

### **Summary**

At present, despite the transition to the information society, where the share of exchange of services and information is increasing, the market for sale and purchase of vital capital continues to increase its volumes, there are new alienation opportunities due to the development of science and technology. This trend indicates that moving to the information society, the physiological level of alienation does not lose its relevance, but is transformed using new technologies, as well as new forms of alienation of tangible and intangible property (transplantology, sports industry, show business, etc.).

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<sup>7</sup> E. R. Valeev, A. V. Kamasheva, "The Human Health Capital as a Basic Condition of Social and Economic Development," in *Economic Sciences*, CXX (2014), p. 17; R. Kh.Yagudin, "Intellectual Property is an Important Component of Innovation Processes," in *Practical Medicine*, IV (2014), no. 80, p. 21-24; R. Kh. Yagudin, "Health of the Population: Institutional Approach," in *Contemporary Art of Economics*, II (2011), no. 2, p. 25-30.

*The Alienation Of The Rights To Life And Health: The Institutional Dimension, Astra  
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**Theoretical And Legal Basis To Conception Of Organized Crime In  
Modern Conditions**

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**Abstract.** *Article considers questions of the definitions which are completely reflecting content by the form of crime, all-recognized by scientists and practitioners, opening an essence of organized crime. Now exhaustive signs of organized crime, where in legal relations there are many gaps, complicating law-enforcement process concerning members of organized criminal groups, especially its top and many other things aren't worked out. In our opinion, "stability" and "unity" can be considered as synonyms which have the right to existence and have to be regulated along with other signs of organized criminal group in the existing penal legislation of the Republic of Kazakhstan. All these circumstances require searching of the new approaches in research work at studying of organized crime, which would give the chance to receive a true picture of organized crime.*

**Keywords:** a definition to organized crime; forms of criminal complicity; elements (types) of criminal group; criminological signs of the group; concepts of “unity” and “stability”.

### **Introduction**

The present stage of economic, political and social development of Kazakhstan is accompanied by a number of the factors, interfering forward and systematic state development, one of which is organized crime.

The President of state N.A. Nazarbayev said for the first time about scales of organized crime in Kazakhstan in the speech at a meeting on fight against crime and corruption on April 19, 2000. So the President of the country, giving critical evaluation to a criminal country situation for that period, noted that everywhere there is a revival of criminal traditions and customs, professionalizing and specialization of underworld. Many citizens have the main source of the income - a criminal business. In Kazakhstan there were “crowned thieves”, who distribute spheres of influence between criminal groups. There are prospered narcobusiness, alcohol smuggling, trade in stolen cars, prostitution became the ordinary phenomena. And there are engaged in all this not separate groups, but well organized criminal societies with “supporting gang of criminals” in law enforcement agencies.<sup>1</sup>

Organized crime is so large-scale, multifunctional and diversified that as a result represents a certain amorphous and intangible formation where it is difficultly not only to confront, but even it is difficult to research.

On this occasion, the American scientist Jay Albeneze wrote that organized crime is always contained a certain secret that made exaggerate its importance. This

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<sup>1</sup> “Kazakhstan” truth Newspaper. 21th of April 2000.

image was in many respects created thanks to belief that behind of some crimes there are some mysterious organizations which in every possible way were cultivated by popular editions and Hollywood. Today it is difficult to understand where the reality comes to an end and literature begins. Many do not have a clear idea of what is a mafia in fact, what it does and what takes place in the world of organized crime. For nearly hundred years the nature of organized crime and its sources remained unknown that excluded a possibility of effective fight against it.<sup>2</sup>

According to the Russian scientist Yu.A. Voronin, organized crime – is one of the burning issues of the present, but a peculiar paradox is the fact that till this moment it is not developed accurate concept of what it represents.<sup>3</sup>

Other scientist I.V. Godunov fairly writes in the preface of his work: “Organized crime – what is it? The sign of a century or plague of the present?!” In modern conditions this topical issue faces not only whole world community and each individual state; in a varying degree, it concerns each person, each member of modern civilized society.<sup>4</sup>

According to A.I. Dolgova, organized crime – is a highest manifestation of criminal orderliness. It is about very difficult phenomenon, which is due to its complexity, is treated in the scientific, educational literature and regulatory legal acts as multiple-valued.<sup>5</sup>

The Kazakhstan scientists consider that the modern criminology, both in our country and abroad, isn't developed the definition so far, which is completely reflecting content of this type of crime all-recognized by scientists and practitioners, opening an essence of organized crime; exhaustive signs of organized crime, where in legal relations there are many gaps, complicating law-enforcement process concerning members of organized criminal groups, especially its top and many other things aren't worked out.<sup>6</sup>

All these circumstances require searching of the new approaches in research work at studying of organized crime, which would give the chance to receive a true picture of organized crime or at least to approach to its solution.

In 1983 for the first time scientists of the former USSR, namely group of authors of research associates of All-Union research institution Ministry of Internal Affairs of the USSR (A. Volobuyev, E. Galkin, V. Pakhomov), offered the structure of the organized crime in the form of a pyramid.<sup>7</sup>

## DISCUSSION

Let's consider the main approaches to understanding of organized crime.

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<sup>2</sup> J. F. Sheli (ed.), *Criminology*, Sankt Petersburg, SpB, 2003, p. 320.

<sup>3</sup> Yu. A. Voronin, *Introduction to criminology: course of lectures*, Moscow, Flinta, Moscow Psychological and Social Institute, 2008, p. 171.

<sup>4</sup> I. V. Godunov, *Organized crime from dawn to sunset: Manual for higher education institutions*, Moscow, Academic project, 2008, p. 4.

<sup>5</sup> A. I. Dolgova, *Criminology*, 3<sup>rd</sup> edition, Moscow, Norm, 2009, p. 326.

<sup>6</sup> T. K. Akimzhanov, S. A. Begimbayev, *Organized crime at the regional level (Criminological and criminal and legal aspects)*. Manual, Almaty, IC OFPPI “Interligal”, 2015, p. 10.

<sup>7</sup> G.F.Khokhryakov, *Criminology: Textbook*, Moscow, V. N., 1999, p. 380.



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One group of authors, despite the happened changes in all spheres of life after the collapse of the USSR, continues to claim that there is no organized crime that it – is the myth, which was thought up by journalists and was picked up by some criminologists.<sup>8</sup>

Other authors, referring to documents of the international conference of the UN on problems of the organized crime, which took place in Suzdal (October, 1991), determine organized crime as functioning of steady, managing communities of the criminals, who are engaged in crimes as business and creating system of protection against social control by means of corruption.<sup>9</sup>

The third group of authors at determination of organized crime, in a basis of a definition, gives process of the circulation of the criminal capital and calls organized crime as social and economic process of the circulation of the criminal capital in the criminal sphere with involvement of a general population, with use of corruption and all that promotes its building-up and enrichment.<sup>10</sup>

The fourth group of authors, doesn't give a definition to organized crime, and prefers to list its signs, refer to them: steady community; separation of functions between participants; hierarchy; specialization of a field of activity; generation of profit; ensuring own safety; harsh discipline; legalization of the money got in the criminal way; international relations; presence of national or class signs; use of science and technology achievement.<sup>11</sup>

The fifth group of authors, giving definition to organized crime, recognizes that it is first of all a crime type.<sup>12</sup>

In our opinion it is the most preferable position, as far as in it, a definition of organized crime is given rather complete and logically.

According to the famous criminologist A.I. Dolgova, the society of market economy, domination of the capital – it is not “a paradise” in the criminological relation at all. Many foreign criminologists, studying this society “on the inside”, convincingly show that it has strong criminal potential and high criminality.<sup>13</sup>

Now organized crime already has an international character and it is transformed to transnational criminal structures.

According to expert opinions the international organized crime has about 300 billion dollars of investments to the real estate, in various firms and the entities, and also on the bank accounts. These monies are received mainly from traffic in drugs, weapon, and racket. Moreover, its annual income about 120 billion dollars.<sup>14</sup>

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<sup>8</sup> A. I. Dolgova, S. V. Dyakova (eds.), *Organized crime*, 2<sup>nd</sup> volume, Moscow, 1993, p. 31.

<sup>9</sup> V. N. Kudryvatsev (ed.), *Criminology*, Moscow, 1997, p. 258; V. G. Grib, *Counteractions of organized crime*, Moscow, 2001, p. 11; \*\*\*, *Organized crime. Criminological characteristic of modern visions of crime in the Republic of Kazakhstan*, Almaty, 2001, p. 85.

<sup>10</sup> N.F. Kuznetsova, G.M. Minkovsky (eds.), *Criminology*, Moscow, 1998, p. 347.

<sup>11</sup> E. O. Alaukhanov, *Organized crime in Kazakhstan: social and procedural and legal aspects. Manual*, Almaty, “NURPRESS” publishing house, 2012, p. 12; A. I. Alekseev, *Criminology. Course of lectures*, Moscow, “Shchit-M” publishing house, 2005, p. 189-191.

<sup>12</sup> N.F. Kuznetsova, G.M. Minkovsky (eds.), *Criminology*, p. 347.

<sup>13</sup> A. I. Dolgova, *Criminology*, p. 143.

<sup>14</sup> I. I. Rogov (ed.), *Criminal law of Kazakhstan (A special part)*, Almaty, 2002, p. 256.

Interesting data are provided by the Russian scientific criminologists on the damage, caused by organized criminal groups in the sphere of privatization. So, according to estimative data loss to the economic capacity of Russia from privatization was colossal: "... losses were in two and a half times higher than the losses of the USSR in the Great Patriotic War and they were equaled 9540 trillion rubles according to the prices of 1995. On today's rate it is 2 trillion dollars, or 58 trillion rubles.<sup>15</sup>

Certainly, organized crime in Kazakhstan has no such big scales, such as in Russia, and furthermore in foreign countries, but the tendencies characteristic for it can take place and at us.

Not casually our society was begun to get used to contract murders, plunder in especially large sizes and to other loud crimes that is a favorable condition for organized crime.

So, before speaking about organized crime as the phenomenon, it is necessary to decide on its basic concepts and the methodology of a research conceptually.

For complete idea of organized crime it is necessary to consider it in an extended and confined sense of the word.

If to consider organized crime in the broadest sense, then it is represented along with other types (crime of minors; relapsing crime; crime of the military personnel, etc.) such as independent type of crime. And as it is a type of crime, then organized crime must be included a set of the specific crimes, differing in the features and criminal and legal characteristics.

It is known that various criteria (for example, crime object; fault form; character and degree of public danger of the committed crime, etc.), taking into account that there is defined the structure of a special part of the Criminal Code of Kazakhstan, can be the basis for qualification of criminal offenses (crimes or criminal offenses).

In our case, organized crime is cumulative of the offenses, committed by organized criminal groups or criminal societies (the criminal organizations).

Unfortunately, scientific criminologists pass directly to consideration of signs of organized crime at the determination of essence of organized crime: and the cumulative offenses, constituting an independent type of crime and which are referred to as organized crime, remains out of a field of vision.

The reason of absence of a clear boundary of organized crime as object of a research is insufficient legal support of questions of criminal and legal responsibility and high latency of this type of crime.

For the first time it is given the explanation of such concepts as criminal group, a criminal society, the criminal organization, a transnational criminal society, the transnational criminal organization, transnational organized group, organized group in article 3 of the Criminal Code of the Republic of Kazakhstan, which was adopted on 3 July 2014 and entered into force January 1, 2015.<sup>16</sup>

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<sup>15</sup> A. I. Dolgova (ed.), *Criminology: the textbook*, 4<sup>th</sup> publication, Moscow, Infra-M, 2010, p. 580.

<sup>16</sup> \*\*\*, *Criminal Code of Kazakhstan*, Almaty, LAWYER, 2015, p. 7-8.

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In the article 31 of the Criminal Code of Kazakhstan it is given the description of criminal liability for the criminal offenses made by group.<sup>17</sup>

Criminal liability of various forms of criminal complicity is provided in the articles 262, 263, 264, 265, 266 of the Criminal Code of Kazakhstan.<sup>18</sup>

In addition in point 2) of article 54 of a general part of the Criminal Code of Kazakhstan, and also a number of articles of the special part along with others as aggravating circumstance it is recognized committing a criminal offense as a part of a group of persons, a group of persons by previous concert, criminal group.<sup>19</sup>

It should be noted that one of novel of the new Criminal Code of Kazakhstan is the fact that in the Criminal code of RK of 2014 there were changed by developers a definition of the organized (complex) forms of criminal complicity, that is there was a change of the form of their definition, and the substantial party was undergone insignificant adjustments and practically was remained as prior version.

If in the Criminal Code of Kazakhstan of 1997 there were four organized (complex) forms of criminal complicity (organized group, a criminal society (the criminal organization), transnational organized group, a transnational criminal society (the transnational criminal organization), then according to the Criminal Code of Kazakhstan of 2014 an organized (complex) form of criminal complicity there is only one and it is a criminal group.

At the same time the organized (complex) forms of criminal complicity earlier known to the penal legislation, which are listed above, were included as separate types into structure of a general, single form of criminal complicity under the name "criminal group". It should be noted that some of types of criminal group (earlier independent forms of criminal complicity) underwent certain changes (for example, a concept of a criminal society and the criminal organization).

As independent types of criminal group there are allocated the gang, terrorist group, extremist group, an illegal paramilitary force (earlier, these concepts were covered by such forms of criminal complicity as organized group and a criminal society (the criminal organization).

According to the part 3 of Art. 31 of the Criminal Code of Kazakhstan the crime is recognized as committed by criminal group if it is committed by organized group, the criminal organization, a criminal society, transnational organized group, the transnational criminal organization, a transnational criminal society, terrorist group, extremist group, gang or an illegal paramilitary force.<sup>20</sup>

Concepts of all elements (types) of criminal group are considered in Art. 3 of the Criminal code of RK of 2014.

However, as practice shows, the offered means of criminal and legal fight against organized crime by the legislator are obviously not enough.

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<sup>17</sup> *Ibidem*, p. 18.

<sup>18</sup> *Ibidem*, p. 112-114.

<sup>19</sup> *Ibidem*, 28.

<sup>20</sup> *Ibidem*, p. 18.

Therefore, it is absolutely fair the note of some scientists that it is possible to theorize for a long time about criminological signs of the group, acting by previous concert, organized group, a criminal society (the criminal organization), transnational organized group, the transnational criminal organization, a transnational criminal society, terrorist group, extremist group, gang or an illegal paramilitary force.

However, the legislator is obliged to give accurate definitions of these phenomena, so far as he connects with them occurrence of criminal legal consequences of various weight, but not to give definition of signs of these phenomena at the discretion of law-enforcement justice.

The firm principle of responsibility for fault, i.e. when the guilty person clearly realizes all objective circumstances of deeds is enshrined in the criminal law. Content of the concepts “organized group”, “criminal organization”, “criminal society” is especially subjective.<sup>21</sup>

Imperfection of the penal legislation complicates the procedure of proof of the fact of organized creation group or a criminal society.

For example, Verbovaya D.V., during carrying out comparison between gang and a criminal society, specifies that the fact of the organization of gang or participation in it gives in to proof in much bigger degree, than the fact of the organization of a criminal society as the structure of gangsterism is characterized, in addition to a number of coincident estimative signs, also such defining sign of the objective party as armament.<sup>22</sup>

Luneev V. specified on the difficulties of proof of the acts, committed by organized criminal groups so that the acts, committed by organized criminal groups, are taken into this account, he also notes, that these acts (organized crime) were accounted only when criminal case is solved and there are sufficient evidences about crime execution by organized criminals, though the same acts were committed by the considered criminals. But it, undoubtedly, isn't established, and they don't fall in this consideration.<sup>23</sup>

According to item 11 of the Normative resolution of the Supreme Court of the Republic of Kazakhstan of June 21, 2001 “About some questions of application by courts of the legislation on responsibility for gangsterism and other crimes, committed in criminal complicity” about stability of organized criminal group there can be confirmed, in particular, such signs as stability of its structure, close interrelation between its members, coordination of their actions, a permanency of forms and methods of criminal activities, duration of its existence.

Management of organized group can be realized of both one, and several persons.

According to the item 13) of the above-stated Normative resolution of the Supreme Court of the Republic of Kazakhstan of June 21, 2001 the organized

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<sup>21</sup> L. N. Boytsov, I. Y. A. Gontar, "Criminal and legal fight against organized crime: illusions, reality and possible alternative," in *State and law*, XI (2000), p. 35.

<sup>22</sup> O. V. Verbovaya, *Criminal and legal fight against gangsterism*, Almaty, Monograph, 2002, p. 144.

<sup>23</sup> V. V. Luneev, "Geography of organized crime and corruption in Russia (1997-1999)," in *State and law*, XI (2000), p. 23-34.

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criminal group can exist also without head. It is necessary to refer to those cases when participants of small organized criminal group or gang, without separating the leader from the environment, resolve issues of criminal activities together and act, as a rule, as joint participants of the crimes, committed by them.

A crime is considered as completed from the moment of the actual management of the specified criminal groups. The actions directed to creation of organized group or the criminal organization but didn't come to the end with their creation for the reasons which aren't depending on the guilty person, must be qualified as attempt at creation of organized group or the criminal organization.

For complete idea of organized crime, it is necessary to consider organized crime also in other aspect – as activities, that are in the narrow sense of the word.

If between the first and second forms of criminal complicity, that is the group of persons without previous concert and a group of persons with previous concert, is available visible border, then at comparing with the third form of criminal complicity, criminal group which united the organized group, the criminal organization, a criminal society, transnational organized group, the transnational criminal organization, a transnational criminal society, terrorist group, extremist group, gang or an illegal paramilitary force, there can not be said as well.

In addition, it is difficult to prove a unity sign, as in the law there are no accurate criteria in what cases the group is united or less united.

For example, there could be a time sign of group creation – till 1 year, over 2 years, etc. It is difficult to proof and other sign of organized group – it is the purpose of creation of group – commission of grave or gravest crimes. If to assume availability of united group, but not committed of grave or gravest crimes, so it is difficult to prove also this intention.

Especially as the purposes of creation of organized criminal group can be non-criminal as well.

So, some authors<sup>24</sup> define organized crime by its content as a variety of the social activities of a certain number of society members, directed to acquisition of income, various benefits both criminal and non-criminal methods.

Without denying existence along with criminal and non-criminal ways of activity, it is difficult to agree with comparison of organized crime as variety of social activity.

In our opinion, organized crime can be only unlawful activity, where Grib V.G. fairly specifies that at the present stage of development of the Russian state organized crime it is considered as a type of unlawful activity, essence of which makes a process of the capital circulation, purchased by criminal forming in the illegal way, and also in legal and illegal spheres of the public life.<sup>25</sup>

Authors of the textbook the Criminal law of Kazakhstan (a general part) absolutely fairly specify that in the new Criminal Code of Kazakhstan the legislator doesn't use a concept “form of criminal complicity”, but exactly this concept has

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<sup>24</sup> L. N. Boytsov, I. Y. A. Gontar, "Criminal and legal fight against organized crime: illusions, reality and possible alternative," p. 37.

<sup>25</sup> V. V. Grib, *Counteractions of organized crime. Manual*, Moscow, 2001, p. 4.

meaning for elucidation of content of criminal liability basics for the criminal complicity.<sup>26</sup>

Though in the theory of the criminal law and in practice in case of division of criminal complicity in a crime into forms on nature of performance by accomplices of the objective party of the committed crime there are allocated two forms of complicity in a criminal offense:

1) simple criminal complicity (it is called criminal complicity without separation of roles or joint participants) and

2) complex criminal complicity (criminal complicity with separation of roles or criminal complicity in close sense of this word).<sup>27</sup>

Unfortunately, despite the aspiration of scientists to reach objectivity in case of qualification of criminal groups, the signs of organized criminal groups have subjective character.

The first – quantitative signs. On our belief in the law there must be concretized the number of participants of organized group. So, it is impossible to consider criminal group consisting of 2-3 people as organized, as far as this quality doesn't allow, even theoretically, to realize criminal purposes, which refer to the committed acts to the category of the most socially dangerous.

Exactly this vagueness allows to manipulate of law-enforcement bodies at all stages of consideration of criminal case in case of qualification of activities of criminal groups.

For example, drawing an analogy to a construction gang, than the construction object is more difficult, the more must be the structure of labor collective, and also the requirements to professional training of builders must be higher, there already must be a specialization, etc.

It is no coincidence, according to some scientists, that the criminal organization is compared as a type of labor collective.<sup>28</sup>

Therefore the comprehensive analysis of practice, taking into account opinions of the specialists, providing fight against organized crime, will allow for the scientists to make offers in the current legislation on the considered problem.

Grib V.G. fairly indicates on the need of legislative fixing of the quantitative characteristic of forms of criminal complicity, and this position has full authority for legislative fixing, as the criminal society consisting of two people will hardly be able to correspond to such characteristics as structure, availability difficult organizational and hierarchical relations, system of protective measures, conspiracy, presence of security guards, etc.<sup>29</sup>

## CONCLUSION

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<sup>26</sup> I. I. Rogov, K. Zh. Baltabayev (eds.), *Criminal law of the Republic of Kazakhstan. General part. Manual for higher education institutions. E*, Astana, L. N. Gumilyov Eurasian National University publishing house, 2015, p. 160.

<sup>27</sup> A. V. Naumov, *Russian criminal law. General part: Course of lectures*, 2<sup>nd</sup> edition, Moscow, 2000, p. 315.

<sup>28</sup> R. Aidishen. Ya. Gilinsky, *Functional theory of the organization and organized crime (Studying of organized crime: the Russian-American dialogue)*, Moscow, 1997, p. 62.

<sup>29</sup> V. V. Grib, *Counteractions of organized crime. Manual*, Moscow, 2001, p. 18.

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We consider that legislative fixing of a quantitative sign will facilitate considerably the solution of the available problems in this sphere.

In our opinion, the second sign of organized crime, needing a legal regulation, – is stability. Unfortunately, as well as the first sign - quantitative, stability and unity because of the subjectivity also complicates qualification of the committed crime and needs a legal fixing.

In Russian “stability” means non-susceptibility to fluctuations, a permanency, firmness, hardness”.<sup>30</sup>

Authors of the textbook “Criminal law of Kazakhstan” (a general part) as stability, as a sign of such form of criminal complicity as commission of a crime by organized criminal group, understand a presence in the group not of casual people, and those who intends to commit together with others one or several crimes, participants of this group trust each other, the structure of group is stable, there is a leader to whom participants of group are submitted.<sup>31</sup>

Because of legal abeyant in practice there is often allowed confusion of concepts of “unity” and “stability”.

“United” in Russian means also amicable, unanimous, organized.<sup>32</sup>

And judging by this interpretation, “unity” as a criminal complicity sign, considers closer form of communication of people.

However, if to take into account more extensive interpretation of the terms “stability” and “unity”, it is possible to consider them as synonyms. For example, it is difficult to object comparison, than more united group, the more it is steadier and vice-versa. In this case it is possible to carry out between signs “unity” and “stability” an equal-sign.

In literature there is also other point of view according to which content of “unity” is much broader than “stability”.

So, authors of the textbook “Criminal law of Kazakhstan” (a general part) consider that unity of group means not only stability of its structure, presence of the head (heads) to whom all other accomplices submit mutual support of each other, interchangeability, and mutual assistance. Unity means high degree of organization, observance of the rules of conduct established in the criminal organization.<sup>33</sup>

According to other scientists L.D. Gaukhman and S.V. Maximov, signs actually only of unity are: the “mutual protection” which is expressed in joint commission by participants of group of a crime earlier, serving by participants before of sentence in the same place of imprisonment, mutual awareness of participants on the materials, compromising each other; use for maintenance of discipline in group of violence, threats, rigidity, etc.; the conspiracy, consisting in use of code names and signals, a criminal slang, codes, passwords; the general till

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<sup>30</sup> S. I. Ozhegov, *Russian dictionary*, Moscow, 1986, p. 730.

<sup>31</sup> I. I. Rogov, S. M. Rahmetova, *Criminal law of Kazakhstan (General part). Manual for higher education institutions*, Almaty, 1998, p. 125.

<sup>32</sup> S. I. Ozhegov, *Russian dictionary*, p. 657.

<sup>33</sup> I. I. Rogov, S. M. Rahmetova, *Criminal law of Kazakhstan (General part). Manual for higher education institutions*, p. 126.

(“common fund”) representing the money and other values, extracted as a result of criminal and other illegal activities, etc. which are at the disposal of group; availability of special technical means, i.e. various listening and anti-listening devices, the security alarm system of transport, etc. which equipped organized groups.<sup>34</sup>

In our opinion, “stability” and “unity” can be considered as synonyms also has the right to existence and must be regulated, along with other signs of organized criminal group, stated above in the existing penal legislation to the Republic of Kazakhstan, namely in the article 3 of the Criminal Code of Kazakhstan, where there is given an explanation of some concepts, containing in the Criminal code of RK.

Such offer will allow to enhance the existing penal legislation of the Republic of Kazakhstan, and to activate considerably law-enforcement activities and to increase its efficiency concerning the crimes committed by criminal groups (organized group, criminal organization, a criminal society, transnational organized group, the transnational criminal organization, a transnational criminal society, terrorist group, extremist group, gang, an illegal paramilitary force).

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<sup>34</sup> L. D. Gaukhman, S. V. Maximov, "Responsibility for the organization of criminal community," in *Legality*, II (1997), p. 14.



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## **A New Stage of Relations between the European Union and Kazakhstan: Europeanization Process**

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**Abstract.** *This paper argues that Kazakhstan and the European Union have entered a new stage marked by two major changes. First, the parties finally signed the Enhanced Partnership and Cooperation Agreement (EPCA). The second change is described through the concept of Europeanization. In 2015 Kazakhstan reordered its policy agenda towards building a more transparent and accountable state. In order to assess this change empirically, we conducted an original content analysis of President Nazarbayev's speeches. A total of 69 speeches from 2010 to 2015 were evaluated. The analysis findings suggest that in 2015 the leadership of the country started paying greater attention to issues such as accountability, rule of law, and transparency, which are considered as core EU values. Kazakhstan's weak institutional development is regarded as a major barrier in EU-Kazakhstan relations; Europeanization of Kazakhstan's policies should be viewed as a significant event that will boost bilateral investments, trade, and other aspects of cooperation.*

**Keywords:** Kazakhstan, Europeanization, European Union, Accountability, Rule of Law, Democracy, Content Analysis.

### **Introduction**

In December of 2015, Kazakhstan and the EU signed the Enhanced Partnership and Cooperation Agreement (EPCA). This agreement is the first of its kind to be signed by the EU with any of the Central Asian countries. The agreement replaced the previous Cooperation and Partnership Agreement, which had governed bilateral relations since 1999. For decades Kazakhstan and the EU have built close and mutually beneficial relations. The EU is Kazakhstan's biggest trading partner and investor.<sup>1</sup> The Union also plays a major role in improving Kazakhstan's international visibility and recognition. Similarly, Kazakhstan is regarded as the EU's main partner in Central Asia, as most of EU's trade with the region is concentrated in Kazakhstan. Experts note that Europe is mainly interested in the country's hydrocarbon resources. However, it also seeks to extend its normative power over Kazakhstan. Particularly, development of Europe's values such as good governance, democracy, human rights, and rule of law in Kazakhstan are actively promoted as important conditions for bilateral relations. As Jos Boonstra (2015)<sup>2</sup> puts it, "democratic principles should be the centerpiece of engagement, since these countries will only become more reliable partners when they would develop and respect the rule of law and apply democratic governance."

This emphasis on European values such as democracy, rule of law, and good governance in the EU's foreign policy is theorized in the concept of

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<sup>1</sup> European External Action Service, "EU-Kazakhstan Relations Factsheet," 2015.

<sup>2</sup> J. Boonstra, *Reviewing the EU's approach to Central Asia*, Astana, Open Society Foundations, 2015.

Normative Power Europe (NPE). Ian Manners (2002),<sup>3</sup> who coined the term, describes it as the power over opinion, or shaping of what constitutes normal. According to Manners, the spread of EU norms such as democracy, rule of law, respect for human life, and fundamental freedoms describes an essential element in European foreign policy.

However, this paper is centered on the counterpart of the NPE – the Europeanization concept. KyriakosMoumoutzis (2011)<sup>4</sup> defines this as adoption of European norms and practices by nation states. Thus, if the NPE describes actions of the EU, this Europeanization explains the behavior of individual countries that interact with the EU. The term has been particularly used to describe the spread of democracy, rule of law, improved governance and other European norms in countries that joined the EU comparatively recently or that have ambitions to join it. The term is also used to describe reforms that have happened in older EU members and even in non-EU states.

Gawrich, Melnykovska, and Schweickert (2010) identify three streams in Europeanization studies: Membership Europeanization, Accession Europeanization, and Neighborhood Europeanization. The Membership Europeanization stream examines Europeanization patterns in member states. Anders Esmark's (2008)<sup>5</sup> study is a perfect example of this stream of Europeanization studies. In the paper he argues that Europeanization created new institutions and procedures in Denmark's central public administration. Similar studies were conducted in Britain, Germany, and other long-standing members of the European Union. However, most of the studies have been conducted on Accession Europeanization. They describe how Eastern European countries brought their regulations and policies closer to European standards in order to become a part of the EU. For example, Jan-Hinrik Meyer-Sahling, and Christian Van Stolkthere (2014)<sup>6</sup> conducted research on the Europeanization of central governments in Central and Eastern European countries such as Poland, Slovakia, Latvia, and others. Neighborhood Europeanization centers on EU neighbors with noimmediate EU accession plans. Gawrich et al. (2010)<sup>7</sup> focused on the effectiveness of Europeanization policies in Ukraine. Similarly, Defne Günay (2014)<sup>8</sup> examined the Europeanization of Turkey's foreign policy.

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<sup>3</sup> I. Manners, 2002. "Normative Power Europe: AContradiction in Terms?," in *Journal of Common Market Studies* , XL (2002), p. 235-258.

<sup>4</sup> K. Moumoutzis, "Still Fashionable yet Useless? Addressing Problems with Research onthe Europeanization of Foreign Policy," in *Journal of Common Market Studies*, IL (2011), no. 3, p. 607-629.

<sup>5</sup> A. Esmark, "Tracing the National Mandate: Administrative Europeanization Made in Denmark," in *Public Administration*, LXXXVI (2008), no. 1, p. 243-257.

<sup>6</sup> J. H. Meyer-Sahling, C. V.Stolk, "A Case of Partial Convergence. The Europenization of Central government in Central and Eastern Europe," in *Public Administration*, XIIIIC (2014), no. 1, p. 230-247.

<sup>7</sup> A. Gawrich, I. Melnykovska, R. Schweickert, "Neighbourhood Europeanizationthrough ENP: The Case of Ukraine," in *Journal of Common Market Studies*, IIL (2010), no. 5, p. 1209-1235.

<sup>8</sup> D. Günay, "Europeanization of State Capacity and Foreign Policy: Turkey in the Middle East," in *Mediterranean Politics*, XIX (2014), no. 2, p. 220-237.

The EU has been nudging Kazakhstan to align with European norms from the early period of their bilateral relations. In fact, values such as the rule of law, human rights, and free and democratic elections were included in all of the key bilateral agreements, memorandums, and other documents. They can be found in the Partnership and Cooperation Agreement and in the Enhanced Partnership and Cooperation Agreement as well as in the EU and Central Asia strategy for a new partnership.

In practice, the leadership of Kazakhstan has avoided these issues. According to Anceschi (2014),<sup>9</sup> EU-Kazakhstan relations have been very pragmatic, paying little attention to human rights and civic dimensions. They have concentrated on material issues such as trade and investments, while more civic issues have stayed in the background. As Aitolkyn Kourmanova (2014)<sup>10</sup> argues, Kazakhstan has managed to use the divergent positions of EU member states to ignore or conveniently overlook these inconvenient matters.

However, in March of 2015, Kazakhstan's president initiated the Five Institutional Reforms. These reforms aim to build a functioning rule of law, an improved accountability system, and a modern bureaucracy among other things. Thus, they aim to strengthen the very values that Kazakhstan used to avoid.

A few months later the president announced how these five institutional reforms would be implemented in the 100 Concrete Steps program. The program specifies in what ways public administration and regulations will be brought closer to the EU norms. Some of the reform steps specifically refer to European norms. For example, Step 49 stipulates that the country's standard construction codes should be replaced with the Eurocodes.

Both the Five Institutional Reforms and the 100 Concrete Steps programs were identified as the country's national plan for the next 10 to 15 years. Thus, these documents will shape Kazakhstan in the foreseeable future. By the end of 2015, the parliament had already passed 59 new laws that modernized the country's regulations<sup>11</sup>. One of them is the new Law on access to information, which makes it easier for the general public to obtain government-held information and improve the public sector's transparency and accountability. Hence, the country has embarked on a long journey of aligning itself with European norms.

In this paper we argue that the bilateral relations have entered a new stage of development. This new stage is marked by two major events: the signing of the EPCA and the Europeanization of Kazakhstan's policy agenda. The importance of the Enhanced Partnership and Cooperation Agreement in this regard is hard to

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<sup>9</sup> L. Anceschi, "The Tyranny of Pragmatism: EU-Kazakhstani Relations," in *Europe-Asia Studies*, LXVI (2014), no. 1, p. 1-24.

<sup>10</sup> A. Kourmanova, "How Does Central Asia View the EU?," *EUCAM working paper #18*, 2014.

<sup>11</sup> N. Nazarbayev, 2006. "President's Speech to the Nation: The Strategy of Kazakhstan in Entering into the 50 Most Competitive Nations of the World," available at: [http://www.akorda.kz/en/addresses/addresses\\_of\\_president/address-by-the-president-of-the-republic-of-kazakhstan-leader-of-the-nation-nnazarbayev-strategy-kazakhstan-2050-new-political-course-of-the-established-state](http://www.akorda.kz/en/addresses/addresses_of_president/address-by-the-president-of-the-republic-of-kazakhstan-leader-of-the-nation-nnazarbayev-strategy-kazakhstan-2050-new-political-course-of-the-established-state), accessed 12. 06. 2017.

overestimate. It is a major comprehensive agreement that describes the terms of cooperation for decades to come. Therefore, we will not spend much effort proving its merits. Instead, we will focus on the second event, which is less obvious and also grossly overlooked. Specifically, we will empirically assess the extent of the Europeanization of Kazakhstan's policy agenda.

The paper will proceed as follows: the first part will describe the evolution of relations between Kazakhstan and the EU. The second part will examine the policy context that brought Kazakhstan to its existing policy choices. The third part will explain the methodology of our empirical study and will be followed with our findings and discussion of bilateral relations in light of these findings.

### **Evolution of relations**

The two parties established diplomatic relations right after Kazakhstan declared independence. Scholars identify several developmental stages of bilateral relations. Particularly, Isaev (2007)<sup>12</sup> differentiates three periods of development. In this case, the first stage played out during the years 1992-1995. During this period, political and diplomatic relations were officially established. The EU opened its technical assistance and financing programs such as the

Technical Assistance to the Commonwealth of Independent States (TACIS) and the Trans-European Mobility Scheme for University Studies (TEMPUS) to Kazakhstan.

These rather shallow bilateral relations between the two sides strengthened after the signing of the Partnership and Cooperation Agreement (PCA) at the end of 1995. This agreement marked the second stage of cooperation. It was the first comprehensive agreement that established strategies between the two parties. The PCA listed core principles of bilateral relations. According to the agreement the relationship between Kazakhstan and the EU would be guided by principles such as respect for democracy, international law, and human rights. The document also included goals such as a transition to a market economy, encouragement of trade and investment, and political dialogue.<sup>13</sup>

During this period bilateral trade and investments were at the center of relations. Bilateral cooperation expanded in a wide array of industries including oil and gas, telecommunications, logistics, and transportation. Political cooperation also deepened through creation of a special committee, the Kazakhstan-European Union, which later became an important platform for political dialogue.

The third stage of cooperation started in 2001. In this period bilateral relations enjoyed the full impact of the PCA, which came into force in 1999. During this stage, bilateral relations matured. The parties signed agreements that allowed businesses to avoid double taxation and to import workers. All of this

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<sup>12</sup> K. Isaev, *Respublika Kazakhstan I Evropeikiy Soyuz: Osnovnie Etapy Sotrudnichestva za 15 let nezavisimosti Kazakhstana*, Almaty, KISI institute, 2007.

<sup>13</sup> EUR-Lex. 1999. "Partnership and Cooperation Agreements (PCAs): Russia, Eastern Europe, the Southern Caucasus and Central Asia." <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=URISERV:r17002>, accessed 12. 06. 2017.

boosted bilateral trade and investment to maximum levels. In particular, bilateral trade increased from \$3.5 billion in 2000 to \$15.3 billion in 2005. Technical assistance also increased. The EU extended its assistance into areas such as ecology, customs, and border control among others.

Aneschi (2014) builds on Isaev's periodization and identifies a fourth period, which started in 2007. In this year the EU adopted the Strategy for a New Partnership with Central Asia. Unlike the PCA, the Strategy for a New Partnership is a multilateral arrangement that involves all five Central Asian states. It was an important milestone in EU-Kazakhstan relations because it paid greater attention to non-economic issues such as support of democracy, rule of law, and human rights in all of the Central Asian republics. This was the first European strategy that specifically aimed to spread European norms and values in Kazakhstan and differed from the previous approach, which focused primarily on economic issues. This new strategy was also complemented by the European Instrument for Democracy and Human Rights (EIDHR), a grant program that allocates €1,000,000 per year to Kazakhstan to support the goals listed in the strategy. In response, Kazakhstan adopted the Road to Europe (Put' v Evropu) state program. The program was adopted in 2008 and consisted of three components. The first component focused on the deepening of traditional economic ties in trade, logistics, and similar matters. The second component stressed the importance of institutional-judicial development based on European best practices. The third component was devoted to the creation of conditions for Kazakhstan's presidency of the Organization for Security and Co-operation in Europe (OSCE) in 2010.<sup>14</sup> Hence, through the Road to Europe program, Kazakhstan expressed its appreciation of the EU's new strategy towards Central Asia and its willingness to develop its institutions based on European best practices. Moreover, according to Baizakova (2013)<sup>15</sup>, the state program also raised the level of cultural cooperation.

However, during this period the EU became increasingly disillusioned with Kazakhstan's progress towards genuine democratization and the establishment of the rule of law. From 2007 the EU had expended a great deal of energy to develop democracy, accountability, rule of law, and other institutions. The European community even actively supported Kazakhstan's bid to chair the OSCE with the hope that it would deepen the role of democratic institutions in Kazakhstan. However, the long-awaited democratization did not happen. Instead, the country's leadership increased its grip on civil society. Since 2003 the country has enacted regulations which centralized state funding to NGOs and drastically

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<sup>14</sup> Republic of Kazakhstan. President. 2008. "Gosudarstvennayaprogramma Put' v Evropu." [http://ru.government.kz/docs/u080000653\\_20080829.htm](http://ru.government.kz/docs/u080000653_20080829.htm)

<sup>15</sup> K. I. Baizakova, "Regional Security Cooperation Between the Republic of Kazakhstan and the European Union," in *Russian Politics & Law*, LI (2013), no. 1, p. 88-95.

decreased the number of non-governmental organizations that advocate for human rights and freedom of expression.<sup>16</sup>

The country avoided democratization issues even during its presidency of the OSCE in 2010. The OSCE's mandate covers a broad range of issues such as security, the fight on terrorism, democracy, and human rights among others. During the country's presidency, Kazakhstan leadership focused on the first two issues. It openly neglected matters such as democratization, rule of law, and the establishment of a free society. In fact, following the OSCE chairmanship, the country's record on democratization, human rights, and rule of law moved backwards.<sup>17</sup>

Hence, this stage is characterized by both positive and negative factors. On the one hand, the EU's Strategy for a New Partnership with Central Asia and Kazakhstan's Road to Europe programs brought two sides closer than ever. On the other hand, Kazakhstan's poor record in advancing the goals of the EU strategy towards Central Asia had a negative impact on bilateral relations.

In this paper, we claim that in 2015 Kazakhstan and the EU entered a new stage of bilateral relations. In December of 2015, Kazakhstan and the EU signed the Enhanced Partnership and Cooperation Agreement, for which negotiations began in 2011. The new agreement consists of 29 areas of cooperation, including better conditions for bilateral trade and investment. Kazakhstan's Minister of Foreign Affairs, E. Idrissov, also underlines that development of human capital was included into the priorities of the new agreement. Consequently, implementation of the EPCA should result in more joint educational and research programs. Moreover, as EU High Representative Federica Mogherini stated, the new agreement puts a strong emphasis on development of democracy, human rights, and sustainable development. Idrissov also reiterated this by saying that the Strategy for a New Partnership with Central Asia was the basis of this new agreement.<sup>18</sup> Thus, Kazakhstan's commitment to adhering to European values was also indicated in the newly signed EPCA.

### **Context of Kazakhstan's europeanization**

Both Kazakhstan and the EU entered into this new chapter of bilateral relations in a world which differs from that of 2007 in significant ways. First, the EU no longer has illusions regarding Kazakhstan's rapid democratization. Before the EU embarked on its ambitious strategy towards Central Asia, most former Soviet Union countries experienced some form of political liberalization. In Ukraine, Georgia, and Kyrgyzstan, which embraced political liberalization the most, the rapid democratization processes even resulted in revolutions. In the search for

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<sup>16</sup> V. Axyonova, "Supporting Civil Society in Central Asia: What Approach for the EU?," in *EUCAM Commentary*, 2011.

<sup>17</sup> T. Tsertsvadze, J. Boonstra, "Kazakhstan: Finding Obstacles in the Path to a New EU Agreement," 2013 available on EurasiaNet.<http://www.eurasianet.org/node/67613>, accessed 12. 06. 2017.

<sup>18</sup> A. Turebekova, "Kazakhstan, EU Sign Landmark Agreement," *Astana Times*, 2015: <http://astanatimes.com/2015/12/kazakhstan-eu-sign-landmark-agreement/>, accessed 12. 06. 2017.

international legitimacy, Kazakhstan's leadership also promised speedy democratization. These promises became especially pronounced during Kazakhstan's bid for OSCE chairmanship. However, Kazakhstan's track record on democratization, and building the rule of law and an accountability system has now belied these promises. Furthermore, the economic difficulties in Ukraine and Georgia give the leadership of Kazakhstan a valid reason to postpone further democratization. Therefore, this time, the EU's approach to Kazakhstan is more down to earth, and there are no inflated expectations regarding speedy democratization of the country. There is a rather long-term approach.

Second, Kazakhstan's need for foreign investments and export markets is greater than ever. The drop in oil prices had a significant impact on Kazakhstan's fiscal situation and current account balance. People's purchasing power has also suffered as the country's national currency lost almost 100% of its pre-crisis value. In previous years high prices for oil provided the country with most of its hard currency. This flow of wealth attracted foreign investors into the lucrative oil sector regardless of the country's institutional development. That is because higher than average returns in the oil sector fully compensated for any risks that arise in countries with weak institutional development. Kazakhstan could afford to ignore the rule of law, good governance, and other things that were usually expected by European investors. Not anymore. Now the country's revenues from oil are just a fraction of what they used to be. The oil industry is not so attractive for investment, either. So, if Kazakhstan wants to continue receiving high levels of investment, it has to offer efficient bureaucracy, better regulations, rule of law, and other related Western institutions. Thus, it has to comply with the norms and values of its biggest export market and investor.

Moreover, previously large revenues from oil made Kazakhstan's national currency too strong for development of other sectors. That is, the country suffered from the classic Dutch Disease. Now the country has a historical chance to diversify its economy if it manages to improve its rule of law, accountability, and governance.

Last but not least, the continuing standoff between the EU and Russia creates unnecessary barriers to cooperation between Kazakhstan and the EU. The relations between Kazakhstan's two key partners worsened due to the crisis in Ukraine and following economic sanctions. This deterioration of relations also impacted Kazakhstan. Specifically, when the Kremlin banned imports of agricultural products from the EU, food deliveries to Kazakhstan that were passing through Russia also suffered. Russian authorities substantially strengthened the restrictions on transit and the risk of re-exportation of goods transiting through to Russia.

Moreover, both the EU and Russia expect Kazakhstan to take their side. However, the Central Asian country is too dependent on both of them to choose. The EU is Kazakhstan's largest trading partner and investor. It absorbs about half of Kazakhstan's total exports and provides more than a half of its foreign direct

investments.<sup>19</sup> Similarly, Kazakhstan also cannot distance itself from Russia either. Kazakhstan and Russia now share a common economic space and the world's longest land border. Kazakhstan also has a large Russian minority, which could cause an internal conflict if Kazakhstan decides to distance itself from its northern neighbor. Even more important, almost all of Kazakhstan's exports to Europe are transported via Russian roads and pipelines. Therefore, the country has to find a balance between the two conflicting sides, by positioning itself as a bridge between the EU and Russia. Instead of choosing sides, the country views this situation as an opportunity to become a hub that would connect European business with the EEU market.

In this regard, the country's decision-makers understand that the mere signing of the EPCA is not sufficient for this goal. The country needs to transform itself and offer European investors improved governance and regulations. This is the reason why the leadership of the country launched the five institutional reforms at the beginning of 2015. These reforms aim to drastically improve accountability of government structures and the rule of law and create a much more efficient government. Thus, the Five Institutional Reforms aim to achieve higher levels of Europeanization of Kazakhstan's regulations and policies. In order to test Kazakhstan's commitment to Europeanization, we conducted a content analysis of President Nazarbayev's speeches. The content analysis should also reveal evolution of the government's agenda and priorities over time.

### **Methodology**

Flockard (2010) identifies thick and thin forms of Europeanization. The thick form refers to full internalization of European values and practices. In contrast, the thin form is associated with no more than a change of rhetoric and agenda. Considering the institutional underdevelopment and inherently authoritarian structure of governance in Kazakhstan, we believe it is premature to discuss the thick form of Europeanization in this Central Asian country. Hence, this study focuses on thin Europeanization. Specifically, it examines the level of Europeanization of the country's agenda in detail. This study used an original content analysis of President Nazarbayev's speeches from 2010 to 2015<sup>20</sup>. The president's speeches were used because he is the main agenda setter for the country.

We took a sample of 69 speeches from 2010 to 2015 from the president's official [www.akorda.kz](http://www.akorda.kz) website. During this time period, the president made many more speeches, but not all of them are reflected in the official website's contents. We focused on speeches from the official website as we assume that the most important and agenda-setting ones are placed there. However, the population of the content analysis consists of all of the internal policy speeches, including those

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<sup>19</sup> European Commission, *European Union, Trade in goods with Kazakhstan*, 2015.

<sup>20</sup> The content analysis does not cover speeches that were made in December 2015, as they were not available on the official website when the content analysis was done.



that are not present on the website. Thus, our text analysis excludes external policy speeches.

The goal of the research was to identify the role of European values in the speeches. Other issues such as economic development and social security have been removed. Moreover, although the president's speeches contain texts in both the Kazakh and Russian languages, only Russian-language texts were included in the analysis. The Kazakh portion of texts was not covered for the following reasons. First, the substantive part of the president's speeches is delivered in Russian; the Kazakh portions of the speeches contain mostly extended greetings and some emotional remarks. Second, the Kazakh part of these speeches is usually directed to ethnic Kazakhs and has little to do with the broad state agenda. More importantly, in some of the speeches, the Kazakh text replicates the content of the text in Russian. Hence, including the Kazakh portion alongside the Russian version can result in double counting of coded words in some of the speeches.

During our content analysis, we developed codes that closely relate to European values such as democracy, rule of law, and good governance. In order to achieve higher objectivity in selecting our codes, we relied on the World Governance Indicators (WGI) as a theoretical basis. The WGI, which was developed by <sup>21</sup> consist of the following six dimensions of good governance: (1) voice and accountability, (2) political stability and absence of violence/terrorism, (3) government effectiveness, (4) regulatory quality, (5) rule of law, and (6) control of corruption. These governance indicators were used as broad categories or guidelines in developing specific codes.

Our codes consist of words that fit one of the six categories listed above. A total of 23 codes were identified during the initial review of the speeches. Since the codes were picked during subjective analysis by the authors, other researchers may come up with a different set of codes. A full list of codes in each category is listed in appendix A.

The coded words were used to run queries and generate frequencies of coded words. In order to achieve higher objectivity, the roots of the coded words were used. For example, the root word corrupt was used in order to find all of the target words such as corruption and corrupted. Moreover, in order to control for the number of words in each speech, we measured the proportional percentage of coded words as opposed to their absolute number.

As the frequencies of coded words were measured, they were categorized according to years. Then frequencies of coded words in 2015 were compared with the average of frequencies during the period 2010-2014.

## Findings

Our content analysis results show that there is a significant increase of attention in half of the governance indicators. Particularly, the empirical data shows

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<sup>21</sup> D. Kaufmann, A. Kraay, M. Mastruzzi, "The Worldwide Governance Indicators: Methodology and Analytical Issues," in *Hague Journal on the Rule of Law*, III (2011), no. 2, p. 220-246.

that the president paid greater attention to the following categories: Voice and Accountability, Rule of Law, and Control of Corruption. The full table of results can be found in appendix B.

The highest increase in the president's attention was observed in the Voice and Accountability category. This includes the following five code words: *accountability*, *democracy*, *party*, *powers*, and *transparency*. Most of the codes that were included in this category exhibited higher frequency in 2015 than the average of 2010-2014 showed. Moreover, the accountability code showed the most impressive increase among all of the 23 codes. In 2015 it was mentioned 49 times more than in the previous four years. The president also mentioned the word *transparency* five times more than he used it in previous years. Furthermore, the president referred to *democracy* twice as often as he had used it in previous years. Hence, in 2015 we can observe that the leadership of the country paid special attention to building a more accountable, transparent, and democratic society.

The second most frequently mentioned category in comparison with previous years was Rule of Law. This category consists of three codes: *Law*, *Rule of Law*, and *Judiciary*. The frequency of the Rule of Law codes grew by an astonishing 17 times in comparison with previous years. In contrast, the incidence of *judiciary* and *law* fell slightly. Thus, the president maintained some interest to the latter two issues whereas *rule of law* gained disproportionately more attention in the president's 2015 speeches. In fact, this code takes up almost 0.10% of speeches in 2015, although until 2013 the president did not mention the *rule of law* in any of the sampled speeches.

The third category that recorded growth in comparison with previous years consists of only one code. The frequency of the Corruption code (Control of Corruption category) grew by two times in 2015. Nevertheless, in 2015 the frequency of this word was a mere 0.05%, half of that of the other coded words. Thus, despite this significant growth of attention to combatting corruption, the subject still plays a relatively smaller role than other components of good governance such as development of accountability or the rule of law.

Unlike the above listed three, the categories Government Effectiveness and Political Stability did not receive any increase in attention. Frequencies of the relevant codes in both of these categories remained more or less the same as in previous periods. This is mainly because these issues have always been a priority in the government's agenda. Particularly, the leadership of the country has always stressed the importance of stability and harmony for the multicultural society of Kazakhstan. In fact, in terms of attention in 2015, the code words *stability* and *tolerance* tallied the highest frequencies. Specifically, these codes take up an overpowering 0.27% and 0.15% of speeches respectively. This is, of course, considerably higher than the 0.10% of coverage that the accountability code received in 2015. This increase in attention to stability can be explained by conflicts in Ukraine and other parts of the world. Furthermore, economic difficulties for Kazakhstan that were caused by the drop in oil prices could also threaten instability. Therefore, the president was forced to buttress his security and stability agenda.

Similar to the presence of the topic of political stability, the category of government effectiveness also exhibited relative stability in the president's speeches. Technically, in 2015 the coded words in this category received more attention than in previous years. However, these increases are so modest, that they cannot be regarded as a change of attention to this issue. For example, the frequency of the code word *modernization* only grew from 0.13% to 0.14% of speech coverage. Similarly, the president used the word result in 2015 in 0.08% of his texts as opposed to 0.07% in previous years. Hence, throughout 2015 the president's interest in the government effectiveness remained unchanged. The only code word in this category that stands out is *productivity*, which grew in frequency from 0.07% to 0.13%. The higher attention to this issue can easily be explained by the country's economic slowdown. Considering the fall of revenues from exports of oil and other raw materials, the country urgently needs to boost its labor productivity.

The only category that received considerably less attention than in previous years was that of regulatory quality. This category consists of four code words: *mechanism*, *competitiveness*, *regulation*, and *services*. All of them received less attention in comparison with previous years. We found this result surprising, as we anticipated higher frequencies for *regulation* and *services*. Considering that the country embarked on widespread structural reforms, it is logical to emphasize issues of improved regulation and state services. The increase was also anticipated because the president had paid relatively little attention to these issues in previous years. They took only 0.03%-0.06% of the president's texts before 2015. However, in 2015 the head of the country decreased his already low interest in these issues. *Competitiveness* is the only code word in this category that used to be a priority before 2015. That is because the country was pursuing a strategy of becoming one of the 50 most competitive nations for many years (Nazarbayev, 2006). However, in 2015 its frequency in the president's speeches dropped by half.

Overall, the data support our initial claim that in 2015 Kazakhstan's policy agenda moved significantly closer to European values. Categories such as voice and accountability, rule of law, and control of corruption greatly advanced in the country's agenda. Meanwhile, traditional issues such as political stability and absence of violence, as well as government effectiveness maintained their high profile. The only category that lost ground in country's agenda was regulatory quality.

It is also worth noting that the president's speeches are context-specific. The president pays more attention to certain issues depending on the geopolitical, economic, and social situation in the country and in the areas around it. For example, before the elections of 2011, his speeches were largely focused on economic achievements and directed at laypeople. In contrast, the speeches of 2015 were rather addressed to investors, both domestic and international.

## Discussion

Findings of the content analysis suggest that three out of six governance categories increased their presence in the leadership's agenda. These are the categories that are closest to the European values. Furthermore, in 2015 the leadership started paying attention to issues that had previously been ignored. These include the rule of law, accountability, and transparency, which are also closely associated with European values. Thus, our initial hypothesis that the country's agenda has Europeanized is confirmed.

Meanwhile, the president's traditional priorities such as political stability, security, and government effectiveness maintained their high profile. This is understandable considering the deteriorated economic situation in Kazakhstan. With inflation at 13% (Tengrinews 2015)<sup>22</sup> and the purchasing power of people dropping, there is a higher risk of social unrest. The risk is further reinforced by the continuing conflict in Ukraine. There is a fear that separatist ideas can spread and destabilize Russian-dominated northern parts of Kazakhstan, just as happened in Eastern Ukraine.

The Europeanization of the country's agenda is a significant event that should bring the EU and Kazakhstan closer together than ever. In fact, the Five Institutional Reforms, which are the basis of the country's Europeanization, should be considered as an enhanced version of the Road to Europe initiative. The Road to Europe was a short-term program, which lasted for only two years. Moreover, although it raised issues of institutional development, it devoted far more attention to traditional economic issues such as trade, energy, and logistics. In contrast, the Five Institutional Reforms effort covers a much larger projected time-span of 10-15 years. Furthermore, three out of five institutional reforms are devoted to institutional development. Only one of them is devoted to economic modernization and another one to identity building. Thus, in terms of institutional-judicial development the stated aims of the Five Institutional Reforms are far more comprehensive.

However, there are limits to Kazakhstan's Europeanization as well. After all, Kazakhstan is an authoritarian state. As Acemoglu and Robinson (2012)<sup>23</sup> noted, deeper democratization processes and more inclusive institutions usually threaten existing elites. This can be the reason why country's new agenda does not include issues such as human rights and freedom of expression.

Furthermore, we can also observe resistance to the president's plans for institutional development. Despite higher attention to issues of accountability and transparency, laws that undermine the influence of the people's voice and democracy have been passed. Particularly, the new labor code that was adopted at the end of 2015 makes it easier to lay off employees.<sup>24</sup> Hence, the new labor code

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<sup>22</sup> Tengrinews, "Inflation in Kazakhstan Nears 13%, Central Bank Admits," 2015, available at: <http://en.tengrinews.kz/finance/Inflation-in-Kazakhstan-nears-13-central-bank-admits-263121/>, accessed 12. 06. 2017.

<sup>23</sup> D. Acemoglu, J. A. Robinson, *Why nations fail: the origins of power, prosperity and poverty*, London, Profile Books, 2012.

<sup>24</sup> J. Lillis, P. Leonard, "Kazakhstan Passes New Labor Law Without Consulting Workers," 2015. <http://www.eurasianet.org/node/76291>, accessed 12. 06. 2017.

significantly diminished the bargaining power and voice of ordinary workers. Similarly, a new law on non-governmental organizations centralized financing of NGOs. That is, any funding that does not go through a special state operator becomes illegal.<sup>25</sup>

Nonetheless, we can observe that Europeanization of the country's agenda has already showed its first results. At the end of 2015, President Nazarbayev visited Great Britain and France. During these visits the president informed the European community of Kazakhstan's new reform agenda. He particularly stressed that the country had started paying special attention to issues of the rule of law, accountability, and good governance. As a result of this visit, investment agreements worth \$10 billion were signed.<sup>26</sup>

Moreover, in one of his speeches the president noted that these five institutional reforms would be followed by further democratization. He emphasized that, before embarking on deeper democratization, it would be essential to build up a strong middle class.<sup>27</sup> Kazakhstan's current agenda and institutional development may not create a democracy which entirely conforms to EU norms; however, a huge step towards greater Europeanization has been made. It is still too early to evaluate the full impact of Kazakhstan's Europeanization. This is a subject for further research in the years to come. However, it is clear that country's institutional underdevelopment is the main obstacle to a further deepening of bilateral relations. In this regard, Kazakhstan's current efforts towards greater accountability, rule of law, and good governance should strengthen EU-Kazakhstan relations more than any official agreement.

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<sup>25</sup> S. Glushkova, "Na zakonoproektob NPO aktivistiprosiatnolozhit' veto," 2015; Radio Azattyq, <http://rus.azattyq.org/content/kazakhstan-ngo-veto-obraschenye/27288103.html>, accessed 12. 06. 2017.

<sup>26</sup> V. Panfilova, "London i Paris Staviatna Kazakhstan", in *Nezavisimaya Gazeta*, 2015, available at: [http://www.ng.ru/cis/2015-11-09/7\\_kazakhstan.html](http://www.ng.ru/cis/2015-11-09/7_kazakhstan.html), accessed 12. 06. 2017.

<sup>27</sup> *Kazakhstan Today*, 2015 "V Predvibornuyu Kompaniu Nazarbayeva Vklucheni Piat Institucionalnikh Reform."

Appendix A.

Full List Of Codes By Categories

Categories	Voic e and Accountability	Politi cal stability and absence of Violence	Regula tory Quality	Gov ernment Effectiveness	ule of law	ontrol of Corruption
Codes	Acco untability	Securi ty	Mecha nism	Effec tiveness	aw	C orruption
	Dem ocracy	Stabili ty	Compe titiveness	Mod ernization	ule of law	
	Party	Terro r	Regula tion	Prod uctivity	udicial	
	Pow ers	Toler ance	Service	Resul t		
	Tran sparency	Unity		Succ ess		

Aitmukhanbet YESDAULETOV Askhat ORALOV, Aigerim TURKHANOVA,  
IlyasYESDAULETOV, Lyazzat TULESHOVA, Ardak YESDAULETOVA

Categories	Codes	010 (N*=7)	011 (N*=16)	012 (N*=14)	013 (N*=10)	014 (N*=11)	015 (N*=11)	VE RA GE 201 0- 201 4	201 5/(AVG201 0-2014)
Voice and Accountability	Accountability	.00%	.00%	.00%	.00%	.01%	.10%	.00%	49.15
	Democracy	.11%	.07%	.05%	.10%	.00%	.14%	.07%	1.97
	Party	.05%	.13%	.12%	.17%	.02%	.03%	.10%	0.25
	Providers	.00%	.02%	.00%	.05%	.11%	.02%	.04%	0.47
	Transparency	.03%	.00%	.03%	.03%	.00%	.08%	.02%	5.05
Political stability and absence of Violence	Security	.30%	.11%	.26%	.07%	.12%	.12%	.17%	0.69
	Stability	.17%	.14%	.19%	.13%	.17%	.27%	.16%	1.65
	Terror	.05%	.01%	.02%	.00%	.00%	.01%	.02%	0.81
	Tolerance	.20%	.08%	.15%	.11%	.04%	.15%	.11%	1.30
	Unity	.19%	.37%	.12%	.11%	.05%	.15%	.17%	0.89
Regulatory Quality	Mechanism	.02%	.03%	.05%	.06%	.06%	.02%	.04%	0.54
	Competitiveness	.27%	.11%	.09%	.22%	.25%	.11%	.19%	0.59
	Regulation	.04%	.02%	.01%	.04%	.03%	.00%	.03%	-

	S									
	ervices	.01%	.02%	.00%	.04%	.05%	.01%	.02%	9	0.4
Government Effectiveness	E									
	ffectiveness	.09%	.07%	.08%	.32%	.21%	.11%	.16%	1	0.7
	M									
	odernization	.04%	.10%	.29%	.16%	.07%	.14%	.13%	8	1.0
	P									
	roductivity	.04%	.06%	.06%	.04%	.15%	.13%	.07%	1	1.9
R										
esult	.00%	.08%	.13%	.09%	.06%	.08%	.07%	4	1.1	
S										
uccess	.24%	.18%	.22%	.23%	.15%	.23%	.20%	3	1.1	
Rule of law	L									
	aw	.20%	.11%	.30%	.34%	.07%	.15%	.20%	3	0.7
	R									
ule of Law	.00%	.00%	.00%	.02%	.01%	.09%	.01%	39	17.	
J										
udicial	.01%	.02%	.02%	.21%	.01%	.03%	.05%	3	0.5	
Corruption	C									
orruption	.01%	.04%	.00%	.03%	.05%	.05%	.02%	8	2.0	

Appendix B.

RELATIVE FREQUENCIES OF CODED WORDS BY CATEGORY AND YEAR

\*Number of speeches.



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## **Testimonies Deposition Of The Victim And Witness In The Criminal Procedure Of The Republic Of Kazakhstan**

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**Abstract.** *On the basis of the analysis of the criminal procedure novel of the Kazakhstan legislation there are considered features and problematic issues of interrogation by the investigating magistrate of the victim and witness (testimonies deposition). Deposition by the investigating magistrate of testimonies of the victim and witness in pre-judicial proceedings provides acceleration and simplification of all criminal legal proceedings.*

**Keywords:** criminal procedure, evidence process, victim and witness testimony, deposition, investigating magistrate, reception of right.

### **Introduction**

Before the adoption of the new edition of Criminal Procedure Code RK of 2014, a number of the victims and witnesses, including key, weren't done court appearance for variety of valid reasons, they avoided to appear in court without a valid reasons. It was involved an adjournment of judicial proceedings, tightening of terms of consideration and adjudication and, respectively, redundancy of criminal procedure coercion for providing their court appearance and, eventually, it wasn't facilitated the timely solution of problems of criminal procedure.

Solution of the problem was become possible at a combination of the reasonable balance of public and private interests, provided in particular, with testimonies deposition.

In this regard Art. 217 of the Criminal Procedure Code PK<sup>1</sup>, changes the approaches to the theory and practice of collection of evidence in criminal procedure. The Code provides a new to Kazakhstan an institute of testimonies deposition — features of interrogation by the investigating magistrate of the victim and the witness.

In structure of the criminal procedure law the testimonies deposition of the victim and witness is regulated by chapter 26 of the Criminal Procedure Code RK "Interrogation and Confrontation". On the face of it, it is quite logical to consider deposition of such testimonies as a kind of interrogation of the victim and witness.

But deposition significantly differs from other varieties of interrogation of the victim and witness: primary, additional and re-examination, with use of scientific and technological means (STM), interrogation of the minor.

The last ones on the key parameters are almost identical to standard interrogation in a stage of pre-judicial investigation. They are made and procedurally made out by the examining magistrate, the investigator. Defender, representatives, experts can participate at their conducting. Interrogation goes by

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<sup>1</sup> The Criminal Procedure Code of the Republic of Kazakhstan of July 4, 2014 No. 231-V with amendments of November 7, 2014 No. 248-V [An electronic resource]. — Access mode: <http://adilet.zan.kz/rus/docs/K140000231>, accessed 12. 06. 2017.

the general rules of pre-judicial investigation (Art. 210 of the Criminal Procedure Code RK), which don't coincide with conducting of interrogation on judicial examination. The testimonies, which are previously received in a stage of pre-judicial investigation owing to spontaneity of investigation of evidences, are estimated by court, as a rule, in total with results of interrogations in judicial examination of the same participants of process.

Despite such common features as the search, informative, certifying direction,<sup>2</sup> testimonies deposition of the victim and witness differs from classical investigative interrogation in the following signs:

- do not coincide with the traditional interrogation of the initiators of this investigative action (the person, conducting the pre-judicial investigation, having the right to initiate before the prosecutor, and the prosecutor, the suspect or his defense attorney has the right to petition before the investigating magistrate for interrogation of the victim and witness);

- the executor of deposition – the investigating magistrate;

- the testimonies of the victim and the witness, deposited by the investigating magistrate as the "preserved" proving evidence are checked and estimated directly at consideration of criminal case by court;

- in a stage of pre-judicial investigation there is excluded the subsequent interrogation of such depositors by the examining magistrate, investigator;

- interrogation by the investigating magistrate of the depositor is conducted by the general rules of judicial examination of the main judicial proceedings;

- deposition is provided with guarantees of reliability and admissibility of the received testimonies, and it is carried out in the conditions of publicity, participation of the parties, their equality and competitiveness, with involvement of defenders, representatives, the prosecutor;

- the deposited testimonies are registered by the court clerk in the form of the protocol of court session;

- the participants of process who were presented at testimonies deposition have the right to receive the copy of the protocol of court session in which the testimonies deposited by the investigating magistrate are recorded, and they can bring the remarks about it.

Possibly, on the basis of similar intrinsic differentiation earlier the legislator marked out as an independent investigative action - confrontation.

## **Discussion**

Thus, here it seems that the stated arguments are sufficient for a conclusion about the difficult legal nature of the deposited testimonies of the victim and witness which are differed considerably in a procedural form from traditional interrogation of the examining magistrate, the investigator. It gives the grounds to raise a question about independent nature of *interrogation of depositors - the victim and the witness and its separation in an independent variety of investigative actions along with interrogation and a confrontation.*

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<sup>2</sup> V. V. Kalnitsky, *Investigative actions*, Omsk, 2003, p. 4.

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Art. 217 of the Criminal Procedure Code RK is contained the closed list of circumstances - legislative bases of the prosecutor statement, the suspect or his defense attorney of the petition before the investigating magistrate for testimonies deposition of the victim and witness. Let's notice that the domestic circle of such bases is more systematized, than for example, Ukrainian, which besides is open (Art. 225 of the Criminal Procedure Code Ukraine).

The provided bases of deposition of testimonies of the victim and the witness can be classified by the standard criterion in the theory of criminal procedure as justification of the basis on two groups:

- 1) actual bases;
- 2) juridical (legal) bases.

According to the fair statement of the Professor S.A. Shafer, factual basis of proceedings of these or those investigative actions are the data, indicating a possibility of extraction required evidentiary information from sources provided by law.<sup>3</sup>

The actual bases of deposition in the formulation of part one of Art. 217 of the Criminal Procedure Code RK: “if there is reason to believe” represent a set of both sufficient evidences, and other data, substantiating before the investigating magistrate a conclusion of the initiator of this investigative action about need of its proceedings.

These evidences form testimonies of other participants of process on interrogations, confrontations, during the checking and specification of testimonies on the place, results of other public and unpublished investigative actions, the conclusions and testimonies of the expert, the specialist, documents and materials, other sources of evidences.

A.S. Shafer notes that the juridical (legal) bases of conducting investigative action are existence of the general competences of the investigator to proceedings of investigation.<sup>4</sup> It is necessary to specify such approach in the conditions of the reformed criminal procedure law of Kazakhstan, in the context of the considered investigative action - interrogation by the investigating magistrate of the victim, the witness (testimonies deposition).

It is preferable to refer to the legal ground of proceedings of investigative action, regulated by the Criminal Procedure Code of the formal legal requirements:

- existence of criminal proceedings;
- the investigator authorities, examining magistrate, other authorized subjects (prosecutor, investigating magistrate, chief of body of inquiry) and participants of criminal procedure (parties);
- preconditions legality of procedural decisions (for example, overcoming immunity and privileges of persons, witness immunity, etc.);
- the formalized circumstances generalized by the law;
- if it is necessary - coordination or sanction of the authorized official;

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<sup>3</sup> S. A. Sheyfer, *Investigative actions. System and procedural form*, Moscow, Norma, 2001, p. 60.

<sup>4</sup> *Ibidem*.

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- pronouncement of the relevant resolution or statement of the petition.

As the generalized and formalized legislative bases of interrogation by the investigating magistrate of the victim, the witness (testimonies deposition) there are served the norms, enshrined in part one of Art. 217 of the Criminal Procedure Code RK. They reflect the most typical investigative situations when their later interrogation during pre-judicial investigation or court session can be impossible owing to the objective reasons.

Based on the various and successfully approved foreign experience, the legislator of Kazakhstan enumerated a number of the objective circumstances, interfering an appearance of the victim, witness in court:

- 1) permanent residence outside the Republic of Kazakhstan;
- 2) travel abroad;
- 3) serious condition of health;
- 4) application of security measures;
- 5) elimination of the subsequent psychoinjuring impact on minor witnesses and the victims.

Absence of the victims and witnesses in the main judicial proceedings doesn't violate its general condition - direct examination by the court of circumstances of a criminal offense and confrontation of trial. It is compensated by the deposited "secondary" personal source of the evidence, which is previously modeling a situation if the process of evidence would have happened in court with their participation.

The foreign legislative experience, connected with somewhat different aspect, deserves attention. Particularly, the rule 15 (c) (3), Federal rules of criminal legal proceedings of the USA, is regulated deposition of testimonies of the witness, who is out of the territory of the USA, which is conducted without defendant. Such deposition can be conducted if according to the circumstances of concrete case the court finds out the following:

- a) for the purpose of implementation of criminal prosecution on cases of serious crimes, the testimonies of the witness can be considered as the important evidence for establishment of the actual facts of the case;

- b) there is a high probability of the fact that it will appear impossible to provide participation of the witness in judicial proceedings;

- c) presence of the witness during the deposition, which is conducted in the USA, is impossible;

- d) the defendant won't be able to be involved in interrogation of the witness, who is in other country; because the country, where witness is, won't allow to the defendant to be present at deposition;

- e) defendant, by force of reasonable means, can be present at process of deposition of testimonies of the witness, who is in other country.

Applications of security measures have to have the actual justification, and don't take into account an imaginary fears and assumptions of the victim and witness. Criminal prosecution authorities, the investigating magistrate must base their decision on testimonies deposition on reality of threat, impossibility to

prevent it other measures (for example, election or change of a measure of restraint, other procedural enforcement measures – restraining order, etc.).

Undoubtedly that the third part of Art. 97 and Art. 217 of the Criminal Procedure Code RK contain rather effective procedural guarantees of reliability of the deposited anonymous testimonies. On the assumption of features Kazakhstan national investigative and judicial practice, there is pertinent their strengthening at application of security measures to anonymous depositors - prosecution witness. Certainly, they are really afraid of punishment and counteractions from the suspect, the defendant, the defendant, their environment in many cases.

At the same time we dare to assume that in this area criminal prosecution authorities will be allowed abuses under the pretext of such basis of deposition most of all. Anonymous deposition will begin to be applied on criminal cases, as a rule, about sale of drugs after involvement as the main prosecution witnesses, dependent on law enforcement agencies and drug-addicted persons.<sup>5</sup> Similar negative practice is widespread in member-countries of Europe Council. It is clearly demonstrated by rather typical situation with anonymous witnesses in the case "Doorson v. the Netherlands" (the resolution of March 26, 1996).<sup>6</sup>

The deposition bases for an exception of the psychoinjuring impact on the minor victims and witnesses, unfortunately, aren't detailed yet. As it seems to us, in this context the main idea, first of all, must be about testimonies of the juvenile victims on criminal cases in the sphere of sexual integrity.

In addition experience of Estonia can be useful to the Kazakhstan legislator. According to Art. 691, 70 (2) of the Criminal Procedure Code of this state the following special conditions of deposition of testimonies of the minor victims and witnesses are provided:

- 1) the witness hasn't reached ten-year age, and repeated interrogation can exert an adverse effect on mentality of the minor;
- 2) the witness under fourteen years of age, and interrogation is connected with family violence or with the inadequate sexual treatment;
- 3) the witness has speech or sensory impairments, a mental shortcoming or has a mental disorder (with the expressed disease of nervous system).

At the same time foreign law-enforcement practice allows investigative and miscarriages of justice, when prosecution is based not on the deposited testimonies of the juvenile victim, and on "secondary" testimonies of witnesses from his words. It is a characteristic example the case "P.S. v. Germany" (the resolution of December 20, 2001).<sup>7</sup>

Expansion of the Kazakhstan bases of deposition of testimonies of the victim and witness is urgent. In this regard there is reasonable a reception of norm of Art. 691 of the Criminal Procedure Code Estonia, establishing:

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<sup>5</sup> Baltabayev K.Zh., etc. Consideration of criminal cases by the courts, connected with illicit manufacturing, processing, acquisition, storage, transportation, transfer or sale of drugs or psychotropic substances. – Astana, 2011. – Page 200-201.

<sup>6</sup> T.G. Morshchakova (ed.), *Fair trial standards (international and national practitioners)*, Moscow, Norma, 2012, p. 407-409.

<sup>7</sup> *Ibidem*, p. 401-402.

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- a restrictive substantive legal basis of the deposition – is a deliberate crime, for which as punishment there is provided an imprisonment for the term of not less than three;

- besides the objective reasons of impossibility of interrogation during pre-judicial investigation or court session the second criminal procedure basis of deposition – is fear that the person can be forced to perjury.

Along with the stated and contained in Art. 217 of Criminal Procedure Code RK, the general basis of deposition - is impossibility of later interrogation of the victim and witness during pre-judicial investigation or court session, in our opinion, it is advisable to add it with a case of difficulty of interrogation.

The foregoing is enabled to us to construct a revised edition of the first part of Art. 217 of the Criminal Procedure Code RK:

"1. The prosecutor, the suspect or his lawyer, participating in case as the defender, have the right to petition for interrogation by the investigating magistrate of the person who is the victim, the witness in case *pre-judicial investigation is conducted concerning the deliberate crime suspected of commission for which the law has prescribed punishment in the form of imprisonment for the term of over two years, and* there are had the reasons to believe that their later interrogation during pre-judicial investigation or court session can turn out impossible *or difficult* owing to the objective reasons (permanent residence outside the Republic of Kazakhstan, travel abroad, serious condition of health, application of security measures), and also *in view of fear that the victim and the witness can be forced to perjury, and for not conducting* the subsequent interrogations of minor witnesses and victims for an exception of the psychoinjuring impact on them".

The order of deposition by the investigating magistrate of testimonies of the victim and witness, established in Kazakhstan, *guarantees their reliability and admissibility*, their objective assessment by court of the first instance by consideration of criminal case in absence of depositors.

It is no accident, that interrogation of the depositor at the investigating magistrate and recording of his testimonies are made with observance of the rules of the main judicial proceedings, provided by articles:

- 347 of the Criminal Procedure Codes RK - recording by the court clerk of process of deposition of testimonies of the victim and witness by the general rules, provided for recording of the main judicial proceedings.

The protocol of court session, fixing the deposited testimonies of the interrogated person by the investigating magistrate is signed by the investigating magistrate and the court clerk. The participants of process who were present at testimonies deposition have the right to receive the copy of the protocol of court session, to bring for it the remarks within five days after its signing. Remarks for the protocol are considered by the investigating magistrate in day of receipt with pronouncement of the resolution on their acceptance or a deviation. After that the protocol of court session, the remarks (if they were brought) and the judge's ruling on their consideration are directed to the prosecutor for attaching to the criminal case file.

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- 369 and 370 of the Criminal Procedure Codes RK – the deposited interrogation of the victim and witness are kept publicly, in the conditions of competitiveness and equality of participants, at a possibility of interrogation of the depositor by the investigating magistrate and the parties: the prosecutor, the victim, the civil claimant, the civil defendant, their representatives, the suspect, his defense attorney, and also with application of scientific and technical means of fixing of testimonies of the depositor.<sup>8</sup>

- 371 of the Criminal Procedure Codes RK - interrogation of the minor depositor (the victim and the witness) in the presence of their lawful representatives and the teacher.

In addition, the norms of the Criminal Procedure Code about an order of conducting judicial examination directly indicate a possibility of use by court of the testimonies of the victim and witness, deposited by the investigating magistrate with stages of pre-judicial investigation:

- the fourth part Art. 366 of the Criminal Procedure Code RK - the citation and interrogation in court of the witness and victim aren't conducted in cases if their testimonies are deposited by the investigating magistrate in the order, provided by Art. 217 of the Criminal Procedure Code RK.

- the fifth part Art. 371 of the Criminal Procedure Code RK - a citation in court session and interrogation of the minor victims and witnesses aren't conducted if their testimonies during pre-judicial proceedings are deposited by the investigating magistrate.

- point 3) of the first part Art. 372 of the Criminal Procedure Code RK - announcement in the main judicial proceedings of the testimonies of the victim and witness, given by them at pre-judicial proceeding, and also video recordings and filmings of their interrogation is allowed at their deposition by the investigating magistrate.

Being guided by the rule of free assessment of evidences, the law and conscience (Art. 25, Art. 125 of the Criminal Procedure Code RK), the judge, considering in the main judicial proceedings criminal case in essence, at his permission has the right to recognize motivated on the internal belief, based on set of the evidences considered in judicial examination reliable or doubtful, admissible or inadmissible the evidence, obtained by the investigating magistrate in the form of the deposited testimonies of the victim and witness. In this case there is worked the general rule – no evidences have in advance established force.

If it is necessary the judge (court) of the first instance, considering criminal case in essence, is competent to interrogate depositors in judicial examination repeatedly - the witness and the victim, having subpoenaed them or remotely in the location online with application of scientific and technical means. Need of elimination of the reasons of essential contradictions, completions of considerable gaps in earlier given deposited testimonies, and also doubts in reliability and admissibility of the deposited testimonies can be the bases of repeated interrogation. In such situation the judge (court) can also use the right for

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<sup>8</sup> The Criminal Procedure Code of the Republic of Kazakhstan of July 4, 2014.

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announcement (re-proceedings) in court of the deposited testimonies for their comparison to those which are received in the main judicial proceedings.

*Limits of testimonies deposition.* According to the Criminal Procedure Code RK the procedural form of interrogation in the form of its deposition by the investigating magistrate is possible only in stages of pre-judicial proceedings: beginnings of pre-judicial investigation, pre-judicial investigation and referral of the defendant to court by the prosecutor.

## **Conclusion**

Testimonies deposition is allowed by the legislator applicable only to two types of sources of evidences – to testimonies of the victim and testimonies of the witness. Due to various forms of fixing of testimonies there is lawful a question: whether are testimonies a subject of this action, which were reported by specified persons on interrogation; or can be there testimonies during other adjacent investigative actions, directed to fixing of testimonies of the victim and witness?

We believe that the legislator mentioned no incidentally, as far as in edition of the name of Art. 217 of the Criminal Procedure Code RK there are the semantic row “features of interrogation by the investigating magistrate of the victim, the witness” and “testimonies deposition”.

Such approach dictates need of broad interpretation of the term “testimonies deposition”. In our opinion, except interrogation of the victim and the witness, the investigating magistrate has the right to deposit also their testimonies on confrontations, during the checking and specification of their testimonies on the place and line-up. As an integrated subject of extensive deposition by the investigating magistrate there are served the testimonies of the victim and the witness, reported by them during proceedings of the called investigative actions.

Unlike criminal legal proceedings of the USA, the Kazakhstan criminal procedure doesn't limit the number of depositors for the parties of prosecution and defence. In the long term we believe reasonable to limit the number of the deposited testimonies on criminal cases, for example, no more than 5 persons for each of the parties of criminal procedure. It will allow not to turn the main judicial proceedings into the absentia process, not to push the parties to concealment of weak evidentiary base, to evasion of doubtful reputation of witnesses, often prosecution, from confrontation in court of the first instance.

Interrogation by the investigating magistrate of the victim and witness is conducted in the presence of the prosecutor, the suspect (at his presence), his defense attorney, and in cases of need and other participants of process. In our opinion, to other participants of process can be included other victims, representatives, and also experts, specialists.

Unfortunately, the Criminal Procedure Code RK isn't regulated a question about alternative place of interrogation of the seriously ill patient of the witness, the victim who can't be according to subpoena. For example, in a number of the



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countries (Art. 225 of the Criminal Procedure Code of Ukraine,<sup>9</sup> the project of the Criminal Procedure Code of Armenia, etc.) interrogation of the depositor by the investigating magistrate can be conducted during assizes court session in the place of treatment or stay of this person.

Thus, deposition by the investigating magistrate of testimonies of the victim and witness in pre-judicial proceedings provides acceleration and simplification of all criminal legal proceedings.

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<sup>9</sup>A. P. Getman (ed.), *Commented Criminal Procedure Code of Ukraine of April 13, 2012 No. 4651-VI*, Kharkov: Yaroslav Mudryi National Law University [An electronic resource]. - Access mode: <http://pravo-ukraine.org.ua/resyrsi/kz/ugolovno-protsessualnyj-kodeks/5395-statya-225-dopros-svidetelya-postradavshego-vo-vremya-dosudebnogo-rassledovaniya-v-sudebnom-zasedanii>, accessed 12. 06. 2017.

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**Insufficient Study Of The Organized Crime As One Of The Reasons Of Its  
High Latency**

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**Abstract.** *Today there is no special research methodology, different from the studying of general crime, giving a full picture of the organized crime. Confrontation to the organized crime is possible only with condition of a clear idea about it, about the formation mechanism and functioning of criminal groups, and strengthening of statehood, as the organized crime arises only on those places where there are side effects and public administration faults. Therefore the search of legislative forms, which could eliminate legal invulnerability of such leaders, is one of key problems of effective impact measures on the organized crime.*

**Key words:** the organized crime, insufficient study, the hidden crime, latency, dangerous type of crime, activity of mafia type.

### **Introduction**

Now, insufficient study of the organized crime is an open question. We have no standard definition of the organized crime, where there is no exhaustive list of the signs, characterizing this type of crime, despite abundance of the publications, devoted to problems of the organized crime, and also the considerable scientist list of the Soviet and Post-Soviet periods. Also there is no special research methodology, different from the studying of general crime which allows giving a full picture of the organized crime.

The main reason of such situation is put in the nature of organized crime emergence, the essence of which is its secretive and intangible character.

Let's consider why the organized crime is latent and what prerequisites are available for this purpose.

The first. Excessive politicization of criminology science. It is known, that during the Soviet period the party membership principle of criminology had brought in science a number of postulates, where all scientists had to be adhered to it and not only the former USSR, but also the countries of the socialist commonwealth. It was steady decrease, and in the long term it was the crime elimination in country, caused by advantages of socialist production way compared with capitalist.

The crime reasons were associated mainly with the side effects of the past of capitalism and the actual influence from outside.

In the late fifties a proclamation about the end of fight against gangsterism was not corresponding, and this type of crime was remained as active and successfully functioned, moreover, thanks to this postulate the qualification of criminal acts occurred in circumvention of this article of the criminal code respectively.

For example, we observe manifestations of criminology politicization on pages of the solid edition "Course of the Soviet Criminology", written by the leading scientific criminologists of the Soviet Union (Kudryavtsev V.N., Sakharov

A.B.) during an era of Gorbachev reorganization. They specified that for understanding of the social nature and the crime nature (including at socialism) as the initial is the Marxist-Leninist provision on historically caused character of the social phenomena.

It has great importance for a denial of attacks of the bourgeois ideologists to socialism “accusing” that it still “wasn't coped” with crime, ignoring the fact intentionally that in socialist society there are no the most dangerous crime forms, inherent in the previous formations, like a gangsterism, racket; there is no merging of underworld with government; there are no whole population layers, profiting on crime and interested in it; there are no politicians, seeking to come to the power by means of criminal methods. These are the huge socialism advantages, reached owing to radical restructuring of social life for very short historical period of time: crime exists many millennia, and socialism – only a little more than sixty years.<sup>1</sup>

Yu.G. Kozlov has very critically spoken concerning this edition, which was the one of participants of the first round table on problems of organized crime. He has noted that this work was published in 1985: at this time investigative brigades of Prosecutor's office of the USSR had already worked in Uzbekistan, untangling a difficult tangle “our nonexistent” relations of underworld and the government highest echelons. There were known the Sokolovs, Krasnodar, Rostov cases. However, the diagnosis of the most dangerous disease of our society – the organized crime – hasn't been put in time. And here the social myths of the recent past are guilty in many respects: “We don't have it because it can't be there”. Therefore, it is possible to tell that the myth – is the statement about impossibility of existence of organized crime in our country – it is dangerous, and together with it disorients the public opinion and casts a sweet sleepiness over law enforcement agencies. In this connection the scientist and the journalist missions were become exclusively responsible – exactly they at continuous fruitful contact with officers of law enforcement agencies must inform in due time the society on the danger threatening to it, at the same time without being afraid of discontent from the power, discrediting myths of stagnant times.<sup>2</sup>

Moreover, the theme of studying under the name “Criticism of reactionary essence of bourgeois criminology” had been provided in teaching course “The Soviet criminology” in the highest legal educational institutions.

However, it is necessary to take into account that in the conditions of rigid ideological control - it wasn't necessary to speak about essence and the crime nature, and furthermore, about its organized forms. Otherwise, we wouldn't see the truthfulness any editions of new criminology annuals, including the quoted of “The Soviet criminology course”.

So, A.I. Dolgova, the leader of a round table on the organized crime problems, told in the opening speech that: “How it is possible not to recognize existence of the organized crime problem, if for its statement, the former General

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<sup>1</sup> \*\*\*, *Course of the Soviet criminology. Subject. Methodology. Crime and its reasons*, Moscow, Crime, 1985, p. 145.

<sup>2</sup> A. I. Dolgov, S. V. Dyakov (eds.), *Organized crime*, Moscow, Crime, 1989, p. 66-67.

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Prosecutor of the USSR V.V. Naidenov was left the post for the first most active actions for fight against this crime? Now, it is the obvious fact”.<sup>3</sup>

The second. Confusion of ideas “the organized crime” and “organization in crime” were in the former USSR after recognition of the organized crime though the famous Soviet scientist Karpets I.I. paid attention to it several times. He wrote that the crime history testifies: group crimes were, are and will be. Criminal laws of the different countries, including and our fatherland, always contained the norms, punishing for participation in a crime. At the same time the sign of group participation of commission of a crime is characteristic for organized crime. Some scientists fairly suggest considering the general structure of the organized crime of the post-socialist period in two aspects, namely:

- 1) as the organization of general crime;
- 2) as the organized crime of officials.

And, “the growth medium” for these two types of the organized crime in the former USSR territory, in their opinion, is the intensifying process of demoralization of the public relations, chaos in economy, an impoverishment or worsening of the material population status, an aspiration of considerable population segments to a profit in any way.<sup>4</sup>

V.V. Luneev absolutely fairly noted: “whether is it possible to oppose an organization crime - the organized crime?”.

The first concept, in my opinion, is wider than the second. At the same time, it is it is unlikely possible to claim that organized crime – the highest level of criminal formation! The organization is the one of major signs of the considered type of criminal activity. It is very important to find its exact criterion, which would allow distinguishing the criminal community of the organized criminals from other groups, committing crimes by previous concert.<sup>5</sup>

Lack of the specified criteria, distinguishing the organized crime from organization in crime, contribute to distortion of representation of the true from organized crime.

The third. Despite the great number of conducted researches for the organized crime, the sciences have no united conventional approach, namely a methodology for understanding of organized crime essence. Ones scientists define organized crime as illegal activity; others connect it as a special type of the relations; the third as a special form of participation in criminal activity and so on. For example, we have the standard definition of a crime, the criminal nature, and when we consider the one of its crime types, so there is arisen a great number of the questions and ambiguities.

And as a result, it is the lack of empirical base of basic data and continuous “imagination” concerning various schemes and images of organized criminal society.

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<sup>3</sup> A. I. Dolgova, S. V. Dyakov (eds.), *Organized crime*, p. 4-5.

<sup>4</sup> I. I. Karpets, *Crime, illusions and reality*, Moscow, Crime, 1992, p. 264-267.

<sup>5</sup> A. I. Dolgova, S. V. Dyakov (eds.), *Organized crime*, p. 24-25.

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According to the author opinions, existence of the great number of organized crime definitions, which are considered the given type of crime in the different viewpoints, testifies to the problems in methodology and research methods of the organized crime.<sup>6</sup>

The fourth. The reasons of high latency of the organized crime are directly connected with the legislation.

The omissions and crudity in legislative activity in relation to organized crime are caused by a number of problems in law-enforcement activity. The problems is: it is impossible to achieve clarity in the matter without knowing a clear boundary of concepts of the organized criminal group, which is the main criterion of the forming the number of crimes, called as the organized crime.

Because of high latency not only in Kazakhstan, Russia and even foreign countries, neither the legislator, nor scientific researchers, nor practical employees of the law enforcement agencies, conducting direct fight against it, and in general law-enforcement system, have no clear idea of this phenomenon.

The concept of the organized crime is “blurred” from simple complicity – as like a group crime, to the compound complicity, called by criminal group and that is, according to the item 3 of Art. 31 of the Kazakhstan’s Criminal Code, was made as the organized group, criminal organization, criminal community, transnational organized group, the transnational criminal organization, transnational criminal community, terrorist group, extremist group, gang or an illegal paramilitary force.<sup>7</sup>

## **Discussion**

According to the Russian scientist S.M. Inshakov: the organized crime – is rather new research object for to the domestic criminology. The one statement of the numerous types of the organized crime, formed by various factors, including ethnic, economic can’t be possible to define it. However in general, this phenomenon can be characterized as the complex criminal activities, which are carried out in wide scales by the organizations and other groups, having internal structure, which get financial profit and get the power by creation and operation of the markets of the illicit goods and services.<sup>8</sup>

According to our deep belief, the organized crime should be studied as a type of latent crime, as organized crime is invisible and inaccessible for research methodics of usual crime in order to exclude simplification in representation of organized crime or artificial complication.

But the reason of insufficient investigation of the organized crime is given in the various images as the form of a pyramid, where the top part is unknown or it is in the iceberg form, which lower part is also “invisible and is under water”.

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<sup>6</sup> T.K. Akimzhanov, S. A. Begimbayev, *Organized crime at the regional level (Criminological, criminal and legal aspects)*. Manual, Almaty, IC OFPPI “Integral”, 2015, p. 33-34.

<sup>7</sup> \*\*\*, *Criminal Code of the Republic of Kazakhstan: Practical guide*, Almaty, “Norma-K”, 2016, p. 34-35.

<sup>8</sup> S. M. Inshakov (ed.), *Criminology: The manual for the students of higher education institutions*, Moscow, Norma, 2005, p. 151.

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Organized crime is compared to the state within the state,<sup>9</sup> as it was based on the activity of the state institutes and was legalized the work completely. Sometimes it is compared to “a cancerous tumour”, meaning that it likes a fatal disease, which leads to degradation of a social organism, and that society wasn't found effective measures of its disposal.<sup>10</sup> The organized crime on danger system to society is put on the second place after wars.<sup>11</sup>

According to the Russian scientist Yu.M. Antonyan: a globalization creates conditions for emergence of new, wider crime forms, in particular to transnational. According to some estimates, now there are 50-60 thousand of multinational corporations in the world (MC) and about 150 largest now. By the end of the 20<sup>th</sup> century it is nearly a half of trade volume fell to their share in the developed countries, plus to it – the 80-90% export of the fuel-raw and agricultural goods from developing countries. At the same time, the share of informal transactions was made from 10 to 40%.<sup>12</sup>

It is not a coincidence in the Kazakhstan's Criminal Code, adopted on July 3, 2014 and which was come into force on January 1, 2015 in article 3; it is given the concept of transnational organized group, the transnational crime organization and transnational criminal association<sup>13</sup> and also it was provided in the Articles 264 and 265 of the Kazakhstan's Criminal Code, for their creation, management and participation in them.<sup>14</sup>

Approximate study phases of the organized crime are given in the criminology textbook edited by N.F. Kuznetsova and G.M. Minkovskiy where it is specified that in domestic criminological researches the concept “organized crime” was used in the 1970th, however, the developed researches of a problem have been started since the middle of the 1980th. Practical specialization of the fight against organized forms of crime, ensuring this fight in organizational and legal aspects was happened even later, only since the end of the 1980th. In the same years the problem began to be emphasized in the training programs; as for criminology textbooks, for the first time it was emphasized in the textbook of Moscow Law Institute (1992) and in the edition of 1994 of the present textbook.<sup>15</sup>

The methods, applied at a research of other crime types were used in studying of the organized crime.

Therefore many aspects of the organized crime were not studied as it is almost impossible to see organized crime “with the naked eye”.

The position of the Russian scientists is absolutely fair that latent crime causes serious negative consequences. Its existence creates a psychological situation

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<sup>9</sup> A. I. Dolgova, *Criminology*, Moscow, Norma, 1999, p. 59.

<sup>10</sup> S. M. Inshakov (ed.), *Criminology: The manual for the students of higher education institutions*, p. 294.

<sup>11</sup> V. V. Luneev, "Organized crime in Russia: consciousness, sources, tendencies", in *State and Law*, IV (1996).

<sup>12</sup> Y. M. Antonyan, *Criminology: manual for bachelors*, 2<sup>nd</sup> edition, Moscow, “Yurayt” Publishing house, 2013, p. 428.

<sup>13</sup> \*\*\*, *Criminal Code of the Republic of Kazakhstan: Practical guide*, Almaty, “Norma-K”, 2016, p. 24.

<sup>14</sup> *Ibidem*, p. 138.

<sup>15</sup> N.F. Kuznetsova, G.M. Minkovsky (eds.), *Criminology: Manual*, Moscow, Norma, 1998, p. 341.

of impunity of socially dangerous acts in a certain microenvironment, and it encourages the persons who have committed such crimes, to continue and expand the criminal activity. The influence of the hidden crime as it “is nevertheless caught” by the people around, the sense of justice of some society members undergoes negative changes which conduct to criminal acts .<sup>16</sup>

It can be shown especially in relation to the organized crime, considering its increased public danger.

According to the Russian scientists, expansion of the organized crime to economy had assumed the menacing scale. So, criminal business includes more than 40 thousand enterprises, the state and commercial organizations; 70-80% of the privatized enterprises and commercial banks, the most trade organizations are impose on extortion. The “tributes” size (a kind of tax in favor of criminals) makes 10-20% of a circulation that quite often exceeds a half of balance profit of the enterprises .<sup>17</sup>

The latent nature of the organized crime has also another side. So, Lunev V.V. at the first round tables, devoted to judgment of essence of the organized crime, specified that the one of ways of criminal community activity is the spreading rumors and fears about the power. It brings to criminal communities more benefit, than harm. Rumors and fears will demoralize witnesses and the victims. It is shown accurately on the Moscow racket. Widespread extortion and in a hundredth part isn't reflected in single criminal cases. Other victims were paid off and kept a silent. They are afraid of punishment, and they don't believe in protection of law enforcement agencies as well. So, it is accompanied with the organized criminals .<sup>18</sup>

Authors of the criminology textbook specify about it, and they were noted that by-turn, an intimidation with the assistance of mass media for the population “omnipresence” and “omnipotence” of this crime was generated the public opinion about power inability to carry out an effective fight against of the organized crime forms, having strengthened a passivity position, unwillingness to help law enforcement agencies .<sup>19</sup>

Such practice can bring, and sometimes and it leads, to the organized crime myth. Thanks to the latency the terms “mafia is immortal”, “mafia is impossible to behead, it can be only headed”, “mafia hands are long” and others have strongly become current not only ordinary citizens, but also representatives of law-enforcement system.

When organized crime is compared to an iceberg, where its part is invisible, it can be as reality that it was invisible part, and it can be both a big and small, and it may be doesn't exist at all.

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<sup>16</sup> V.N. Burlakov, N.M. Kropachev (eds.), *Criminology. Manual for higher education institutions*, Sankt Petersburg, SPb, 2003, p. 52.

<sup>17</sup> V. D. Malkov, *Criminology: Manual*, Moscow, CJSC “Yustitsinform”, 2004, p. 406.

<sup>18</sup> A.I. Dolgova, S.V. Dyakov, *Organized crime*, p. 26-27.

<sup>19</sup> N.F. Kuznetsova, G.M. Minkovsky, *Criminology. Manual*, p. 342.



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Therefore, the organized crime can be considered and as a type of latent crime.

For a long time the scientific criminologists are interested in the latent crime problem and it is a subject of an independent research.<sup>20</sup>

According to the scientific criminologists, in criminological aspect, the latent crime is multiple offences, which aren't included in the crime analysis of the statistical data, owing to absence of official data by a certain moment.<sup>21</sup>

Other scientists give more detailed description of the latent crime. According to their opinion, it is that part of real-life in the space-time (i.e. in a certain place and for a certain period) limits of the actual crime, which represents the cumulative (accumulative) crime massif and the committed crime persons, who aren't revealed by bodies of criminal justice and aren't considered by criminal statistics, within limitation periods of criminal prosecution.<sup>22</sup>

The famous Russian scientific criminologist Hokhryakov G.F. considered in detail the latent crime in the special 12<sup>th</sup> chapter of the criminology textbook with the same name: "Criminology of Latent Crime".<sup>23</sup> Scientists were fixed such axiom: the execution organization is higher, the higher its latency.

As organized crime represents the multiple offences of highest organization and execution, so the latency of this type of crime is at appropriate level. Therefore it is possible to claim with confidence that organized crime is one of types of latent crime.

According to foreign experts, a latent part of organized crime at 6-10 times exceeds the part, registered by law enforcement agencies.<sup>24</sup> Despite special attention of scientists to a research of the fight against organized crime problems because of its latency, the further studying raises more and more questions, than answers.

Not incidentally, in the Leader Nation of N.A. Nazarbayev's Address to the people of Kazakhstan: "Strategy "Kazakhstan – 2050" was noted: the new political course of the established state shouldn't be reconciled even with the smallest offenses, hooliganism, lack of culture, because it violates public peace, reduces life

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<sup>20</sup> A. S. Shlyapochnikov, G. I. Zabryansky, "Detection of latent crime," in *Soviet state and law*, V (1973) ; Yu V Bishevsky, A. A. Koneev, *Latent crime and sense of justice*, Omsk, 1986; K. K. Goryankov A. P. Isichenko, L. V. Kondratyuk, *Latent crime*, Moscow, Norma, 1994; \*\*\*, *Latent crime: cognition, policy, strategy. Material collection of the international seminar*, Moscow, Norma, 1993; S. A. Shcheglova *Latent crime and its value for efficiency of criminal law: abstract of the candidate thesis*, Moscow, 1973; A. A. Konev, *Main criminological characteristics of latent crime*, Omsk, 1980; R. M. Akutayev, *Criminological analysis of latent crime. Abstract of the Doctoral thesis*, Santk Petersburg, 1999.

<sup>21</sup> \*\*\*, *Soviet criminology course. Subject. Methodology. Crime and its reasons*, Moscow, Criminal, 1985, p. 164.

<sup>22</sup> K.K. Goryankov, A. P. Isichenko, L. V. Kondratyuk, *Latent crime*, p. 29.

<sup>23</sup> G. F. Hokhryakov, V. N. Kudryavtsev (eds.), *Criminology: manual*, Moscow, Norma, p. 397-410.

<sup>24</sup> A. V. Vasilyev, "Perspective researches of modern criminology. Legal and organizational issues of improvement of the Internal Affairs Department," in *Work collection of activity of adjuncts and applicants*, IV (1996), p. 137; V. V. Lunev, *Crime of the XX century. World criminological analysis*, Moscow, "Norma" publishing house, 1997.

quality. The disorder feeling and permissiveness creates the “soil” for more serious crimes,<sup>25</sup> to which is belonged organized crime as well.

The famous Russian scientist Luneev V.V. pointed about the high latency of organized crime at the International Scientific and Practical Conference, which was taken place in Moscow on November 2-3, 2000.<sup>26</sup>

The reason of lack of a clear boundary of the organized crime as research object is an insufficient legal support of the questions of criminal liability and as a result of the empirical base.

According to foreign scientists, the organized crime is called sometimes as the state in the state.<sup>27</sup> The organized crime latency which poses to the state threat, and complicating to conduct researches, is shown in its aspiration to legalization: it is especially characteristic for the West countries, having longer history of the organized crime functioning.

This feature of the organized crime is described in detail in S.M. Inshakov’s work where it is specified that the main mafia weapon – savage reprisal, which is sidelines for the background gradually, and for the first place there are moved forward the bribery, based on criminal receptions of the extremely profitable business. And it is known that the mafia family becomes richer the smaller specific weight in its affairs had a crime. Now in the USA, there is quite accurately looked through the aspiration of criminal bosses “to launder” not only money, but also the children. They were distanced from the criminal world they are provided an education of the highest level. “Godfathers” would like to see the children senators and even as like the presidents.<sup>28</sup>

The Russian scientists also point to aspiration of the organized crime legalization. So, Dolgova A.I., speaking about the organized crime relations with the state, noted that between them there is no clear and rigid boundary; the organized crime penetrates various legal relations, including, having own legal entities; it is considered with requirements and interests of different social population groups, trying to win them for their side and to have a reserve of the rank filling; along with constant and active participants of criminal activity has those who cooperates with it an one-time basis.<sup>29</sup>

Therefore CIS countries organized crime has such tendency as legalization, that is from opposition with the state it passes to “close” cooperation by attraction to service, both on a constant and on their temporary basis of the heavy hitter, of government institution specialists, rendering them both material and moral support.

At such interrelating and of the legislation imperfection, for the scientist and furthermore for law enforcement agencies it is difficult to distinguish where

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<sup>25</sup> \*\*\*, *Strategy “Kazakhstan – 2050”: New political course of the established state: Address of the President of the Republic of Kazakhstan - Leader of Nation Nursultan Nazarbayev to people of Kazakhstan*, Almaty, LAWYER, 2013, p. 35.

<sup>26</sup> “*State and Law*” journal, no. 5, 2001, p. 103.

<sup>27</sup> S. M. Inshakov, *Foreign criminology*, p. 303.

<sup>28</sup> *Ibidem*, p. 299.

<sup>29</sup> A. I. Dolgova, *Criminology*, p. 59.

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there are performed a legal acts and where the illegal actions where the organized crime representatives act as the expert of “legality”.

High latency of the organized crime doesn't only complicate but also give the chance to an explanation of true essence of the organized crime, and furthermore to acceptance of adequate measures of fight against it.

Both judicial and law-enforcement practice testifies to high latency of organized crime.

The such situation reasons were well explained by the Russian scientist V.V. Luneev, using of criminal statistics data in the Russian Federation. According to his opinion, the acts made by the organized criminal groups are included in the registered list only when criminal case was opened and there are sufficient proofs about commission of crime by organized criminals. The same acts aren't included in this account, which though had been committed by the considered criminals, but it isn't determined undoubtedly. For example in 1999, there were investigated the 25 terrorism cases, including 20<sup>th</sup> registered in the last fixed year. As a rule, this act was made by the organized criminal groups and the criminal organizations (communities). But, any cases weren't been proved that some terrorist act was committed by the criminal organization (group); therefore, we weren't found any data on commission of the terrorism act by the organized criminals.<sup>30</sup>

### **Conclusion**

The organized crime, thanks to its high latency, gets into all spheres of social activity and poses a threat to state security. It is possible to draw the following conclusion. The following circumstances demonstrate about insufficient study of the organized crime, in view of its latency, at the same time further studying of this phenomenon raises more questions, than answers.

First, the nature of this type of crime. The organized crime is the most socially dangerous type of crime, and scientists were established and almost were confirmed such dependence that the organization in preparation and commission of a crime is higher the percent of its identification is lower.

Secondly, aspiration of the organized crime to legalization and legitimation of its work. It is reached in two ways. An exception from the work of criminal means and methods, the maximum legalization of the work and activity in strict accordance with the current legislation. Another way is to take lobbying measures through the government and parliament in adoption of the “necessary” solutions and acts.

Thirdly, the most part of the organized crime is out of the activity sphere of the criminal legislation, therefore it is latent, and the border between the latent part and registered organized crime goes towards increase in the latent part. This picture is observed at statistical comparison of the committed crimes by organized

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<sup>30</sup> “*State and Law*” journal, no. 11, 2000, p. 26.

criminal groups both in the territory of Kazakhstan, and in the territory of the CIS countries.<sup>31</sup>

Fourthly, the market relations in economy have brought serious changes both to the general crime, and to its organized part.

The main task of the organized crime – is receiving super-profits, and modern market economy disposes to it and favors, and wherein on the lawful basis.

In our opinion, consideration of the reasons on insufficient study of the organized crime will clarify the understanding of this problem, and also will allow to realize and reconsider the work of law enforcement agencies, designed to fight against the specified phenomenon which is referred to the main threats of national security, according to paragraph 1. subparagraph 1) of Article 6, Law RK of January 6, 2012 “About national security” No. 527-IV (with amendments and additions as of January 13, 2014) .<sup>32</sup>

It is possible to oppose effectively to the organized crime only on condition of a clear idea about it, about the formation mechanism and functioning of criminal groups, and strengthening of statehood, as the organized crime arises only on those places where there are side effects and public administration faults.

The famous Russian scientist G.A. Avanesov fairly commented on it that definition of the organized crime is extremely important for the Legislator as only on its basis it is possible to pursue policy of criminalization of all structures activity of mafia type. The solution of the question, concerning the highest criminal echelons, outwardly untouchable to the crimes, is intractable problem. Search of legislative forms, which could eliminate legal invulnerability of such leaders, is one of key problems of effective impact measures on the organized crime.<sup>33</sup>

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<sup>31</sup> A condition of fight against organized crime on the territory of the CIS states - participants / Bureau on coordination of fight against organized crime and other dangerous types of crimes on the territory of the CIS. Main information center of Internal Affairs Ministry of Russia.

<sup>32</sup> \*\*\*, *Collection of the normative legal acts: Practical guide*, Almaty, “Norma-K”, 2016, p. 55.

<sup>33</sup> G.A. Avanesov (ed.), *Criminology: manual for the students of higher education institutions, studied on the 021100 “Law” specialty*, Moscow, UNITY-DANA, 2006, p. 426.

**Concept And Structure Of The Criminalistic Characteristic Of Extortion,  
Committed By The Organized Criminal Group**

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**Abstract.** *This article considers studying the essence of the organized (or the criminal) group which based on the components of criminalistic characteristic because the exception even the one element from its maintenance changes a final picture of the phenomenon significantly. Studying of structure of the criminalistic characteristic demonstrates that the most correct approach in this situation would be to define three main components: the organized criminal group, committing extortion; the object of extortion by the organized criminal group; a way of commission the extortion by the organized criminal group. Such triad answers actually for the main questions of this criminal type studying, and its success. At the same time this triad requires the addition by means of inclusion in it of such elements as the extortion subject, the circumstances and conditions of the commission of extortion, its motives and purposes, the circumstances of the commission of extortion, the victim of extortion and the subject of extortion.*

**Key words:** an essence the organized criminal group, the criminalistic characteristic, an object of the extortion, a way of commission of the extortion.

### **Introduction**

The specific of the extortion, committed by organized criminal group, has essential differences from extortion which made individually, or by the group which is impossible to call organized. At the same time, as priori, it is the main part of the statement that the organized criminal group, engaged in extortion, is significantly differs from other groups, where the basis of criminal activity is other sites of criminal activity. Such statement indicates that the nature of the organization of criminal activity and intra group relations does extortion, committed by the organized criminal group, and exactly given group as the specific formation, which can be carefully studied only together and deeply, so to say in the relationship of causality through functionality and vice versa. I am sure that the investigator of our work will be perplexed with the questions, and it is made him to draw such conclusion about specifics of the considered object. For this reason, the concept and the general question of the commission of extortion by the organized criminal group can't be resolved without the careful and detailed description of an essence of initial criminal group.

In turn, the unconditional condition, defining success of the determination the essence of organized criminal group, committing extortion, is the criminalistic characteristic, through definition of which, it can be possible to understand the essence, arising in the process of extortion of the information vectors. It is obvious; it can't be carried out without criminalistic characteristic of criminal group in general.

For this reason, any essence studying the organized (the criminal) group has to be based, first of all, on the components of criminalistic characteristic, because the exception even the one element from its maintenance changes a final picture of the phenomenon significantly. Inclusion in it the additional, facultative signs of the third level, equally with other signs of the first level of abstraction, turns such a characteristic, on the contrary, into contradictory and very disorderly description,

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which can be conducted, in general, to the little significant results.

## Discussion

Scientists-representatives of absolutely different science branches of the humanitarian direction were engaged in studying by the criminal group, and their range is varied from the psychology and pedagogy, sociology, political science, etc., to branches, having legal value actually (criminal law, criminalistics, and criminology).

We will give for your interest some examples of it. So, for example, as the group in political sense, is understood as “rather stable set of the people, connected by the general relations, activity, motivation and norms”. At the same time, a basis of such classification is the beginning of existence of the general interest, uniting individuals in these groups. One of the most ancient group classifications goes to Aristotle, who distinguished the related, friendly and interested groups. Now, in the political science there is very conditional division on small, big, averages groups, and also on formal and informal.<sup>1</sup> It should be noted also the fact that the standard points of view per se on the theory of group and criminal groups, the organized criminal group in science, aren't revealed by us. We face to series of discussions about essence of the group central element only with disputes on the cementing meaning of the general interest in the context of group formation, concluding in the “interest, which is a relative concept, resultant force of influence, integrated into real integrity”.<sup>2</sup> And, having already proceeded from this conclusion, on fields of scientific discussions, it is possible to find attempts of methodical denunciation it in different type of the concept. The stratometric concept, in details described by A.V. Petrovsky, is very widespread,<sup>3</sup> so in turn, it was formed as a basis for researches V.M. Bykov's criminalistic plan,<sup>4</sup> also A.R. Ratinova's<sup>5</sup> other later works,<sup>6</sup> where we will concern later the parts, regarding the category interesting us.

However, primary, initial and main element in this cascade of the points of view on essence of the criminal group, the organized criminal group, for us it is not the criminalistic group the points of view on the given phenomenon. At the heart of such research, from the point of view of a hermeneutics there can be focused only the criminal and legal understanding of the criminal group, the organized criminal group. Why have we drawn such conclusion? First of all, that the cornerstone is the M. Heidegger's philosophical approach, believing, that the

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<sup>1</sup> Yu.I. Averyanov (ed.), *Political science: Encyclopedic dictionary*, Moscow, Moscow commercial University Publishing Gouse, 1993. p. 79-82.

<sup>2</sup> *Ibidem*, p. 371.

<sup>3</sup> A. V. Petrovsky, *Personality, activity, collective*, Moscow, PolitIzdat, 1982, p. 55.

<sup>4</sup> V. M. Bykov, *Criminal group: criminalistic problems*, Tashkent, 1991, p. 4; V. M. Bykov, *The problems of investigating group crimes. Thesis abstract of Doctor of Law*, Moscow, 1992, p. 15.

<sup>5</sup> A. P. Ratinov, "Legal psychology and problems of fight against crime," in *The questions of fight against crime*, XXXVIII (2002), p. 46.

<sup>6</sup> V. T. Kontemirov, *The criminalistic characteristic of groups in the organized crime sphere. Thesis abstract of Candidate of Law Sciences*. Volgograd, Volgograd Investigative School of MIA RF, 1992, p. 18; V. V. Romanov, *Legal psychology: Manual*, Moscow, “Lawyer”, 1998, p. 288-289.

informative structure can have a formula “mission – sense – understanding – a concept”<sup>7</sup>; and also the development of this approach in I.P. Koryakin’s works, describing it in relation to the criminalistic interpretation and having at the level of the thinking algorithm the following form: “a process = purpose + the means = the process essence, purposes and means”<sup>8</sup>. In such context what qualitative wouldn't be the researches, devoted to studying of essence of criminal groups by scientific criminalists of the Soviet Union or Russia, all of them are focused on the reality which is a little divorced from us, connected with existence in these states of the criminal and legal legislation, defining a concept of the criminal group, the organized criminal group. At the same time, the specifics of criminal and legal understanding of these groups assume the conditionality and proof process and knowledge process in the concrete investigative situation. So, what makes the previous scientific researches in the best way as illustrative? We will notice that further we will use of course such illustrations in the context of facultative approach, but no more. In other words, if in the period of criminalistic and criminal and legal science of the Soviet Union and modern Russia we deal with other interpretation of criminal or organized criminal group in the criminal and legal legislation of that time and space, rather than that which is available in the criminal code of the Republic of Kazakhstan today, then the most part of conclusions about essence of the organized criminal group or extortion are remained inapplicable for the domestic legal framework, and respectively and for the domestic criminalistics, domestic practice of investigation. It is necessary to recognize that such approach where the understanding and a concept of the organized criminal group is dominating in researches of all authors practically, describing the questions of commission of extortion by organized criminal group, is as the main question<sup>9</sup>. In this case none of them are able to afford the divergences, concerning the end result at which the constructed knowledge model will be based on the structure, where the main is the terminology excluding further uses of the result. The exception, perhaps, there can be considered the works, devoted to a theoretical research of the most central concept (in our case – a concept of the group, the criminal group, the organized criminal group). Those have a criminal and legal profile<sup>10</sup>, and they logically are the “soil” for legislative judgment of these or those theoretical moments in the criminal legislation. Authors of the criminal procedure or criminalistic character works, being conducted in this logical chain, quite reasonably don't risk taking such step.

We will notice that according to structure of the Criminal Code of Kazakhstan the concept of the criminal group appears as aggravating sign of commission the extortion (part 4. Article 194 of the Criminal Code of Kazakhstan “Extortion”).

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<sup>7</sup> M. Heidegger, *Being and time*, Sankt Petersburg, SPb, 2006, p. 158.

<sup>8</sup> I.P. Koryakin. *Monograph*. Karaganda 2009, p. 257-258.

<sup>9</sup> N. Egorova, "The concept “criminal group and “group crime,” in *Legality*, II (1999), p. 19.

<sup>10</sup> A. L. Onuchin, *Determination the signs of commission of a crime by a group and the investigation specifics of such crimes. Thesis abstract of Candidate of Law Sciences*, Sverdlovsk, Sverdlovsk Law Institute, 1970, p. 4-7.

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Besides, the criminal group in its legislative understanding is described by the set of points, described in the Article 3 of the Criminal Code of the Republic of Kazakhstan “Explanation of some concepts, contained in the present Code”. So, paragraph 24) of this Code is specified that: “The criminal group – organized group, the criminal organization, criminal community, transnational organized group, transnational criminal organization, transnational criminal community, terrorist group, extremist group, gang, an illegal paramilitary group”.

Thus, the legislator lists all types of the criminal groups where it is entered the interesting us type “the organized group”. In turn, the last is specified in addition, and explained by paragraph 36) of the Article 3 of the Criminal Code of Kazakhstan “An explanation of some concepts, contained in the present Code”, pointing that “the organized group – is steady group of two or more persons who have united in advance with the purpose of commission of one or several criminal offenses”.

We will notice that this interpretation of the criminal group, the organized group, we will adhere further, during creation of our criminalistic characteristic of commission the extortion by the organized criminal group. We will point only to some approaches in such process and the logic of their separate probabilities in order to show futility of other attempts and at the same time to show the studying care of the question the structuring of criminalistic characteristic of commission the extortion by the organized criminal group. So, the question of drawing up the criminalistic characteristic of the phenomenon, its content was investigated earlier rather carefully.<sup>11</sup>

However, today, the criminalistic science dominates, according to which “the criminalistic characteristic of a crime represents a data system on ways of the commission and concealment of a crime, also the commission circumstances of a crime; individual specifications for the personality of the criminality, motives, the purposes of crime committing; the description of the typical circumstances, promoting to the commission of a crime”.<sup>12</sup> We will notice that such approach, being and undoubtedly having the interest to our subject, assumes that the concept formation of the criminalistic characteristic the extortion, committed by the organized criminal group or only this group is impossible in view of the fact that the important criterion, defining degree of the organization of that group, and also the main indicator of such organization missed out of it (in understanding of the legislator) - “stability”.

Relatively the recent T.V. Kolesnikova’s works who believe that “From the point of view of the system analysis, the criminal groups are self-developing systems, passing the number of stages – such as origin, formation, further development, destruction, indicate the organization criterion as an obligatory component of such characteristics. At the same time gradation of the criminal groups are: the group of persons – is the group of persons by previous concert –

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<sup>11</sup> R. S. Belkin, *Criminalistic encyclopedia*, Moscow, Publishing house BEK, 1997, p. 105.

<sup>12</sup> T. V. Kolesnikova, "Organized criminal group: system analysis," in *Investigator*, VIII (1999), p. 45-46.



the organized group – the criminal community represents the ascending line from the lowest step of organization – to the highest”<sup>13</sup>

From L.A. Sergeyev’s the point of view there are seven possible elements of the criminalistic characteristic of a crime: “the method of committing a crime, the conditions, circumstances, object of the criminal encroachment, the subject, interrelation between these elements, interrelation of these elements with other crimes”. He also excludes the criminalistic characteristic of the extortion, committed by the organized criminal group at the level of its point of view.

Together with this approach to understanding of the criminalistic characteristic there is also another - with the description of characteristic stages of development of the phenomenon.<sup>14</sup>

In general, R.S. Belkin’s reasonings have put the end in the series of discussions about nature of the criminalistic characteristic. So, as result we can do the following probable conclusions:

1) the concept of the criminalistic characteristic is a private fiction typical for the statement of the separate points of view on essence of the separate phenomena and it can’t embrace by its structure all situations in which such characteristic is necessary;

2) the concept of the criminalistic characteristic at the functional mission is just imperfect and it demands the specification then it can be used in criminalistic science.

In favor of the first conclusion there are testified the arguments of the scientists, pointing that the concept “criminalistic characteristic of a crime” is legally incorrect, and it narrows the types of researches, so, together with it, means the description of characteristic, distinctive properties.<sup>15</sup>

It is impossible to disregard also the opinion about an exception of the criminalistic characteristic of a crime from structure of private methods, and inclusion in it the fact in proof.<sup>16</sup> At the same time, we can’t fully agree with it because the perspective of knowledge and proof are distinguished, so, therefore here is impossible to change the situational cognition – in the belief, from the point of view for its cognition, as for criminalistics there is placed as the first – a structure, and it must be structured exactly from the point of view simplification of cognition. Having removed from the content of the private investigation methodology this element, we risk to lower significantly the heuristic characteristics of this branch of knowledge. In this context it is possible to claim that the criminalistics as heuristic science anticipates a proof which takes place only at creation of final model of knowledge. At the same time, this model of knowledge is

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<sup>13</sup> V.D. Grabovsky, A.F. Lubin (eds.), *Criminalistics: crime investigation in the sphere of economy: Manual*, N. Novgorod, Nizhny Novgorod HS MIA RF, 1995, p. 48.

<sup>14</sup> S. V. Lavrukhin, "Criminalistics subject," in *Criminalistics. Expertise. Detection. Collection of scientific articles*. Saratov, SHS MIA RF, 1995, p. 9-10.

<sup>15</sup> S. N. Churilov, *The criminalistic doctrine about the general method of investigating crimes. Thesis abstract of Doctor of Law*, Moscow, Academy MIA RF, 1925, p. 28.

<sup>16</sup> N. S. Yumashev, "Value of the criminalistic characteristic of crime type for development of a system of typical versions," in *The questions of fight against crime in modern conditions. Collection of scientific works*, Moscow, All-Russian Research Institute of MIA USSR, 1989, p. 48-49.

formed by means of the elements which aren't entering into the subject of knowledge. The inductive and deductive opportunities have and determine the large information volume passing through the learning person, and therefore it is impossible and useless in proof, in view of non-coherence with the fact in proof. The volume can have also auxiliary character as knowledge in fact has phenomenal character in difference from the proof, giving to knowledge certain forms, including by means of fictions and presumptions.

In favor of the second position there are testified the opinions that "the criminalistic characteristic of a crime is the necessary scientific construction, caused by practical activities, that the typical signs, which are contained in it, form a basis for development the system of the investigative leads" .<sup>17</sup> So, together with it, we agree with the opinion data, because in relation to our research, such element is necessary, where there is an opportunity to study and characterize this phenomenon typologically and to detail its separate properties. Such need is determined by essence of axiomatic approach in combination with representative practice of knowledge.

One more point of view in favor of existence of the criminalistic characteristic is Kolesnikova's position that "the criminalistic characteristic of a crime can be considered as one of the constructional options and a statement of data system on a crime, from the point of view of its disclosure and investigation".<sup>18</sup>

In principle, the same position is taken also by Samygin L.D., believing that "the criminalistic characteristic can serve as model for development of an effective methodology at investigation of the organized criminal activity, who marked out the criteria of creation of such model".<sup>19</sup> His position is closely bound with the point of view on essence of modeling in criminalistics and in some way follows from it . It should be noted that a basis of their point of view is the idea, following from opinion that "the criminalistic characteristic of a crime can be considered as model, because the ordered knowledge finds expression in it, an also conception about space-time construction, the phenomenon".<sup>20</sup>

## **Conclusion**

The attentive analysis of all specified positions indicates that Luzgin I.M. position is more attractive, as it allows not to be connected concerning quantity of elements of the criminalistic characteristic, their obligatory and facultative types. So, we can agree with this position correspondingly. Moreover, we believe that it functionally is reasonable because from the point of view of a hermeneutics the sense has the result

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<sup>17</sup> T. V. Kolesnikova, *The criminalistic characteristic of criminal groups, committing extortion. Thesis abstract of Candidate of Law Sciences*, Saratov, 2000, p. 19, p. 244.

<sup>18</sup> L. D. Samygin, *The specific signs of organized criminal activity - Thesis abstract of Candidate of Law Sciences*, Saratov, 2000, p. 25.

<sup>19</sup> M. N. Hlyntsov, *The criminalistic information and modeling at crime investigation*, Saratov, Publishing house of Saratov University, 1982, p. 160.

<sup>20</sup> I. M. Luzgin, *Modeling at crime investigation*, Moscow, 1981, p. 52.

and in a less degree – its form. Nevertheless, anyway, it is necessary to speak about the elements entering this type in relation to any separate kind of such characteristic, as the criminalistic characteristic can't be amorphous in the absolute. We will try to determine those elements of the criminalistic characteristic of extortion committed by the organized criminal group, which in our opinion, are inherent in this type of the characteristic.

Studying of the structure of criminalistic characteristic demonstrates that the most correct approach in this situation would be to define three main components: the organized criminal group, committing extortion; the object of extortion by the organized criminal group; a way of commission the extortion by the organized criminal group. Such triad answers actually for the main questions of this crime type studying, and its success.

At the same time this triad requires the addition by means of inclusion in it of such elements as the extortion subject, the circumstances and conditions of the commission of extortion, its motives and purposes, the circumstances of the commission of extortion, the victim of extortion and the subject of extortion.

We believe that an addition to the main group (the organized criminal group, the commission way of extortion by the organized criminal group) of the facultative elements must be happened in accurate relation with basic elements. It allows more accurately retracing the relations between basic and facultative elements, and also relations between basic elements and conducted behind them.

*Concept And Structure Of The Criminalistic Characteristic Of Extortion, Committed By The Organized Criminal Group, Astra Salvensis, V (2017), no. 10, p. 113-119*

Mohammad Hossein JAVADI, Seyyed Mehdi SALEHI,  
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**Effect of Islamic Jurisprudence and Law on  
Practical Ethics with an Overview to Jame Abbasi Sheikh Baha'i**

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**Abstract.** *The human being who is a civilian entity and lives in the community is forced to interact with others, and major part of this interaction is through actions that are objective, tangible, and understandable. It is a natural that due to the sense of need to be loved and praised, humans attempt to perform verbs and actions in the normal conditions that are considered by others. It is due to the fact that in the study of the thought and way of life of Sheikh Baha'i, ethics and ethical dignity in human existence is one of the gates of spirituality. From the viewpoint of the Islamic scholars, especially Mulla Sadra, human in his own being and survival cannot be satisfied to his nature and to be needless from others; because his kind is not unique to a particular person, he cannot live in the world, except through civilization and community and co-operation. Over the years, sociologists have consistently emphasized this view that the most important feature of the modern world is rationality. And this is while rationality, alone and without reliance on religion and ethics is not able to reform society and solve the basic problems of social life of humans due to cases such as the domination of sensual desires upon practical reason, the ignorance of man and his social relations, the use of modern societies from the teachings of religion, and the ignorance of real life of man and the reduction of life to material life. In this article, tried to be investigated the influence of the belief in the concepts and themes of the verses in practical ethics and behavior, one of the great scholars of Islam i.e. Mohammad bin Hossein Ameli, known as Sheikh Baha'i and the effect of morality on his ethics, with an overview in the jurisprudential and law context of Jame Abbasi to be discussed and investigated. This research seeks to determine whether the foundations of religious ethics are capable of solving community problems.*

**Key words:** Islamic Ethics, Jurisprudence and Law, Sheikh Baha'i, Practical Ethics, Jame Abbasi

### **Introduction**

Religion and ethics, as two sources of guidance and virtue and prosperity have always been considered by human community. For this reason, these two issues have been the constant subjects of intellectual and philosophical scholars and schools since the beginning of the widespread of rational and philosophical issues. Religious ethics has been a great part of the teachings and recommendations of all religions during history, and in terms of rationality, interrelationship, the influence of religion in the formation of complete ethics in human society and the capacity of the foundations of religious ethics in solving relevant problems has been the foundation of thought of scholars and caused numerous research and works. Sheikh Bahai is one of the few Shiite thinkers who have been a skillful person that he has some ideas in the theoretical and practical field. He is the one who applies religious doctrines and individual learning and his social, political, jurisprudent and intellectual ability during his time, he has been neither theoreticians nor enforcement, but he has been master in theory and practice, because Sheikh Bahaoddin Mohammad is grown in the field of religious teachings and has a developed religious thought and he is a religious theorist has been able to introduce religious ethics so that this behavior is seen throughout his life. By an overview of

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the conduct of this great scholar of the Islamic world, it can be easily considered the grateful works of Islamic goodness in the achievement of social and cultural affairs during his time. By thinking in the high position of Sheikh during the Safavid era, it will be discovered that his success in applying religious teachings is with goodness and this is precisely the example of Imam Ali (as) who has said that religion is nothing but affection. In this article, we are going to study the effect of Islamic jurisprudence and law on practical ethics by an overview to "Jame Abbasi" that is the first jurisprudential thesis codified. This research seeks to determine whether the foundations of religious ethics are capable of solving problems with society.<sup>1</sup>

### **A review on life and jurisprudent and ethical compilations of Sheikh Baha'i**

Sheikh Baha al-Din, Mohammad Bin Hossein Ameli <sup>2</sup>known as Sheikh Baha'i is a famous scientist of Safavid period. He was from Jabal Amel Sham. Bahaeddin Muhammad was ten years old when his father, Ezz al-Din Hussein Ameli, went to Iran from the elders of Sham. When they arrived in Qazvin and found that city as the center of Shiite scholars, they settled there and Baha al-Din became his father's apprentice and other scholars. The death of this great mystic and scientist is mentioned in 1030 or 1031 at the end of eighty-seventh year of his life. He was died in Isfahan, and disciples took him to Mashhad with magnificence, and buried in the shrine of the eighth Shiite Imam alongside the Shrine. Sheikh Bahai was a man who hated the pretense and prosperity, and this was an incentive for pure reputation of sheikh. Sheikh Bahai was confirmed and acknowledged by most scholars and orientalis, he was one of the unique men of Iran's science and literature who was grown by the culture of that era of this border and was the best representatives of the Iranian education in the tenth and eleventh century. Sheikh Baha'i has trained students who has been one of the greatest scholars of Iranian science and literature, such as the philosopher and divine wise Molasadra Shirazi and Molahasan Hanifi Kashani, another promise that was outstanding in philosophy and wisdom, jurisprudence, principles and mathematics and astronomy and became bright stars in the field of Iranian science and literature that not only Iran but the Islamic world were proud of them. Among the books and great literary and scientific works of Sheikh Baha'i, in addition to Ghazalites and Rubaiyat, there are two Masnavi, one called Masnavi "Nan and Halva" and the other is "Shir and Shekar", and his scientific works are "Jame Abbasi, Kāshkol, Bahr al-Hesab and Meftah al-Fallah Valarbaein and Share al-Qalaf, Asrar Al-Balaghe and Al-Vajize." Other books by Sheikh Baha'i, which is over eighty-eight books and treatises, have

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<sup>1</sup> T. David Evans, "Re-investigating the Relationship between Religion and Crime: The Impacts of Religion, Non-Religious Controls and the Social Environment on Adultery's Delinquency", translated by Ali Silmy in *The Journal of Field and University*, XXIII (2006), p. 142-179.

<sup>2</sup> Ameli, Sheikh Baha al-Din Mohammad, Jame Abbasi Farahani *Publications of Tebran Aqiqi Bakhsbayeshi, Abdul Rahim Translation of Al-'Arabain, Sheikh Baha'i International Congregation of Commemorate of Sheikh Baha'i*, Central Secretariat of the Congress, Thought Publishing, 2008.

always been the books needed by the applicants of science and literature. "Jabal Amel" area has always been one of the Shiite centers in the west of Asia, and there are many Shiite leaders and scholars who have come from this area. At any time, even today, the Shiite sect has lived abundantly in Jabal Amel, and has greatly contributed in the establishment of Shiite religion in Iran and its foundation, especially from the seventh century and during this time; great leaders went among them and Baha'i family has been among the most famous Shiite families in Jabal Amel.

Baha'eddin came to Iran with his father in childhood, and after graduation, he became sheikh al-Islam of Isfahan. He moved to Hajj in 991, he went to many Islamic territories including Iraq, Sham and Egypt, and returned to Iran after four years later when he became Darwish. He was proficient in philosophy, logic, board and mathematics sciences, a collection of works that he wrote is about 88 books and treatises. In 1031, he died in Isfahan and, according to his will; his corpse was taken to Mashhad, and buried him near the holy shrine of Imam Ali ibn Musa al-Reza (pbuh) near Astan Ghods Museum.

### **Sheikh Baha'i's ethical school**

Sheikh Baha'i's ethics and conduct can be investigated precisely. Sheikh Baha'i has been pure Shia undoubtedly by repeated stipulations that has in his works and placed Imam Ghaem as the intercessor of his sins. His ethics is apparently as a Darwish, and has considered official science as fracas and everywhere has said:

The official science is fracas no quality is achieved from it In Sheikh Baha'i's works, there is adherence to ethics, especially in Arba'in, which has explained ethical themes with a particular scrutiny in issues such as enjoining good, sincerity in action, and ethical orders, religious brothers' rights, sincerity and true intention and ... In the sixth chapter of Jame Abbasi in the discussion of enjoining good, he said:

"You should know that it is obligatory to do good work as prayer is obligatory and good deeds is custom as prayer is custom, and forbidden of the denial act i.e. obscene as adultery is obligatory and denial of the abominable act is custom, and there is reward in both of these and the obligatory of enjoining good is obligatory and forbidding evil is consensus and none of mujtahids is wrongdoing in incumbency of these two. But the contrast is whether the necessity of this is based on the custom or on the basis of law, and there is a contrast among mujtahids whether it is obligatory that if some uprising, it is overthrown from others or it is obligatory on everyone, some believe in the first one and some in second, in the sense that whenever a person enjoins good and forbidden evil and the person does not accept, it is also obliged to others to do it until he accepts, and it is not obligatory until five conditions. A person who is enjoining good and forbidden evil must be wise. Second, he should know that the good deed is good and bad deed is bad until he is safe from wrongdoing. Third, he should know if he orders or forbids, it affects the person, so if it does not affect, it is not obligatory. Fourth, the

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person who has will force him to do good or forbid him from bad deed, so if he repented, his obligation or forbidden is not obligatory."

Sheikh Baha'i believes that enjoining good deeds is obligatory in the rank of obligatory prayer and considers enjoining good as custom as Mustahab prayer. According to this idea, if this important promise is considered by Islamic society, as Sheikh considered, the society will be able to approach a society with the characteristics in Madine. Also attention to the incumbency conditions that he considers shows well that the movement of society towards ethics has certain delicacies.

### **Resort and utilization of Bahai from religious teachings in the introduction of Islamic ethics**

Sheikh Baha al-Din Mohammad Ameli has a special mastery in these affairs because he himself has these characters and virtues and it is due to these features that he was able to have a special position in the Safavid court, that not only all the friends and acquaintances but also the enemies and adversaries also acknowledged with Sheikh. About the division of water of Zayande Rud, the land disputes and the conflicts between the marginalized areas and the areas used Zayande Rud has been a long and historic disagreement that Sheikh by the power of thought and the calculative ability and of course, with cleverness, the most important of all these components is having toleration and ethic because with all the differences, a person entering the subject must have a good ethics in order to be able to withstand the harshness and has a positive influence on the situation. Anyway, it can be concluded that if Sheikh had these abilities, he has been surely true in the religious teachings in faith school that could pass the problems that he encountered in childhood in the closed political social space and by tolerance of plenty of suffering reach to Sheikh Al-Eslami and to be the sole guardian of the Safavid court.

### **The role of religion and ethics in controlling and solving social problems**

From the perspective of Islamic scholars, the need of the society to the law is the main reason of man's need to religion and prophecy. Mulla Sadra also writes: "Man in his own being and survive cannot satisfy his nature and to be needles from others, because his kind is not unique to a particular person, therefore he cannot live in the world, except through civilization and society and co-operation and therefore its existence and survival alone is not possible .<sup>3</sup> Allameh Tabatabai believes that humankind is seeking to exploit and recruit others, and this issue while compelling him to form a community, faced him with disarray and corruption; consequently, in all aspects of his life faced with conflict and the only correct solution of conflict is the way of religion and religion has established all the laws required by mankind. The human need in forging law to religion in contemporary society is more than ever because human social relations have

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<sup>3</sup> Muhammad ibn Ibrahim Sadr al-Motaalehin, *Al-Shavahed Al-Rabubie*, by Correction, Suspension, and Introduction of Seyyed Jalaleddin Ashtiani, Tehran, Tehran University Press, 1967, p. 359-360.



become more widespread and complex, creating issues that not existed in the past. Shahid Motahhari believes that the social life of man requires a kind of "division of labor" among the people of the society, according to which each person performs their "duties" and "assignments" to each other. The realization of such a healthy position in social life is based on respect for treaties, covenants, and contracts. According to him, devotion to the promise and covenant is one of the most important pillars of human civilization. This role has always been in responsibility of the religion, and so far no substitute has been found for it. One of the main concerns of community leaders and social science researchers is finding an effective and efficient way for protecting the law and the norm and contact with law and solving social problems. From the point of view of Allamah Tabatabai, Bu'ali and Mulla Sadra and other Islamic scholars, one of the most important functions of religion and ethics in contemporary society is to protect social laws and norms and combat with deviants and social deviance in an Islamic society. In addition to the viewpoint of Islamic thinkers, non-Muslims also refer to this point. For example, the commentators and commentators of Durkeim's view have considered one of the functions of religion as social control and control. "Important social values and norms, such as those related to human life, sexual behavior and property, usually not only placed in the realm of law, but also in the realm of religion," says Kouzer. And religion through the strengthening of important values and norms helps to individual social control effectively. <sup>4</sup>In the view of Dutocvill, the function of religion is not solely to the formation and establishment of democracy, but also plays a crucial role in controlling the society and solving its problems. In his opinion, religion in front of people is like a barrier that not let the nation to accept any new commentary and to do anything. Parvardan says: "It is religion ... that has been used as enforcement for primary legislation" <sup>5</sup>From the point of view of other people like Montesquieu, Hobbes and Bodan, religion plays an important role in social controlling.<sup>6</sup>

### **The role of ethics in solving individual and social problems in Islamic society**

All religions have ethical components, and religious approaches to ethical issues historically have dominated ethics over secular approaches. Given that "ethic is a matter of worship, man equally that worships God unknowingly, he unknowingly follows a series of divine orders when consciousness becomes unconscious, that the prophets have come for this purpose (the prophets have come to lead us to our own nature and convert that unconscious mind and that natural issue into a conscious issue) then all his actions will be ethical, not just a course of certain work; but his sleeping and eating can be an ethical act. i.e. when

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<sup>4</sup> Lewis Kouzer, *The Life and Thought of the Elders of Sociology*, translated by Mohsen Solasi, Tehran, Scientific Publications, 2001; Amanollah Fassihi, "The Need of Modern Society for Religion; with an Emphasis on Law and Ethics," in *Islamic Educational Journal*, 2013.

<sup>5</sup> Julie Scott, Irene Hall, *Religion and Sociology*, translation of Afsaneh Najjarian, Tehran, Rasesh Publication, 2003, p. 85.

<sup>6</sup> *Ibidem*, p. 85.

our plan of life is set based on the task and satisfaction of the right, then our eating, our sleeping, our walk, our speaking, and the summary of our lives and death will be ethics seamlessly. The y will be holy works seamlessly:

Properly, pray and worship, life and death are for God"

Everything will be God, and everything becomes ethics. The issue of ethics and ethical ad human dignity, except in the school of God, cannot be justified and proved in any other school. Only the school can justify and essentially this ethics and ethical dignity in human existence is one of the gates of spirituality i.e. one of the gates that introduces man to the meaning universe and believes in the world of religion.<sup>7</sup>"

### **Reasons for the need of human society for religion and ethics from the perspective of the scholars of Islam**

Over the years, sociologists consistently emphasized on this view that the most important feature of the modern world is rationality, as Max Weber has introduced "rationality" as the most important feature of modern society . Weber's intended reason is instrumental rationality; a rationality that distrusting to the traditions, distrusting to the heavenly rituals in socialization, the belief in self-esteem of man, the belief in the self-esteem of reason, and the belief in the instrumental role of reason are considered among its most important features.<sup>8</sup> In Weber's view, the rationality is realized in three areas: "social structure", "thought and reason", and "culture", and makes man needless from other matters, such as religion (Parsons, 2010). A problem that arises in this connection is that rationality alone and without reliance on religion and ethics will not be able to reform society and the basic issues of human social life.

**1) The domination of desires on the practical reason:** Allameh Tabatabai believes that a reason which is forging and stipulating law is practical reason, not theoretical reason whose duty is to recognize the truth of everything. Practical reason takes preliminaries of its judgment from the intrinsic feelings that exist in every human being at the beginning of its existence. And it does not need to have actuality, and these feelings are the forces of sordidness and disbelief, and these emotional sentiments are the cause of destructing system. The result is that human by trust to reason from religion cannot be needless in establishing law and the way of living.

2) Unknown human being and his social relations: Man has two types of intentional and non-intentional behavior. In spite of non-intentional behaviors of human, intentional behaviors always require a plan, method, and choice of means for the destination. Human reason is useful in the design of program and related to the everyday problems of life, but developing comprehensive plans of all dimensions of human life and according to its components is beyond the power of

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<sup>7</sup> Julien Freund, *Sociology of Max Weber*, translation of Abdul Hussein Nik Gohar, Tehran, Rayzan, 1989.

<sup>8</sup>Alireza Shojae Zand, *Become customary of Christian and Islamic Experience*, Tehran, Center of Recognition of Islam and Iran, 2002.

individual and collective intellect, since, firstly, human beings, and in particular social life is the highest unknown; Secondly, man has an eternal life that reason does not have the power to understand it, because it does not have the ecstasy of experience. So the need for a school and ideology is necessary.<sup>9</sup>

**3). The use of modern societies from the teachings of religion:** the neglected problem is that all the positive developments of the contemporary world are considered to be the product of human rationality; while it is not as this, and religion in this field directly and indirectly has a role. Allameh Tabatabai believes that despite the fact that Islam has a short life was dominated on west and east while the realm of his governance was very low and created a transformation in history of human; a transformation that its remarkable works have remained so far and will be remained from now on. According to Allameh, the transformation of the present age and its full effect is the emergence of Islam in the world<sup>10</sup>.

**4). ignoring the true life of man and the reduction of life to material life:** religion in the first step is for providing the spiritual and mental needs of man. Allameh Tabatabai says that the main purpose in today's world is to exploit and enjoy the benefits of material and worldly life, while in terms of Islam, worldly and afterlife prosperity is not achieved, except through inviting and joining to pure monotheism.<sup>11</sup> Allamah Mohammad Taqi Jafari, with the division of life into natural and sensible says that man in organizing natural life not only does not need religion, but religion in some cases disturbing him. What caused the human needs to religion is a reasonable life and in which man reaches the ultimate perfection, and the realization of it is in the hereafter. Therefore, the ultimate goal of religion is to make a reasonable life. And if this goal is to be neglected and natural life to be preceded, it is instrumental use of religion, such as those who have preceded natural life have used religion and other values as instrumental use.<sup>12</sup>

## Conclusion

In the study of Sheikh Baha'i's thinking and method and ethics can be sought behaviors that show intellectual, ethical, social, and spiritual maturity, because he has used every opportunity to serve the people, and strengthening of the status of religion, so that in most of these affairs, he has achieved success. This is precisely the same sentence that: worship is the service of people, and the service is the transcendental ethics of the cultivated people in the high Islamic and revelation teachings. Therefore, the issue of ethics and human and ethical dignity, except in the school of God, cannot be justified and proved in any other school. Only this school can justify it and essentially this ethics and ethical dignity in human existence is one of the gates of spirituality. In the perspective of Islamic

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<sup>9</sup> Morteza Motahari, *Collections of works*, 2<sup>nd</sup> volume, Tehran, Sadra, 1995, p. 47, p. 172.

<sup>10</sup> Seyyed Tabatabaee, Mohammad Hossein, *Interpretation of Al-Mizan*, translated by Seyyed Mohammad Bagher Mousavi Hamedani, Qom, The Society of Teachers Publishing, 2009, p. 175-180 p. 196-197.

<sup>11</sup> *Ibidem*, p. 196-197.

<sup>12</sup> Mohammad Taghi Jafari, *Philosophy of Religion*, Tehran, Research and Culture Center, 2007, p. 125-126.

scholars, especially Mulla Sadra, man in his own being and survive cannot satisfy his nature and to be needles from others, because his kind is not unique to a particular person, therefore he cannot live in the world, except by civilization and society and co-operation and therefore its existence and survival alone is not possible man cannot inherit in his own being and survive, and it is unnecessary to others, because his style is not unique to a particular person, therefore, he cannot live in the world, except through civilization and society and co-operation, the need of human to forge law to religion in contemporary society is more than the past, because human social relations have become more widespread and complex, and created problems that not existed in the past. One of the main concerns of community leaders and social science researchers is finding an effective and effective way of protecting the law and the norm, dealing with law and regulators, and solving social problems. One of the main concerns of community leaders and social science researchers is finding an effective and efficient way for protecting the law and the norm and contact with law and solving social problems. From the point of view of Allamah Tabatabai, Bu'ali and Mulla Sadra and other Islamic scholars, one of the most important functions of religion and ethics in contemporary society is to protect social laws and norms and combat with deviants and social deviance in an Islamic society. Over the years, sociologists consistently emphasized on this view that the most important feature of the modern world is rationality, as Max Weber has introduced "rationality" as the most important feature of modern society. The issue raised in this relation is that rationality, alone and without reliance on religion and ethics, based on the causes, such as the domination of desires on the practical reason, the unknown man and his social relations, the use of modern societies from doctrine teachings and ignoring the real life of man and the reduction of life to material life has not been able and will not be able to reform society and solve the basic problems of human life. According to above, religious teachings has the ability to solve the problems of man and society around him, and the man must take step to eliminate the barriers of progressive life in heaven teachings, and the more human kind has ethics recommended by religion, they will have more happiness in the individual social life and even among the most societies.

Who are believers?

## Aspects of political theology in the spiritual autobiographies of the Orthodox space?

### New potential keys of lecture\*

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**Abstract.** *Starting from the title question, the author tries to identify aspects of political theology in the spiritual autobiographies from the Orthodox space (especially from the 19<sup>th</sup> and 20<sup>th</sup> centuries). After presenting the main aspects that defines the genre, and, in the same time, after showing what political theology means, he emphasizes the main important elements of this topic that can be founded in the works of the aforementioned genre. Afterwards, he emphasizes the actual dimension of it and proposes a new key of lecture of the identified passages that contain elements of political theology taken from spiritual autobiography. Through these aspects, that may highlight new important ones, the author brings into attention elements that were not enlightened enough before. Although the diaries of Saint John of Kronstadt or Saint Silouan the Athonite, or the one of the Russian Philosopher Nikolai Berdiaev were not supposed to be works of political theology, they constitute important aspects for this topic and useful elements for an analysis that can show how the Gospel principles can be applied in nowadays world.*

**Keywords:** human being, politics, diary, memories, contemporary world, aspects of actuality.

### Introduction

Important topic for the theological and political debates, "political theology" was, from its first use in 1922<sup>1</sup>, very investigated. Authors from different confessional spaces and places, with different political orientations<sup>2</sup> have spoken about the way how the Gospel principle of love can be put into practice into the

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<sup>1</sup> Carl Schmitt, *Political Theology: Four Chapters on the concept of Sovereignty*, trans. by George Schwab, Cambridge, MIT Press, 1985.

<sup>2</sup> In books like: Grant N. Havers, "Carl Schmitt, Leo Strauss, and the Necessity of Political Theology", in Gabriel R. Ricci (ed.), *Politics in Theology*, col. "Religion&Public Life", vol. 38, New Brunswick and London, Transaction Publishers, 2012; Pantelis Kalaitzidis, *Orthodoxy and Political Theology*, col. "Doxa & Praxis", Geneva, World Council of Churches Publications, 2012; Jean-Yves Calvez, *La politique & Dieu*, col. "Essais", Paris, Les Editions du Cerf, 1985; Thia Cooper, *Controversies in Political Theology: Development or Liberation?*, col. "Controversies in Contextual Theology Series", London, SCM PRESS, 2007; Peter Losonczi, Mika-Luoma-Aho, Aakash Singh (eds.), *The Future of Political Theology. Religious and Theological perspectives*, Burlington, Ashgate, Farnham, 2011; Theodors Assefa Teklu, *The Politics of Metanoia. Towards a Post-Nationalistic Political Theology in Ethiopia*, col. "European University Studies", Series "Theology", Frankfurt am Main, Peter Lang, 2014; Adam Edward Hollowell, *Power and Purpose. Paul Ramsey and Contemporary Christian Political Theology*, Grand Rapids, Michigan, William B. Eerdmann Publishing Company, 2015; Nathanael Micklem, *The Theology of Politics*, London, New York, Tokio, Oxford University Press, 1941; Luke Breherton, *Christianity and Contemporary Politics. The Conditions and Possibilities of Faithful Witness*, Oxford, Wiley Blackwell, 2010; Bernhard Giesen, Daniel Suber (eds.), *Religion and Politics. Cultural Perspectives*, col. "International Studies in Religion and Society", vol. 3, Leiden, Boston, Brill, 2005; Kristina Stoeckl, Ingeborg Gabriel, Aristotle Papanikolaou (eds.), *Political Theologies in Orthodox Christianity. Common Challenges – Divergent Positions*, col. "T&T Clark Theology", Edinburgh, T&T Clark and Bloomberg, 2017.

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political discourse of their time.<sup>3</sup> Some of them tried to link it with topics like the theology of liberation,<sup>4</sup> or Ecology<sup>5</sup>, and others with other topics. The results resided in some interesting researches published until today and in the way how this topic can be used to create bridges between theology and other cultural and scientific spaces.

Starting from the interdisciplinary meaning of this topic, we will try here to investigate if there can be founded aspects of political theology in the spiritual autobiographies from the Orthodox space. We will shortly define this topic, we will present the main works of the genre and analyse the main aspects from its content that fits with our key-word.

### **Aspects of political theology in the spiritual autobiographies of the Orthodox space? New potential keys of lecture**

Started in the 4<sup>th</sup> century of the Christian Era with the *Confessions* of Saint Augustine,<sup>6</sup> but rooted much deeper in the 12<sup>th</sup> chapter of the 2<sup>nd</sup> Letter of Saint Paul to Corinthians<sup>7</sup>, the genre of spiritual autobiography knew during the time the

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<sup>3</sup> Jean-Louis Leuba, "Autour de la Théologie politique", in Mihail P. Grigoris (ed.), *Nikos A. Nissiotis, Religion, Philosophy and Sport in Dialogue. In memoriam*, Athens, Thessaloniki University Press, 1994, p. 203; Elisabeth Ferris, "Pace-making in the Emerging World", in *The Ecumenical Review*, 44 (1992), no. 3, p. 325-332; Lesslie Newbigin, "Whose Justice?", in *The Ecumenical Review*, 44 (1992), no. 3, p. 308-311.

<sup>4</sup> Cf. M. D. Litonjua, *Liberation theology the paradigm shift*, Lanham, University Press of America, 1998; Gustavo Gutiérrez, *A theology of liberation history, politics and salvation*, London, SCM Press, 1988; James H. Cone, *A Black theology of liberation*, Maryknoll, N.Y, Orbis Books, 2010; Shaibu Abraham, *Pentecostal theology of liberation. Holy Spirit & holiness in the society*, New Delhi, Christian World Imprints, 2014; Dwight N. Hopkins, *Introducing Black theology of liberation*, Maryknoll, N.Y, Orbis Books, 1999; Thomas Kochuthara, *Theology of liberation and ideology critique. A study on the praxis of liberation in the light of the critical theory*, New Delhi, Intercultural Publications, 1993.

<sup>5</sup> Fact that transformed even authors like the Ecumenical Patriarch Bartholomew in writers with contributions on political theology, according to some authors. Cf. Ecumenical Patriarch Bartholomew, *Et Dieu vit que cela était bon. La vision théologique de la création dans la tradition orthodoxe*. translated in French language by Jean-Francois Colosimo, Paris, Les Editions du Cerf, 2015; Olivier Clement, *Adevăr și libertate. Ortodoxia în contemporaneitate. Convorbiri cu Patriarbul Ecumenic Bartolomeu I*. translated in Romanian language by Mihai Maci. Sibiu, Deisis Press, 1997. Cf. Kwok Pui-Ian, "Ecology and the Recycling of Christianity", in *The Ecumenical Review*, 44 (1992), no. 3, p. 304-307; Elías Crisossomo Abramides, "Echical Aspects of Climate Changes", in *The Ecumenical Review*, 44 (1992), no. 3, p. 333-338.

<sup>6</sup> Saint Augustine, *Confessions*, translated by Henry Chadwick, Oxford, Oxford University Press, 1991.

<sup>7</sup> See: Rudolf Bultmann, *The Second Letter to the Corinthians*, edited by Erich Dinkler, translated by Roy A. Harrisville, Minneapolis, Augsburg Publishing House, 1985, p. 218-236; Roger L. Omanson, "Second Corinthians 8:4 and 9:1 and the larger context of Paul's letters", in *Review & Expositor*, CVIII (Summer 2011), p. 307-311; Ralph P. Martin, *2 Corinthians*, col. "Word biblical commentary", Waco, Word books, 1986; Larry Joseph Kreitzer, *2 Corinthians*, col. "New Testament Guides", Sheaffield, Sheffield Academic Press, 1996; Mitzi L. Minor, *2 Corinthians*, Macon, Ga., Smyth & Helwys Pub., 2009; Ivar Vegge, *2 Corinthians - a letter about reconciliation: a psychagogical, epistolographical and rhetorical analysis*, Tübingen: Mohr Siebeck, 2008; *Fully Revised Fourth Edition The New Oxford*

contribution of some important writers and mystics like: Saint Teresa of Avila<sup>8</sup>, Saint John Paul the Second,<sup>9</sup> Saint Faustina Kowalska,<sup>10</sup> John Wesley,<sup>11</sup> Dag Hammarskjöld<sup>12</sup> and s. o. In some confessional spaces, especially in the branches of reform, this genre became very important being also used for proselyte purposes. This fact explains the huge increase of it there.

In the Orthodox space, there are many texts that contain passages of spiritual autobiography,<sup>13</sup> but only three of them are really parts of the genre: the ones of Saint Silouan from Mount Athos,<sup>14</sup> Saint John of Kronstadt's<sup>15</sup> and philosopher's Nikolas Berdiaev.<sup>16</sup> From the very beginning, we must specify the fact that each author focuses on his autobiography in a special way. The monk from Athos speaks about the works of the grace in his heart, Saint John speaks about his meetings with God into the Holy Liturgy but he also sometimes makes references to his life, while the aforementioned philosopher presents the same topic linked with the history of his country and with some philosophical meditations.<sup>17</sup> Therefore, no one of them is particularly dedicated to the aspects of political theology nor do they speak about it at least in one chapter of their books.

If in the last book, there are some references to the every day life of people from that time, contemporary with the author, to the evolution of the Russian world,<sup>18</sup> but also to the evolution of the whole humanity and even if sometimes the author criticises some political aspects and proposes solutions (as a secondary aspect of his memorial notes, because the primordially it belongs to his autobiography and to the evolution of his life), while in Saint John of Kronstadt's diaries there are some references to the relationship between politics and Church, in the notes of Saint Silouan there cannot be found a direct reference to this.

*Annotated Bible. New Revised Standard Version With The Apocrypha*, ed. Michael D. Coogan, Oxford, New York, Oxford University Press, 2007, p. 2035-2037, for more information about this topic.

<sup>7</sup> John Barclay, "2 Corinthians", in: James D. G. Dunn,

<sup>8</sup> Thérèse d'Avila, *Œuvres complètes*, Paris, Les Editions du Cerf, 1948.

<sup>9</sup> Saint John Paul II, *In God's hands*, San Francisco, Harper One Press, 2017.

<sup>10</sup> Saint Maria Faustina Kowalska, *Diary – Divine mercy in my soul*, Stockbridge, Marian Press, 2005.

<sup>11</sup> John Wesley, *The Journal of the Rev. John Wesley, A. M.*, edited by W. Reinald Ward and Richard P. Heitzenrater, col. "Bicentennial Edition of the Works of John Wesley", vol. 18, Abingdon, Abingdon Press, 1988.

<sup>12</sup> Bernhard Erling, *A Reader's Guide to Dag Hammarskjöld's Waymarks*, Minnesota, St. Peter, 2010; Dag Hammarskjöld, *Markings*, London, Faber and Faber, 1972. Cf. Maxim (Iuliu-Marius) Morariu, *Autobiografia spirituală a lui Dag Hammarskjöld – o abordare teologică*, Cluj-Napoca, Argonaut Publishing House, 2016, for more information about this important spiritual autobiography from the Lutheran Swedish space.

<sup>13</sup> Like the memories of the Romanian Orthodox monk Nicolae Steinhardt: Nicolae Steinhardt, *Jurnalul fericirii*, Cluj-Napoca, Dacia Press, 2002.

<sup>14</sup> Saint Silouane, *Œuvres Spirituels – extraits*, col. "Spiritualite Orientale", vol. 5, Begrolles en Magues, Abbaye de Bellefontaine, 1976.

<sup>15</sup> Saint John of Kronstadt, *Viața mea în Hristos*, translated in Romanian language by Dumitru Dura, 2<sup>nd</sup> edition, Sibiu, Oastea Domnului Publishing House, 2005.

<sup>16</sup> Nicolai Berdiaev, *Essai d'autobiographie spirituelle*, Paris, Buchet –Chastel, 1958.

<sup>17</sup> Mario Casañas, Mario, "L'autobiographie de Berdiaev" *Revue Philosophique de Louvain*, XXXXVI (1982), no. 3, p. 282-288.

<sup>18</sup> Cf. Nicolai Berdiaev, *Essai d'autobiographie spirituelle*, p. 38.

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But one could notice that, in his texts<sup>19</sup>, in some situations, Saint John of Kronstadt criticises the excessive rationalism. Isn't this fact linked with political theology? Wasn't the excessive rationality caused by a bad politic, by the struggles between the politics and the Church and a form of secularism?<sup>20</sup> Surely is. Therefore, from this point of view, there can be found aspects of political theology even in this short paragraph of the Russian starets<sup>21</sup> where he apparently speaks about the contemporary world and its influence upon the Church.

Also, we must mention that some doxological texts can be also read and used in researches of political theology. For example, in his memories, he says that:

*"Looking at the creatures that God created and at their infinite multitude, I see myself risen upon all, through the image and likeness of God, through reason and freedom, through the capacity of understanding with my mind the whole creation and wonder of how can be seen in it the hand of the the Creator, too wise and so good."<sup>22</sup>*

Here, as we can see, he speaks about the whole creation giving to his words an ecological content, like Pierre Rabhi<sup>23</sup>, Pope Francisc,<sup>24</sup> or Ecumenical Patriarch Bartholomew<sup>25</sup> in their writings. But he also presents a pacific vision that can surely be used in the discussions of political theology.

The same thing can be said about Saint Silouane who, sometimes seems to despise the world and its values<sup>26</sup> and to be without interest on this topic, but, in other situations he prays for the world and for that the Grace of God work there:

*"O Lord, give this love to all of us!*

*Give it to whole world.*

*Holy Spirit, come in our souls and make as to glorify the Creator with a loud voice: Father, Son and Holy Spirit! Amen! Amen! Aleluia!"<sup>27</sup>*

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<sup>19</sup> Saint John of Kronstadt, *Viața mea în Hristos*, p. 6.

<sup>20</sup> Cf. Maxim (Iuliu-Marius) Morariu „O perspectivă ortodoxă asupra fenomenului secularizării”, în *Altarul Banatului*, XXVI (LXV) (2015), no. 3-6, p. 76.

<sup>21</sup> Maxim Egger, "Lumières et ombres d'un saint au milieu du monde", in Alla Selawry, *Jean de Cronstadt – Médiateur entre Dieu et les hommes*, traduction de l'allemand par Martine Redhon et Maxime Egger, Paris, Pully, Les Edition du Cerf, Le Sel de la Terre, 2001, p. 8.

<sup>22</sup> Saint John of Kronstadt, *Viața mea în Hristos*, p. 58-59.

<sup>23</sup> Cf. Pierre Rabhi, *Manifeste pour la terre e l'humanisme*, Paris, Actes Sud, 2008; Pierre Rabhi, *Le Recours a la terre*, Lyon, Terre du ciel, 1995; Pierre Rabhi, *L'Offrande au crépuscule*, Lavalledieu, Candide, 1989; Pierre Rabhi, *Le Gardien du feu: message de sagesse des peuples traditionnelles*, Paris, Albin Michel, 2003.

<sup>24</sup> Pape François, *Le visage de la miséricorde*, Paris, Les Editions du Cerf, 2015.

<sup>25</sup> Patriarche œcuménique Bartholomée, *Et Dieu vit que cela était bon. La vision théologique de la création dans la tradition orthodoxe*; Olivier Clement, *Adevăr și libertate. Ortodoxia în contemporaneitate. Convorbiri cu Patriarbul Ecumenic Bartolomeu I*, p. 87-96; Elphidoporos Lambriniadis, „Ecological and Inter-Generational Solidarity. Initiatives of The Ecumenical Patriarchate”, in Ingeborg Gabriel, Helmut Renockl (ed.), *Solidarität in der Krise. Auf der Suche nach neuen Wegen*, Wien-Wurzburg, Echter Verlag, 2012, p. 113-120.

<sup>26</sup> "When I was a child, I loved the world and its beauty; the forests and the grasps; I loved the gardens ant the forest, the rain, the snow which was falling from the sky. I loved whole God's creation... But after God has known me, everything has changed and my soul became his prisoner. I didn't want the world anymore. My soul was always looking the places of the world leaved by my Lord. Like a prisoner bird who wants to escape from its cage, so my soul was looking for God. Where are you, my light? I search you with tears". Saint Silouane, *Ecrits Spirituels – extraits*, p. 32.

<sup>27</sup> *Ibidem*, p. 79.



His words are a real exhortation at peace and love for the peace of the whole world. He also proposes there a solution for all the problems of the world, which political theology is dealing with, the rejoice in Lord's presence. Even now, after almost one century from his departure from us, his words are very actual and important. Used in the debates of political theology they can offer interesting solutions at some problems and help to a better Orthodox understanding of the world, of its problems and future.

### **Conclusion**

As we can see, although the spiritual autobiographies from the Orthodox space are not dedicated to the political theology having little to do with this topic, there can be found interesting thoughts of their authors that can be read in that key, being useful for the investigations of political theology. Ecological points, the care for the whole world seen as a creation of God, the intercessions for God's intervention in its problems or for the work of Holy Grace upon all the people are only a few points that can be used in the debates of political theology. Reading from this perspective some parts of the aforementioned works, it can help to find solutions at some important problems of nowadays society but also to better highlight the Orthodox approach on some contemporary issues.

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# *Art and History*



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## Art-Image Contents of Lexeme “Time” in the Poetic Language of J. Brodsky<sup>1</sup>

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**Abstract.** *The article deals with the study of the peculiarities of the author’s individual semantic filling of the lexeme время / time in the poetic language of J. Brodsky.<sup>1</sup> Time is one of the system-forming abstract entities that play an important role in the person’s realization of the world’s organization of nature and society of people. The results of cognition of the properties of time find a vivid expression in the very language, so the study of linguistic temporal structures allows us to objectify the mental forms and comprehend the conceptualization of the world by human consciousness and mentality.*

*A special realization of time lexemes is in literary texts, because individualized meanings generated by the text itself along with the main nominative generalized meaning are realized in linguistic units. From this insight into the textual behaviour of linguistic units, it logically follows that each particular text has its own individual, functional-semantic field of artistic time inherent only in it, the units of which realize the temporal category in a special, original and unique way. In this connection, a special interest for our study is the corpus of poetry by J. Brodsky, which gives a metaphorical, axiologically coloured, emotionally marked image of time.*

*As a result of the research it has been found that the lexeme время / time in the texts of I. Brodsky has both usual meanings and occasional ones. In most contexts, the traditional interpretations of the temporal lexeme are enriched in the poet’s works with additional meanings connected with the author’s individual interpretation of temporal reality, as a result of which new original metaphorical images arise that reflect the specificity of the writer’s worldview. Thanks to the special image system, the anthropomorphic depiction of temporal aspects, the abundance of associative parallels of the lexeme время / time is perceived in the literary world of J. Brodsky as a multidimensional, original temporema, saturated with poetic meanings.*

*Research methods: descriptive-analytical method, method of contextual analysis of literary text, method of interpretation of literary text, method of continuous sampling.*

**Keywords:** time, poetic language, J. Brodsky, temporal category, metaphorical images.

### Introduction

Among large number of poetic systems, works by J. Brodsky representing a collection of bright, extraordinary, original literary texts are full of an abundance of philosophical and metaphysical reflections on life and place of a person in it.<sup>2</sup> The key role in Brodsky’s literary world is played by the category of time, based on the synthesis of philosophical, existential concepts. Time in the poetic language of

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<sup>2</sup> V. Polukhina, *Brodsky through the Eyes of his Contemporaries*, London, The Macmillan Press, 1992; D. M. Bethea, *Joseph Brodsky and the Creation of Exile*, Princeton, Princeton University Press, 1994; G. L. Kline, "A History of Brodsky’s «Ostanovka v pustynе» and his «Selected Poems»", in *Modern Poetry in Translation*, X (1996), p. 8-19; L. Loseff, *Joseph Brodsky: a Literary Life*, New Haven, Yale University Press, 2011; A. Berlina, *Brodsky Translating Brodsky: Poetry in Self-Translation*, New York, Bloomsbury, 2014.

Brodsky has not only a universal semantic structure, being characteristic of European and Russian linguistic view of the world, but also a number of specific, individual-authoring features that create on the pages of his works a unique multi-layered image of time.

It is known that the language of poetic works is characterized by various transformations of lexical units that differ in semantic complexity, the abundance of associative connections and the presence of extralinguistic subtext.<sup>3</sup> Brodsky's poetic text is not only conducive to the development of semantic augments in the semantics of temporal lexemes, the appearance of various kinds of transformations inherent in the words with temporal meanings, but also represents a concentrate of symbolic meanings associated with the category of time.

The topicality of the work is due to the fact that the study of the category of time represented in the poetic language of J. Brodsky creates a pronounced anthropocentric orientation of the work and makes it possible to determine the features of the author's individual worldview that influences the creation of literary reality.

The aim of the research is to reveal the peculiarities of the author's individual semantic filling of the lexeme *время* / *time* and to determine its figurative content in I. Brodsky's literary works.

### **Materials and methods**

The material of the study is the poetic texts by J. Brodsky, representing the main corpus of the poet's works, as well as the fragments of his essays, interviews and conversations.

In the process of studying, the following methods were used: descriptive-analytical method, method of contextual analysis of the text of literature, method for interpretation of the literary text, method of continuous sampling.

### **Results**

As is generally known, in the scientific picture of the world time is recognized as a materially non-embodied category, being devoid of any visual, audial or tactile characteristics: "Time cannot be measured in terms of the physical experience of the five senses, it does not leave perceptual images in the mind and is a mental representation in its pure form, reflecting a person's idea of the world around him"<sup>4</sup>. However, in the texts of literature it can possess the above features,

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<sup>3</sup> S. R. Levin, *Linguistic structures in poetry*, Hague, Mouton, 1962; R. Pinsky, *The situation of poetry. Contemporary poetry and its traditions*, Princeton, Princeton University Press, 1976; R. W. Gibbs, *The poetics of mind: Figurative thought, language and understanding*, Cambridge, Cambridge University Press, 1994; A. S. Afanasev, A. M. Sayapova, "Space as semantic beginning in E.A. Boratynsky's early poetics," in *Journal of Language and Literature*, VII (2016), no. 3, p. 163-166; D. Rakhimova, G. Hayrutdinova, "Semantics and functioning of the lexeme *igra* (GAME) (Based on the Material of Literary Works of Russian Poetry of XIX-XX Centuries)," in *Journal of Language and Literature*, VII (2016), no. 1, p. 186-189.

<sup>4</sup> I. Zakhariyeva, "Emigrant Note in J. Brodsky's Lyrics of 70s-80s of the Twentieth Century," in *Russian Poets of 20th century: Phenomenal Aesthetic Structures*, Sophiya, 2007, p. 153-162.

reflecting the specifics of the author's personal, individual perception of the phenomenon of time by the poet.

It should be noted that J. Brodsky was always interested in the abstract idea of time, the embodiment of ideas about which in poetry was possible only by their description by the lexemes with concrete semantics: ... *I would say that I am more interested in a purely abstract idea of time. I think I can quite say that I use concrete ideas about time at the moment of immersion in abstract reflections. And I try to make these abstract reflections tangible via imagery, specific symbols and all that sort of things.*<sup>5</sup>

Being a category of abstract, not amenable to visual contemplation, time in the ordinary consciousness of a person does not correlate with any kind of colour spectrum, which cannot be said about literary world-image, in which time acquires concrete-material outlines and becomes the object of visualization. In the poetical texts of J. Brodsky, time is presented as an object of visual perception, which receives a colour description that carries a special symbolic subtext. Time in poetic language turns out to be directly related to one colour - gray, which is due to special extra-linguistic factors and personal associations of Brodsky: *I always say that if you imagine the colour of time, it will most likely be gray. This is the main visual impression and sensation from the North,*<sup>6</sup> *There is a gray colour in fashion - the colour of time and logs* ("The Fifth Anniversary"). Gray colour is associated in the worldview of the poet with the North, the Baltic Sea, and also becomes a symbol of the whole water element, with which the author repeatedly compared himself, but more often - time.

Time in the works of J. Brodsky appears as a reified entity, directly connected with a certain matter: *В этом силлом хрипении / за годами, / за веками / я вижу материю времени, / открытую петухами* («Петухи» / «Roosters»). / *In this wheezing hoarse / over the years, / over the centuries / I see the matter of time / discovered by roosters*). It is assimilated to a piece made of cloth and associated with the process of spinning: *И он перестойт века, / галактику, жилую часть / грядущего, от паука / привычку перенявши прясть / ткань времени, точнее – бязь / из тикающего сырца, / как маятником колотаясь / о стенку головой жильца* («Взгляни на деревянный дом...») / «Glance at the Wooden House ...»). / *And it will outlive times, / the galaxy, the living part / of the future, from the spider / adopting a habit of spinning / a gist of time, more precisely - coarse / from the ticking raw, / like banging with pendulum / the tenant's head against the brick wall*. In this context, according to O.I. Glazunovaya, the metaphor of spinning conveys the idea of prolonging time, stretching it.<sup>7</sup> Using such metaphorical combinations, J. Brodsky often brings together the category of time with the traditional-poetic image of Parki, the goddess of life and fate: *Жизнь есть товар на вынос: / торса, пениса, лба. / И географии примесь / к времени есть судьба. / Нехотя, из-под палки / признаешь эту власть, / подчиняешься Парке, / обожжающей прясть* («Строфы» / «Strophes»). / *Life is a commodity to take out: / torso, penis, forehead. / And admixture of the geography / to time is fate. / Reluctantly, under the lash / you will*

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<sup>5</sup> В.П. Полухина (ed.), *Joseph Brodsky. Large Book of Interviews*, Moscow, Zakharov, 2000.

<sup>6</sup> S. Volkov, *Dialogues with Joseph Brodsky*, Moscow, Independent Newspaper, 1998.

<sup>7</sup> O. I. Glazunova *Poetics by Joseph Brodsky: author's thesis for doctor of philology: 10.01.01; 10.02.01*; Sankt Petersburg, 2009.

*recognize this power, / submit to Parki, / who adores to spin.* However, in the poet's works there are other author's individual images of time created due to nominations related to needlework and weaving: *Но много сломанных иголок / на платье времени сгубя, / хотя бы собственных знакомых / любить, как самого себя* («Петербургский роман» / «Petersburg novel»). *But many broken needles / having been spoilt for the dress of time, / at least own friends / to love like yourself.*

Time in the poetic language of J. Brodsky also appears in the role of creation, which is characterized by certain physiological processes. For example, it is actualized in the poet's texts as the addressee of speech capable of carrying out communicative activity, as evidenced by linguistic constructions in which the temporal lexeme is used in the function of circulation: *О, время, послужи, как пустота, / часам, идущим в доме Аполлона* («Приходит март. Я сызнова служу...» / «March comes, I am anew ...»). / *O, time, serve as emptiness / hours in the house of Apollo.* J. Brodsky accentuates the readers' attention to the possibility of time to carry out a speech action, which is expected from him by a lyrical hero, trying to build up an original dialogue in the course of time: *Да. Времени – о собственной судьбе / кричу все громче голосом печальным. / Да. Говорю о времени себе, / но время мне отвечает молчаньем <...> Пусть время обо мне молчит* («Бессмертия у смерти не прошу...» / «I do not ask death for immortality ...»). / *Yes. Time - about my own destiny / I'm crying louder with a sad voice. / Yes. I'm talking about time to myself, / but time responds with silence ... <...> Let the time be silent about me.* In this poetic fragment, the temporal lexeme is used with the predicate *молчать / be silent*, which implies the possibility of performing a speech action, and therefore, "belongs to the virtual area of the language"<sup>8</sup>. The use of acoustic metaphors allows J. Brodsky to depict time as a category capable of carrying out the process of speaking, but for some reason does not use this possibility and remains silent: *Над нами время промолчит, / пройдет, не говоря* («Шествие» / «Procession»). *The time will remain silent over us, saying nothing.* This feature of the representation of time draws attention of V. A. Kulle, who marks the motive of silence in his works, the accompanying image of time in the poet's work.<sup>9</sup> Confirmation of this interpretation are the examples illustrating time in the image of entity that verbalizes without the participation of speech or lacking the ability to speak: *И возникает на пороге / пришелец, памятник, венец / в конце любви, в конце дороги, / немного времени гонец* («Петербургский роман» / «Petersburg novel»). / *And the messenger of a dumb time appears on the threshold / an alien, a monument, a crown / at the end of love, at the end of the road.*

It is important to note that in J. Brodsky's poetic works, time is endowed with sounding, that is, the ability to reproduction of certain sounds, which is indicated by the semantics of verb forms that are combined with a temporal lexeme. But in most cases, sounding is not the main feature of time but indirect, serving as an additional accompany of action performed by time: *Однако время, шурша, / сделало именно это / Однако, время rustling, / did precisely that* («Fin de

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<sup>8</sup> M. N. Epstein, "Word and Silence in Russian Culture," in *Zvezda*, X (2005), p. 202-222.

<sup>9</sup> V. A. Kulle, *Poetic Evolution of Joseph Brodsky in Russia (1957- 1972): dissertation for candidate of philological sciences: 10.01.01., Moscow, 1996.*



Siecle»). The adverbial participle used in the given poetic fragment with the temporal lexeme is in the meaning of “making a muffled crackling sound” and indicates the possibility of time to make sounds. The presence of acoustic features of time is indicated by the contexts in which the temporal word is in combination with the predicates with the meaning of deprivation of sound which, according to the poet, it never had: *Он шел по пространству, лишенному тверди, / он слышал, что время утратило звук* («Сретенье» / “Candlemas Day”) / *He was going around the space, deprived of solid surface, / he heard that time lost its sound.*

In addition to the acoustic features, time is endowed in J. Brodsky’s works with other characteristic features as well, for example, an ability to see: *...а Время / взирает с неким холодом в кости / на циферблат колониальной лавки* («Осенний вечер в скромном городке...») / “An Autumn Evening in an Unpretentious Town”) / *... and Time / gazes with a cold in the bone / upon clock face of colonial bench; ...покамест Время / варварским взглядом обводит форум* («Римские элегии» / “Roman Elegies”) / *... meanwhile Time / is shooting a barbarous look around forum.* In “a look” of time the poet captures a certain axiological colouring which gives a distinctive imagery to the temporal unit.

Time in J. Brodsky’s language of art is endowed not only with the ability to bring about all kinds of physiological processes, but to be carried away into the sphere of sensing and tactile perception owing to the use of meteorological metaphors that represent time as an entity being sensed via tactility. The most frequent lexeme that characterizes time in the same way is the word *холод* / *cold*. It is the cold that the time is likened to and associated with: *Время есть холод. Всякое тело, рано / или поздно, становится пищею телескопа: / остывает с годами, удаляется от светила. <...> Там, где роятся сны, за пределом зренья, / время, упавшее сильно ниже / нуля, обжигает ваш мозг, как пальчик / шалуна из русского стихотворенья* («Эклога 4-я (зимняя)» / “Eclogue 4” (winter)) / *Time is cold. Any body, sooner/ or later, becomes food for telescope: / gets cold, moves off the luminary. <...> Where the dreams swarm, beyond the sense of sight, / time, having dropped below zero/ burns your brain like a finger / naughty child from Russian verse.* The poet points to the inextricable link between time and cold, manifested in their peculiar correlation: *В феврале чем позднее, тем меньше ртути. / Т.е. чем больше времени, тем холоднее...* («Эклога 4-я (зимняя)» / “Eclogue 4 (winter)”) / *In February, the later, the less mercury. / That is, much time, colder... .* According to I. Zakharieva, cold in the poetic world of J. Brodsky is connected with the image of glaciation, the process of which is synonymous with the idea of aging:<sup>10</sup> *Жизнь моя затянулась. В речитативе вьюги / обострившийся слух различает невольную тему / оледенения* («Эклога 4-я (зимняя)» / “Eclogue 4 (winter)”) / *My life dragged on. In blizzard’s intoning / a keen ear discerns an involuntary theme / of glaciation.* However, in the scientific literature on J. Brodsky’s works, there are the other variants of interpretation of the symbolic content of the lexeme *холод* / *cold*. For example, if I. Y. Samoylova regards cold as a variant of

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<sup>10</sup> B. N. Zhanturina, "Spacial Component in Metaphors of Time," in *The Proceedings of Volgograd State Pedagogical University*, V (2009), p. 24-27.

emptiness along with such concepts as vacuum and absolute zero,<sup>11</sup> L. Batkin sees in cold an indispensable sign of death<sup>12</sup>, then E.V. Melnikova notes a positive perception of cold that is understood as "accumulating extensible beginning", associated with "eternity", being capable of "slowing down life and preserving space".<sup>13</sup> According to Melnikova, the acuity of perception of the lyric character is connected "with cold": the attitude to creativity as more visible, clear, to what remains after you; the attitude to death as a way of approaching eternity."<sup>14</sup>

### Summary

The image of water is directly associated with the notion of time in the poet's works: *Я просто считаю, что вода есть образ времени, и под всякий Новый год, в несколько языческом духе, стараюсь оказаться у воды, предпочтительно у моря или у океана, чтобы застать всплытие новой порции, нового стакана времени («Набережная нецелых») / "The Waterfront of the Incurable" / I simply believe that water is an image of time, and on every New Year's Eve, in a somewhat pagan spirit, I try to find myself by the water, preferably at the seaside or at the ocean, to catch the emersion of a new portion, a new glass of time). This traditional convergence of time and water element finds a vivid expression in the poetic language of J. Brodsky, being abundant in detailed metaphorical images: *Время выходит из волн, меняя / стрелку на башне — ее одну («Лагуна» / "Lagoon") / Time comes out of the waves, changing / the arrow on the tower — it only. Water in the poet's works is interpreted as "mirror" of time, its original twin, which makes it possible to speak on the existential perception of J. Brodsky's foundations of the world: *Ведь вода, если угодно, это сгущенная форма времени <...> Если можно себе представить время, то скорее всего оно выглядит как вода / After all, water, if you like, is a condensed form of time ... If one can imagine time, it looks like water. Water becomes the main "cultural mythologeme" in Brodsky's poetry, which embodies the substance, the "thing" that "is also a mediator between time, space and language, and the property of all things in general, their beginning and end".<sup>15</sup>***

### Conclusion

Thus, in the poetic language of J. Brodsky, in the semantic structure, the lexeme *время / time* encompasses both the main nominative generalized meanings and individualized ones, formed by the author's concept and generated by the text. The poetic language of J. Brodsky is characterized by an abundance of semantic nuances of the lexeme *время / time* and its conceptual, psychological and evaluative interpretation, which reveals the originality of the author's thinking and attitude.

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<sup>11</sup> I. Y. Samoilova, *Dynamic Picture of the World of J. Brodsky: Linguistic Aspect: Monography*, Grodno, GrSU, 2007.

<sup>12</sup> L. M. Bakhtin, "Thing and Emptiness. Notes of the Reader in the Margins of Brodsky's Verses," in *October*, I (1996), p. 161–182.

<sup>13</sup> E.V. Melnikova, "Some Aspects of Frame "Tactility" in J.A. Brodsky's Sensory Picture of the World," in *The Herald of Cherepovets State University*, III (2010), p. 36-40.

<sup>14</sup> *Ibidem*, p. 39.

<sup>15</sup> E. A. Chernichenko, "Culture as a Myth in Poetry of Late J.A. Prodsky," in *Philology and Man*, III (2008), p. 169-177.

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The semantic fullness of the temporal lexeme reflects the features of the author's individual perception of time, the formation of which was significantly influenced by extra-linguistic factors.

*Art-Image Contents of Lexeme “Time” in the Poetic Language of J. Brodsky, Astra Salvensis,*  
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**Complex Corpus Of Turkisms Of The Russian Language\***

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**Abstract.** *The complex (multiple) corpus of Turkisms that is described in this article is the result of a long-standing study of the Turkic layer of Russian vocabulary, which has been formed in a multicultural language environment. The data obtained during analyzing the Turkic lexical elements from ten academic explanatory dictionaries of the Russian language, published within the period from the 18th century till the 21st century, have been involved. A large number of lexicographic parameters in dictionaries of this type make it possible to create an adequate picture of the functioning of lexical units in the Russian literary language. The study uses descriptive, comparative-contrastive and statistical methods.*

*The article fixes various shifts and changes associated with the functioning of the Turkic vocabulary layer during the period under consideration, in particular phonetic-graphic, grammatical, semantic, functional-stylistic changes. In addition, it analyzes the methods of lexicography (dictionary fixation) of loan words, for example, the features of the historical and etymological description of the Turkisms, which, in turn, enables to reveal various inaccuracies and inconsistencies relating to the dictionary description of Turkic words. In addition, the article discloses the advantages of a complex fund of Turkic borrowings of the Russian language, outlines the prospects and possibilities for its use. The information resource being created allows to fix and generalize the changes, characteristic of this circle of loan words of the Russian language.*

**Keywords:** borrowing, dictionary, Turkism, lexicography, complex corpus, the Russian language.

## Introduction

The problem of language contacts has always been in the field of view of domestic and foreign linguistics. This problem takes on especial significance in the context of a multinational state, that is, Russia.<sup>1</sup> Many contemporary works note the importance of a thorough study of the Turkic elements existing in the Russian language.<sup>2</sup>

The study of the Turkic elements in the Russian vocabulary has a long tradition. The analysis was based on various materials (literary monuments, fictional literature, dialects, regions, folklore, the language of mass media, etc.), from various viewpoints (etymological, chronological, phonetic, spelling, semantic, grammatical,

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> G. R. Galiullina, A. Sh. Yusupova A, "European linguistic borrowings in the Tatar sprachraum (by written sources of the XIX - XX centuries)", in *Life Science Journal*, XI (2014), Issue 7, p. 697-700; G. Kh. Gilazetdinova, I. Zh. Edikhanov, A. A. Aminova, "Problems of ethnocultural identity and cross-language communication," in *Journal of Language and Literature II* (2014), p. 39-42.

<sup>2</sup> M. V. Oreshkina, (2013). "The Dictionary of borrowings into Russian from the languages of the peoples of Russia and the Near Abroad Countries: principles and concepts," in *IV International conference «Language, Culture and Society in Russian - English studies» (22 - 23 July, 2013) London, University of London; School of Advanced Study; Institute of English Studies; Russian Academy of Sciences; Russian Academy of Linguistics; Moscow Institute of Foreign Languages*, London, Senate House, University of London, 2013, p. 170 – 173.

functional, comparative-contrastive, etc.). The objects of scientific research were the Turkic borrowing words of certain thematic groups (the names of plants, animals, clothing, buildings and construction, household utensils and appliances, the names of persons, military vocabulary, vocabulary of food, etc.).

Nowadays, it is urgent to generalize, thoroughly comprehend the rich material on borrowings in modern linguistics, including a multidimensional description of the Turkic layer in the Russian lexicon.

The lexical variety of language at a certain stage of its development, as is generally known, is reflected in lexicographical sources. Explanatory academic dictionaries present this information most completely. The chief task of these publications is to explain the meanings of the units in them. However, the scope of information contained in these dictionaries is much broader. They contain the information about pronunciation, stress, writing, grammatical characteristics, the peculiarities of the use of a word, in a number of cases, they give set expressions, etymological and historical comments.

### **Materials and methods**

A large number of lexicographic parameters in explanatory dictionaries make it possible to create a fairly complete picture of functioning of the Turkic units in the Russian literary language.

The explanatory dictionaries of the Russian language of the academic type compiled in the 18th-21st centuries were used as the sources: 1) "Словарь Академии Российской" (1789-1794) ("The Dictionary of the Russian Academy"), 2) "Словарь Академии Российской, по азбучному порядку расположенный" (1806-1822) ("The Alphabetical Dictionary of the Russian Academy"), 3) "Словарь церковно-славянского и русского языка" (1847) ("The Dictionary of the Church Slavonic and Russian Language"), 4) "Толковый словарь русского языка" под ред. Д.Н.Ушакова (1935-1940) ("D. Ushakov's Explanatory Dictionary of the Russian Language" (hereinafter UD), 5) "Словарь современного русского литературного языка" (1948-1965) ("The Dictionary of the Modern Russian Literary Language") The Dictionary of the Russian Language: in 4 volumes (1981-1984)/ Edited by A.P. Evgenieva.- 2nd edition, revised and enlarged.- M.: Rus, Yaz,<sup>3</sup> (hereinafter GAD), 6) "Словарь русского языка" под ред. А.П.Евгеньевой (1981-1984) "A.P. Evgenieva's Dictionary of the Russian Language" (further SAD), 7) "Толковый словарь русского языка" С.И.Ожегова и Н.Ю.Шведовой (1997) ("Explanatory Dictionary of the Russian Language" by S.I. Ozhegov and N. Y. Shvedova, 8) "Большой толковый словарь русского языка" под ред. С.А.Кузнецова (1998.) ("Large Dictionary of the Russian Language" edited by S. A. Kuznetsov) (hereinafter LED), 9) "Новый словарь русского языка. Толково-словообразовательный" Т.Ф.Ефремовой (2000) ("New Dictionary of the Russian Language. Explanatory and Word-Formative" by T. Efremova) (hereinafter ED); 10) "Толковый словарь русского языка с включением

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<sup>3</sup> A.P. Evgenieva (ed.), *The Dictionary of the Russian Language: in 4 volumes (1981-1984)*, 2<sup>nd</sup> edition, Moscow, RUs, Yaz, 2015.

сведений о происхождении слов”, изданный коллективом авторов (2007) “Explanatory Dictionary of the Russian language with the Inclusion of Information about the Origin of Words”, published by the team of authors.

In addition to the descriptive method (in analyzing the materials of explanatory dictionaries, their content), the study also uses linguistic statistics method (for quantitative characteristics of Turkisms) and comparative-contrastive analysis.

### **Discussion**

In contactological lexicography, the complex corpus of Turkisms of the Russian language (based on the material of explanatory dictionaries), according to its concept and structure, \ the number of characteristics reflected in it, is primarily new development and has no analogues.

The task of informatization of linguistic data is urgent at the present stage of the development of linguistics, which is directly connected with the development and use of computer machinery and computer technologies. At the same time, of particular importance are the reference systems, which allow of generalizing, structuring, supplementing various information<sup>4</sup>

Creation of complex corpora, including the materials of dictionaries, is one of the promising areas at present.

The complex corpus of Turkisms of the Russian language is an information resource that reflects the information about the Turkic lexical elements, fixed in the Russian dictionaries of the period. It comprises a description of the Turkic loan words according to the following lexicographic parameters:

- orthography of borrowing (reflecting phonetic and graphic variants);
- phonetic (orthoepic) characteristic;
- grammatical characteristic (belonging to parts of speech, peculiarities of word changing);
- semantic characteristic (explanation);
- stylistic characteristic;
- etymology.

The data of the complex corpus, thus, allow to note the changes associated with the functioning of the layer of Turkic vocabulary within the period from the 18th century till the 21st century, to reveal the features characteristic of this scope of Russian language borrowings.

### **Results**

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<sup>4</sup> A. R. Gizatullina, C. R. Galiullin, "Dictionaries and texts of ancient manuscripts in Kazan region during XVI-XVII centuries: Development prospects," in *Journal of Language and Literature*, VI (2015), Issue 1, p. 267-272; M. V. Oreshkina, "Language and culture: lexicographical description," in *The Third International Conference 'Language, culture, and society in Russian - English studies' Senate House, University of London, 9 - 10 July, / University of London; School of Advanced Studies; Institute of English Studies; Russian Academy of Sciences; Russian Academy of Linguistics*, Moscow, Institute of Foreign Languages, 2012, p. 1-11.

According to our calculations, 16% of Turkic words (about 150 units) have variations of spelling or pronunciation, i.e. they are presented with phonetic-graphic variants in the analyzed dictionaries (this number does not include the accentological variants): *бергамо'т – баргамо'т, калу'ффер – кану'ффер, сайда'к – саада'к* and so on. None of pairs to occur in all lexicographic sources or even dictionaries of the twentieth century has been fixed. Orthographic variants, as a rule, result from the representation in writing of the variation of the vowels *a* and *o* in the pretonic syllables (*карачу'н – корочу'н, карга' – корга', магары'ч – могары'ч, ата'ра – ата'ра* ad others). In a number of occasions (for 30%), one can say about profound mastering of words, choice or confirmation of one of the variants existing earlier; see, for example (the variant to have been ousted was highlighted in bold): *салта'н – султа'н, сергу'ч – сургу'ч, чевя'ки – чувя'ки* and others. During the analysis, there were revealed the accentological variants, ousted from the Russian language within the analyzed period of time: *бели'берда – белиберда', домра' – до'мра, жемчу'г – же'мчуг* and others. To compare, the gender variants of the loan words under study function without visible changes in the language – the variants, fixed in the dictionaries of the beginning of the 20th century, occur in the sources of the end of the 20th century: *каптан – каптана, мамон – мамона, тут – тута, хабар – хабара, чинар – чинара* and others.

Some Turkic words or their meanings are not reflected in lexicographic publications as time goes by. The reasons for this, in our opinion, are:

1) occurrence of Turkic borrowing words or their individual meanings in the layer of obsolete vocabulary as a result of vanishing of the designated realia or notion – about 20 units (*фронтъ* 'non-Orthodox prayer-house', *селямлик* '1. Parade of the sultan to the mosque. 2. Admission to sultan's Bairam. 3. Man's half of the house typical of the Turkish people', *ерлаш* '<...> 3. *Obsolete*. Blend of different sorts of dry jam, sweets' and others);

2) a restricted scope of the use of certain lexemes (as well as some of their meanings), inclusion or non-inclusion of which into the vocabulary of the dictionary depends on the principle of choosing the material by the compilers (*ергак* 'тулуп из жеребьячьих шкур' / sheepskin coat, *пирог* 'пшеничный хлеб' / wheat bread, *талагай* 'невежа, неуч, boor, ignoramus, тумак ' меховая шапка' / fur cap and others).

The portion of the Turkic words (more than 200 units) acquire new meanings with time. Most of them are recorded for the first time in UD (about 100) and GAD (more than 50): *каланча* 'tall person', *камьш* 'overgrowth with such grass', *лапша* 'spineless, weak-willed man', *табор* 'a large group of people', etc. A considerable part of new lexical-semantic variants of Turkic words arose as a result of metaphorical transfer; the most productive are the models "the name of animal" → the name of the person (*ишак* 'donkey → a person resignedly fulfilling the hardest work'), 'the name of the subject → the name of the person' (*фитиль* 'ribbon in lighting fixtures → thin and very tall man'), "the name of the object → something similar to it" (*шалаш* 'an easy building → something that resembles such construction'), etc. Most of the semantic derivatives resulted from the metonymic transfer are formed by the models "the name of the material → an article made



from it (*собака* 'fur, the skin of such animal → the furs of such animal'), the plant → the product from its fruit (*баклажан* 'plant → the food from the fruits of this plant'), the name of the animal (fish) → the product from it" (*тюлька* 'small fish → canned food from such fish'), etc.

A number of Turkic loan words of the Russian language are gradually included in the layer of common vocabulary (as a consequence of the spread of the corresponding realia), and therefore their lexicographic fixation (*аджика, азу, йогурт*, etc.) becomes possible. It is obvious at the same time that the ousting of the lexical-semantic variant from the language, judging from the data of the dictionaries, is much slower than the appearance of a new meaning.

The involvement of the materials of the corpus also provides the information for identifying and correcting inaccuracies contained in the dictionaries and studies, adjusting and supplementing information and provisions concerning various aspects of the characteristics of the Turkic lexical elements of Russian vocabulary. Thus, the etymological glosses of explanatory dictionaries convey the Tatar prototypical words not always correctly: АЙДА' interjection <...> (Tatar *айда*) in (The Dictionary of the Russian Language: in 4 volumes, 1981) instead of *әйдә* (here and after the Tatar words are given from <sup>5</sup>; БИРЮ'К, а, м. <...> Tatar *бире*, Turkic *бөрү* – wolf in <sup>6</sup> instead of *бүре*; ТЮФЯ'К, -а', м. <...> (From Tatar *тууәк*) in (The Dictionary of the Russian Language: in 4 volumes, 1981), ТЮФЯ'К, а, м. (from Tatar *тууәк*) in (Great Explanatory Dictionary of the Russian Dictionary, 1998) instead of *тууәк* and others.

In a number of cases the dictionaries present the meanings of words belonging to one thematic group non-uniformly, they can be given individually or in the context of lexico-semantic variant. For example: ПАША' м. 1. The title of the highest military and civil dignitaries in the former Sultan Turkey <...>. 2. A person who has such title; and КАГА'Н м. 1. The title of the head of state of the ancient Turkic peoples. // A person who had such title. 2. <...>; БАДЬЯ' ф. 1. A wooden or metal wide bucket, narrowed downwards. 2. The amount of smth., being contained in such vessel; and СТАКА'Н м. 1. A glass vessel of cylindrical shape, without handle, serving for drinking. // The amount of substance that can be contained in it <...>.<sup>7</sup>

### Conclusion

Thus, the complex corpus Turkisms of the Russian language, compiled on the basis of the information of academic explanatory dictionaries, allows not only of reflecting the specific functioning of this layer of vocabulary, but demonstrates the importance of a structured, systematized dictionary representation of Turkic borrowing words.

<sup>5</sup> Татар теленең аңлатмалы сүзлеге, Баш ред. Ф.Ә. Ганиев, Казан: Матбугат йорты, 2005.

<sup>6</sup> S. A. Kuznetsov (ed.), *Great Explanatory Dictionary of the Russian Dictionary*, Sankt Petersburg, Norint, 1998.

<sup>7</sup> T. F. Efremova (ed.), *New Dictionary of the Russian Language: Explanatory- Word-Formative: more than 136000 dictionary entries: in 2 volumes*, Moscow, Rus. Yaz, 2000.

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The inclusion of the complex corpus of Turkisms in the international computer network will enable to fulfil operative information exchange between scientific collectives; will provide a reliable factual basis for various studies in this field. In general, it will serve for enrichment and informatization of the theory of language contacts in a multinational state of Turkic-Russian language contacts.

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## **Determination of National Specificity of Perceiving the Concept “Learning” in German and Russian through the Association Experiment\***

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**Abstract.** *The article attempts to determine the national specificity of the concept “learning” in German and Russian by means of free association experiment. In the experiment, intermediate school students from different types of institutions of learning in Germany and Russia took part. The resulting associate words made it possible to reveal the general and nationally specific in the conceptual sphere of the students, and also to determine the attitude towards German and Russian teaching of schoolchildren. The scientific novelty is as follows: the concept “learning” is first analyzed from the standpoint of revealing the national specificity of the linguistic means of its verbalization in the German and Russian linguistic world-image. The relevance of this article is determined by the high importance of the concept “learning” for German and Russian cultures of language, as well as the need to study vocabulary from the perspective of presentation of cultural values.*

*It was found with the help of experimental method that in the sphere of concepts the German school students realize the lexical and semantic variant of the lexeme Lernen – human activity, which consists in mastering knowledge and mastering skills and abilities. The acquisition of a profession or specialty as a variant of the lexical and semantic meaning of the lexeme Lernen is imagined by the pupils of German schools to a far lesser degree, and the perception of this concept in the meaning of “being a student of an educational institution” is presented quite insignificant and implicit in the conceptual sphere of German students.*

**Keywords:** concept, sphere of concepts, learning, association experiment, associate words, connotation.

### **Introduction**

Scholars in cultural linguistics and psycholinguists assign a special role to association experiment as one of the most important research methods. The career of culture and language is always society, personality, and, therefore, they cannot exist outside of society. Language and culture have inherent contradiction “dynamics—static”, language and culture are subjects to certain regulations adopted in this cultural society. The investigations of manifestations of the national in the psychological type of the representatives of a particular nation, in domestic literature occupy a central place in home and foreign science. One of the key concepts in this field of research is the concepts of national identity and national character. National identity is a socially and politically oriented materialization of a certain historical and psychological genotype (national character) for a given social group within a particular period. National character is a complex of spiritual and psychological traits, qualities and characteristics that has developed throughout the existence of culture and the specific for each given historically stable community which defines the type of world perception and thinking, forms, means and methods of social

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\*The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

*Determination of National Specificity of Perceiving the Concept "Learning" in German and Russian through the Association Experiment, Astra Salvensis, V (2017), no. 10, p. 151-156.* organization that are most preferable for a given community, as well as the most probable types of personal and social complexes and types of psychological compensation.<sup>1</sup>

Concepts governing our thoughts have influence on our everyday activities.

These concepts include our feelings, our behaviour and our attitude to other people into a unified system.<sup>2</sup> However, each society has its own system of ideas about reality, its own view of the world, a special type of national identity and national character.

## Methods

We made an attempt to reveal in what sense the lexical meanings, fixed by academic dictionaries, and the additional meanings, revealed through analysing the linguistic means representing the concepts "Lernen" and "Учеба" (Learning) in German and Russian are stored in the minds of the speakers of these languages. In order to study the mental characteristics of the society, the associative-semantic field of the stimulus word was analysed for the purpose of isolating the underlying layer of the analysed concept. In this regard, a free association experiment was conducted. In a free experiment, 80 speakers of the German language took part and the same number of the Russian language speakers aged from 10 to 15 –the schoolchildren of various types of educational institutions in Germany and Russia. In this experiment, we deliberately examine the students of secondary school to establish a correlation of associations of representatives of German and Russian linguistic images of the world, since it is this period of schooling during which the students are on approximately equal footing and it is possible to talk about the relevance of the data obtained. During the processing of the answers, they were divided according to the base layer and the interpretation field. All associates were characterized as frequency ones if they sprang up to many native speakers, and single ones if they were comprehended in the answers of the informants no more than twice.

## Results

As a result of the free association experiment among the German students of gymnasium, consolidated school, non-classical secondary school and basic school, the following associations to the lexeme *Lernen* were obtained:

1. among the school children of Hauptschule (basic school): Lehrer (17), Bildung (15), Schule (13), Projekt (13), Schüler (11), Klasse (10), Vorteile (10), Klassenverband (8), Wissen (8), Spielen (7), gemeinsam (6), Lesen (3), Zeit (3), Unterricht (3), Internet (3). As one can see from the data obtained, the pupils of

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<sup>1</sup> E.V. Varlamova, E.A. Tulusina, Z.M. Zaripova, V.L. Gataullina, "Lexical Semantic Field as One of the Keys to Second Language Teaching," in *Interchange. A Quarterly Review of Education*, XX (2016), p. 1-11.

<sup>2</sup> A. F. Mukhamadiarova, R. A. Ayupova, R. A. (2016) . "Concept "Love" in American and Tatar Female Poetry", in *Interchange. A Quarterly Review of Education*, XX (2016), Special Issue, p. 234 – 241; E. V. M. I. Gafiyatova, "Solnishkina Multi-word lexical entries in lsp dictionaries: Theoretical considerations," in *Journal of Language and Literature*, V (2015), no. 2, p. 71-75.

the basic school associate learning with concrete concepts, persons more closely (*Lehrer* - teacher, *Schüler* - pupils, *Klassenverband* - class community, etc.). On the whole, one can observe meliorative connotative meanings among this group of respondents.

2. among the students of Realschule (non-classical secondary school): Beruf (18), auswendig (15), gemeinsam (15), Kooperation (13), langweilig (11), schwer (10), Freizeit (6), lange (6), eigen (6), sozial (3), Bildung (3), verstehen (3). The students of non-classical secondary school are focused on getting a profession (Dannhäuser) <sup>3</sup>, which cannot but be reflected in the language - the most frequent association is the lexeme *Beruf* (profession). In this group of respondents, one can also note the presence of pejorative assessments of studying (*langweilig* - boring, *schwer* - hard, *lang* - long). Besides, one can observe the desire for cooperation, joint efforts (*gemeinsam* - joint, *Kooperation* - cooperation).

3. among the students of Gymnasium (gymnasium): Einsatzmöglichkeiten (17), Motto (16), Vorteile (15), Projekt (15), Fremdsprachen (14), Computer (14), mobile (15), erfolgreich (14), Forschen (13), Neu (13), Mathematik (12), kollegial (12), Gedächtnis (10), Motivation (10), gefördert (7), Wissen (6), Spaß (5), Freizeit (5), erfolgreich (4), Leben (3), muss (3) interkulturell (5). Obvious in this group of the respondents is a larger number of associates with reference to the lexeme *Lernen*, which indicates a higher grade of intellectual growth of schoolchildren. In addition, here we can observe predominantly abstract nouns (*Motto* - motto, *Vorteile* - advantages, *Forschen* - research, *Gedächtnis* - memory), which also indicates the generality, structuredness of gymnasium students' linguistic world image.<sup>4</sup> Meliorative assessments of the learning process prevail in this group.

4. among the schoolchildren of Gesamtschule (consolidated school): viel (18), auswendig (16), voneinander (16), müssen (14), etwas (13), Englisch (13), Fehlern (13), siegen (11), Schüler (11), verstehen (11), gemeinsam (10), schwimmen (8), neu (7), Schule (6), schnell (4), Vokabeln (4), Neu (3), Fürchten (3), Demokratie (3). Consolidated school is a mixture of different types of schools "under the same roof", which is partially reflected in the language. Also, quite often the respondents point to democracy, freedom, cooperation in learning, however, the associations that objectify pupils' fears and obligations towards parents, teachers and society on the whole are more frequent (Tremml).<sup>5</sup> In the Russian language, a similar experiment was conducted with the students of comprehensive secondary schools, schools with enhanced coverage of certain subjects that constitute the

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<sup>3</sup> Albin Dannhäuser, *Schule besser machen. Pädagogische Positionen – Politische Postulate*, Sankt Petersburg, 2003, p. 174.

<sup>4</sup> Th. M. Gather, *Meine Klasse, meine Schüler; ein überkommenes Bild*, Sankt Petersburg, 2000; Th. M. Gather, A. Rakhimova, A. Sharipova, Z. Zaripova, I. Gurianov, "The Realization of Binary Opposition Joy/Sorrow in Contemporary German Fiction Discourse," in *Review of European Studies*, VII (2015), no. 6, p. 65 – 96.

<sup>5</sup> Alfred K. Tremml, *Allgemeine Pädagogik: Grundlagen, Handlungsfelder und Perspektiven der Erziehung*, Stuttgart - Berlin – Köln, 2000, p. 305.

*Determination of National Specificity of Perceiving the Concept “Learning” in German and Russian through the Association Experiment, Astra Salvensis, V (2017), no. 10, p. 151-156.* specialization and the students of gymnasiums. As a result, the following associate words were obtained to the lexeme *Учеба*(Learning):

1. among the pupils of comprehensive secondary schools: *заниматься*/ study (15), *домашнее задание*/ home assignment (15), *ЕГЭ* (14), *чтение* /reading (12), *понимать* / understand (10), *ошибки*/ mistakes (10), *сложно*/ difficult (8), *усталость* / fatigue (8), *интересоваться*/ be interested in(6), *стараться* /try (5), *списывать* / crib from (5) *прогуливать* / playtruant (3).The stimulus word has a neutral emotional colouring in this group of the respondents, although pejorative reactions can be noted.

2. among the students of comprehensive schools with a strong focus on certain subjects learning: *classmates* (17), *teacher* (17), *grades* (16), *cognition* (15), *examination* (14), *stress* (12), *home assignment* (10), *subjects* (10), *knowledge* (7), *headache* (7), *success* (5), *school uniform* (5), *boring* (3), *textbook* (3), *crib from* (2), *break* (2). During analysing the answers of this group of respondents, we noted a high grade of correlation of responses with the first group of respondents.

3. among the students of gymnasia: *учитель*/ teacher (18), *одноклассники* /classmates (17), *школа*/ school (15), *ЕГЭ*/ Centralized Testing(15), *знания* /knowledge (15), *домашнее задание* / home assignment(13), *интернет*/ the Internet (11),*класс*/ class (10), *решать задачу* / accomplish a task (9), *память*/ memory(7), *думать* / think (6), *умения и навыки* / skills and experiences (5), *исследование*/ investigation (5), *доказывать свою точку зрения* /prove one’s own point of view (3), *внимание* / attention (3), *профессия*/ profession (3). In this group of the respondents, associations that bond learning with knowledge, acquiring knowledge, skills and experience were revealed.

Comparing and summarizing the obtained data, we distribute them according to levels that designate sensation, perception, representation and concept, thus getting the following summary data (см. табл. 1а, б):

Table 1a. Associative structure of the concept “Lernen”

	Associations
Sen sation	langweilig (12), stressig (11), müde (9), interessant(5)
Perc eption	Kenntnisse (9), Schwierigkeiten (9), Freude (6)
Rep resentation	Einsatzmöglichkeiten (17), Lehrer (17), Motto (16), Wettbewerbsvorteile (15), Projektarbeit (15), Bildung (15), Fremdsprachen (14), Computer (14), erfolgreich (14), Schulen (13), gemeinsam (13), Kooperation (13), Forschen (13), Neu (13), Mathematik (12), kollegiales Lernen (12), Schüler (11), Klasse (10), Gedächtnis (10), Motivation (10), gefördert (7), Wissen (6), Spaß (5), Freizeit (5), Leben (3), Unterricht (3), Internet (3)

Concept	Freizeit (6), Existenzsicherheit (4), eigene Bildung (6), soziale Bildung (3), verstehen (3), Fürchten (3), Demokratie (3)
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Table 1b. Associative structure of the concept “Учеба”

	Associations
Sensation	усталость (11), переживание (5), нервозность (3)
Perception	мучение (15), трудности (11), радость (5)
Representation	занятие (22), трудности (21), посещение уроков в школе (20), исследование (18), экзамены (17), ЗУН (15), самообразование (13), усилия (12), знание (10), повторение (9), обучение профессии (8), свет (7), продвижение вперед (7), оценки (5), будущее (5) выполнение домашнего задания (6), старание (4), рост (3), плод (3), объяснение (2), запоминание (2), ответ (2), решение задачи (2), зубрежка (2), анализ (1), интернет (1), решение (1)
Concept	развитие (28), совершенствование (22), взросление (7), ум (4), уверенность в завтрашнем дне (3), осознание (2), вложить все силы и старания (1)

### Discussion

The symmetry of the “layered” structure of the concepts “Lernen” and “Учеба” in German and Russian lies in the presence of all components: sensory, perceptual, imaginative and conceptual. The core of both concepts is figurative-conceptual (that is, at the level of representation and concept).

Most associates have a positive or a neutral connotative meaning (63%), although at the level of sensations the pejorative component of meaning is pronounced: difficulties, fatigue, stress (37%). Specific for the German linguistic image of the world is a purely practical directedness in learning, as evidenced by the most frequent associations *Einsatzmöglichkeit* (the possibility of using in everyday life), *Wettbewerbsvorteile* (competitive advantages), *Motivation* (motivation), as well as the desire to work in a team: *kollegiales Lernen* (joint learning), *Projektarbeit* (project work), *gemeinsam* (together). In general, such aspects of learning as initiative, working ability, freedom of the inner “self”<sup>6</sup> are noted. The Russian linguistic image of the world emphasizes the emotional-psychological opposition: the complexity of the process of learning consists in pleasure, satisfaction about the results.

<sup>6</sup> B. Frommelt, *Universität in öffentlicher Verantwortung*, Tillmann, 2000, p. 163-176.

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In each sphere of concepts, one can thus observe special, specific traits inherent in a given nation.<sup>7</sup> For example, the project form of teaching German schoolchildren in gymnasiums is reflected in the presence of this associate word in the German language and its absence in the Russian language. Obviously, German and Russian school children have more pleasant associations that are induced by the stimulus word related to development, admission to higher education institutions, learning process, as well as the improvement and self-improvement of a person (Tremml). However, one can encounter quite often the reactions related to people’s fears that are associated with this stimulus word, which allows us to conclude that the concepts “Lernen” and “Учеба”(Learning) are polar - the process of improvement and growth, on the one hand, and the hidden fear of threat, on the other .

### **Conclusion**

Comparing the verbal associations of German and Russian respondents with the meanings listed in the dictionary entries, we obtain the following results:

In the sphere of concepts of the German school students, the lexical and semantic variant of the lexeme *Lernen* is primarily realized - human activity, which consists in acquiring knowledge and mastering skills and abilities. The acquisition of a profession or specialty as a variant of the lexical and semantic meaning of the lexeme *Lernen* is perceived by pupils of German schools to far lesser degree, and the perception of this concept in the meaning of “being a student of an educational institution” is quite insignificant and implicit in the conceptual sphere of German students.

In the sphere of concepts of Russian students, the lexical-semantic variant of the lexeme *учеба* is also objectified as a cognitive activity of the trainees, aimed at mastering the sum of knowledge, skills, abilities and methods of learning activity. For Russian students “to learn means, first of all, “to master, acquire knowledge, skills”. “Learning” in the meaning of “being a student of an educational institution” is perceived by schoolchildren to far lesser extent. In the conceptual sphere of Russian school children, the perception of this concept in the sense of “the acquisition of a profession or specialty” is presented quite insignificant and implicitly.

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<sup>7</sup> S. R. Nailieva, G. I. Olegovich, T. Y. Antonovna, "Contextual use of phraseological units with transparent inner form in the English and Russian languages and the use of statistical programmes in their study," in *Journal of Language and Literature*, VI (2015), no. 1, p. 248-252.



## Cultural Shifts In Developed Countries In The Last Two Centuries: Attitude To Nutrition\*

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**Abstract.** *Nutrition process and practices are one of the basic elements of the human routine life. This process has a significant cultural and historical imprint and subject to social changes. The paper is devoted to food studies. Food studies is the new interdisciplinary field that includes critical analysis of food and its contexts in science, art, history and society. Food studies cover wide range of sociocultural issues related to food and nutrition. All these issues reflect the approach to nutrition not as to satisfaction of basic human need in food but as to significant and historically variable sociocultural practice and part of the lifestyle.*

*The paper examines how the attitude to various types of food and drinks has changed over the course of two centuries, as well as to nutrition in general in developed countries. The data source is a collection of books created by Google as the only source of long-term data. The time frame for the various changes has been established. Some of our results confirm the established opinions, others are unexpected.*

**Keywords:** food, diets, developed countries, drinks, sociocultural trends.

### Introduction

Nutrition process and practices are one of the basic elements of the human routine life. On the one hand, this practice may be regarded as exclusively individual choice made in accordance with needs and taste preferences. However, it is obvious that this process has also a significant cultural and historical imprint and subject to social changes.

Food studies is the interdisciplinary and relatively new field of studies that includes critical analysis of food and its contexts in science, art, history and society. This field of studies attracts historians, anthropologists, sociologists, literary scholars, cognitologists and representatives of other fields of science.

Food studies cover wide range of sociocultural issues related to food and nutrition: food impact on the environment; nutrition ethics; food as indicator of social inequality and identity etc. All these issues reflect the approach to nutrition not as to satisfaction of basic human need in food but as to significant and historically variable sociocultural practice and part of the lifestyle. Basic models and nutrition types are always determined by culture of the human environment. Even in primitive societies, only those products have been eaten that have been approved by the society, which is evidenced by food taboos and table manners existing almost in any culture.<sup>1</sup>

In terms of ‘the consumer society’ and ‘the affluent society’ foods studies including studies of cultural shifts in eating practices and senses given to food, acquire special importance. Food in developed countries of the world having become available as never before turns nutrition practices at most into

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<sup>1</sup> N. Elias, *The Civilizing Process. Sociogenetic and Psychogenetic Investigations*. Oxford, Basil Blackwell, 2000.

consumption of symbols than of products. Appearance of new nutrition discourses (for example, vegetarian, dietary, ecological nutrition) is an indicator of changes in different fields of society. Despite globalization processes, unification of menu and eating behavior in developed countries, we believe that there are differences at cultural level that relates to determination of tasty, healthy, available etc. food.

The interest of the authors of the article is focused on changes of relation to nutrition in developed countries within the extended historical period covering 200 years. Therefore, we regard books reflecting place and role of nutrition in the society as the most informative information source.

In the paper on the ground of data of Google Books Ngram collection, we have reflected the change of frequency of food references including references to vegetarian diet and diets in general, if the preference is given to tasty, healthy or cheap food, dynamics of drinking of certain beverages. The article is devoted not only to dynamics of the specific country but also to comparative analysis of the leading European Countries and the USA.

### **Theoretical Basis**

Despite to newness of food studies sociologists and anthropologists have already suggested ideas of social nature and nutrition functions long time ago. Thus, "The Sociology of the Meal" by G. Simmel discovers socializing role of nutrition. According to classical sociologist the meal unites the exclusive egoism of eating with a frequency of sociality.<sup>2</sup> Simmel wrote one of the first essays on interrelation of food and social stratification where he compared nutrition practices of upper and lower classes.

The other classical sociological thesis in this field is "Hunger as a Factor" by P. Sorokin.<sup>3</sup> Sorokin links lack of food within the society with social upheaval (criminal growth, social tension and even revolutions). Finally, hunger has further social consequences that lead to increase of governmental role and centralized welfare distribution. Sorokin has also paid attention to food as to the factor of inequity: on the ground of empirical studies of different classes he has concluded that with income increase the part of expenses for food becomes less, when poor people have to spend for meal major part of their money.

However, shift to the affluent society and to the consumer society<sup>4</sup> marked in the 20th century gave new sense to different social practices related to consumption including to nutrition. Within such a society consumption has transformed from routine satisfaction of the need into consumption of symbols, communicative process, and formation of personal identity. Therefore, by the end of the 20th century the range of nutrition studies has been extended due to significant changes in production, consumption and distribution of products.

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<sup>2</sup> G. Simmel, (2010) "Sociology of the meal," in *Sociology: theory, methods, marketing*, IV(2010), p. 187-192.

<sup>3</sup> P. Sorokin, *Hunger as a factor in human affairs*. Gainesville, University Presses of Florida, 1975.

<sup>4</sup> J. Baudrillard, *The Consumer Society: Myths and Structures*. London, SAGE Publications Ltd., 1998:

European and American scholars have shown major interest to this area of studies<sup>5</sup>. In Russian science this field has been reviewed much later.<sup>6</sup> Discourses of modern scientists on food and nutrition are focused on such issues as formation of global food, increase of role of performative practices in food consumption, nutrition differentiation, individualization, erosion of traditional values in eating etc. Russian studies can be characterized by use of qualitative methods providing for selective analysis of routine nutrition practices in specific social groups.<sup>7</sup>

European researches have a great experience in studies of nutrition discourses – way of talking about the food, cooking, eating and ethics of dining. In these works the nutrition shall be regarded as one of the components of the individual's life world. For example, C. Fjellstrom<sup>8</sup> regards nutrition as cultural and social arena for actualization of new knowledge on food and significance that we give to a food. Thus, food facilitates to formation of individual identity and nutrition in general acquires the signs of cognitive process.

For example, vegetarianism is not only the type of eating behaviour but also a way to declare to people around on intolerance to animal killing for eating them. In ancient civilizations as well as in modern societies there have been products and dishes that have not been eaten due to specific social, not biological reasons (for example, pork refusal of Muslims). Therefore, food is a communication system,<sup>9</sup> where the major significance have senses and properties given to products.

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<sup>5</sup> J. Coveney, *Food*, London and New York, Routledge, 2014; L. B. Raymond, M. Goodman, "Consuming narratives: the political ecology of «alternative» consumption," in *Transactions of the Institute of British Geographers, New Series*, XXIX (2014), no. 3, p. 344–366; S. O'Hara, S. Vienna, "Global food markets and their local alternatives: a socio-ecological economic perspective," in *Population and environment*, XXII (2001), no. 6, p. 533–554;

<sup>6</sup> I. L. Andreev, L. N. Nazarova, "Sociology of life: the dynamics of food: from food chains to humanistic biopolitics," in *Sociological Studies*, VII (2016), p. 101-109; Y. V. Veselov, "Daily eating practices," in *Sociological Studies*, I (2015), p. 95-104; N. N. Zarubina, "Ascetic, disciplinary and self-limiting practices as a factor in the formation of nutrition strategies in modern Russia", in *The Bulletin of the Institute of Sociology*, III (2015), no. 14, p. 30-48; D. N. Karpova, "Food as a counterculture and the movement of anti-capitalism," in *The Bulletin of the Institute of Sociology*, III (2015), no. 14, p. 65-73; S. A. Kravchenko, "Paradoxes of the "arrow of time": the birth of non-eating," in *The Bulletin of the Institute of Sociology*, III (2015), no. 14, p. 13-29; A. V. Noskova, "Nutrition as an object of sociology and a marker of social inequality," in *The Bulletin of the Institute of Sociology*, III (2015), no. 14, p. 49-64..

<sup>7</sup> E. Y. Ganshau, V. N. Minina, G. I. Semenova, Y. E. Gronov, "Daily nutrition practices for residents of St. Petersburg and the Leningrad region," in *Journal of Sociology and Social Anthropology*, XVII (2014), no. 1, p. p. 41-58; M. A. Martinez-Gonzalez, B. Holgado, M. Gibney, J. Kearney, J. A. Martinez, "Definitions of healthy eating in Spain as compared to other European Member States," in *European Journal of Epidemiology*, XVI (2000), no. 6, p. 557–564; S. Henneberry, K. Piewthongngam, H. Qiang, "Consumer food safety concerns and fresh produce consumption," in *Journal of agricultural and resource economics*, XXIV (1999), no. 1, p. 98–113.; A. Arce, T. Marsden, "The social construction of international food: a new research agenda," in *Economic Geography*, LXIX (1993), no. 3, p. 293–311.

<sup>8</sup> Ch. Fjellstrom, "Food's cultural system of knowledge — meals as a cultural and social arena," in *Food in Contemporary Society*. ed. P. Palojoki, Helsinki, Yliopistopaino, 2009.

<sup>9</sup> R. Barthes, "Toward a Psychosociology of Contemporary Food Consumption," in *Food and Culture: A Reader*, edited by C. Counihan and P. V. Esterik., 2<sup>nd</sup> edition, New York: Routledge, 2008.

Russian scholar Yu. Veselov notes that the food becomes a part of the social situation: Physical and labour activity that is a power consumption shall be compensated with a snack bar (in other words, to take a snack); business lunch notion has absolutely another sense it should stimulate activity of managers, facilitate to making transactions. To have a coffee means to have a break (coffee break), short rest of work or communication.

Detailed analysis of nutrition practices is provided in work by P. Bourdieu (Bourdieu, 1984). He links nutrition with amount of economic and cultural capitals owned by individual or social group. As we have already told people with higher income spend on food less than poor people. However according to Bourdieu, labour aristocracy (for example, heads of the units), having higher income than their employees stay loyal to simple taste, while professors and teachers whose income is often much lower have different food preferences both from labour classes and the middle class. This can be explained by cultural capital. With increase of economic capital consumption shifts from cheap products (intended for labour force production) to expensive and light (for upper classes' satisfaction), from simple to exquisite, from fat and heavy dishes to light and fat free. In cases when economic capital increases without increase of the cultural capital (this is the example of taste of labour aristocracy and entrepreneurs), eating and spending money on food increase, while the tastes remain the same with hard liquor, sweet and spicy expensive dishes. Therefore, the food is an indicator of social differences.

Somewhat other approach to food is focused on issue why having a diversity of products in modern world people eat in the similar way. This can be explained by economics: people eat what the existing market system and the nearest supermarket offers. People try to eat efficiently in accordance with industrial economics and to get maximum use from food with minimum expenses. This stimulates modern human's taste to similar products and cheap and nourishing industrial cuisine. Its role in this process is played by fast food restaurants. As result in terms of wide diversity of food in modern world the similar eating habits and behaviour are formed.

Therefore, we can summarize the main issues that have been reviewed within the food studies. Starting point of the sociocultural food studies is regarding the food not only as a way of physical need satisfaction but also as a social institute, performing other important functions. Nutrition is socializing factor, marks social differences, and bears impression of social norms of specific society. Nutrition is also a communicative act, connected with social situations and discourses. Moreover, nutrition practices and food choice at most are stipulated by economics that leads to formation of the unified global food system in terms of globalization and standardization.

Despite obvious role of globalization, nutrition changes in modern world are rather contradictory. According to some scholars modern societies have lost importance of traditional family meal, and individualization of eating comes to the

fore.<sup>10</sup> ‘Gastro-anomie’ term comprised of words ‘gastronomy’ and ‘anomie’ that means decay of prior norms, is used by several authors to underline the process of erosion of the established nutrition rules.<sup>11</sup> At the same time, other scholars believe that the threat of gastro-anomie has been highly exaggerated and eating is still deeply connected with traditional patterns.<sup>12</sup> For example, results of some Russian scholars have shown that the modern nutrition of Russians preserve traditional elements of menu and diet, despite penetration of universal globalized dishes into the menu.<sup>13</sup>

During the second part of the 20th century the food acquires new significance due to transformations in European societies related to shift from societies with lack of food products to food affluent societies.<sup>14</sup> Social transformations change both food preferences and the notion of eating well.

In addition to social norms, modern society has a notion of dietary norm that also regulates people’s eating behaviour.<sup>15</sup> Social norms as regulators of eating behaviour are social regulations on quality, type, terms of eating. Dietary norms, in their turn, relate to regulations based on achievements of science and medicine and focused on the need of healthy eating. Social and dietary norms according to the scholars sometimes may contradict to each other.

In addition to the above stated tendencies due to development of media food becomes a popular theme for public talk. Modern media is one more conductor of social and dietary nutrition norms that form a culture of comprehend relation of people to food. For example, in the research made among the Scotland citizens and with reference to a number of semi-structured interviews, it has been concluded that people actively search and finally find the sense in their eating practice. Being aware of the problems related to global food economics the participants of this research have used their product choice as the way to mark their identity. According to the author, scientific studies of interrelation between the food and identity are especially useful complex of ideas allowing to study daily relation to food products in terms of food economics globalization and industrialization.

Therefore, problems of change or preservation of eating habits are significant research problem. European sociologists have gained twenty-years of experience of studies of daily eating practices on the ground of extended database

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<sup>10</sup> P. Caplan, *Food, Health and Identity*, London, Routledge, 1997; C. Fischler, "Food, Self and Identity," in *Social Science Information*, XXVII (1988), no. 2, p. 275–292; A. Warde, *Consumption, Food and Taste: Culinary Antinomies and Commodity Culture*. London, Sage, 1997.

<sup>11</sup> C. Fischler, "Food Habits, Social Change and the Nature," in *Culture Dilemma, Social Science Information*, XIX (1980), no. 6, p. 937-953; A. MacDonald, *Negotiating 'Gastro-anomie': Exploring the Relationship Between Food, the Body & Identity in Halifax, Nova Scotia*. Halifax, Nova Scotia, Dalhousie University, 2014

<sup>12</sup> J. Gronow, A. Warde, *Ordinary Consumption*. London, Routledge, 2001.

<sup>13</sup> E. Ganskau, *Trust and Safe Choices. Coping with Health-Related Risks in Food Consumption in St. Petersburg*. Lysaker, SIFO, 2006.

<sup>14</sup> C. Méndez, C. Benito, "Food, Consumption and Health," in *Social Studies Collection*, XXIV (2008).

<sup>15</sup> J. Hernández, M. Arnaiz, "Preferences and Food Consumption: Pleasure, Convenience and Health," in *Social Studies Collection*, XXIV (2008).

on various aspects of eating.<sup>16</sup> In Russian science daily eating practices have not been thoroughly studied, however, there is a range of ethnographic works on history of Russian and Soviet cuisine with reference to political and cultural changes within the society.<sup>17</sup>

## Methods

The food studies based on analysis of statistical data and sociological surveys and observations cannot cover long historical periods. Amounts of production and sale of specific food products could serve as the information source for the present study. However, these data has been collected only in recent decades. Thus, website of the Food and Agriculture Organization of the United Nations (<http://www.fao.org/faostat/en/#data/CC>) provides data only from 1961. Therefore, we prefer to use books. Moreover, we regard relation to nutrition as cultural, cognitive phenomenon reflecting evolution of public mind during a long term. Sales amounts are too dependent on economic situation including on economic crises. For example, consumption of coffee in Russia in 2008 has 1.5 reduced, consumption of tea in 1990-1992 – almost three times. These data, of course, do not reflect relation of Russians to these drinks. Sociological studies cover even the less period of time and may ensure data on the ground of small digests only.

In order to assess changes of relation to food and nutrition we use data of Google Books Ngram (<https://books.google.com/>), collection of books in 9 languages, covering five centuries, of which we shall review only the last two centuries. Detailed information on this resource and some ways of its application may be found in the main thesis.

In a number of prior theses Google Books Ngram collection has been used to study dynamics of multiple sociocultural and psychological aspects: Individualism,<sup>18</sup> social welfare,<sup>19</sup> cultural changes,<sup>20</sup> happiness level<sup>21</sup> etc.

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<sup>16</sup> L. Holm, M. Pipping-Ekström, J. Gronow, U. Kjaernes, Lund T. Boeker, J. Mäkelä, M. Niva, (2012). "The modernisation of Nordic eating," in *Studying Changes and Stabilities in Eating Patterns, Anthropology of Food*, 2012, p. 7; U. Kjaernes, P. Ekström, J. Gronow, L. Holm, J. Mäkelä, "Introduction," in U. Kjaernes (ed.), *Eating Patterns. A Day in the Lives of Nordic Peoples*. Lysaker, SIFO, 2001, p. 25–64.

<sup>17</sup> K. Kelly, "Leningrad cuisine / La cuisine leningradaise - a contradiction in terms?," in *Anthropological Forum*, XV (2011), p. 241-278; V. V. Pokhlebkina, *The Kitchen of the Century*. Moscow, Polyfact, 2000; V. V. Pokhlebkina, (2004). *National cuisines of our peoples*, Moscow, Tsentrpoligraf, 2004; O Syutkins, P. Syutkins, O. and P. *Unexpected history of Russian cuisine*, Moscow, Astrel, 2011.

<sup>18</sup> P. Greenfield, "The Changing Psychology of Culture From 1800 Through 2000," in *Psychological Science*, XXIV (2013), no. 9, p. 1722- 1731; J. Michel et al., "Quantitative Analysis of Culture Using Millions of Digitized Books," in *Science*, XIV (2011), vol. 331, no. 6014, p. 176-182; V. Solovyev, I. Batyrshin, "What does happiness depend on? Quantitative comparative analysis of various cultures. Advances," in *Social and Behavioral Sciences*. X (2015), p. 4-9.

<sup>19</sup> A. Acerbi, V. Lampos, P. Garnett, R. A. Bentley, "The Expression of Emotions in 20th Century Books," in *PLoS ONE*, VIII (2013), no. 3, e59030.

<sup>20</sup> V. V. Bochkarev, A.V. Shevlyakova, V. D. Solovyev, "The average word length dynamics as an indicator of cultural changes in society," in *Social evolution & History*, XIV (2015), no. 2.

In this thesis the main attention is focused on the following issues: frequency of food references including references to vegetarian diet and diets in general, if the preference is given to tasty, healthy or cheap food, dynamics of drinking of certain beverages. The opportunity to use Google Books Ngram for these purposes has been introduced for the first time in ,), however, in this thesis the idea has not been developed, and data are provided for English only. We will be interested not only in dynamics of specific country, but also in comparative analysis of the leading European Countries and the USA.

## **Results and discussions**

Here various countries demonstrate various behaviors. Frequency of food reference may decrease (in general) during two hundred years as for example in Russia (fig. 1). It may also increase as for English-speaking countries (fig. 2). It can be observed that relation to drinks is more stable in all countries except Russia, where strange explosions of interest to drinks can be observed.

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<sup>21</sup> V. D. Solovyev, V. V. Bochkarev, A. D. Kaveeva, "Variations of social psychology of Russian society in the last 100 years," in *Proceedings of the 8th IEEE International Conference on Social Computing and Networking*, 2015, p. 519-523.



Fig. 1. Dynamics of reference to еда + пища 'food' and напитки 'drinks' words in Russian



Fig. 2. Dynamics of reference to food and drinks words in English

*Tasty food vs. healthy food vs. cheap food.* In this section we shall review relation to food. What does prevail: is it more important for food to be tasty, healthy or cheap. Surprisingly, there are significant differences between British and American English (compare fig. 3 and 4), and between them and Russian.



Fig. 3. Dynamics of relation to tasty, healthy and cheap food in Great Britain





Fig. 4. Dynamics of relation to tasty, healthy and cheap food in the USA

As we can see, the price is much more important for the citizens of the British Isles in comparison to wealthy Americans. For Americans it is much more important to eat healthy. A similar rapid increase of attention to healthy food from the end of the 20th century has been marked in Germany, France, Spain and Italy.



Fig. 5. Dynamics of relation to tasty, healthy and cheap food in Russia

Fig. 5 provides data for Russian. In Russia priority to healthy food has been given even since the 19th century, and only in the second half of the 20th century tasty food suddenly came to the fore. And only recently people began to pay attention to healthy food again. Cost of food has never played the main role that is interesting taking into consideration rather low income level of the population of Russia (and the USSR and the Russian Empire).

*Diets and vegetarianism.* As we know, much attention recently began to be paid to healthy way of life including to various diets in developed countries. However, vegetarianism tradition has already existed long ago. Let us review dynamics of references to word diet, few terms related to vegetarian food and the word meat. For illustrative and comparative purposes of the graphic charts data on frequency of reference to the word meat has been 10 times reduced.

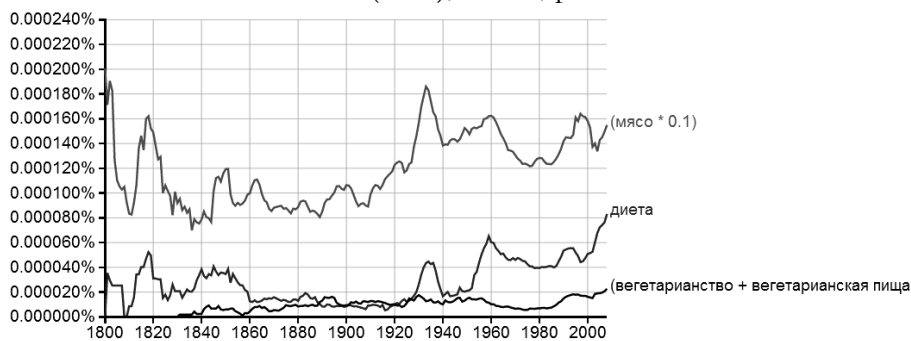


Fig. 6. Dynamics of relation to diets, vegetarian food and meat in Russian

Fig. 6 provides data for Russian. Especially rapidly interest has grown in the 21st century. At that the interest to vegetarian food is rather mild and to meat is vice versa big. The similar situation can be observed with other languages being analysed. At that the role of diets in comparison to meat is often (as in Spanish, Fig. 7) much higher than in Russian.

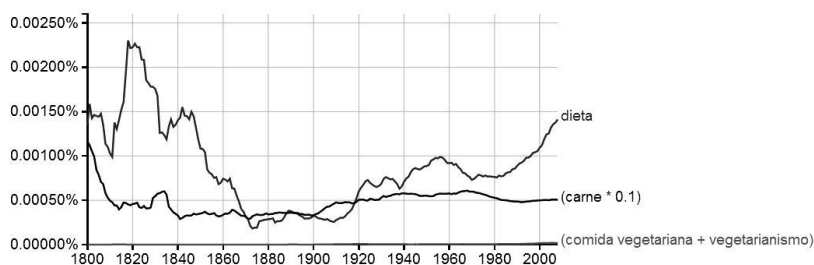


Fig. 7. Dynamics of relation to diets, vegetarian food and meat in Spanish

*Dynamics of relation to drinks.* We have chosen the most widely used drinks: coffee, tea, wine, beer and whiskey (for Russia vodka). These are general trends. First of all, let us note that in recent decades number of references to almost all drinks and in all countries has increased. In the end of the said period (2008) in all countries, except Russia, wine is most frequently referred to (in Russia – tea); the second place takes coffee (in Great Britain - tea), the third place takes tea (in Germany – beer) and the last place takes hard liquor (whiskey or vodka). Of course, the comparative data for countries received provide no surprise, vice versa; they show that human cultural heritage reflected in books correlates well with reality. We will provide only one figure – for Russian (Fig. 8).

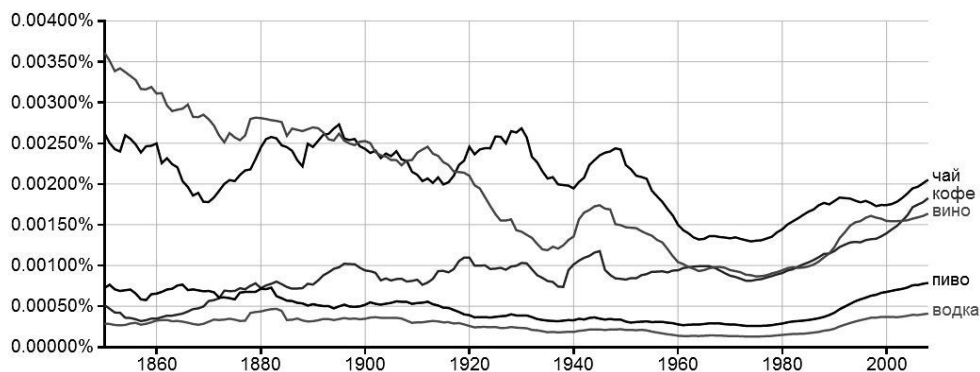


Fig. 8. Dynamics of drink references in Russian.

### Conclusions

Our main conclusions are not unexpected. For instance, the increased interest of the recent decades in diets and healthy food, which is revealed by our study, supports the trends marked by many researchers. However, this is not a universal rule, as some countries do not demonstrate this trend. Besides, the data from Google Books Ngram make it possible to determine, when certain trends appear in the public conscience. For example, the growth of interest in healthy nutrition is marked almost in all countries since 1980. Apparently, it is since then, due to the broad development of mass media, that people have become more aware of nutrition as a significant marker of lifestyle, as well as its impact on health.

Some regularities found in the research appeared to be unexpected. For example, the great significance attributed to tasty food in Russia and lower significance of its price (compared to richer countries). The stated regularities cannot be found by other means due to the absence of statistical data for long periods of time. The results of our work can be useful for the studies of nutrition history and, broader, of the dynamics of socio-cultural processes (memes). They can also contribute to the development of a new scientific discipline – cognitive sociology.

*Cultural Shifts In Developed Countries In The Last Two Centuries: Attitude To Nutrition,*  
*Astra Salvensis, V (2017), no. 10, p. 157-167*

Railya R. VILDANOVA, Radif R. ZAMALETDINOV, Madina R. SATTAROVA,  
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### **Tatars Names as a Phenomenon of Traditional Culture\***

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**Abstract.** *This paper studies a linguistic and cultural description of the vocabulary of the Tatar language associated with the rite of naming. This ritual of the Tatars attracts the attention of researchers from different fields. In the present study, the results of studies of ethnographers, historians, dialectologists, where the features of the ritual with the object of revelation of national specifics are used. The authors of the article suggest an analysis of the concepts associated with the ritual of naming the Tatars. This rite has a deep content that includes both national and religious worldviews. The semantics of phraseological units, lexical units used in describing the rite, emphasize the ancient rite, the complexity of its formation and diversity, depending on ethnic groups. Despite the fact that the Tatar people went through various historical events, he managed to preserve the value of the phenomenon in the Soviet era. When collecting and systematizing the materials, descriptive method, method of continuous sampling, excico-semantic method, methods of linguocultural, component and semantic analysis were used to expose the cognitive features of the functioning of linguistic units. In order to reveal the specifics of the reflection of the content of the ritual on the linguistic material, the materials from explanatory, dialectological, phraseological dictionaries were selected and analyzed.*

**Keywords:** Tatar language, naming, linguoculturology, ritual vocabulary.

### **Introduction**

Modern studies in the field of linguistics aim to analyze the linguistic material as a source of information about culture, ethnography, originality, national self-consciousness of the people. All peoples associate the birth of a child with a certain mystery, sanctity, miracle. There is a depth of meaning in every custom connected with the birth of a baby. One of the rituals of the Tatars, which expresses the desire for a deep knowledge of the traditions, the cultural heritage of its people is naming. The researchers noted that “family ceremonial rites, being the most important source for the ethnographic characteristics of the people, undergoing the inevitable evolution, in comparison with other areas of spiritual and material culture of the people, are more conservative and distinctive and have long attracted the scholars”.<sup>1</sup>

Such an interesting ritual as naming at the Tatars has attracted the attention of ethnographic researchers, historians, dialectologists for a long time. Scientific literature, which covers this topic, refers to several areas, and each of them contributes to the search for ways to solve the problem of linguocultural research on naming at the Tatars.<sup>2</sup> Despite the fact that the rituals associated with naming

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> F. T. Fatykhova, *Traditional Rites and Customs of the Bashkirs Associated with Birth and Death: the Author's Thesis for Candidate of Historical Sciences*, Sankt Petersburg, 1994.

<sup>2</sup> *Ibidem*; F. S. Bayazitova, *Өмөртнөң өч түе (татар халкының гаилә йолалары)*, . – Kazan, Татар. кит. нәшр. 1992; R. K. Urazmanova R. K., *Contemporary Rituals of the Tatar People (Historical and Ethnographic Research)*, Kazan, The Tatar Publishing House, 1984; N. I., Vorobyov, G. M. Khisamutdinov, *The Tatars of the Middle Volga Region and Cisurals: Monography*, Moscow, Nauka, 1967.

the Tatar people have been studied in more detail, there has been no monographic study devoted to the analysis of the vocabulary of naming so far. Based on this, the purpose of this study is to determine the linguistic and cultural analysis of the vocabulary associated with the ritual of naming at the Tatars.

### **Materials and methods**

The material for analysis was the ritual vocabulary of the Tatar language connected with naming. Lexical units were selected by means of continuous sampling from the Explanatory Dictionary of the Tatar language, the Large Dialectological Dictionary of the Tatar Language. Moreover, in order to reveal the specifics of reflection of the studied units in the minds of native speakers, an analysis of Tatar personal names was conducted. Etymological and semantic analysis of personal names also was a material for analysis.<sup>3</sup> Of particular interest are phraseological units with the components containing concepts related to naming.<sup>4</sup>

The methodological basis of the study is a combination of a number of general scientific and concrete linguistic methods. In order to study the reflection of the world outlook of the people in the analyzed thematic group of the Tatar language, the following research methods were used: the method of continuous sampling and the descriptive method were used to collect and systematize materials on the research topic; with the help of the lexical-semantic method, a systematic analysis of the lexical material was carried out; the methods of linguocultural, component and semantic analysis were used to reveal cognitive features of the functioning of linguistic units. In the process of work, such methods and techniques as observation of linguistic facts, analysis and synthesis, classification were also used. From the point of view of the theory of scientific research, the chosen methods are the best.

### **Results and discussion**

As it turned out, the family-ritual culture is an important part of the historical, genetic, spiritual, economic-legal, ideological life of the people. Depending on the circumstances, the rite of naming is conducted on the third, seventh or fortieth day from birth. However, in any locality it was not recommended to postpone this ceremony for a long time. There was also a popular belief that if a child often cries, then he asks a name to be given to himself. The smile on the child's face during the ritual of naming was understood as the adoption by a newborn of his name. In this regard, it should be noted that in the

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<sup>3</sup> Z. M. Kajumova, G. R. Galiullina, G. K. Khadieva, "History and culture in the onomasticon of the tatars (as exemplified in cadastres of the xvi-xvii centuries)," in *Modern Journal of Language Teaching Methods*, V (2016), no. 2, p. 71-75.

<sup>4</sup> G. R. Mugtasimova, G. A. Nabiullina, E. N. Denmukhametova, "Paremiological fund of the Tatar people in the ethno-linguistic aspect," in *Life Science Journal*, XI (2014), no. 11, p. 409-412; F. R. Sibgaeva, G. F. Zamaletdinova, R. S. Nurmukhametova, "Linguoculturological specific features of phraseological units of the Tatar language," in *Modern Journal of Language Teaching Methods*, V (2016), p. 116-119.

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Tatar language the state of the soul, emotions, attitude towards the surrounding world is very clearly mirrored in the linguistic material.<sup>5</sup>

The process of naming at the Tatars is described approximately equally and rather concisely in all sources. This day is a family holiday for the Tatars. The parents of the child invite the mullah, as well as their relatives and acquaintances. All the guests brought eatables and clothes for the newborn. There were gathered an abundance of presents, especially among the rich Tatars, who celebrated the day of giving the name to the child solemnly and lavishly. The ceremony itself is that the baby on the pillow is brought to the mullah, and he, reading excerpts from the Koran, pronounces in the ear of the newborn its name several times.

Within the framework of the research, the stages of the sacred ceremony studied were analyzed and lexical units from different stages of the process of naming were classified. The study of dictionaries from the point of view of the concepts we are interested in allows us to analyze the frequency of their usage depending on the era and make certain conclusions.<sup>6</sup>

*Choosing a name for the child.* This process is complex and interesting at the same time. However, it is necessary to take a responsible approach to it. It is important to think about the name in advance, before the birth of the baby. The name of the child born in the Tatar family must be of a Turkic-Tatar, Arabic or Persian origin and not contradict the canons of the Koran. The usual names are the models of the names like "Gabd + the name of Allah" *Габдулла/ Gabdulla, Габделкарим/ Gabdelkarim*, etc. The names of the prophets are considered to be blessed: Ильяс / Ilyas, Муса / Musa, Аюп / Ayup, Сулейман / Suleiman, Юсуф / Yusuf. However, the experts note that it is not recommended to name the child as Prophet Muhammad without any additional component. Therefore, the names such as *Мухамметзян/ Muhammetzyan, Мухаммадамин / Muhammadamin, Мухамматгали / Muhammatgali*, etc. were common among the Tatars. Beautiful, sonorous are the names of the Turkic origin, having a positive meaning. Common names among such Tatar names are the following ones with the component *ил/ il* (country), *ай / ai* (moon), *гөл / gul* (flower). For example, *Айнур / Ainur, Айсыйла/ Aisyula, Гөлназ/ Gulnaz, Илшат/ Ilshat, Илнур / Inur*, etc.

There are the names determined as undesirable, banned, which are considered to be discordant in meaning, inciting to commit a sin, the names of famous tyrants; the names of Satan *Иблис/ Iblis, Люцифер/ Lucifer*, etc. It should be noted that the responsibility for choosing a name completely lies on the shoulders of the mother and father and at present the public is concerned about the enormous number of identical names.

*The process of naming.* The ritual is performed in the following sequence: the child is turned to the side of the kyibl (the child's face is laid on the pillow, legs are

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<sup>5</sup> R. R. Zamaletdinov, G. F. Zamaletdinova, R. S. Nurmukhametova, M. R. Sattarova, "The lexicon and its reflection in the inner world of the individual (on the basis of the Tatar language)," in *Journal of Language and Literature*, V (2014), no. 4, p. 333-335.

<sup>6</sup> R. S. Nurmukhametova, R. R. Zamaletdinov, M. R. Sattarova, "The vocabulary of Tatar literary language (the first half of the XX century)," in *Life Science Journal*, XI (2014), no. 10, p. 670-673.

stretched towards the cueble and placed in front of the mullah); the adhan is read; the name is pronounced (the mullah repeats the child's name three times in its ear). The final stage of the process of naming is considered to be “бәби туге” (baby's wedding), that is, a festive meal. The rite of naming is accompanied by giving gift, wishes to the newborn, which are comprehended in a rich folklore material. The good wishes pronounced in the process of naming reflect the ideals of the people about honor and nobility, focus attention on duty, filial duties to parents and rules of life. They depict the echoes of archaic beliefs in amulets, in the sacral force of objects.

The following stage of the ritual of naming as *changing a name, renaming* occurs sometimes. According to the Muslim religion, to change the name is not forbidden. This is done if the child is often sick (it is believed that “the name did not fit”), moles appear, after attaining adulthood, a person has the right to change the name, based on personal considerations. It should be noted that this does not contradict the active laws of the Russian Federation and the Republic of Tajikistan, as well as the canons of Islam, but clergymen do not approve of this action without good reason.

The present material shows that the ceremony of naming is a complex process that requires preparation, material costs, presence of a clergyman (mullah). This causes the presence and special vocabulary, characteristic only for this rite or acquiring a special connotative meaning only in the context of the ritual of naming. A number of such names disappear, having been preserved only in dialectological vocabulary, some of them are transformed, according to new realities, and some are used in several variants. For example, naming – *исем кушу / исем булчу / ам булчу / ам кычкырты / ам салу / ам кушу (to give a name)*, etc. With the course of time the participants of the ritual, the place of performing the ritual have been changing, the ritual of common meals has undergone certain changes.

Interesting is, in our opinion, an attitude towards the newborn in the period of the Soviet power, when, on account of atheistic education, anti-religious propaganda, young people did not perceive the ceremony of naming as something obligatory, since the name of a child is registered by the state services. Thus, the birth of the child began to be perceived not only as sacral, but also as the birth of another member - a fighter for the prosperity of the Soviet power and the attitude towards it was built on the principle of attitude to all representatives of the state: it was recorded by state authorities, under the close supervision of the Soviet authorities, namely catered by a kindergarten, school, provided by work, its behavior was regulated by social and pedagogical institutes of that time.

At present, due to the revival of religion, performance of the rituals related to the birth of a child became again meaningful for many families, the mullah again became an honored guest in the process of naming the child; the practice of the circumcision rite again became common, although it began to be done in medical institutions. More and more attention has been paid to the scientific study of the peculiarities of the rituals connected with the birth of a child.



It is important to note the fact that the culturological features of the process of naming were preserved in the phraseological foundation of the Tatar language: *изгеат* (sacred, good name) is a name that is remembered only in the good light; *исем алу* (get a name) - to gain recognition, fame; *исембуяу / исемнә тап салу* - sully one's name; *исеммаклану* - about the cases when a person prays for forgiveness of his sins with kind gestures; *исеме генә калу* (only the name remains) - about someone's death; *исемем фәләһ булмасын* (let my name not be not that) - it is said in cases when a person expresses a willingness to renounce his name, if he commits an action, often associated with revenge; *исемн чыгару* (take out name) - to disgrace; *исеме һисемнә туры килгән* (the name coincided with the subject) - about the cases when the meaning of the name coincides with the character, the appearance of a person; *исемнәре алтын хәрәф бәләһ язды* (to write the name in golden letters) - about personalities whose acts have brought great benefits to the country, its people, and are remembered with the deepest respect; *исемн Һую* (lose name) - about a forgotten person, about lost glory; *ат алу* (get a name) - win the name / deserve a good name; *ат бирү* (give a name) - to name; *аткалдыру* - leave a good name; *аткүтәрү* (pick up a name) - lose a good name; *атсату* (sell out a name) - dishonor a name, etc. The most terrible wish to the enemy of the Tatars was *атык коргыры* (let the name get dry), *исемн телгә алсаң, тел әрәм* (I pity my tongue to pronounce his / her name).

As one can see, naming is associated with a variety of rituals and concepts that emphasize the importance of this event in human life. In the worldview of the Tatars, the person's name is fully identified with his personality, doings, and occupation. Moreover, the Tatar people believe that man is mortal, and name is immortal. That is why in every family all members of the family participate in choosing a name and in many lexical units the semantic potential of the people's perception of this responsibility remains.

It is necessary to say about another important stage of the ritual of naming, which has almost outlived itself today. The fact is that one used to give the first temporary name to a child immediately after its birth - *кендек исем* (a umbilical name). This tradition exists in many Turkic peoples and has archaic roots, since, in ancient times, there was a popular belief that to have several names implied an additional protection for a person. As the scholars note, “кендек исем” (for Bashkirs – “йүргәк исем” – “the name of diapers”) almost always refers to a group of the names that have arisen on the basis of ancient Turkic language and customs, nature-worship ideas reflecting life, historical changes, etc.

The rite of naming, like all rituals, performs the functions of socialization (having received a name, the child officially becomes a member of society), the integrating function (in the process of rite, the connection between ancestors and descendants, the past and the present is restored), the reproducing function (ancient traditions are maintained, in accordance with the epoch they are renewed) and the psychotherapeutic one (having given a name to a child, its parents believe that they protected the child from the influence of evil spirits, and when ritualizing the name - that they chased the disease out through the chimney, etc.). It should

also be noted that the faith in power of the name is not the vestiges of the past, but the actuality of the present, as evidenced by clergymen, mullahs, who are often addressed to by people seeking to change their names in order to attract luck, not to become a victim of the evil eye, etc. Thus, the ceremony of naming has an important cultural and ethnographic significance, demonstrates spiritual wealth and purity of thoughts of the Tatars.

### **Summary**

Summing up the preceding, it should be noted that the rite of naming is the first wedding, the first celebration in man's life. The tradition of the Tatar people, having been developed over centuries, contains all the best that it has to conduct this ritual: it involves a mullah reading passages from the Koran and thereby deterring the Shaytans from the child; one whispers the name chosen by the parents and that bears the wishes for the child to have beauty, longevity, health, to have the qualities of Allah, etc. in the child's ear three times; a lavish feast with marvelous spread laid on is arranged; relatives and near friends are invited; special honors are rendered to a woman in childbirth (previously to midwife too). The rite of naming includes mythological components (frightening the shaytans, closing the doors, chimney so that the name does not run away), folklore motives (wishes, congratulations to the child), linguistic components (euphony of the name), and also reflects the value orientations of the Tatar people (generosity, readiness to share joy, respect for elders, respect for the woman in childbirth and for all those who are involved in the birth of the child). The educational potential of this ritual is immense. Observance of age-old traditions and active use of lexical units containing national worldview allow to analyse the national distinctness as a unique phenomenon that has developed as a result of the fusion of the sacral, the day-to-day, the desired.

### **Conclusion**

The study of the ritual vocabulary of naming of the Tatars makes it possible to ascertain the attitude of the people to the child from century to century, from the times of paganism, when the relatives of the newborn together with the patroness of Umai's children and mothers fought for its life and treated everyone to oil, until the time of the Islamic period when it was believed that the name whispered by the mullah thrice in the baby's ear would help it to survive in the world and not become a victim of the jinns. In connection with the changes in society throughout the twentieth century, the attitude towards national rites and rituals has changed to some extent, but in general, in our view, the naming ceremony retains its main features.

The function of socialization is manifested in the fact that the ritual prepares the individual for social life. During the rite of naming the newborn first appears as a new member of society. The integrating function helps to realize the interconnectedness of the members of the collective, and also that the connection between the ancestors and descendants, the past and the present is restored. This is especially evident in the situations where the child is named after the deceased

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members of the family. This naming has its own rules, canons. An important factor in choosing a name for a newborn child was the fact that the Tatars had to know 10-12 generations and not to give their names to their children.

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**The historic city as an object of cultural tourism (on the example of Yelabuga)\***

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**Abstract.** *This paper deals with the experience of the existence of historic cities, their opportunities as centers for tourism development. At present, there are 41 historic settlements in Russia with different status. The tourist appeal of historic cities is determined primarily by their historic and cultural heritage. In recent years, such form of tourism as cultural has become more popular. Among the objects of cultural tourism is the historic and cultural heritage in its material and non-material, intangible forms. These are historic territories, including historic cities, architectural structures and complexes, archaeological excavations, art and historic museums, folk crafts, festivals, folklore, household ceremonies, traditional values, activities and the daily life style of the local population. Within the framework of cultural tourism, an individualization of demand occurs. Travelers are interested not only in getting acquainted with the well-known sights, but also in a kind of "immersion" in the historic environment, in the knowledge of the traditions and customs of the local population. Management of their historic and cultural heritage is carried out, for the most part, by reserve museums. The project activity of Yelabuga Reserve Museum is being studied as a means to increase the tourist flow and attract new partners.*

**Keywords:** historic city, cultural tourism, reserve museum, historic and cultural heritage, Yelabuga.

### **Introduction**

The UN General Assembly proclaimed 2017 the International Year of Sustainable Tourism for Development. The resolution adopted on December 4, 2016 expresses the hope that the proclamation of an international year of sustainable tourism will contribute to better understanding between peoples, the dissemination of knowledge of the rich heritage of various civilizations and the development of respect for the imperishable values of different cultures, which generally leads to the consolidation of peace in all over the world (United Nations declares 2017 as the International Year of Sustainable Tourism for Development).

A crucial role in these processes belongs to cultural tourism, which has been developing rapidly in recent years. The term "cultural tourism" is already quite often found in publications devoted to the problems of tourism, museum activity, and cultural studies.<sup>1</sup> In Russian research, terms such as "cognitive" or "cultural-cognitive" tourism are used in parallel. Among the objects of cultural tourism is the historic and cultural heritage in its material and non-material, intangible forms. These are historic territories, including historic cities, architectural structures and complexes, archaeological excavations, art and historic museums, folk crafts,

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> R. A. Corbos, R. I. Popescu, "Museums, Marketing, Tourism and Urban Development. The British Museum – a Successful Model for Romanian Museums," in *Management & Marketing*, CCCIII (2011), vol. IX, Issue 2, p. 303-313; E. G. Moiseeva, "Cultural tourism as a strategic resource of Russia," in *Bulletin of the Moscow State University of Culture and Arts*, V (2012), no. 1, p. 96-100; R. F. Westervelt, *Museum and Urban Revitalization: Regional Museums as Catalysts for Physical, Economic, and Social Regeneration of local communities*, New Jersey, Seton Hall University, 2010.

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festivals, folklore, household ceremonies, traditional values, activities and the daily life style of the local population. They also include the current culture, contemporary art and performance arts.<sup>2</sup>

Cultural tourism is not just an opportunity to get acquainted with a certain cultural object, but also to understand its interpretation, to learn new meanings through the environment, to evaluate the context (to feel the atmosphere of the place), in other words, to learn the intangible culture of the place and its inhabitants.<sup>3</sup> An essential feature of cultural tourism is not only and not so much the aspiration of the tourist to get a complete picture of the object or destination. It goes, rather, about gaining impressions, i.e. about stimulating the emotional-sensory sphere of a person. This is achieved through the "immersion" in the cultural life of the local community, acquaintance with its traditional values. Accordingly, a new hierarchy of interests of tourists and objects of these interests arises. Cultural tourism allows diversifying traditional tourist products, adding new components to it, creating new complexes of tourist goods and services. The speed of movement of tourists changes. It is no coincidence that today more and more people are talking about a new type of flaneur tourists, well-informed, sophisticated, critical of the proposed tourist services. The flaneur tourist is more selective and demanding of offers, focused on independent scheduling of the travel program; he shifts away from standards and manifests his individuality. He is guided by the new formula of tourist preferences - "three L" (Lore-Landscape-Leisure). This is a tourist who shows an increased interest in local color, the peculiarities of everyday life, the customs of another culture.<sup>4</sup> The influence of consumers of cultural tourism triggers changes in the museum concept. Museums gradually move away from the function of storing artifacts. According to the famous researcher N. Kotler, the main function of the museum is to provide attractive and memorable impressions.<sup>5</sup> These changes give rise to a new approach to the visitor-tourist, the desire to best meet his needs.

## Methods

To study the opportunities of the historic city as an object of cultural tourism, the following methods were used: the narrative method, which became the basis for in-depth analysis; comparative and typological methods, which made it possible to identify groups of similar phenomena and processes. The principle of the system approach was also used.

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<sup>2</sup> COMOS, International Tourism Charter, (2002). (Electronic resource) URL [http://heritagemalta.org/erdf032/documents/06\\_ICOMOS%20International%20Cultural%20Tourism%20Charter.pdf](http://heritagemalta.org/erdf032/documents/06_ICOMOS%20International%20Cultural%20Tourism%20Charter.pdf), accessed 25. 05. 2017.

<sup>3</sup> V. E. Gordin, M. V. Matetskaia, *Cultural tourism as a strategy for city development: the search for compromises between the interests of the local population and tourists*, 2017: electronic resource - URL [http://tourlib.net/statti\\_tourism/gordin.htm](http://tourlib.net/statti_tourism/gordin.htm), accessed 25. 05. 2017.

<sup>4</sup> A. V. Liashko, "Museum tourism. Evolution of the format," in *Bulletin of St. Petersburg State University*. VI (2012), no. 3, p. 21-26.

<sup>5</sup> Neil G. Kotler, (2008). *Museum marketing and strategy: designing missions, building audiences, generating revenue and resources*, 2<sup>nd</sup> edition, . San Francisco, Jossey-Bass publ., 2008.

## Results

The main principle of cultural tourism is the principle of sustainable development, which means supporting local culture, preserving cultural and natural sites and improving the living standards of the local population. Thus, cultural tourism can seriously stimulate the development of historic cities.

Article 3 of the International Charter for the Protection of Historic Cities emphasizes that the participation of residents is a prerequisite for the preservation of the historic city. Protection of historic cities and neighborhoods, above all, concerns their inhabitants. This means that it is impossible to preserve the historic environment of the city by unilateral actions of the state through legislation or carrying out restoration work. The inhabitants themselves should feel their involvement in the history of the place where they live, identify themselves with this place, and contribute to the maintenance of this environment. Tourism, implemented on the principle of sustainable development, is an important means of ensuring employment of the population and economic development of the region, as well as the preservation and involvement of cultural objects in the socio-economic development.<sup>6</sup> On the other hand, one of the levels of cultural tourism is cultural quasitourism, which includes the movement of residents of a given locality, one of the motives of which is the consumption of cultural goods. These conditions provide significant opportunities for historic cities, which are an optimal platform for the development of cultural tourism.

## Discussion

The concept of a "historic city" was introduced by architects and historians of architecture with the aim of drawing attention to the town-planning heritage, resolving questions on its restoration and preservation. Later, the historic city as a civilizational phenomenon began to be studied in the context of geography, economics, history, and sociology. In recent decades, interest in the essence and capabilities of the historic city has been actively manifested in tourism<sup>7</sup>. The

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<sup>6</sup> <http://media.unwto.org/press-release/2015-12-07/united-nations-declares-2017-international-year-sustainable-tourism-develop>, accessed 25. 05. 2017; International Charter for the Protection of Historic Cities. (Electronic resource) URL [http://rossigr.narod.ru/170399/4\\_3.html](http://rossigr.narod.ru/170399/4_3.html), accessed 25. 03. 2017.

<sup>7</sup> T. I. Agishina, "Experience and prospects for the development of tourism in Yelabuga as a small historic city / "TOUR FACTOR 2014" - "Strategies for the development of the tourist and recreational sphere of the region," in *Materials of the VII International scientific-practical conference (Kazan, April 10-11, 2014)*, edited by S.E. Ivanov et al., Kazan, UNIVERSUM, 2014, p. 18-22; N. A. Emelianova, S. V. Saraikina, *The natural and cultural-historic potential of small towns of Mordovia and the development of tourism in the region*, (Electronic resource) URL <http://cyberleninka.ru/article/n/prirodnyy-i-kulturno-istoricheskiy-potentsial-malyh-gorodov-mordovii-i-razvitiye-turizma-v-regione#ixzz4XJv0vHqY>, accessed 25. 05. 2017; L. S. Timofeeva, *The potential of reserve museums in the sphere of "cultural tourism" (on the example of the activity of reserve museums of Tatarstan) / Museum and the problems of "cultural tourism"*, Sankt Petersburg, Publishing house of the State Hermitage, 2016, p. 242-247; C. Hamnett, N. Shoval, "Museums as "Flagships" of Urban Development", in L. M. Hoffman, D. Judd, S. S. Fainstein, (eds.), *Cities and Visitors: Regulating People, Markets, and City Space*, Oxford, Blackwell, 2003, p. 223 -226.

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Russian legislation considers a historic city as a city with cultural heritage sites (monuments, ensembles, sights), as well as other scientific or socio-cultural values - archaeological, historic, architectural, urban, aesthetic – located within its boundaries. Historic cities are the places where a territorial-local community is formed, which, being a part of Russia's history and culture, at the same time, reflects the specifics of a certain region, allowing the creation of unique tourist products.<sup>8</sup>

At the same time, the historic city is perceived as a single territorial complex of cultural and natural heritage, which has a significant scientific, aesthetic and memorial value. This puts increased demands on town planning and the mode of life of this city, up to the establishment of its special legal status. The term "historic cities" was established in the literature in the 1970s, after the appearance of the corresponding list of the Ministry of Culture of the RSFSR. As a result of permanent additions to 2002, 478 historic urban settlements were already on this list. Among them there were 9 such settlements located in the territory of Tatarstan - Kazan, Bugulma, Yelabuga, Laishevo, Mamadysh, Menzelinsk, Sviyazhsk, Tetyushi, and Chistopol. But in 2010 the list of historic cities in Russia was seriously changed. There were only 41 cities left, including Yelabuga and Chistopol located on the territory of Tatarstan,<sup>9</sup> Ministry of Regional Development of the Russian Federation No. 339 of July 29, 2010.<sup>10</sup>

Yelabuga acquired the status of the city in 1780. In the XIX century, the city became a major trading center of the Kama region. The holistic architectural appearance of the city was formed in the XIX century, when after the fire, which destroyed a significant part of the wooden Yelabuga, stone construction began. The central streets, which preserved the image of the traditional merchant city of the century before last, are built up in eclectic style with elements of classicism. Uniqueness of Yelabuga as an object of historic and cultural heritage consists in the presence of the only preserved pre-Mongolian Bulgarian monument Chertovo gorodishche, an excellently preserved historic center of the XIX century, multiple museums and other objects of tourist interest. Currently, Yelabuga is the fifteenth largest historic city in Russia, popular with tourists.

To understand the essence of the processes taking place in historic cities under the influence of tourist activity, G.J. Ashworth and J.E. Tunbridge developed the appropriate scheme.<sup>11</sup> This scheme systemizes the development of the average

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<sup>8</sup> Federal law No. 73-FZ of June 25, 2002 "On objects of cultural heritage (monuments of history and culture) of the peoples of the Russian Federation". (Electronic recourse) URL <http://base.garant.ru/12127232/>, accessed 25. 05. 2017.

<sup>9</sup> On the approval of the list of historic settlements: Order of the Ministry of Culture of the Russian Federation No. 418, Ministry of Regional Development of the Russian Federation No. 339 of July 29, 2010 (Electronic resource) URL <http://base.garant.ru/199389/>, accessed 25. 05. 2017.

<sup>10</sup> <http://media.unwto.org/press-release/2015-12-07/united-nations-declares-2017-international-year-sustainable-tourism-develop>, accessed 25. 05. 2017.

<sup>11</sup> G.J. Ashworth, J. E. Tunbridge, *The Tourist–Historic City: Retrospect and Prospect of Managing the Heritage City*, Amsterdam & New York: Pergamon, 2000.



historic cities in Europe. The approach presented in it can be applied to the historic cities of Russia. The authors distinguish four stages in the development of the city:

1. All urban activities took place within the boundaries of the city, which most often represented a fortress. It included the central business district, where such functions as trade, management, etc. were concentrated.

2. Urban boundaries become narrow, and residents begin to settle in the surrounding areas, developing the adjacent territories. Secondary business districts are formed here.

3. At this stage, the secondary areas become full-fledged centers with a full set of all functions. The territory of the center and part of its historic buildings become free. This raises the question of the preservation and rational use of the cultural heritage left in the old center.

4. At this stage, tourism and tourist activity are becoming an important factor in the development of the city. The demand for tourist services in the old and new centers increases. The influx of tourists leads to the creation of new tourist facilities and the rapid development of the corresponding infrastructure. It can be argued that, in accordance with this scheme, Yelabuga is at the fourth stage of development. This is evidenced by the creation in recent years of a number of new urban objects (monuments, new museums and museum complexes, works of urban sculpture, hotels, cafes) that either are the tourist attractions or meet the needs of tourists. Among them one can single out the museum-theater "Traktir", created in the spirit of the district inn of the XIX century, the only museum in Russia "Portomoinia", where the history of the laundry business is presented, the unique V.M. Bekhterev museum of parish medicine, objects of urban sculpture that form a unique image of Yelabuga - monuments to the XIX-century Policeman, the Janitor, the stray dog. At the same time, new tourist routes and services are being formed in order to expand the tourist market.

Successful development of historic cities, especially small and medium-sized ones, largely depends on the presence of subjects or structures that manage objects of historic and cultural heritage and stimulate the interest of tourists to them. The most successful in these terms are the corresponding structures of reserve museums, operating today in 22 historic cities of Russia. Museum-reserves, being integral complexes, are able to preserve most effectively not only architectural, archaeological or memorial monuments, but also the historic territory itself, including unique cultural and natural landscapes, historic urban and rural settlements, the way of life of people living in historic territories of the population.

The territory of Yelabuga Reserve Museum includes the entire historic part of the city with an area of 491.5 hectares, where more than 180 historic and cultural sites are located. Six of them, including the house-museum of one of the most famous and recognizable Russian artists I.I. Shishkin, the house-museum of cavalry-maiden Nadezhda Durova, are of federal importance. The presence of large areas and a various nature of facilities creates opportunities for the implementation of projects and shares in a wide range in the museum-preserve. This allows not only presenting here historic and cultural events, but also "involving" the museum

space in modern cultural and social processes, thereby attracting new groups of visitors, developing new types and forms of tourism, and promoting the city brand.

An example of such a project, which plays a significant role in the Yelabuga Reserve Museum, is the revival of the Spasskaia Fair in Yelabuga. It has been held in the city from the second half of the XIX century and has been widely known not only in the Volga region, but also throughout Russia. The revival of the fair took place in 2008 and since that time it has been held annually. Traditionally, the fair is a place not only for trade, but also for communication and entertainment. By recreating this atmosphere, its organizers include in its program, in addition to trade in arts and crafts and folk crafts, the work of national farmsteads and "Cities of Craftsmen", performances of folklore and circus groups, children's and sports playgrounds. The "City of Craftsmen" is for master classes where the visitors can acquire the skills of pottery and weaving craft, learn hand knotting, making amulets from bast, chintz and vine.

A unique form of presentation of the intangible heritage was the All-Russian Bell-Ringing Festival, held in the framework of the fair, which was attended by representatives of Russia and Tatarstan, vocalists and musicians playing the Old Russian instruments - wheel lyre and harp.

It should be noted that this is not the only project implemented in Yelabuga. Artistic symposiums, art and ethno-projects are held here annually. This contributes to the development of another subspecies of cultural tourism - professional, the basis of which is the actualization and presentation of contemporary art. Equally important here are the performances to the audience and the opportunity for professional communication between performers and participants of creative collectives, artists and painters.

Participation in such projects not only allows reserve museums to improve their financial situation, but also contributes to changing their social status, forming the image of museums as significant cultural centers of the city and regional communities.

### **Summary**

Modern science considers cultural tourism as a form that includes several types (subtypes) of tourism, most often synthesized. Let us stop on some of them, which contribute to the realization of the tourist potential of the historic city.

Sightseeing (cultural and fact-finding, or excursion) tourism. It is certainly the "oldest" and one of the most popular forms of tourism. Actually, it has served as the basis for further gradual formation of cultural tourism.

Heritage tourism or cultural and historic tourism is turned to the past, to recognized cultural values, which are expressed in authentic "monuments" (historic, architectural, literary, artistic) and traditions. Its objects of tourist interest are historic buildings, cultural landscapes associated with historic personalities or events, archaeological sites, local traditions and traditional events.

Thematic tourism. The basis for creating a route for this type of tourism is the demonstration of the objects within the framework of a specific topic related to the history of the city, famous events, outstanding personalities. Examples of its

development are thematic excursions "Merchant Yelabuga ", "Yelabuga – Shishkin's city", etc.

Event-driven cultural tourism. This type of tourism provides direct participation of tourists in regional and local holidays, festivals, and fairs. It promotes repeated, moreover, multiple visits of tourists. An example is one of the most famous tourist brands of Yelabuga - Spasskaia Fair.

Art tourism. Art tourists are characterized by the desire to participate in cultural events that mark an event or phenomenon in art. Art tourism is characterized by a more or less massive professional tourist component, so it is appropriate to use the term "professional" tourism. The historic city is a natural setting for conducting a variety of art practices. An example is holding in Yelabuga the annual International Art Symposium on contemporary art, accompanied by art and ethno projects, such as "Belaia iurta", "Koleso", etc.

Ecocultural tourism. The small and medium-sized historic cities of Russia are the centers of rural territories. Thus, they have much more opportunities to create tourism products related to rural and environmental tourism. An example is the agro-tourist complex MIRAS in the village of Morty (20 km from Yelabuga), where a project called "Ethnoderevnya" has been realized, which allows tourists to get acquainted with the traditional culture and peculiarities of life of people living in Tatarstan. Visiting the complex is included in a number of excursion programs of Yelabuga Reserve Museum.

Tourism of impressions. A distinctive feature of tourism of impressions is getting a more complete and valuable for the tourist presentation of the destination in an interactive mode. The main results in this case are not getting new knowledge, but pleasure from taking part in the process of travel, excursion, visiting a cafe, direct participation in a master class, etc. Historic cities provide travelers with a variety of opportunities for acquiring new experiences.

All the aforementioned types (subtypes) of cultural tourism contribute to a high degree of involvement of the local population - residents and quasitourists. In this regard, attention should be paid to the territorial location of Yelabuga as a historic city located in close proximity to the "new" cities, whose history is only a few decades old (Naberezhnye Chelny and Nizhnekamsk). This neighborhood imposes special obligations on the tourist structures of Yelabuga - actualization and popularization of authentic heritage sites, and preservation of its historic memory.

### **Conclusions**

Cultural tourism can become a driving force for the development of small and medium-sized historic cities. In Europe, the "cultural routes" connecting such cities are a notable phenomenon that has a serious impact on tourism activities and the promotion of heritage. The creation of unique, Russian "cultural routes" that unite the potential of the most interesting and developed historic cities from the tourist point of view will be another incentive for the preservation of cultural heritage and the development of both international and domestic tourism.

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## **History And Autocratic Power: Vasily Zhukovsky As A Mentor Of The Tsesarevich Alexander\***

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**Abstract.** *The article is devoted to consideration of pedagogical program developed by Vasily Zhukovsky for the education of the heir to the throne – the future Emperor Alexander II. Pedagogical views of Zhukovsky are inseparable from his political preferences and philosophical-historical ideas. Pedagogical system of Zhukovsky in general terms is based on the concept of I. Pestalozzi, but it was adopted to the individual elitist education. The main task of Vasily Zhukovsky was the education of a monarch who would be able to set himself practical challenges and successfully resolve them, while based on Christian morality. The military component of the training should be reduced to a minimum. The most important means of education were history, and the personal views of Zhukovsky, transmitted to the crown Prince, were based on historical concepts developed by Karamzin and Johann von Muller. Archival materials indicate that to a large extent the teacher has achieved its objectives. In the historical views of Muller Zhukovskiy mostly singled out the idea of history as a means of moral education and the rule of law, combined with an enlightened autocratic rule. Such projects were actually doing him a "loyal opposition" and led to the resignation from the court service.*

**Keywords:** History, Intellectual history, Official ideology, Education, Historiography, V. Zhukovsky, N. Karamzin, J. von Müller.

### **Introduction**

Vasily Andreyevich Zhukovsky in the 1830 - ies was actively involved in the state and the ideological construction of the Nikolaevsky Russia. He was appointed the tutor of the heir to the throne – the future Emperor Alexander II, and accepted his position as an important mission. One of the most important threads, linking the romantic poet with the reigning house, were the events of the Decembrist uprising (Decembrist uprising) of 14 December 1825. It's characteristicly, that this whole day Zhukovsky held in the Winter Palace. As a result, the poet was involved in discussions about the ideal monarch and the search for points of ideological pairing between Zhukovsky and the Imperial family. Overall, his views were Orthodox, but in the diary he allowed himself the criticism of a state mythology, in the construction of which was attended by himself.<sup>1</sup> In this context, of paramount importance is the consideration of his activity as a teacher-historian – mentor of the heir to the throne.

### **Materials and methods**

The works of V. A. Zhukovsky in education never constructed a single case and they were not systematized by him on purpose. Against this background, the special place occupies "The Plan of the teachings of His Imperial Highness the Sovereign Grand Duke Tsesarevich Alexander Nikolaevich" (Plan of the education of His Imperial Highness Grand Duke Tsesarevich Alexander Nikolaevich),

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<sup>1</sup> Ilya Vinitsky, *Vasily Zhukovsky's Romanticism and the Emotional History of Russia*, Moscow, Northwestern University Press, 2015.

compiled in 1818. Other texts, including those relating to the education of the future Emperor Alexander II, or the children of Zhukovsky, of specific literary, historical and linguistic aspects of education, or comments on certain provisions of the methodology.

In the presented study the materials of V. A. Zhukovsky were used, dedicated to the education of the Heir to the Throne, including a shortened version of "The Plan of Teaching" aimed at French to F. Gille in 1826, and the development of the initial plan, presented in 1827 to the Emperor Nicholas I. All of these materials entered the 12-volume collected works of Zhukovsky, published by the firm of A. F. Marx (Berlin, 1902). In the new collected works of Zhukovsky<sup>2</sup> in 20 volumes, started in 1999, these materials are placed in the not yet released volume. Pedagogical views of Zhukovsky are inseparable from its historical and political positions.

## Results

Pedagogical activity of V. A. Zhukovsky at the Court began in October 1817, when he was appointed a teacher of Russian for the Grand Duchess Alexandra Feodorovna (Alexandra Feodorovna, born Princess Charlotte of Prussia), wife of Nikolai Pavlovich (Grand Duke Nikolai Pavlovich). Later he held the same position with the Grand Duchess Elena Pavlovna (Grand Duchess Elena Pavlovna, born Princess Charlotte of Württemberg).<sup>3</sup> The new position – a teacher of the Heir to the Throne, demanded Zhukovsky to solve other tasks, as he had not to conduct a private course, but to coordinate the activities of different teachers under the universal education programs.<sup>4</sup>

The final version of the plan by Zhukovsky was published in the journal "Russian antiquity" (*Russkaya Starina*) in 1880, that is, during the life of Alexander II.

Zhukovsky supposed to implement the Plan for the education of the future Emperor in three stages, set as preliminary types of primary, secondary and higher education. The first stage is from 8 to 13 years – included a "preparatory exercise" (preparatory learning), i.e. the study of General subjects. The second period – from 13 to 18 years – provided for the "detailed teaching" (detailed learning), i.e. a systematic course of the basic Sciences, and the third period from 18 to 20 years – the "practical learning" (applied learning), focused on life practice of the Heir to the Throne, the circle of his "professional" duties.<sup>5</sup> The pedagogical system of Zhukovsky was based on the methods of I. G. Pestalozzi (1746-1827), who was the creator of an original system of education based on the ideas of Jean Jacques Rousseau. Zhukovsky was well acquainted with this system, and dedicated it several

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<sup>2</sup> Works of V. A. Zhukovsky, in 12 vols. Sankt Petersburg, A. F. Marx Publ. House, 1902.

<sup>3</sup> M. Soroka, C. A. Ruud, *Becoming a Romanov. Grand Duchess Elena of Russia and her World (1807-1873)*, London, Routledge, 2016.

<sup>4</sup> S. V. Kiselev, E. M. Zhilyakova, "The Education Plan is co ... of Tsarevich Alexander Nikolaevich" in the Context of V. A. Zhukovsky's Pedagogical Legacy," *Tomsk State University Journal of Philology*, VI (2014), no. 32, p. 125-136.

<sup>5</sup> *Ibidem*.

articles in 1808 – 1811; in his personal library were books on pedagogy and works of Pestalozzi.

In practice, V. Zhukovsky has implemented the ideas of Pestalozzi in the training of Grand Duchess Alexandra Feodorovna in the Russian language in 1817-1820. He tried to coordinate classes with the daily life of the pupil and to use the other recommendations of the Swiss educator. It should be taken into account that the task for Zhukovsky was non-trivial: to adapt the model of Pestalozzi, developed for public schools, to an elite individual education. On the "preparatory stage" the main task is to teach the child logical thinking, to teach him to state the problems and their solution. The set of objects of that block was supplemented by Zhukovsky with Biblical history and Christian morality, that is, subordinated it to the teaching of moral education. The same principle was maintained at the second stage, when the systematic understanding of basic Sciences became only the basis for moral self-determination, the answer to the question, "what should I be" and "what I intended for."

Zhukovsky preserved and other principles of Pestalozzi, in particular, order and regularity, supplemented by forming of their own motivation and interest for further study. A considerable place in the program took the liberty, interpreted in the following way: "freedom means freedom and pleasure to do what the duty orders." In the second stage, visual aids played a huge role – the use of aids, including physical devices and mineralogical specimens, as well as interactivity, taking into account the individual qualities of the pupil.<sup>6</sup>

The specific of teaching of the Grand Duke was to minimize the direct influences of his duties – military and courtiers. They were inevitable, but, according to V. Zhukovsky, must be consistent with the whole system of education. He asked the Emperor Nikolai, to reduce the travel of the Heir and his participation in the Court ceremonies. The military classes had to fit in vacation time.<sup>7</sup> The fact is that the Emperor fulfilled the teacher's suggestions, and by his personal arbitrary decision for the first time sent his son off to military camps at 11 years of age, not at 9-year-old, as it was practiced previously.

A significant place in the Plan held the training of history as an important subject for the political activities of the sovereign. It was also the influence of the Swiss pedagogy, in this case – of Johann Muller (Johannes von Müller, 1752 – 1809), the letters of which, translated into the Russian language, Zhukovsky has published. In the historical views of Muller Zhukovskiy signed out most of all the idea of history as a means of moral education, and the rule of law, combined with an enlightened autocratic governing.<sup>8</sup>

The vast majority of researchers believed in the inseparability of the historical views of V. Zhukovsky from the concept of N. Karamzin, that is,

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<sup>6</sup> E. M. Almedingen, *The Emperor Alexander II: A Study*, London, Bodley Head, 1962.

<sup>7</sup> I. Grey, *The Romanovs*, New York, New Word City, 2016.

<sup>8</sup> L. Leighton, *Russian Romantic Criticism: An Anthology*, London, Greenwood Press, 1987.

however, true for their literary relations.<sup>9</sup> Teaching history for the Heir began with the initial stage, and for this purpose the poet has prepared a detailed synopsis of a volumetric work by Karamzin – 12- volume “The History of the Russian State”. The abstract is preserved, it included that part of the works of Karamzin, which is dedicated to the history of Russia from the 1230-ies to 1480, i.e. Tatar-Mongol invasion on Rus’. The issue of creating a centralized monarchical state was studied as the key one. The pedagogical task demanded more detailed, than at Karamzin’s, consideration of the nature of the Monarch’s power; selection and presenting of specific historical material and evaluations were due to the pragmatics of the classes with the Heir.

It is typical, that the figures of Russian rulers, driven for example were directly correlated with the personality of Nikolai I. The most important qualities of the Emperor (these epithets were used by Zhukovsky, Karamzin and even A. S. Pushkin) were "the mind, kindness and firmness". The latter is equivalent to "power." Judging from the 1831 essay about Alexander Nevsky, written by the Heir, he had not perceived the concept of Zhukovsky. For Alexander Nikolaevich the ancient Prince was endowed with the traditional heroic and the Christian traits of humility and self-sacrifice. It is possible due to the influence of his father, who made notes for family reading with personal impressions of the Decembrist uprising of 1825, which accompanied his accession to the Throne. Nikolai I endured the sacrifice and heroism, and the same traits were emphasized by Zhukovsky in the description of his reign. A later essay of Alexander II is preserved, which shows that ultimately the initiative of Zhukovsky had a success. The Heir announced as the most important achievement of Alexander Nevsky the ability to secure the trust of citizens in times of severe crisis and war. The slip is notable, when he called Alexander Nevsky the Emperor, that is, in a schoolboy’s essay on a historical theme there is a reflection on the present times.<sup>10</sup>

Another work by the Crown Prince was dedicated to the historical portrait of Ioann III, in which he has also highlighted the features that were important to Zhukovsky – the desire of the Tzar to autocracy, his care about the people's welfare, love for justice. Judging by the will of Nicholas I to his successor from 1855, the ideals of the monarchy and the relations with citizens, the principles of governing the State, political priorities, which have been indoctrinated with the parent-Emperor and Zhukovsky-a teacher are largely the same. First of all, it dealt with the challenges of moral education.<sup>11</sup>

In this context, it is possible to quote the main theses of the notes by Zhukovsky "The Use of history for the Emperors", dated by 1829 (this is an extract from "The plan of education"). It begins with a definite phrase: "The Treasure of the Royal enlightenment is the history, teaching with the experiences of

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<sup>9</sup> D. Offord, D. "Nation-Building and Nationalism in Karamzin's "History of the Russian State," in *Journal of Modern Russian History and Historiography*, III (2010), no. 1, p. 1-50; J. Schneider, *The Age of Romanticism. Westport (CT)*, London, Greenwood Publishing Group, 2007.

<sup>10</sup> T. Guzairov, *Žukovskij – istorikii deolo gnikolaevskogo carstvovanija*, *Dissertationes philologiae Slavicae universitatis tartuensis*, Bd. 19. Ulikoolikirjastus Tartu, 2007.

<sup>11</sup> *Ibidem*.



the past, they explain the present and predict the future". Then follows a list of "rules of the Royal activities":

1. The power of the Tzar comes from God. Here is the remark "not to put himself above the court of the people, but to subordinate himself to the Supreme Court of God."

2. The respect for the law of people is determined by personal example of the Ruler, who respects the laws.

3. The spread of education, which is "the strongest support of the well-intentioned government." It is easier to make ferocious rebels of blind slaves; educated people appreciate the good order and laws.

4. Respect for public opinion, which is "the strictest judge of the executors of the Royal Will."

5. Love of freedom, which means respect for the personal safety and rights of people. The law needs to protect citizens, first and foremost, from the officers of the law. Freedom and law enforcement – are one and the same.

6. The government is realized not by force, but by order. "The true power of the Sovereign is not in the number of his soldiers, but in the solid welfare of the people".

7. True to his word: without the trust of his people, the Emperor is powerless.

8. "Surround yourself with worthy of you assistants." If the Tzar will alienate people, exceeding him in moral character or in competence, he will become a victim of the "greedy slaves".

9. "Respect your people, then they will become worthy of respect".

10. "Without love of the Tzar to the people, there is no love of the people to the Tzar".

11. The Sovereign must have in his soul the ideal of beautiful, that could protect him from contempt for humanity.

A set of commandments ends with a quote from "The World History" (Vier und zwanzig Bücher allgemeiner Geschichten) by Johann von Muller, calling for moderation and order.

## **Discussion**

T. Guzairov determined Zhukovsky as "the loyal opposition". His position was not understood by his contemporaries, primarily because of the aesthetic, but not pragmatic, approach to reality. From the position of V. Zhukovsky, the history is the life of the people, and the Monarch is responsible for each of them. In the first place in his political, historical and pedagogical approaches, Zhukovsky nominated the Monarch as the person, but not the Monarch-hero.

## **Insights**

Thus, the course of history is determined by the spiritual search of each person, and its only content is the simultaneous search of harmony and God. In the diaries of V. Zhukovsky the thoughts on modern life are inseparable from the ideas about education, and the religious search was expressed in the writing of

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political articles. However, in conditions of the tsarist Russia, an idealistic pragmatism of Zhukovsky could find expression only in the sphere of literature but not in state activity.

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**The Ideological And Artistic Originality in the Dramatization of the  
Story "on Friday Night..." (1972-1979) by Gilyazova A. M., made by a.  
Zaripov\***

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**Abstract.** *The subject of research was the problem of dramatization the prose of the Tatar writer A. M. Gilyazov. The story "On Friday night..." and the script of the homonymous TV drama by A. Zaripov were used as the material. The focus of attention was the imaginative and stylistic transformation of a text in the process of adapting the prose to functioning in new conditions. Methodological basis of research are works on the history and theory of dramatization of literary works. Descriptive-comparative method is used in this study. Methods of generalization and systematization of theoretical information are combined with the methods of language analysis (lexical-semantic, syntactic), and semiotic analysis. The article proves that the basis for the creative interpretation of the story became its ideological and artistic originality. Comparative analysis of the original and the script showed that the literary work has been subjected to substantial transformations that have emasculated its potential. At the same time, the Director A. Zaripov made the neoplasms, different from the author's intentions which were aimed to strengthen the dramatic conflict. In the analysis of the performance the potential of scenography and music was revealed. Dramatic action was analyzed in lingua-semantics aspect. The paper provides the observations about the performance of the actors. The analysis showed that the work of A. Zaripova is not characterized with integrity and completeness.*

**Key words:** the Tatar literature, A. M. Gilyazov, the story "On Friday night...", the dramatization, the TV drama, stylistic features.

### **Introduction**

Dramatization of narrative works have repeatedly been the subject of research in the scientific literature. There were studied the adaptations of a particular author<sup>1</sup>, director<sup>2</sup>, or theater.<sup>3</sup> The number of works is devoted to the adaptations of the specific era.<sup>4</sup> In theater studies and literary criticism there are

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> D. Ledur, "Réflexion sur l'adaptation théâtrale," in *Études Théâtrales*, II (1992), p. 28-56.

<sup>2</sup> B. Joinnault, *Théâtre de Faire tout : la mise en scène des textes non dramatiques chez Antoine Vitez*. Thèse, Rennes, Univ. de Rennes 2, 2008; Rey A. Antoine, *Vitez et Louis Aragon: Une filiation revendiquée*. Thèse, Paris, Université de la Sorbonne Nouvelle, 2001.

<sup>3</sup> L. F. Shkileva *The problem of the theatrical staging of the Russian classic novel on the Soviet stage. (Mat, 30-years)*, Moscow, GITIS, 1972.

<sup>4</sup> M. P. Lamarque-Rootering, *Les adaptations théâtrales de romans français au XIXe siècle*. Thèse, Paris, Université de la Sorbonne Nouvelle, 2007; V. I. Kozlov, *The main problems of staging prose in the Soviet drama theatre (70-ies)*, Moscow, GITIS, 1984; A. A. Chepurov, *The Modern Soviet prose on stage. Principles of theatrical transformation works of different narrative genres: dis. kand*, Leningrad, LGITMIK, 1984; J. G. Miller, "From Novel to Theatre: Contemporary Adaptations of Narrative to the French Stage," in *Theatre Journal*, XXXIII (1981), no. 4, p. 431-452.

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general studies of the theory and history of dramatization.<sup>5</sup> Dramatic action is studied by Gordienko E. I.<sup>6</sup> in lingua-semantic aspect. There are very few works on this topic in the Tatar literature.<sup>7</sup> The novelty of our study is that we first investigate the use of non-dramatic works of art by M. A. Gilyazov in theatre practice. The object of our attention is image and linguistic structure of the text of dramatization of the story by M. A. Gilyazov "On Friday night..." The subject of the study is linguistic and semiotic principles of the transformation of the prose text into the drama text. The material is the story by A. M. Gilyazov "Friday night..." and its reception in the TV drama by A. Zaripov.

### **Methods**

As the primary elected to descriptive-comparative method. Use methods of generalization and systematization of theoretical information, methods of language analysis (lexical-semantic, syntactic), and semiotic analysis.

### **Discussion**

The first time the story "On Friday night...", written in 1972-1979, was staged by a TV Director Akhtyam Zaripov in 1984 by order of the Committee for television and radio broadcasting of Tatarstan. After the premiere a hot debate flared in the press. The author of the story has received nearly two hundred letters from the readers and TV-viewers. A. M. Gilyazov summed up the results of this debate in a special television program. The writer was sincerely glad that the story of Bibinur has caused such a fervent interest and resonated with readers and viewers, but at the same time was upset that his author's conception remained a mystery for many people. The subject of discussion in the letters was only the moral potential of the story: the story of a lonely old age.

We must say that A. M. Gilyazov was always wary of genre transformation of his works. The first attempt to dramatize the prose of the writer on the stage of the Tatar theatre was undertaken in the early 1970s, during the "dramatization boom" in the national theatre (1960-1970 years), after the triumph of the story "Three feet of the ground" (1962) in Moscow. At the initiative of the Director of the TSAT named of Kamal M. H. Salimzhanov, A. M. Gilyazov reworked his

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<sup>5</sup> B. Martin, *La théâtralisation du texte écrit non-théâtral: thèse de doctorat*, Saint-Denis, Paris VIII, 1993; F. Maurin, *Adapter ad lib – L'adaptation théâtrale, entre obsolescence et résistance*, Caen, : Presses universitaires de Caen, 2000, p. 87-92; M. Plana, *Roman, théâtre, cinéma, Adaptations, hybridations et dialogue des arts*, Rosny-sous-Bois, Bréal, 2004; K. L. Rudnitsky, *Prose and stage*, Moscow, Znanie, 1981; O. B. Sokurov, *Great prose and Russian theater (a hundred years the stage of development of prose)*, 2<sup>nd</sup> edition, Sankt Petersburg, Izd-vo Sankt-Peterburgskogo universiteta, 2004; N. S. Skorokhod, *How to stage prose: Prose in the Russian scene: history, theory, practice*, Sankt Petersburg, Petersburg theatre journal, 2010; M. E. Babicheva *Stylistic differences between epic and drama in connection with the problem of mock Diss. kand. filol. Sciences*, Moscow, MGU, 1985.

<sup>6</sup> E. I. Gordienko, *Dramatic effect in linguistic and semiotic aspect (on the material of Russian and French adaptations of narrative prose): dis. kand. filol. Sciences*, Moscow, Moscow state University, 2014.

<sup>7</sup> D. R. Fardeeva, *F 24 National prose on the stage of the Tatar state academic theatre named after G. Kamal*, Kazan, Iyali, 2014, p. 188.

famous story "Three feet of the ground" (1962) in the original play (1972) This was pointed out by the author himself and then recognized by the Director.<sup>8</sup>

The novel "On Friday night..." was the subject of special pride of the writer (Khabutdinova, 2012). The form of the TV drama by A. Zaripov was a dramatic variation on the story by M. A. Gilyazov. In the process of adapting the prose for the stage the plot and the composition of the original have been undergoing substantial transformation. Naturally, this has led to the impoverishment of ideological and artistic potential of the novel.

A. Zaripov showed the life of the main heroine Bibinur in the mirror of gossips of the villagers in a local shop. Such a focus allowed the television Director to achieve a smooth transition of the plot of the drama from the present to the past and vice versa. The basis for this has been given by the story itself, where the shop is called "the headquarters" of women in the village Aksyrgac. A. Zaripov pushed from one more observation of the author of the story that the life of a villager is always in the orbit of attention of the villagers. The story of Bibinur in the TV drama is also given in the frame of the thoughts of the Chorus of villagers – "the witnesses" about what would happen if a good light goes out of a human heart: "the Sun rises and sets, / sets and rises, / Forever scatters light! // But if in the soul of a Man / the Sun will set – How the Earth will live?" (under-lane transl. is ours– M. H.) .

"Old woman Bibinur is a great heroine... She's a very emotional attitude to everything living, running and crawling with what the world is filled. She is a righteous person with an open face in the most difficult moment, in any life time. She is a woman with her secret love, with her secret not only in the intimate sense, but in the broad sense of good will. Her goodness is for all the time, not selectively, she was born to give, asking nothing in return... Naturally, she entered the world from the heart longing of the writer with beautiful, too alive to stay and live within the workbook. Bibinur is touching with the continuity of her moral heroism, she is true everywhere, she steps small traces. And her late love is purified from carnal motives, magnifies her "secret". This is to what heights can the spirit of the afflicted person rise, like the author says. Here's how the heart is enlightened! The righteous always bears the stamp of tragedy, a halo of martyrdom. (...). And anyone accompanying old Bibinur, is valued with her opinion, with vigilance of her soul – and Gihangir, and Galickai, and Abdulhasan and Wali, and Zuhribanu-twin" – so astutely said the writer R. Cutuy about Bibinur.<sup>9</sup>

In the head-piece of the TV drama an artist W. Mukhetdinov emphasized the idea of continuity of generations through the image of a fallen tree. This title image gives rise to many associations, forcing to think about the human race, family history, the human soul.

Structure-the set design of the stage is the obelisk to the fallen in the Great Patriotic war. This way the theme of memorable and forgetful characters is visualized in the play. The characters of the drama know the story time, through

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<sup>8</sup> A. M. Gilyazov, *The Rooster flew up on the fence*, Kazan, Tatar kN. publishing house, 2002.

<sup>9</sup> Ayaz Gilyazov: *Memories*, 1<sup>st</sup> volume, Kazan: Tatar. kN. publishing house, 2006.

their memory happens the immersion in the past, where things are going. Reflected consciousness of Bibinur requires special forms of depicting. In the TV drama the Director has turned to various means of connection of time-schedules. Most often it becomes a retrospective way of storytelling through the memories of the villagers in the shop. The pages of the calendar of Bibinur lead to the past, accidentally preserved by one of the villagers. Some words and phrases, heard accidentally, evoke associations with the past: so the talk about a clown outfit of Galickai turns softly to the memories of the school Director Idris / Ignat. The obelisk is transformed by the Director into a moral barometer. Everything that happens in present Bibinur evaluates through the prism of perception of the characters-victims of war and revolution. The drama emphasizes the role of monuments in the process of formation and preservation of the values of one's past (the grave of Gaishi– the victims of collectivization, the obelisk in honor of those killed in the Great Patriotic war). At the same time, the obelisk participates in the play in the organization of the spatial environment. It embodies the ideas, dominant in the consciousness of Cihangir-a fan of old times (the museum in his native house in the drama takes a shape in the dialogues between Bibinur and the old man Vali).

The Director after the author emphasizes the ritual function of the national holiday Sabantuy in preserving the unity of the village. "In understanding of the Tatar writer the key to preserving unity are the continuity of generations and the feeling of each member of the collective of his ownership of the whole (mother nature, traditions of rural life, centuries-old moral-ethical foundations)" – said literary critic M. Ibragimov.

A. Zaripov following A. Gilyazov thinks in the TV drama on the transformation of the worldview of his contemporaries. He invites the TVviewers to seek the origins of corrosion of the spirit in the characters ' past and in the history of the country. Events of the Civil war, collectivization, the Great Patriotic war, the difficulties of post-war reconstruction of the economy, the era of stagnation come to life in the conversations of visitors to the village shop. Through the antithesis the following is opposed to: the years of the Great Patriotic war as the era of sacrifice and heroism of Soviet citizens to the 1970s, the heyday of stagnation, when society focuses on materialistic consumer interests.

Love theme of Bibinur gets a kind of solution in the TV drama. The love to Mirzagit, Abdullazane, Gihangir, on the one hand, is given in the mirror of rural gossips, on the other hand, in the separate dramatic scenes, which reveal the nature of their relationship. The late love of the old woman is shown through the episode with gramophone recording of the song by S. Sadykova "Waiting for you". This allows A. Zaripov to push the temporal boundaries in the drama. In this first Tatar tango, created in 1942 to the verses by A. Ericsey, the backbone were the words: "Waiting for you, waiting for you..." This song immediately became popular among the people, although there was no such thing as tango in the Tatar music. Love feeling of Bibinur as the mirror reflected the tragedy of the women of her generation, early widowed, who are not lucky enough to get married, as their loved ones perished in the Great Patriotic war. A lonely dance of Bibinur blends in a

dance with a partner. So the Director reveals a heart secret of an early widowed woman, the full depth of her love and the life drama of women, whose youth fell on the years of the war. This theme is also supported through the image- symbol of the red scarf. Communication with the Chairman of the collective farm Gihangir is supported through the red cloth, from which a piece was cut for the upholstery of the coffin and the for the Bibinur's scarf to Sabantui.

A. Zaripov, on the contrary with the author's, gave his own version of the conflict of Bibinur with her children. Ruining the father's house, they accused the stepmother in the fact, that parents did not register the marriage officially, that later became an obstacle to receipt of benefits laid. This, according to Hatima, doomed the family of the soldier to a miserable existence. Taking away the documents of her father from the stepmother, the daughter of a war veteran is going now to write to the Ministry of defense to receive the benefits from the state.

The dogs Karabay expands in the TVdrama in a succinct symbol of the modern generation, infected by individualism, greed, anger. Before her death in the fevered minds of Bibinur in the foreground merge into one the faces of the gossip villagers, her ungrateful children, and on the periphery appear the figures of Gishi, Abdullazana, old man Vali, the Chairman Gikhangir.

If in the novel its rhythm was maintained by the image of the dam, in the TV drama it is maintained due to the music pieces consisting of parts of folk songs and works of composers.

As it is noted by M. Husnimardanov, A. Zaripov failed to build up the final of the TV drama. Experiences of Bibinur before death were not conveyed to the audience. The creator of the drama was confined to the massive scene, depicting the vanity of the villagers.

Comparative analysis of the texts of the story<sup>10</sup> and the script of the TV drama from the point of view of stylistics has shown that the principles of the transformation of the narrative text to the text of the drama depend on the choice of the subject of speech and his relationship to the world, told about. For different subjects of the speech the transformations are different.

A. Zaripov uses dramatization when working with intonation. The actor here speaks on behalf of his character – their difference is not detected explicitly. At one moment only one spatial-temporal plan of the diegesis can be represented on the stage. All the interferential forms of speech of the character are transformed in direct speech. The narrative model turns to the speech one, this changes either the form of egocentric elements of the language (past tense changes to present, the third person speech –to the first and the second) or function (auristive function of the past changes to perfective, anaphoric reference of pronouns – to deictic). The authorizer of the narrative text becomes a talking character.

The replicas in the staging-dramatization mimize the natural speech. The difference of the actor from the character does not receive linguistic expressions: personal pronouns indicate the characters of the diegesis, but not on the actors separately from the characters. Also in the subject term of the utterance the viewer

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<sup>10</sup> A. M. Gilyazov, *Selected works in 5 volumes*, 5<sup>th</sup> volume, Kazan, Tat.kN.publishing house, 2002.

is not presented explicitly. Spatial and temporal duality of the narrative text transforms in the dramatization to a one-dimensional display of the plan of the characters. The turning point becomes the moment of speaking of the character, coinciding with the current moment on the stage. The narrative mode of the utterance goes into the speech. In A. Zaripov's dramatization while changing the forms of verbs their meanings are also changed. All the forms of the character's speech in a narrative text are transformed in the dramatization to the direct speech of the character without introducing sentence with a predicate of propositional setting. Other forms of speech are included in the dramatic text only in the direct speech of the character, showing the differences between the authorities of the entire replica and the transmitted text. The transfer of thoughts and feelings of another character without the "words of estrangement" is impossible – the character can't know for certain what another one thinks or feels. The authorizer of the remarks becomes the character, in whose remark the Director included the narrative text. A. Zaripov in the script "On Friday night..." does not use the potential of directing remarks to penetrate the consciousness of the character. "Internal monologues" used in the text of the story have also disappeared from the dramatization.

A. M. Gilyazov became famous for the skill of portrait characteristics. We share the view of M. Husnimardanov that the Director of the TV drama has deprived the speech of the characters of its individualization in the process of transformation of narrative text into dramatic one.<sup>11</sup>

According to the testimony of the wife Nakii Glazova the writer was not enthusiastic about the TV drama. Apparently, the author did not agree with the Director's concept of A. Zaripov. We assume that the reason for the rejection of the author of the story layed deeper: he did not accept the differences in linguistic structure of dramatic and narrative texts. That is the conclusion we came to after analyzing the script of the TV drama (Zaripov, 1984). Perhaps the writer was not satisfied with the performance of the actors. The actors of the Tatar theatre felt insecure during the filming. It is felt that it was difficult to perform in conditions of a television studio. The viewers in their comments described the role of Bibinur as one of the artistic successes of the actress F. Hairullina. The object of admiration was the scene of courtship of Galicay where R.Sharafiev, R. Mutygullina and F. Hairullina managed to convey the delicacy of the situation.<sup>12</sup>

Through the epigraph and the title A. Gilyazov suggests the way of interpretation of his story "On Friday night...". "Obviously, for the reader involved in the Muslim culture, the title of the novel is symbolic: it is a kind of a "super plot", rolled to the symbol ("mythological connotations"), the essence of which consists in the revelation that detects in "the heart of the individual, socially typical

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<sup>11</sup> M. Husnimardanov, *"Do not scold Bibinur..."*, Socialistic of Tatarstan., Tartarstan, 1985.

<sup>12</sup> *Ibidem*.



and epochal – the national, universal, eternal," – said literary critic M. Ibragimov.<sup>13</sup> The title "On Friday night..." carries the idea of sacred time. The title to some extent "predicts" the life drama of the main heroine of the story.

The story is prefaced by three epigraphs. Thus, in the first of them the "small homeland" is sacralized – the village Axergic. Epically detailed panorama of a dying peasant farmsteads in the second epigraph has become a symbolic crosshairs of the personal and the national, of the natural- subjective of the space and secret life elements. In the third epigraph the Tatar folk song "Oh my heart" is quoted. On the one hand, this passage with respect to both the main text and the previous two epigraphs performs a synthesizing function. The song "Oh my heart" warned the lovers: "love burning", not in the power of the mind, inevitably leads the harmonious existence of a person to collapse. A. M. Gilyazov seeks to convey the truth to his contemporaries: a break with the Patriarchal tradition leads the world to the chaos. The death of the heroine occurred outside the sacred day, in the evening. The "fault" of the character-the righteous, according to the writer, was in the fact that it departed from the heritage of their ancestors and did not raise children in the tradition. Fall into oblivion the values of national culture, the children of Bibinur turned into the greedy "Karabayes", ready to tear anyone's throat in the pursuit of material. Bibinur returned in the bosom of custom only shortly before her death, when, during the funeral of Gihangir suddenly remembered the words of the prayer. The terrible death of Bibinur was supposed to be a shock to readers, the catalyst for understanding the moral problems of our time.

### Results

Comparative analysis of the texts of the story and the TV drama script of the same name showed that the staging of the prose is a creative act. The script of the TV drama by A. Zaripov maintains a direct dependence on the plot and the structure of the conflict of the original work. The peculiarity manifests itself in the structural tumors, allowing to present the author's idea in the conditions of a TV drama.

### Insights

The story "On Friday night..." is a gem of the Tatar literature, the pride of A. M. Gilyazov. The work contains a potential for the creation by the creative personality of its own design. In the story and in the TV drama by A. Zaripov of the same name in the mirror of the individual destinies of the characters, in the system of symbolic images and mythological associations, in changing rhythms of narration, in the dialogic interaction between the author's words and "voices" of the people, of the natural world, in the confessional and inner speech of the central characters was etched holistic, deeply tragic panorama of national life of the Tatars. The primary means of staging becomes dramatization. A prerequisite of this type

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<sup>13</sup> M. Ibragimov, *The Myth of the Tatar literature of XX century: problems of poetics*, Kazan, Gumanitaria, 2003.

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of adaptation is the assignment of the TV drama to the "dramatic" forms, which put an action in the first place, as well as an interpersonal conflict, crisis and resolution of the crisis. Dialogical speech of the actors in the TV drama by A. Sabirova mimetizes the speech of the characters. Spatial-temporal duality of the narrative text transforms in the dramatization to a one-dimensional display of the plan of the characters. Between the stage and the audience is the "fourth wall" that from the perspective of linguistics means the lack of linguistically expressed role of the actor as the subject of speech and of the viewer as the addressee in the subject term of the stage text. Literary and dramatic composition by A. Zaripov is still far from artistic perfection and integrity.

## Conceptual Opposition "Friend" - "Enemy" In Russian Medieval Period\*

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**Abstract.** *The study of the Russian mentality development origin is in the focus of many modern studies in linguistics, cognition science, cultural studies and sociology. The article considers one of the key oppositions of the Russian worldview "friend" - "enemy" and the specificity of its representation in the language picture of the world of a medieval man. In order to study it, various methods were used, including the method of conceptual analysis, a descriptive method, including the analysis of lexicographic sources, and the method of contextual analysis. It was determined that the schematism of a man's image in the linguistic picture of the medieval world determined the great sociological development of the concepts "friend" and "enemy" in the Old Russian consciousness. This opposition was primarily associated with the implementation of military or social relationships idea and much less often with interpersonal relations. The article describes the derivations from the foundations of the friend and the enemy, their synonymous parallels were revealed, and the semantic specialization of each lexical unit and the peculiarity of the syntagmatic relations were determined. The results of the study are important to develop the picture of the historical evolution concerning the notion of friendship in Russian linguistic consciousness, to understand the semantic shifts in the meaning of lexemes representing an opposition under study. The reinterpretation of friendly relations took place in the Russian worldview. They were understood as a state inherent to the masses of people, to the perception of friendship as a deep feeling related with the spiritual sphere of a man. The results of the study are significant in linguistic, cultural, psychological and cognitive relationships.*

**Key words:** conceptual opposition, language picture of the world, semantics, the Middle Ages, Russian annals.

### Introduction

During the study of different concept representation ways in the medieval world picture, it is necessary to take into account the values and the ideals of that epoch and the environment. People in feudal society adhered to certain views, conditioned by the culture and the traditions of their time. The most significant factors that influenced the world outlook of a person of that era were the kept folk and pagan traditions, on the one hand, and new ideas related to the influence of Christianity on the other. The most complete combination of these trends was reflected in the annals, as the monuments of compilations, which had both folklore and religious sources.

According to researchers, the most important signs of Old Russian works were historicism (fiction was practically absent), publicism, patriotism and traditionality.<sup>1</sup> According to these signs in the literature of Ancient Rus, the ideal was a spiritual man, who was characterized in standard formulations. The schematism of a man's image predetermined an insufficient elaboration of the

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<sup>1</sup> I. P. Eremin, *Lectures and articles on the history of ancient Russian literature*, Leningrad, Leningrad State University, 1987; A. Ya. Gurevich, *The categories of medieval culture*, Moscow, Art, 1984; V. V. Kuskov, *The history of ancient Russian literature*, Moscow, Higher School, 1998; D. S. Lihachev, *Historical poetics of Russian literature*, St. Petersburg, Aleteyya, 1999; S. Plokhy, *The Origins of the Slavic Nations: Premodern Identities in Russia, Ukraine, and Belarus*, Cambridge, Cambridge University Press, 2006.

semantic sphere, connected with the description of interpersonal relations. Therefore, the idea of friendship developed gradually in the Russian mentality, for a long time.

In the modern world, the concept of a "friend" is an important element of Russian national conceptual sphere. It refers to the basic social concepts that appeal to ethical concepts. The value of friendship is an ethnic-cultural stereotype,<sup>2</sup> a "genome of culture".<sup>3</sup> The concept of friendship in modern Russian suggests many aspects, each of which realizes the semantics of good relations between close people, mutual assistance, support and spiritual affinity.

In ancient times, friendship belonged to sociological concepts and assumed more formal, external relations, although even then the conceptual concept of friendship contained a value-based ethical component. In the process of the concept "friendship" historical development the psychological aspects of the phenomenon are strengthened, friendship begins to denote the relations based on inner affection, the community of views, goals and feelings. The evolution of the conceptual view of a friend and friendship is the transition from the understanding of this phenomenon as the support in social relations to the designation of assistance and the assistance in interpersonal relationships. "The shift of meaning from the horizontal plane (the ratio of wide coverage, but of shallow depth) to the vertical one (a great depth of connections, spiritual kinship and the close relations of their participants) is evident".<sup>4</sup>

## **Methods**

In order to study the specific features of the linguistic representation of the concepts "friend" - "enemy", a number of research methods are used. First of all, the method of conceptual analysis, which allows to identify the main features of the relevant concept cultural content. In the framework of this approach, it is important to analyze the lexicographic sources, since it is the dictionary data that provide the most adequate representation of the realities and the language means of their expression. The method of etymological reconstruction allows us to restore the most ancient Slavic judgments about friendship, to characterize the origins of its significance. Among traditional linguistic methods, they used descriptive method, the method of component analysis, the method of contextual analysis, as well as the historical method, due to which the evolution of a meaningful concept for the Russian language consciousness is traced.

## **Results And Discussion**

According to etymology, the word friend goes back to o-c- \*drug, <i.e. the base \* dh(e)reugh- "to support", "to prop", "to hold". Thus, historically, the idea of

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<sup>2</sup> N. Alefirekom, "Language as a State of Ethno-Cultural Consciousness," in *XLinguae Journal*, VIII (2015), no. 3, p. 2-18.

<sup>3</sup> L. Talmy, *Toward a Cognitive Semantics*, 1<sup>st</sup> volume – "Concept Structuring Systems," New York, The MIT Press, 2000.

<sup>4</sup> V.I. Karasik, I.A. Sternin (eds.), *The anthology of concepts*, 1<sup>st</sup> volume, Volgograd, Paradigm, 2005.

support and assistance is realized in the idea of friendship. Initially, the word friend meant a satellite. The comparison with the data of other i.e. languages suggests that for the Old Russian language the idea of a friend reflected primarily the relations in military situations. So, the Goth. *driugan* has the meaning "to provide military assistance", "to collaborate in a campaign", an ancient Isl. *draugr* is a "warrior, a kinsman"<sup>5</sup>. An adjective education of the "other one" is also related to the word friend etymologically, but its meaning does not reflect the idea of assistance.

The number of the word "friend" use is insignificant in the annals, which indicates that the idea of friendship did not receive a clear expression in the worldview of Russian Middle Ages. In the earliest Russian chronicle - the Novgorod first chronicle of the Synodal List (further NIL) - the word "friend" has the meaning of "a close person, a neighbor" as the part of the oldest proverb and up to now: "Аще бо кто добро другу чинилъ, то добро бы было; а копяя подь другомъ яму, сам ся в ню вѣвалитъ" (НИ: 82). In the "Tale of Bygone Years" (later ТВУ), in the story about the trial of faiths by Vladimir, relating to the church literature and including a copious citation of religious texts, the word "a friend" is also understood as a "close person": "Они же рѣша ему. аще сего пустиши не имашши быти другъ кясреви"(ТВУ: 103).

However, the idea of cooperation in military operations is implemented much more often in the Old Russian language within the semantics of the word "friend". In this case, the lexeme is used in the meanings of "ally", that is, it refers to the parties that concluded a military alliance: "Рече же князь Печенѣжъскіи къ Прѣтичю. буди ми другъ. онъ же рече. тако створю. и подаста руку межю собою" (ТВУ: 67). When peaceful relations are established between opposing sides, a handshake is used as a ritual of friendship, which indicates the antiquity of this gesture. Its origin is connected with pragmatic goals: the need to show that the communication participants do not have weapons in their hands and are peace-loving.

The word "mate" is more common in chronicle texts is the synonym for a lexeme "friend". This education has a clear word-formation structure and the correlation with the verb of acceptance in the sense "to love, to be kind, to care for someone". The derivative mate is formed with the suffix -tel, referring to the stylistically marked means of the language from the period under study.

In modern Russian, these synonyms refer to ideographic ones and differ by additional shades of meaning. If a friend is a close person with a deep relationship, then a mate is a person the communication with whom is more superficial. In the Old Russian language, such nuances have not become apparent yet due to the weak development of friendship phenomenon psychological aspect. Especially often the word mate is noted in the Moscow chronicle of 1479 (hereinafter МС). It denotes both interpersonal relations, which is reflected in the meaning of "a buddy, a friend," and social relations that are reflected in the meaning of "a supporter, a like-minded person", which is explicated in the fragments of documentary content from

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<sup>5</sup> P. Ya. Chernykh, *Historical and etymological dictionary of modern Russian language*, vol. 1-2, 3<sup>rd</sup> edition, Moscow, V. I. 1999.

the annals: "Въ утреи же побегоша ко князю на Городище тысячкыи Ратимборъ и Гаврило Кияниновъ, и инии приятели его" (МС: 149).

The derivative "squad" is more widespread in the language of chronicles, it derived from the word "friend". It is the squad which acts as an active protagonist in many weather articles. Dmitry Likhachev also drew attention to the fact that "every actor in the annals is portrayed as a representative of a certain social category".<sup>6</sup> Thus, the word squad, in which the suffix -ina has the derivational meaning of collectivity, is the designation of the totality of representatives close to a prince, which is reflected in the dictionary meaning of "people close to a prince, prince council and prince army". This value appears after the contamination of other two meanings of the word squad - "comrades, satellites" and "a military detachment, an army". However, it is used in the annals to name the prince's troops, while in the meaning of the word "squad" it reflects the military component represented in the producing basis - the personal noun "friend" as an additional one.

Another derivation from the basis "friend" using the suffix of the abstract meaning -b(a) is the derivative friendship. It acts with the word-formative meaning of the abstract action-state "friendship, society, comradeship" and is noted in isolated cases with sociologized semantics during the description of diplomatic relations: "С ним прииде посоль от короля Римьского Максимиана Фердирикова сына цесарева, именем Юрьи Дѣлаторъ, о любви и о дружбе и о братствѣ" (МС: 331).

Just as the word friend is synonymous with a mate, the derivative friendship has the synonymous word "affinity" in the sense of "friendship, devotion" motivated by the verb of acceptance. As is known, word formation plays an important role in the modeling of a nationally specific language picture of the world,<sup>7</sup> therefore the derived names occupy a special place in the language, which attests to the significance of the corresponding concepts in the minds of native speakers. Therefore, derived names that retain their internal form are more expressive often. Thus, the word affection is noted in the composition of a stable situational formula of "like someone" in the sense of "being committed to someone". In the TBY, the lexeme of affinity is noted with the doubling of the abstract meaning suffixes -zn' and -stv(o), completely synonymous with the word "affinity" in the sense of "devotion".

There are concepts of a friend - an enemy in the relationship of conceptual opposition, which testifies to the division of the surrounding world into one's own and another's and the presence of a boundary that determines the specificity of human existence in society. The sense of the word enemy reflects the system of ethical and normative assessments of the society. The structure of the concept

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<sup>6</sup> D. S. Likhachev, *A man in the literature of ancient Russia*, Moscow, Nauka, 1970.

<sup>7</sup> N. N. Matveeva, V. G. Fatkhutdinova, "National component in Russian word-formation: linguo-didactic aspect," in *Journal of Language and Literature*, VII (2016), no. 2, p. 233-236; T. Y. Schuklina, T. Y., "Expressive word formation as lingo-cultural phenomenon," in *XLinguae*, IX (2016), no. 3, p. 44 – 50.

under study, like most others in the medieval consciousness, includes religious-mythical and real-historical components. Two basic meanings of the word "enemy" correlate this concept with either a secular, real life - "an enemy, a foe, an adversary", or with the otherworldly, mythical force - "an imp, a devil". The meaning of "a heretic, an apostate, an atheist" is in the area of two marked main values intersection, since it is the nomination of a real person, but serving the supreme spirit of evil.

The concept of "enemy" has been related to military terminology since ancient times.<sup>8</sup> Slavic tribes were in a state of permanent military action, as they were forced to fight for their territories and independence. The representatives of other ethnic groups were seen as the potential enemies who attempted to assure the integrity and the independence of the Slavic principalities. In the medieval picture of the world, the peculiarity of the division of subjects into friends and enemies is their behavior in the conditions of military operations. Therefore, first of all, friends are fellow soldiers, fellow tribesmen, and enemies are foreigners, strangers, the conquerors with territorial and material interests: "И погыбнеть земля руская и врази наши Половци пришедше возмутъ землю Русьскую" (ТБУ: 262).

Along with the incomplete variant of "enemy", there is also a pleophonic "vorog" with the same set of values. The semantics of "foes, ill-wisher" is the most relevant for the texts of chronicles for the lexeme the "enemy" (vorog). In the singular, this name is rarely used, which is related to the general features of the chronicle narrative, in which the actors act as a single, cohesive mass. During the description of the relationship between individual princes, it is possible to use the word "vorog" in singular and in the meaning of "a foe, an ill-wisher", devoid of a military component: "Мюрчюфль же посла къ Николѣ и къ людьмъ въ святую Софию: «язъ ялъ ворога вашего Исаковиця, язь вашъ цесарь" (NIL: 47).

The idea of defeating the enemies in the medieval consciousness is associated with the help of divine forces: "Яко врази наша побѣдени быша молитвами святыя Богородица и святого отца нашего Феодосья" (ТБУ: 282). As an abstract representation, denoting the instrument by which an action is performed, the noun prayer appears. A prayer in the religious worldview is the strongest way to combat any evil. The massacre of enemies is correlated with the idea of revenge in both religious and secular terms, and according to Christian ideology revenge comes from God: "И взложити было на Бога мщенье свое яко же рече пророк. и вздам мечь врагом и ненавидящим мя вздам" (ТБУ: 268).

The word enemy could acquire a specialized semantics "a demon, a devil" as the result of a meaning narrowing. In this case, "an enemy" is contrasted to new people-Christians: "А врагъ сѣтовашеться побѣждаемъ новыми людьми хрьстьянскими" (ТБУ: 153).

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<sup>8</sup> I. Kh. Safin, Ye. I. Kolosova, T. A. Gimranova, "Linguocultural «Military» concept in the Russian linguistic world view: gender aspect," in *Journal of Language and Literature*, VII (2016), no. 2, p. 332-335.

The synonyms of the word enemy were the word "a foe", the substantivized adjectives "opposing", "oppositional", which were also used to nominate both a military adversary and a devil. The complex word "enmity lover" is semantically more capacious definition of devil with the following dictionary meaning: "the one who loves evil".

The derivative "enmity" with the help of the ancient suffix -d(a) from the base "enemy" could have both an abstract meaning and denote "hate, dislike" and the concretized semantics "evil, harm". The derivative name of dislike with the meaning of "strife, enmity, discontent, dislike" synonymous with the formation of enemy is connected with the root -lyub. Another synonym for the word "enmity" was the formation of unfriendliness with the prefix -ne expressing a negative meaning. The use of a number of synonyms with the general meaning of "strife, enmity" is typical of chronicle passages in which prince feuds are described.

### Summary

Thus, the study of concepts important for Russian culture was carried out in accordance with modern approaches through the prism of ethnos symbols and values.<sup>9</sup> Thus, the scholars' opinion about changing semantic systems was confirmed under the pressure of changing society needs.<sup>10</sup> In the Old Russian language, the conceptual opposition "friend" - "enemy" was not so much of ethical as of social content. The semantic content of these concepts was more formalized and typed, almost did not affect the sphere of the inner, spiritual sphere of a man. In most cases, the words "friend" and "enemy", reflecting the division of the surrounding world into one's own and another's, were connected with the military sphere and designated the supporters or the opponents in intertribal conflicts. The elements of meaning, representing the psychological aspects of friendship, are expressed in Old Russian language implicitly yet. The word "squad" occupied a special place in the Old Russian language (as is evidenced by a high frequency of use) as a prince's troops designation, the most significant military and social unit in the era of the Russian Middle Ages.

The importance of these concepts in the Old Russian consciousness is evidenced by the derivational possibilities of the words "a friend" and "an enemy", the developed synonymous and antonymic relations in which they were involved. The change of these lexemes semantic content in the direction of their significance increase can be traced for many centuries and reflects the shifts in the worldview of Russian people connected with the strengthening of the humanistic principle. This study shows the relationship of language, history and culture.

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<sup>9</sup> F. Sharifian, *Cultural Conceptualisations and Language: Theoretical framework and applications*, Amsterdam/Philadelphia. John Benjamins, 2011, p. 238.

<sup>10</sup> B. Nerlich, D. D. Clarke, "Semantic fields and frames: Historical explorations of the interface between language, action, and cognition," in *Journal of Pragmatics*, XXXII (2000), no. 2, p. 125–150.



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## **Turkic Traditions In Musical Culture Of Mordovian-Karatai Ethnic Group\***

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**Abstract.** *The Volga region is a unique polyethnic region of Russia, where the representatives of different peoples were in close interaction for many centuries, forming a unique layer of culture, which includes many components. An important role in this ethnic conglomerate belongs to the musical traditions embodied in folklore, musical instruments, ritual and festive performances, which make an important element of the ethnic culture identity for the indigenous peoples of the Volga region - Tatars, Russians, Mordvins, Chuvashes, Mari and Udmurts.*

*One of the most ancient Volga peoples, who made a great contribution to the development and the preservation of the region unique traditions is the Mordva. The representatives of the Mordovian people are divided into two local ethnic groups - Erzya and Moksha, and there are two local ethnographic groups in their composition - the Karatai Mordva (karatai) and the Tengushev Mordva (shoksha).*

*The article considers the musical culture of the Mordovian-Karatai, the development of which was influenced by the Finno-Ugric, Turkic and Slavic traditions of the Volga region of Russia. The role of external cultures in the development of the unique ethnic appearance of the Mordovian people turned out to be very significant and influenced the development of its unique musical culture in many ways, which, thanks to external factors, acquired a special form of assimilation, which is the synthesis of different national music-style components.*

**Key words:** Mordovian, Karatai, ethnic culture, song, folklore.

### **Introduction**

The ethnic group of Mordva-karatai resides in the Kamsko-Ustinsky district of the Republic of Tatarstan. Karatai look like Mordva and by self-consciousness they also consider themselves to be Mordvinians, but their colloquial speech is based on a special dialect representing the synthesis of Tatar and Mordovian languages. Karatai assert that this is their special language, which is not similar to Tatar, or Erzyan or Mokshan: "We speak our own language!". At the same time, they are baptized and honor the Orthodox traditions. Thus, this unique group, which has only about a hundred people, combines three ethnic strata of the Volga region - the Finno-Ugric, the Turkic and the Slavic.<sup>1</sup>

Previously this small nationality lived in three villages - Mordovian Karatai, Shershalan and Mensitovo. Nowadays, no one lives in the village of Shershalan, and with the emergence of the Kuibyshev reservoir in 1954, the inhabitants of the village of Mensitovo were moved to the Russian village of Zaovrazhnye Karatai, where several Karatai families still remained. At present, the village of Mordovian Karatai is the main keeper of the cultural traditions and language of the Mordovian-Karatai.

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<sup>1</sup> G.R. Stolyarova, T.A. Titova, L.S. Toksubaeva, *Ethnography of the peoples of the Volga-Ural region: textbook*, Kazan, KSU, 2007.

Ethnographic scientists are still proposing different versions on the issue of Mordvinian Karatai origin. Thus, V.N. Belitzer assumes that this is a local group of Mordva, of a mixed Erzya-Mokshan composition, which lost its language and adopted the Tatar language as the result of prolonged residence among Turkic-speaking peoples.<sup>2</sup> On the basis of collected materials H. Paasonen suggests that Karatai knew the Mordvinian language in the 17th century and preserved bilingualism for a long time. L.T. Mahmutova puts forward the version that Karatai is a small part of the Mordva, which lost its native language in the 16th century on the territory of its former habitat (Mordva-Karatais: language and folklore. - Kazan: IALI, 1991). After the study of the phonetic, morphological and lexical features of the Mordvinian Karatai dialect, L.Sh. Arslanov comes to the conclusion that their speech is an independent (local) dialect of the Mishar dialect of Tatar language, common in Mordovia and Penza region.<sup>3</sup> The information about various aspects of life, culture, customs, traditions, musical folklore of Karatai can be found in the works by L.B. Boyarkina, V.I. Rogachev, V.I. Romashkina, etc. The works by R.R. Zamaletdinov cover the issues of Tatar ethnic groups development on the basis of folklore materials, ethnographic, historical and linguistic data.<sup>4</sup>

An invaluable contribution to the preservation and the development of a distinct local ethnic group culture was made by its indigenous representative, the writer V.P. Andreev. He opened a rich inner world of a poorly studied language in the dictionary, trying to maximize the spelling of words to the original phonetically.<sup>5</sup> A.Sh. Yusupova points to the importance of language dictionaries development for the history and the culture of peoples.<sup>6</sup>

The first audio records of Karatai musical folklore were made by the ethnic music researcher M.N. Nigmedzyanov in 1960. In 1985, the records of individual Karataev's songs appeared based on the results of Hungarian scientist L.Vikar and G.Beretský expeditions. The folklorist G.M. Makarov wrote and studied musical folklore of Mordvinians-Karatai. The most significant work on the collection, decoding and notation of song samples collected during folk expeditions in 1980-ies was conducted by N.I. Boyarkin, V.I. Romashkin and A.I. Syreskin.

## Methods

They applied the methods of system and structural analysis of scientific cultural, musicological, folklore, and pedagogical literature in research. The generalization of own experience was carried out within the framework of the

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<sup>2</sup> T. P. Fedyanovich, "The research of the Finn language group peoples of the Volga and Ural regions by V.N. Belitzer. T.P. Fedyanovich," in *Ethnographic Review*, V (2004), p. 112-125.

<sup>3</sup> L. Sh. Arslanov, *The features of Mordovian-Karatai dialect - Mordva-karatai: language and folklore*, Kazan, IALI, 1991, p. 10-38.

<sup>4</sup> R. R. Zamaletdinov, F. Y. Yusupov, I. S. Karabulatova, A. F. Yusupov, D. H. Husnutdinov, "The formation of Tatars ethnic groups in the Southern Urals and Trans Urals region," in *Life Sci Journal*, XI (2014), no. 11, p. 214-217.

<sup>5</sup> V. P. Andreev, *The dictionary of Karatai language*, Kazan, Publishing House "The Word", p. 10-38.

<sup>6</sup> A. Sh. Yusupova, "Tatar Language Dictionaries of XIX Century as a Unified Historical and Cultural Phenomenon," in *World Applied Sciences Journal*, XXXX (2014), no. 2, p. 186-190.

problem under study. Empirical data were obtained during interviews, observations, conversations, audio and video recording.

### Results

The influence of the Turk-Tatar national genre-style and performing components on the development of Karatai musical culture based on Finno-Ugric roots is in the focus of our attention.

The conducted research showed that the great role was played by vocal music in the life of the Mordvins-Karatai, which always surrounded daily life, from birth to death: these are songs for children, and weeping, as well as the singing of songs at festivals, weddings, family celebrations, etc.

L.B. Boyarkina finds three main vocal-performing traditions of the Mordva in the vocal music of Karatai:

- singing (children's lullabies, jokes, single intonation of laments);
- joint ensemble or choral singing in polyphonic textures (common, long-term, epic, lyric, calendar, wedding);
- joint vocal-instrumental performance of songs.

As the researcher notes, these traditions reflect an original musical style of Mordovian people, its involvement in the Finno-Ugric culture, but at the same time they were imprinted by centuries-old ties with the music of Tatar and Slavic peoples.<sup>7</sup>

The main difference of the Mordovian-Karatai song folklore is that the verbal and poetic part of the songs is performed in Tatar language, and this undoubtedly caused the use of other artistic and visual and stylistic means of musical art and the borrowing of new musical and poetic genres. Karatai, divide all vocal music according to the duration of performance (long, short), to a specific place (street, table), destination (wedding, guest), which is characteristic for the classification in Tatar music: long (озын көй), short (кыска көй) street (урам көе), etc. Among other ethnic groups of Mordva, graduation is carried out according to poetic genres (lamentations, korylly, majestic), character of performance (long, short), and the personification of a bride's wines (addressed to a father, a mother, girlfriends).<sup>8</sup>

The transition to the Tatar language by Karatais led to the use of new musical and poetic genres characteristic of the Turkic peoples, such as the "Takmak", widespread not only in the Volga region among Bashkirs, Tatars, Chuvashs, but also among Kazakhs, Kirghiz ("takpak", "takpok"), among Khakas ("tahpah"). The ancient Turkic origin of this genre is proved by the use of the "barmak" metric system (the syllabic genus of versification based on the equal complexity of the verse lines with caesura dividing a verse into equal parts), known

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<sup>7</sup> L. B. Boyarkina (ed.), *Mordovian music encyclopedia*, Saransk, Mordov. publishing house, 2011, p. 215-216.

<sup>8</sup> V. I. Rogachev, *The wedding of the Mordvins of the Volga Region: Rite and Folklore / V.I. Rogachev // There on the Rav River ... (Mordovian of Tatarstan)*, Kazan, 2013, p. 36-39.

to the Turks since the pre-Islamic period.<sup>9</sup> In Tatar folk culture, takmak functions as a special form used in different contexts - it is labor chanting, and a verbal rhythmic accompaniment to dancing, and a humorous satirical song, a chastushka.<sup>10</sup>

We propose to consider a fragment of the takmak "Together in different ways" - "Алай да бергә-бергә, болай да бергә-бергә" (Example 1), written in 2014 by the authors of the article from the participants of the folklore ensemble "Mordovian Patterns" of Mordovian Karatai village (N.N. Nurgayanova's notation).

Example 1. The takmak "Together in different ways"

The melody of the presented takmak is characterized by simplicity, a clean form, the stability of the syllabic structure of the four-line stanza (8-7-8-7) with a clear rhyme (ABAB). From the point of view of the intonational language the presented sample has a clear ahemitonic intonational structure, manifested in a multi-voiced context; clear cadence turns are realized by three-fold fixation of the tonics. At the same time, takmak is not vocalized, but is spoken clearly, at a rapid pace, which is close to the specifics of the Mordvinian singing and performing style.

In ethnic-musicological studies, the song tradition of Karatais is defined in two words: the first one designates the type of a musical sample (long, short), and the second word is "жыр" i.e. "song". For example, such names as озын жыр (a long song), кыска жыр (a short song), урам жыры (a street song) mean that it is the song samples, which, as a rule, are performed by the choir in many voices. It should be noted that, Karatais often do not have fixed texts of songs for a certain melody like in some Tatar melodies.<sup>11</sup>

We propose to consider the fragment of a long song "If you say to sing we will sing" - "Жырларга да әйтсәгез – без жырларбыз" (Example 2) in general

<sup>9</sup> Z. N. Saidashevam, *The essays on Tatar music*, Kazan, Publishing house "Халкыбыз мирасы", 2015.

<sup>10</sup> G. R. Sayfullina G.H. Sageeva, *The categories of the Tatar traditional musical culture: annotated dictionary*, Kazan, Tatar publishing house, 2009.

<sup>11</sup> V. I. Romashkin, *Customs and musical folklore of the Mordva-Karatais - Mordva-Karatais: language and folklore*, Kazan, IALI, 1991, p. 85-104.

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containing more than ten couplets. The sample was written by the authors in the village of Mordovian Karatai in 2015 (the notation by N. Kh. Nurgayanova).

The image shows a musical score for a long song. It consists of six staves. The first two staves are vocal lines, and the last two are bass lines. The middle two staves are piano accompaniment. The score is written in a key signature of two flats (B-flat and E-flat) and a 4/4 time signature. The lyrics are in Russian and Tatar. The lyrics are:   
 Ай, ди, жыр-ла - жыр-лар(ы)бы - з(ы)   
 Жыр-лар-га да айт-сә-гез, ай-ди, жыр-ла - жыр-лар(ы)бы - з(ы)   
 Ай, ди, жыр-лар - жыр-лар(ы)бы - з(ы)   
 мо-ң(ы)ла-р(ы)-га, я да вит, айт-сә-гез, без моң-ла - моң-лар-быз!   
 мо-ң(ы)ла-р(ы)-га, я да вит, айт - сә-гез, без моң-ла - моң-лар-быз!   
 мо-ң(ы)ла-р(ы)-га, я да-вит, айт-сә-гез, без моң-ла - моң-лар-быз!

Example 2. Long song "If you say to sing"

It would seem that we see here typical musical-style components of Mordovian folk songs, namely, a singled out singing (1-2 cycles); a multi-voiced mode with a quarto-fifth ratio of the upper and lower voices; a word-break of the last word of the verse second line followed by its repetition (3-4 and 8-9 bars); the elements of the mobile bourdon in the lower voice.

However, along with this in this sample you can observe the bright musical and style components of Tatar music. Firstly, the Tatar poetic text of the song, which influences the structure and the rhythm of the verse, and the iambic music rhythm resulting from it; at that the assimilated rhythm of a poetic text influences the melodic change. Secondly, as well as in the long-drawn songs of Tatars, one can find here a special type of a song form - a multi-syllabic one with asymmetric caesura, chanting and additional vowels (ай, ди, я, да, вит). The poetic text of the song is interesting: "If you say to sing we will sing; if you ask for a melancholy melody (әйтсәгез моңларга) – we will sing (без моңларбыз)" - Here they use the concept of "моң" (literally "sadness", "melancholy") - an expressive performing technique with the use of melismatics and fine ornamentation, inherent in the Tatar genre of the long song "озын көй".<sup>12</sup> Thus, on the basis of performed theoretical and musical analysis, it can be found that озын жыр (a long song) of the Karatais is the synthesis of different national musical and style elements, in which the long-

<sup>12</sup> N. K. Nurgayanova, G. I. Batyrshina, L. A. Ahmetova, "Intercultural Interaction of the Volga Region Nations in the Context of Ethnomusical Traditions," in *Biosciences Biotechnology Research Asia*, XII (2015), p. 2795-2801.

lasting sound of the song pattern is accompanied by the inclusion of intrasyllable melodic chants.

Tatar lingering and short tunes influenced the style formation of the majority of musical instrumental jokes of karatais. In the old days traditional musical instruments that existed among the peoples of the Volga region, such as кубыз (jews'-harp), кypай (a longitudinal flute). They used various sound reproducing domestic objects existed in their villages: furnace flaps, buckets, knives, etc., but the Tatar accordion (тальян-гармун) occupied a special place.

### **Discussion**

At present, Karatais seek to preserve their customs for the history of musical art, but the number of inhabitants in the village of Mordovian Karatai is still decreasing ... During the folklore expeditions of 2014-2015 in the Republic of Tatarstan within the framework of the project RGNF "Ethnic Music Traditions of the Peoples of the Volga Region: the Pedagogical Aspect", the authors were fortunate enough to touch the unique phenomenon of ethnic-musical creativity. Due to the folklore ensemble "Mordovian patterns", functioning since 1987, of Mordovian Karatai village, led by Okuneva Irina Fedorovna (born in 1963) and the performers Anisya Petrovna Kudalova (born in 1928), Anna Petrovna Afimova (born in 1937), Chekmeneva Nina Petrovna (born in 1939), Afimov Fedor Yakovlevich (born in 1939), Maslova Alevtina Nikolaevna (born in 1956), Koludarova Vera Andreevna (born in 1961) we heard and recorded several samples of a special Karatai language.

It should be noted that this kind of rural folklore creative teams carry out the revival and the reproduction of folk art samples and this is an important form of people knowledge and values transfer to the future generations in the opinion of.<sup>13</sup> Thus, according to Muftakhutdinova D.Sh. and Khurtmatullin R.K., the samples of musical folklore preserve the historical memory of ethnic groups.<sup>14</sup> In scientific and pedagogical studies by,<sup>15</sup> it is said that these forms of social-cultural activity contribute to the revival of spiritual traditions. They are the source and the tool for a favorable cultural environment creation, and make an emotional impact on the mind, feelings and behaviour of people, their involvement in the world of culture, in the process of creation, development, preservation, dissemination and further enrichment of cultural values.

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<sup>13</sup> R. R. Imamova, N. V. Shirieva, I. F. Kamalova, "Social and cultural activities of a folk music ensemble: pedagogical aspect," in *The Turkish Online Journal of Design Art and Communication*, 2016, p. 3061-3066.

<sup>14</sup> D. Muftakhutdinova, R. Khurmatullina, 2015. The Historical Memory of The Tatar People in The Works of Musical Culture," in *Procedia - Social and Behavioral Sciences*, 2015, p. 379–382.

<sup>15</sup> L. A. Ahmetova, N. Kh. Nurgayanova, 2016. "Realization of Cultural Potential of Traditional Music of Kryashen Tatars," in *Global Media Journal*, II (2016), p. 1–6. URL: file:///C:/Users/User/Downloads/realization-of-cultural-potential-of-traditional-music-of-kryashen-tatars.pdf., accessed 12. 06. 2017; Z. M. Yavgildina, G. R. Murtazina, L. I. Salikhova, E. A. Dyganova, I. F., Kamalova 2016. "Shaping of a Musical Culture of Youth in a Small Town," in *Global Media Journal*, II (2016), p. 5.

### **Conclusions**

1. The analysis of traditional creativity with the identification of genre, style, metric-rhythmic features in the context of this folklore system existence, the nature of performance manner - monody or polyphony, allows one to trace the influence of the Turkic traditions on the development of the Mordvinians musical creativity.

2. The musical analysis of the presented samples of song folklore, the verbal and poetic part of which is performed in Tatar language, revealed the use of other artistic and visual and stylistic means of musical language, the borrowing of musical and poetic genres different from Mordovian musical traditions, among which the Turkic genre "Takmak" was spread.

3. Based on the mutual influence of the Turkic and Finno-Ugric traditions in the musical culture of the Mordovian-Karatais, qualitatively new samples of a long song appeared which originated from this ethnic group.

4. The preservation of ethnic-cultural traditions is currently facilitated by the creation of folklore groups, functioning in the areas of certain ethnographic groups' compact residence. Their creative activity contributes to the implementation of ethnic-cultural education process of children and youth through the revival and the reproduction of folk art forms.

### **Summary**

The spiritual, cultural, and economic life of a modern man develops in a multicultural, polyethnic and polyconfessional environment, in the process of interrelation expansion among peoples. In these conditions, the problem of unique cultural traditions preservation is especially actual among different peoples and local groups. Traditional oral music is the earliest kind of musical art, representing a naturally formed deep and truthful image of people, their character, psychology and worldview. Folklore produces original national forms, a system of artistic expressive means is developed, the historical memory of the people is preserved. The study of folk art is an important means of pedagogical influence on the younger generation.

It is not possible to cover all aspects and genres of musical creativity of the Mordovian-Karatais within the framework of one article, but with the examples presented above it can be seen that Karatais created their highly artistic and distinctive music in the course of historical development, differing in genre, melodic richness and original performance. Unfortunately, the rich ethnic-music traditions of the Mordovian-Karatais have not been sufficiently deciphered and published yet, and almost were not included in the work of contemporary composers.

*Turkic Traditions In Musical Culture Of Mordovian-Karatai Ethnic Group, Astra Salvensis,*  
V (2017), no. 10, p. 205-211



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### **Gender-Marked Idioms Referring To A Male Person In Tatar\***

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**Abstract.** *The phraseological fund of a language reflects the features of the world view, mentality, customs and traditions of people. With the development of anthropocentric phraseology, the interest of scholars is increasingly drawn to gender studies. The subject of this article study was gender-marked phraseological units in Tatar language relating to males. The sources of factual material for the study were the "Tatar-Russian phraseological dictionary" by S.F. Safiullina, and "Educational thematic Russian-Tatar dictionary" by Bayramova L.K., from which they selected gender-marked phraseological units related to males.*

*The classification of the collected material was carried out according to the following parameters: related relations, age characteristics, social status, occupation, military and public service. Among the gender-labeled phraseological units relating to males, there are phraseological units with positive and negative connotations. Thus, masculinity, courage, and religiosity are lauded, and dependence on a wife, the addiction to alcohol, an assault, a treachery and effeminacy are ridiculed. The phraseological units that characterize the appearance of men are few and among them the phraseological units with negative connotative evaluation prevail. The analysis of factual material has shown that the phraseological foundation of Tatar language often uses its own names, both native Tatar and borrowed.*

**Key words:** linguistic culture, gender marked phraseology, phraseological units related to males, male gender, Tatar language, phraseological fund

### **Introduction**

The phraseological fund of language, along with paremiological one, is a valuable linguistic-cultural source that preserves the characteristics of the worldview, customs and traditions of a particular nation. The study of a language is closely related with the study of people culture. This explains the relevance of numerous works devoted to the analysis of phraseological units of various languages.<sup>1</sup>

As Maslova A.Yu. notes, "the study of phraseology on the basis of "a man in a language" principle has led to the development of a new trend - anthropocentric phraseology, since phraseological semantics reflects the anthropocentric principle of language widely".<sup>2</sup>

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<sup>1</sup> N. V. Konopleva, A. R. Kayumova, "Phraseological units semantically oriented to a male person in the English language," in *Asian Social Science*, XI (2015), no. 19, p. 120-128; A. Naciscione, *Phraseological Units in Discourse: Towards Applied Stylistics*, Riga, Latvian Academy of Culture, 2001; R. A. Ayupova, *Phraseology and phraseography of English and Russian languages*, Kazan, Publishing house of the Kazan (Volga region) Federal University, 2013; V. N. Telia, *Cultural-linguistic competence: its high probability and deep intimacy in the phraseological units of the language. Cultural layers in phraseological units and discursive practices*, Moscow, RAS. Languages of Slavic Culture, 2004, p. 19-30.

<sup>2</sup> A. Yu. Maslova, "On the semantic specificity of phraseological units with the component "name of a man / a woman" (based on the material of Russian and Bulgarian languages)," in *Bulgarian Russian Studies*, III-IV (2011), p. 23-36.

This approach to linguistic research provides "an opportunity to study not only the semantic and grammatical processes occurring in a language, but also allows to reveal the way a language is connected with the thinking and the psychology of a person, culture and the traditions of a particular nation" .

Gender studies are relevant and interesting, they are devoted to the work of such scientists. The subject of this article study were gender marked phraseological units relating to males in Tatar language.

The sources of factual material for the study were the "Tatar-Russian phraseological dictionary" by S.F. Safiullina and "Educational thematic Russian-Tatar dictionary" by Bayramova L.K., from which gender-marked phraseological units related to males were selected.

### **Methods**

The work used the theoretical method (the analysis of scientific literature on the topic under study); the descriptive method (the collection of factual material and its classification); the statistical method (linguistic material processing).

### **Results**

A continuous selection of the lexemes from Tatar language chosen by us and related to males, made it possible to classify according to the following parameters: relationship (ир (husband), ата (father), ага, агай, абзый (uncle), бабай (grandfather), бырат (brother), кияу (son-in-law), кода (godfather of one's child), etc.): Ата йорты (Father's house), Ир егет (Real man), Ни бырат та ни сыбат (Neither matchmaker or brother), Ата туфрагы (Ancestors' land), Бакыр бабай бакчасы (Copper grandfather garden), Ата-баба йоласы (Ancestors' customs), Бабайлар йорты (Father's house), Ил агасы (Elder), Кияу егете кебек (like a fiancé), Кияу пилмәне (groom's dumplings), Мәчет карты (True Muslim), Сэм агай (Uncle Sam), Суык абзый (Winter cold), Американ абзый (American grandfather), Ир заты (Strong gender);

- age characteristics (сабий (child), малай (boy), егет (young man), ир-ат (man), карт (old man), etc.): Маңка малай (very young), Сакаллы сабий (an overgrown child), Малай тоту (To have a servant), Ташбаш малай (a naughty boy), Егет икәнсең (Well done!), Ут егет (The guy is all right), Урам малае (Homeless), Буй егет (an adult);

- social position (морза (мурза), бай (бей), etc.): Кар бирмәс Карун бай (very greedy), Чабаталы морзалар (Murza in bast shoes);

- occupation (мулла, галим (a scientist), аксакал (an elder), тимерче (a craftsman), пират, юлбасар (a robber), etc.): Ахмак галим (a learned fool), Мәчет таш, мулла юкагач (the phenomena which do not corresponding to each other), Могтәбәр аксакал (Dear aksakal), Ни Аллага ни муллага (a useless person/thing), Тимерченең балтасы китек була (A shoemaker without shoes), Хава пиратлары (Air pirates), Яхъя мулла сандыгы (Secret business), Юлбасар булып көн күрү (to engage in robbery);

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- military arts (Cossack, General, Kaydak (horseman), soldier, ялчы (messenger), etc.): Генерал булырга исәп тоту (To strive to the general rank), Ирекле казак (a free Cossack), Канатлы жайдак (a winged horseman), Солдат боткасы (Soldier porridge), Үлем ялчысы (Executioner), Аталы казак (Mounted cossacks);

- public service (патша (tsar), khan, etc.): Ни патшага, ни бәндәгә (A useless man), Таҗсыз патша (To consider as a king), Патша кешесе (An eternal service soldier), Патша жәяү бара торган жир (the place where the tsar walked), Хан сые (туе) (Festive table), Үзе би, Үзе хан (the master of your destiny), Ак патша (White tsar), Хан заманыннан калган (Since ancient times).

### Discussion

The gendered phraseological units of Tatar language related to males can be divided according to the following features: 1) the phraseological units that describe the physical qualities of men; 2) the phraseological units that describe the psychological characteristics of men; 3) the phraseological units that describe the status-role characteristics of men.

The first group includes phraseological units that characterize the age and the appearance of males. A large number of selected phraseological units contain the "сакал" (beard) and "мыек" (whiskers) component: Ак сакаллы карт булып идем (if wishes were horses, beggars might ride), Ата сакалы авызына житкән көнөндә (When he settled down), Мыегы кабару (to become very angry), Мыегы да кымшанмый (селкенми) (not to turn a hair), Мыегын да бормый (not to turn a hair), Сакал белән түгел, акыла белән (a little can go a long way), Сакаллы сабый (an overgrown child), Сакал биетеп алу (to lay the stomach for a while), Кәҗә сакал (Goat beard), Көрәк сакаллы (with a fine beard).

The outer beauty of a man is secondary in Tatar linguistic culture. The proof of this is an insignificant number of phraseological units describing the beauty of male representatives: Чибәр егет (Handsome), Мәһабәт гәүдәле (буйлы) (Mighty body) and the predominance of phraseological units with a negative connotation: Кап корсак (a fat belly), Миçкә корсак (a belly like a barrel), Камыт аяклары (with crooked legs). Men who care for themselves as women are laughed: Пудыр жиңги (A man who is painted like a woman).

A man's virility and strength is a primary quality: Типсә тимер өзәрлек (Bends a horseshoe with his hands), Аю егарлык егет (He can kill a bear), Герой булып күренү (to look like a hero), Батыр калу (To remain a batyr), Камыр батыр (Bogatyr of the Tatar fairy tales). The lexeme Batyr is used to characterize a courageous, a brave and a strong man. However, the phraseological fund of the Tatar language has the phraseological units in which this lexeme contains a negative connotative evaluation: Йон батыр (a boaster), Сарык янында батыр (a good man among the sheep).

These phraseological units can be attributed to the second group, which includes the phraseological units that characterize the qualities and the personality

characteristics of males. The following phraseological units that characterize a male's penchant for alcohol, treachery and fights contain a negative connotation: Ләх исерек (very drunk), Салган баштан (boozy), Ябалак баш (a drunkard), Хатын өстеннән йөрү (to be a womanizer), Хатын пәрәст булу (to be a ladies' man), Калай этәч (a fighter), Кул белән уйнау (to get handsy), Ике этәч кебек (Like two cocks), Сугыш чукмарлары (Like roosters (fighters)).

The phraseological fund of Tatar language describes a man like a conqueror of women hearts, a heartthrob: Кызлар күзләү (To stare at girls), Хатын-кыз йөрәген (башын) ашаучы (Donjuan).

The dependence of a husband on his wife is ridiculed and reproached: Хатын башмагы (олтырагы, адъютанты) (the servant of his wife), Khatyn tykesesend (bulu) (under the heel of his wife), Hatyny bash (under his wife's heel), Хатын типкесендә (булу) (a pussy-whipped man).

The third group of phraseological units includes the phraseological units that describe the status of a man, his role in a family and society. Thus, the activity of a man is revealed in religious, military and state spheres. A Tatar is represented as a believing Muslim observing the traditions of Islam: Мәхәллә кешесе (a parishioner), Мәчет карты (a true Muslim), Дин әһелләре (Spiritual persons), Хак мөселман (a true Muslim), Сөннәткә утырту (to perform circumcision), Бабага бирү (to perform circumcision).

A man is characterized as a connoisseur of his business, who knows how to do everything that he makes: Төймә генә төйми (Master of all trades).

The phraseological fond of the Tatar language has exclusively male activities: мулла, аксакал (an elder), тимерче (an artisan), an official, a pirate, a cossack, a soldier, карак (a thief), юлбасар (a robber), патша (a king), khan, etc.: Могтәбәр аксакал (Dear aksakal), Юрга янында юрга, мулла янында мулла (he adapts quickly), Ирекле казак (a free Cossack), Солдат боткасы (Soldier porridge), Тимерчегә биеп, бакырчыга багып (to loaf), һава пиратлары (Air pirates), Чүпрәк корсак (an official), Ата карак (a thief in Law), Кесә карагы (a pocket thief), Юлбсарлык белән шөгыйльләну (to rob), Патша жәяү бара торган жир (the place where the king walked), Хан кияве (as a prince).

A man in a family is first of all a father and a husband: Ата баласы (Human race), Аталарча кайгырту (Father's care), Бала атасы (A father of a family), Нәкъ атасы (Like his father), Туй атасы (a toastmaster).

The phraseological fund of the Tatar language testifies to a bride's family positive attitude (bride-in-law) to the groom (brother-in-law): Кияү пәрәмәче (Mark the groom again), Кияү бүләге (a groom's gift), Кияү керү (To accept the groom), Фәрештә кияве (a bachelor).

It should also be noted that the collected and analyzed material uses names often, both native Tatar and borrowed ones: Шалт, Мөхәммәтжан! (You are caught!), Әлеге дә баягы, Мәнди бабаң таягы (The same thing), Әндри казнасы (Unlimited wealth), Бабил манарасы кору (Babylonian pandemonium), Вәли үз эшендә, Гали үз эшендә (Everyone minds his own business), Гишпократ

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оныклары (the grandsons of Hippocrates), Жәмәләң явы (Yemelyan Pugachev's army), Гөбәй белән Хөбәй (Inseparable friends), Локманның авызыннан локмасын алыр (He'll tear out a piece from one's mouth), Нух көймәсе (Noah's ark), Сөңгеле Сөләйман булу (Consider yourself above everyone), Потемкин авыллары (Potemkin's villages), Тантал газәпләры (the torments of Tantalus), Тугры Тукай булу (to be honest), Галәветдин лампасы (Aladdin's lamp), Насыр, Насырның янына барма, сасыр (to stay away from him).

### **Conclusions**

Thus, it can be concluded that in the phraseological fund of the Tatar language, gender-marked phraseological units relating to males characterize age, appearance, qualities, personal characteristics, occupation, family and social status of males. It should be noted that there are phraseological units with both positive and negative connotations in the material selected by us.

*Gender-Marked Idioms Referring To A Male Person In Tatar, Astra Salvensis, V (2017), no. 10, p. 213-217*

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### Concept Of “Love” In English And Kazakh Fairy Tales

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**Abstract.** *Fairy tales are very innocent and figurative literary works in national literature. They have very long history. Even they are told and compiled for children with the aim of upbringing, they reveal inner world and feelings, dreams of people all over the world. Fairy tales appear in languages to describe people's traditions and customs, ways of life at different periods of time. Fairy tales connect common things and phenomena, for example: people, nature, war, animals and etc. But the main idea of any fairy tale is devoted to common concepts. They can be positive and negative such as: happiness, friendship, brevity, love and etc. Fairy tales very vivid and colourful language is used to make the fairy tales fascinating and interesting. In our research work we would like to reveal the concept of “Love” and their peculiarities in the usage and development of fairy tales. The concept of “Love” has been one of the main subjects of fairy tale stories. In this article we consider English and Kazakh well-known fairy tales from the point of comparative and contrastive analysis. Through fairy tales the national culture and traditions can be revealed.*

**Key words:** Kazakh and English fairy tales, concept of “Love”, comparative-contrastive analysis, traditions and national culture.

### Introduction

It is well known that wisdom, human thoughts and spirit of the people and nation can be shown in the traditions of people. And they revealed in their written and spoken language, especially in folklore. One of the forms of folklore which has been developed alongside with history of a nation is fairy tales. People created fairy tales and they could tell their thoughts about magic and charm, bad and good through fairy tales or through the characters of fairy tales. In fact fairy tales are intended for children, but elder people also listen to fairy tales. The knowledge of fairy tales promotes not only to know a language at best, but also facilitates best understanding of views and character of the people. Fairy tales also reveal different concepts of people about different phenomena, surrounding nature, people and animals, plants, more abstract things: perception, feelings and etc. The theme that we have chosen for the research is “The concept of “Love” in English and Kazakh fairy tales”.

Fairy tales of the different nations shows, how much these people have in common that, in turn, promotes their better mutual understanding and rapprochement. In fairy tales rich historical experience of the people, the representations connected with labour activity, a life and culture of people is reflected. Through these activities fairy tales can depict different human feelings, like: friendship, love, betrayal, unfaithfulness and etc. There is no doubt that fairy tales usually convince for kindness and love and appreciate them. Having compared English and Kazakh fairy tales we have come to conclusion that most of fairy tales are about love in these languages. And they also have common understanding of “Love”.

Fairy tales are a folklore part, but national stories are not necessarily fairy tales: we study a folklore subgenre, along with a myth and legends. There is a need

to distinguish such things so as to provide a better understanding of the fairy tale that comprises a huge wealth of the beauty of a nations thought and wit. Especially now, when we witness a vivid interest of guests and linguists of other countries in the folklore of our nation. Therefore, we can underline the topicality of our research work. The aim of our research is to consider the peculiarities of the concept of "Love" the English and Kazakh fairy tales. We also aim at showing similarities and differences of these fairy tales through comparisons. We have allocated the following objectives of the set aim of the research:

- to define the concept of "Love" in fairy tales of English and Kazakh languages;
- to get acquainted with the notion of "Love" both in Kazakh and in English fairy tales and classify them.

### **Methodology of the research**

As we have conducted research and the analysis of English and Kazakh fairy tales, we selected the suitable methods for the research, like: descriptive, comparative and contrastive analysis, statistical methods and etc. And the work comprises information on modern and old fairy tales in a contrasting manner. Here we stick to diachronic and synchronic approaches in the analysis of fairy tales' development.

### **Findings and discussion**

It is common that concept has been the subject of intersubjects, like: linguistics, cognitive linguistics, cultural studies, philosophy, psychology, logics and etc. As any other science, the research of the concept is originated from specifying the essential concept of a particular culture and language. The important cultural, language concepts are the ones that are peculiar to the customs and traditions of a certain people, or the concept which is manifested in the nation's national behaviour and psychological understanding of features and phenomena. Fairy tales are with very similar plots, characters of ordinary people. And motifs are found spread across many different cultures.

Many researchers hold this to be caused by the spread of such tales, as people repeat tales they have heard in foreign lands, although the oral nature makes it impossible to trace the route except by inference. First of all, it is natural to say that Kazakh and English national fairy tales can make it clear that in they contain much in common. It can be explained that all nations of the world live on one planet, develop under the general laws of history. But they have different traditions, religion and laws which differentiate them form each other. The knowledge of separate subtleties of language, including fairy tales, is one of ways of integration of the person in the system of world and national culture.

But fairy tales simultaneously show the national originality of folklore of each people. And the concept of "Love" is also common perception for people. Love can be for God, between male and female, parents and children, people and motherland, between friends, for nature, for profession and etc.



“We consider, the cross-cultural approach is the most productive for the analysis of a metaphor in comparative aspect as in the focus of such analysis there is an ethnocultural specificity of figurative symbolics of nominative units”<sup>1</sup>

Concept of love, of course, belongs to high spiritual abstractions, above which, in the words of R.Rozhdestvenskogo, “dead, airless space begins in the human soul.” He is one of the basic values and “existential goods” (Brudnyi 1998:75), which is expressed by the basic beliefs, principles, and goals in life. The concept of “Love” is in line with the concepts of happiness, faith, hope, peace, freedom, and it is directly linked with the formation of the human meaning of life as the goal, the achievement of which goes beyond his individual existence itself.<sup>2</sup>

In contrast the nearest concept “happiness” can’t be described in terms of the essential features that send to the specific causes of this feeling. And if happiness is defined by a set of semantics of existing in a specific phenomena of views on the “sources” of occurrence of this state of mind (pleasure, peace, virtue, self-realization, implementation of call, and etc.).<sup>3</sup>

In general, “Love” is feeling of human beings which are capable of love when they are willing. Love, joy, blissfulness are human possibilities which differentiate them from animals. But the concept of “Love” in fairy tales has different understanding. According to fairy tales the concept of “Love” has its own thinking and understanding things. When we have analyzed the Kazakh fairy tale “Wolf and kids” and an English fairy tale “The Wolf and three kittens” in details and that has allowed drawing certain conclusions on similarity and distinction of fairy tales about the concept of “Love”. Here we see “Love” between animals. In fact people ignore the love between animals. We also found different interesting stories and included them into the general materials. Here we see the possibility of development of the best mutual understanding and rapprochement of the animals through detailed acquaintance with the history of the origin of fairy tales. In fairy tales it is usual to depict love between animals who are able to love their kids as people. And also for outlook expansion of love between people and animals. We can see in the well-known fairy tale “Beauty and the Beast”.

### **Discussion**

According to some authors, “There are some concepts “recognizable at once” like “happiness”, “time”, “destiny”, “love”, “friendship”, “nature” and etc which is common to many ethnic groups. ... All these concepts make the world’s language image connected (being bounded) with deep knowledge, national

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<sup>1</sup> N. V. Potseluyeva, T. N. Fedulenkova. *Contrastive analysis of zoomorphic phraseology in ENGLISH, RUSSIAN AND KAZAKH*, 2014, av ailable at: <http://cyberleninka.ru/article/n/contrastive-analysis-of-zoomorphic-phraseology-in-english-russian-and-kazakh>, accessed 12. 06. 2017.

<sup>2</sup> N. N. Bolshakova, *Gaming poetry in literary tales*. Smolensk, 2007.

<sup>3</sup> *Ibidem*.

features, and experience of the ethnic groups".<sup>4</sup> As has been already noted, love as an interpersonal feeling includes almost any emotional manifestation of a positive attitude to the other – "God was by means of simple solutions, / all kinds of our relations - / only species of love" (Huberman) but by "true love" is understood, as a rule, erotic love - the most recent kind of love, which was appeared in Europe only in ancient times. Together with its first philosophical concept was developed by Plato and has lived up to our days.

English fairy tales amazingly differ from other countries. The fairy tales written in English, give us representations about national myths, legends, ballads, and also acquaint with separate elements of spiritual and material culture of this rich country. All it allows us to get acquainted with culture and a life of England, to learn different stages of its history. Originality of English national fairy tales outwardly very much reminds versions of fairy tales of other countries. Also it is quite often that English fairy tales borrow ballad plots and construction on their basis.

Usually fairy tales revealing the concept of love starts from ordinary expressions, like: ... *Once upon a time there lived a king or a queen who were happy... The romantic story reflects emotion, and it contains an adventure and picturesque; it deals with the dreams remote by places, the sea, the sky, and objects of the surprise mentioned with beauty and strangeness.*<sup>5</sup>

Generalized prototype semantic model of love, based on the analysis of representations of it in the scientific type of consciousness - in ethical and psychological studies and dictionaries. Love - the feeling caused by a subject experiencing a central place in the system value of the object of his personal values, provided a rational unmotivated select this object and its individuality and uniqueness. At the same time loving tempted to get the item in your "private sphere" or save it to her, wish someone wealth and prosperity, ready to be a victim for the sake of someone, take care of him or her, takes responsibility for his well-being. He finds the meaning of his love and the existence of a higher moral activity.

Love - the feeling of involuntary, spontaneous reactions. "Love" is also the desire to benefit for the sake of someone. The appearance of the object of love is associated with beauty, with a stressful situation and the presence of "feelings" of appropriate emotions. Love is the feeling of developing and dying personal ability. Sometimes, to love somebody depends on the age and natural resources. By the concept of "a person in love" we realize a person who is accompanied by a change in one's view of the world. It is believed that love is the highest pleasure, and that its essence lies in the harmony, complementarity.

Because our most fundamental realities are immaterial, like love and death A few artistic forms remain as capable as fairy tales and poetry for housing such

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<sup>4</sup> Aliya Alimbekgyzy Biyazydykova, Taldubek Alyulu Nurpeiys, I. I. Meiramgul Baimuhanbetovna Baimuhanbetova, "The Studying of the "Happiness" Concept in the Kazakh Language," *Middle-East Journal of Scientific Research*, XIX (2014), no, 5, p. 712-715., 2014

<sup>5</sup> Gennete G. Palimpsests, *La littérature au second degré*, Paris, Gallimard, 1982.

depths. Fairy tales carry us from the prosaic landscape of our workday rhythm to mountain streams of simple wonder and truth.

No filter is necessary to drink of this pure water, just the reawakening of your childhood imagination. Fairy tales are as old as men and rooted deeply in colloquial traditional literature. Eventually they became a literary tradition. In the seventeenth through the nineteenth centuries, famous writers such as: Charles Perrault, E. T. A. Hoffman, the Grimm brothers, Hans Christian Andersen, and Andrew Lang compiled and wrote numerous fairy tales from various traditions, imbuing them with a distinct literary style. And some even invented their own fairy tales, like George Macdonald's *The Princess and the Goblin*, and Oscar Wilde's *The Happy Prince* and etc.<sup>6</sup>

In research of the Kazakh fairy tale as the major area of the Kazakh folklore has had different periods of development. One of the first publications about the Kazakh fairy tale belong to M. Auezov who studied and described the genre nature of the Kazakh fairy tales in detail.<sup>7</sup> It has been brought as the powerful scientific contribution to the study of validity and fiction of fairy tales. «People didn't insert anything into the stories which makes unfamiliar and invented, on the contrary, apparently, everything that has been entered into fairy tales in olden time, undoubtedly, is a reality.<sup>8</sup> As for the mentioned realities of the today, those fairy tales seem like truthful events. It is explained like the result of intellectual development of mankind in comparison with former generations. Collecting and detailed analysis of numerous fairy tales in different nations is immediate task for their nation. As they reveal truth of their elder generation, even some historical facts can be disclosed though fairy tales. All fairy tales can be divided into different levels, from the beginning of the last century to this day. Fairy tales give a lot of interesting facts about understanding of previous life of peoples and also their expectations and aspirations. The majority of fairy tales in Kazakh language appeared before Muslim acceptance. Such fairy tales as: “Er Tostik”, “Edil-Zhajyk”, “Kula saggitarius”, “Three-copecks piece”, “Penalty-saggitarius”, “Zholaman” and “Asanas of Kajgy” were told by Alaman about noble feats and courageous struggle of hunters, well-aimed arrows, about heroes and beauties, wise aged men-prophets.

Traditionally, Romantic fairy tales start in English and Kazakh languages open with the life of ordinary people, who live somewhere far away from the country in poor conditions, for example, “Beauty and Beast” starts like with the following expressions... *Once upon a time, in a very far-off country, there lived a merchant who had been so fortunate in all his undertakings that he was enormously rich. As he had, however, six sons and six daughters, he found that his money was not too much to let them all have everything they fancied, as they were accustomed to do...*

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<sup>6</sup> A short story by Oscar Wilde. - <http://www.wilde-online.info/short-stories.htm>, accessed 12. 06. 2017; Flora Annie Steel, *English fairy tales*, 1998, <https://www.amazon.com/English-Fairy-Tales-Illustrated-Flora/dp/1449596266>, accessed 12. 06.2017.

<sup>7</sup> M. Auezov, "Kazakh fairy tales," in *History of Kazakh literature*, 1<sup>st</sup> volume, Almaty, Press for Literature and Art, 1949.

<sup>8</sup> *Ibidem*.

The same with “Sleeping Beauty”: *There were formerly a king and a queen, who were so sorry that they had no children; so sorry that it cannot be expressed. They went to all the waters in the world; vows, pilgrimages, all ways were tried, and all to no purpose...*

But the culminating point comes in the end when the «Love» helps their all problems to be solved: *...And so she did, and the marriage was celebrated the very next day with the utmost splendor, and Beauty and the Prince lived happily ever after (Beauty and the Beast).*

As for the “Sleeping Beauty”, here we see also that the main idea of the story is “Love”: *... No one dared to tell him, when the Ogress, all enraged to see what had happened, threw herself head foremost into the tub, and was instantly devoured by the ugly creatures she had ordered to be thrown into it for others. The King could not but be very sorry, for she was his mother; but he soon comforted himself with his beautiful wife and his pretty children.*

Let’s analyze one of the romantic fairy tales in Kazakh language: ‘Poor boy Tazsha bala’. The tale starts with the same content like in English: *Erte, erte, ertede, eshki kuirigi kelte zamanda bir tazsha bala ake, sheshesi olip zhetim kalypti. Kunderde bir kuni tazsha bala bazardi aralap zburip munaip otyrgan bir shaldi koripty .....*

The fairy tale ends with happy end: *... Akirinda eki kbannin ekeui de bugan kizdarin berip, ozderine ari kuyeu bala, ari akilgoi kilip ustapti.*

In the traditional romantic fairy tales of English and Kazakh languages, the concept of “Love” is understood as one of powerful means of the life which is mighty to overcome everything in hard lives of people and as a source of happiness.

But not all the latest fairy tales have happy ends. We think of one of more illuminative fairy tales is Oscar Wilde’s “The Nightingale and the Rose”. Interestingly, as licentious, conflicted, and satirical as his fairy tales are set apart, revealing a spectrum of moral wisdom and beauty. The truth is revealed by means of their simple, direct style and clear moral distinctions, and they amplify truth through metaphors and symbols.

In “The Nightingale and the Rose”, each character (or entity) in the tale is named according to what kind of thing what it is in its essence: the Student, the Professor’s Daughter, the Nightingale, the Rose Tree, Love and etc. As the story goes: The young Student is heartbroken because he cannot find a red rose to give to his beloved, the Professor’s Daughter, who said she would dance with him if he brought her a red rose. From a nearby tree, the Nightingale hears his plight and takes pity on him. She understands how wonderful Love is, and possesses a deep reverence for it. So the Nightingale seeks out several rose trees in search of a red rose, but to no avail. Finally, she is directed to the Rose Tree that grows beneath the Student’s window. But it is the middle of winter, and he cannot grow any roses in the harsh, bitter cold. Yet after the Nightingale’s unrelenting insistence, the Rose Tree disclosed the only way that he could get a single red rose: through the Nightingale’s death. She must sing to him all night long with a thorn against her breast, which would pierce her heart, and her life-blood will flow into the tree and become his—producing one beautiful red rose.

Nightingale chose to die for Love. Through her death the most beautiful red rose in the world was created. The Student saw the red rose, presented it to the

girl. But she rejected him: the rose would not match her dress, and she was now interested in the wealthy Chamberlain's nephew who had sent her jewels and who wears silver buckles in his shoes. Dejected, the Student tossed the red rose into the street, where it was crushed by a cartwheel.

Let's begin with the Nightingale, the moral part of the story. She thinks deeply about the Student and about Love:

*Here at last is a true lover. Night after night have I sung of him, though I knew him not; night after night have I told his story to the stars, and now I see him. His hair is dark as the hyacinth-blossom, and his lips are red as the rose of his desire; but passion has made his face like pale ivory, and sorrow has set her seal upon his brow.*

By faith—"though I knew him not"—the Nightingale believed in and recognized the ineffability of Love—for she has sung about it to the stars night after night. For her, only the unfathomable stars seem infinite and transcendent enough to receive her songful musings about Love. As well, she now sees this Love embodied in the Student, signified by descriptive similes and metaphors: "*His hair is dark as the hyacinth-blossom,*" "*his lips are red as the rose of his desire.*" Moreover, the Nightingale elaborates on the spiritual and transcendent nature of Love by contrasting it with material possessions: *Surely Love is a wonderful thing. It is more precious than emeralds. Pearls and pomegranates cannot buy it, nor is it set forth in the marketplace. It may not be purchased of the merchants, nor can it be weighed out in the balance for gold.*

This presents the tale's climax, its highest moment of tension: Will the Nightingale sacrifice her life for Love? Indeed, that which is most precious rarely comes without a great test of will. Her decision is fraught with struggle:

*Death* is, here, a great price to pay for a red rose. Life is very valuable for everyone. It is pleasant to sit in the green wood, and to watch the Sun in his chariot of gold, and the Moon in her chariot of pearl. Sweet is the scent of the hawthorn, and sweet are the bluebells that hide in the valley, and the heather that blows on the hill. Yet Love is better than Life ...

*The Nightingale reminds us that existence is a blessing. Her vivid sensual description of nature conveys the beauty of Life for which we must be thankful. "Life is very dear to all", she says. Yet she ultimately concludes that "Love is better than Life".*

The death of the Nightingale for Love proceeds in a harrowing progression throughout the night:

*So, the Nightingale pressed closer against the thorn, and louder and louder grew her song ... But the thorn had not yet reached her heart, so the rose's heart remained white ...*

Another line shows the character as a victim of Love. *Nightingale pressed closer against the thorn, and the thorn touched her heart, and a fierce pang of pain shot through her. Bitter, bitter was the pain, and wilder and wilder grew her song, for she sang of the Love that is perfected by Death, of the Love that dies not in the tomb. And the marvelous rose became crimson, like the rose of the eastern sky. Then she gave one last burst of music. How extraordinary it is that love and death remain inextricably linked. Perhaps the deepest love can only be understood in the pain of death. With the crucifixion of our Lord, a gravely poignant death happened because of love. Through death, transcendent love poured forth. Without death, there was no resurrection unto life.*

In less technical contexts, the term is also used to describe something blessed with unusual happiness, as in "fairy tale ending" (a happy ending) or "fairy tale romance" (though not all fairy tales end happily). Colloquially, a "fairy tale" or "fairy story" can also mean any far-fetched story or tall tale; it is used especially of any story that not only is not true, but could not possibly be true. Legends are perceived as real; fairy tales may merge into legends, where the narrative is perceived both by teller and hearers as being grounded in historical truth. However, unlike legends and epics, they usually do not contain more than superficial references to religion and actual places, people, and events; they take place once upon a time rather than in actual times.

However, further research has concluded that fairy tales never had a fixed form, and regardless of literary influence, the tellers constantly altered them for their own purposes. The concept of "Love" should reveal moral inner sense of people but the outer appearance, as has been pointed out Alipova A.Y. and Bekkozhanova G.H.: "Concepts of morality: handsome is that handsome does – *Zhaksi adamnin isi de zhaksi*. The Kazakh variant is translated as that is not good who is handsome but who does properly – *Tani sulu - sulu emes, zhani sulu – sulu*. and the Kazakh variant is who has handsome body is not handsome, who has handsome soul is handsome".<sup>9</sup>

In contemporary literature, many authors have used the form of fairy tales for various reasons, such as examining the human condition from the simple framework a fairytale provides. Some authors seek to recreate a sense of the fantastic in a contemporary discourse. There are also many contemporary erotic retellings of fairy tales, which explicitly draw upon the original spirit of the tales, and are specifically for adults.

It may be hard to lay down the rule between fairy tales and fantasies that use fairy tale motifs, or even whole plots, but the distinction is commonly made, even within the works of a single author: George Mac Donald's *Lilith* and *Phantastes* are regarded as fantasies, while his "The Light Princess", "The Golden Key", and "The Wise Woman" are commonly called fairy tales. The most notable distinction is that fairytale fantasies, like other fantasies, make use of novelistic writing conventions of prose, characterization, or setting. Concept "heart" is confirmed the existence and a certain relationship between these concepts in a linguistic cultures. The research of concept heart, as images of culture, forming the basis of the Kazakh and English national picture of the world and is one of the fundamental cultural concepts, helps to identify the ethnic peculiarities of thinking and spiritual life of these people.<sup>10</sup> These factors are distinguished according to the idea and content of fairy tales.

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<sup>9</sup> A. T. Alipova, G. H. Bekkozhanova. "Some peculiarities in the usage of Kazakh, English and Russian phraseological units: proverbs, sayings and idioms," in *The Buckingham Journal of Language and Linguistics*, 2011. - <http://ubplj.org/index.php/bjll/article/view/210>, accessed 12. 06. 2017.

<sup>10</sup> Avakova Raushangul Sultagubiyeva, Gulzhamal, Kortabayeva, Aigul Sultagubiyeva, "Concept "Heart" in the Language Picture of World," in *International Journal of Humanities Social Sciences and Education (IJHSSE)*, II (2015), no. 1, p. 116-120.

For example, in English literature Andersen's work sometimes drew on old folktales, but more often deployed fairytale motifs and plots in new tales. MacDonald incorporated fairytale motifs both in new literary fairy tales, such as *The Light Princess*, and in works of the genre that would become fantasy, as in *The Princess and the Goblin* or *Lilith*.

The concept of “Love” is closely related to the concept “happiness”. If we realize some language units as a notion of culture, the concept of “happiness” shows national beliefs which is based on culture studies. Like the concept of ‘Love’, the concept ‘happiness’ also expresses the nation’s dreams, like: “welfare, material wealth, joy, intentions, blessed peace and quiet life our people are creating priceless treasure of our culture. Solving the problems of this kind, explaining them to the younger generation is the requirement which is to be carried out nowadays. In the Kazakh linguistics, including cognitive linguistics, the “bakhyt” (“happiness”) concept has been mentioned only in the scientific works and articles. It hasn’t been studied separately yet. And that’s why studying the place of “happiness” concept in Kazakh outlook and literature, making a research, concerning applying it in the blessing, proverbs and sayings, set phrases, even in the works of individual writers and poets is one of the urgent problems”.<sup>11</sup>

Unlike scientific works and special articles in newspapers and journals, the aim of fairy tales in all languages is to reach happiness and love. So, the dreams of people, the concepts of “Love”, “Happiness”, “Peace” and etc.

Fairy tales are the most ancient creations of human spirit. A fairy tale is one of popular and favorite genres in folklore and the literature. How many fairy tales are already heard and read by us since the early childhood. There were the fairy tales similar against each other and not similar, happened cheerful and sad, long and short. And here the boring and silly didn't come across never! Fairy tales are available almost for all nations of the world, in them it is a lot of general that speaks laws of the human life, similar living conditions: a great miracle is the earth as mother progenitors, whence leaves the person and where it comes back in the end of a way, eternity of a universe, the world of the nature with the freakish phenomena, with riddles and secrets, with its beauty. At the same time, the fairy tales are created in different languages reflect way of life of these or those people. They are also based on geographical, natural and ethnic conditions, work and a life, features of environment, national character. From here an originality of fairy tales, variety of their maintenance, characters.

### **Conclusion**

Fairy tales themselves are universal features of language, because all languages have fairy tales having similar contents and forms. Almost fairy tales have happy ending. Fairy tales vary from country to country as different countries

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<sup>11</sup> Biyazydykova Aliya Alimbekgyzy, Biyazydykova, and Kenzhegul Alimbekgyzy, "The Studying of the “Bakhyt” (“Happiness”) Concept In The Kazakh Language," in *World Academy of Science, Engineering and Technology International Journal of Social, Behavioral, Educational, Economic, Business and Industrial Engineering*, VII (2013), no. 3.

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have different traditions and perceptions of outer world. Fairy tales tend to take on the colour of their location, through the choice of motifs of the story. The style of the story-teller and the depiction of character have local colour. The concept of "Love" in fairy tales of different countries have the same content.

Most of the fairy tales are romantic in Kazakh and English languages. There are two theories of origins of fairy tales have been attempted to explain the common elements in fairy tales. The most spread fairy tales over continents are universal stories. One of the fairy tales are a single point of origin generated any given tale. They were spread over the centuries among different nations in different versions, like: Cinderella, Beauty and Beast and etc. Another group of fairy tales are formed from common human experience and therefore can appear in many different origins separately. The national experience and culture are shown in these type of fairy tales.



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### **Formation Of Information Culture Of Primary School Students**

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**Abstract.** *This article describes the relevance of information culture formation for primary school students. Possible solutions to this problem are considered. Moreover, by reasoning and results of research, the scientific and practical significance of information culture formation for primary school students is summed up. The result of designed for students of primary school teaching and learning means is considered, which contribute to formation of information culture and development of intellectual abilities of students, as well as further preparation of children to education process at the basic school.*

**Key words:** Information society, computer science, information culture, informatization of education.

### **Introduction**

The development of modern period of civilized society can be called informational. Information society puts forward the new demands on its members such as the possession of certain knowledge, skills and abilities, which in previous stages of society development can be considered as optional or at least not urgent.

Therefore one of the main directions of the development process for modern society is informatization of education, which provides a broad introduction to the practice of psycho-pedagogical research aimed at the intensification of the learning process, the implementation of the ideas for developmental education, improvement of organization forms and methods of educational process, ensuring the transition from mechanical assimilation of factual knowledge to the mastering the ability of independently acquiring new knowledge. Among the qualities that school will form in modern generation the following should be mentioned: the ability to plan the structure of their actions (planning); the ability to build an information model of the object or process under study (modeling); the ability to organize search for information (search); discipline of communication and the ability to structure messages (communication); skills to handle new techniques and new technologies in different life situation (instrumentation activities); technical skills for the most common tools in Information Society such as Computers.

This problem could not be solved within the traditional school disciplines other than computer science, because none of the scientific disciplines reflected in the school subjects, does not possess a well-developed concept for the supply of the appropriate action.

An important contribution to the development of a course was made by the following scientists: A.P. Ershov,<sup>1</sup> G.A. Zvenigorodsky,<sup>2</sup> Yu.A. Pervin,<sup>3</sup> G.NoX,<sup>4</sup> K.

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<sup>1</sup> A.P. Ershov, "Concept of Informatization of Education," in *Education and computer science*, VI (1988), p. 3-22.

<sup>2</sup> A.P. Ershov, G.A. Zvenigorodsky, Yu.A. Pervin, *Computer science in school (Concepts, Condition, Prospects)*, Novosibirsk, Academy of Sciences of the USSR, 1979.

Parmentier,<sup>5</sup> etc.

In dialectical development of strategic objectives for school computer science, the slogan of universal computer literacy, which is relevant to the first stage of computer science, was gradually displaced by the more urgent task of information culture formation. This increases the need for the formation of information search, analysis, processing, storage, distribution, representation of this information to other people in the most efficient manner. We are talking about formation of work culture with information at schools.

A relatively new term "information culture" originally appeared in the pedagogical theory and practice in connection with the introduction of computer science subject as a compulsory subject in basic school.<sup>6</sup>

Information culture is a characteristic of cultural level of modern young person who knows how to work with the needs of everyday life with computers and information systems, databases, and spreadsheets, personal computer and information networks, which assumes not only new tools of activity, but also (and most importantly) a new vision of the world. Information culture, due to the fundamental components of its concepts, should be formed in schools, beginning with the first school lessons.

This implies that one of the education priority tasks should be the formation of information culture for students of secondary school, many elements of which should be in the primary education.

The study of computer science in primary school is an essential tool in the development of a new literacy, the content of which is much wider than the classic "three skills", corresponding to the traditional content of primary education: read, write and count. It is intended as extension of reading concepts (active search for all varieties and types of information, its perception and analysis), writing (information object creation of various kinds, organization of information appropriately) and counting (design and construction of activities, a variety of constructions, including logical). New literacy is a combination of basic linguistic, processing and communication skills, the ability to work with certain materials, instruments of mental and physical labour, the ability to perform operations and procedures, that is, internal and external technologies. New literacy is a basic of educational springboard to subsequent stages and spheres of study.

It should be emphasized an extremely important advantage of the early introduction of young students to the sphere of computer science; the transfer of this subject on the initial stage of education is a factor of preservation for children's unity of the world (so often destroyed in the traditional methods of primary

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<sup>3</sup> Yu.A. Pervin. *Methods of early computer science learning*, 2<sup>nd</sup> edition, Moscow, "Binom", Laboratory of knowledge base, 2008.

<sup>4</sup> G. Nox, "What can computers give to pedagogy: a view from the American school?," in *Computer science and education*, I (1990), p. 107-112.

<sup>5</sup> K. Parmentier, "Computer science in a French school," in *Computer science and education*, II (1991), p. 111 -113.

<sup>6</sup> Yu.A. Pervin, "The course of "Fundamentals of Computer Science" for primary school," in *Computer science and education*, XII (2002), p. 7-12.

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education), developing their ability to approach the problem as a whole, not formalized and prepared.

Psychological readiness of the child for life in information society should be formed in the first years of school. This is primarily due to the necessity of mastering the information literacy. But another important task is to inculcate abstract thinking skills and ability to think logically. All this imposes new quality requirements for the first link of school education in primary school. In our opinion, many of the elements of learning computer science should start in primary school. At this age, children are easier to assimilate the basic concepts of computer science and master practical computer skills. New Information Technologies in Education combined with traditional means contributes to the development of child as a creative person.

### **Objects and Methods of research**

#### *Rationale.*

Currently, there are a large number of researches, a lot of comprehensive courses, program-methodical complexes, individual learning and teaching solutions, dedicated to education and application of information technology in primary school.

Analysis of local and foreign research reveals the following trends in primary school teaching:

Firstly, instead of integrative courses, today we have courses, which differentiate in its content theoretical and practical aspects;

Secondly, the role of courses that emphasize deep study of certain theoretical questions is growing, while there is a danger that well-researched material by students will not be in demand in the course of further education.

Thus, both theory and practice of pedagogy agreed on the need to introduce computer science from the first steps of the school and ending (if we talk about the school education stages) with Farewell bell. It is absolutely clear (again based on the main objectives of computer science in school), that it is not about prevocational training and learning programming within the school subject "Computer science", it is about the general education course, which essentially represents the course of information culture. Since a person's ability to live effectively and efficiently, in our opinion, is formed in the process of studying the subject of computer science, this subject understood by us as the basis of planning regularity and implementation of targeted actions, that is, the need to teach children from the first grade.

A child in the first year of study in their physical and mental qualities is essentially a preschooler, and by the end of the first and beginning of the second year he/she has some features of teen age contradictions and complexities, and therefore requires a special approach to their education.

At the same time, in the presence of various and different approaches to teaching primary school students, there are few publications in Kazakhstan, which would describe specific positive results and validity of teaching primary school students. This, we believe, is due to the fact that the above approach focuses on the

acquisition of solid skills in reading and writing, elementary experience of linguistic communication. And thus the main task of teaching primary school students is providing the initial formation of the child's personality, the identification and development of his ability remains in the shadows. This contributes to the lack of developed scientific problems and practical ways and methods of teaching primary school students, which has a negative effect on the creation of a solid base for further development of the educational programs in grades of primary and basic schools.

The above arguments determine the rationale of our research.

*Goal of the research* is the formation of information culture for students of primary school on the basis of the developed workbook in computer science and educational program for primary school students.

*Research object* is educational process of primary school students.

*Research subject* is the initial formation of the child's personality, identification and development of his abilities.

From the above research objectives the following goals are evident:

- Analyze psycho-pedagogical and methodical literature on the topic of research, and identify features of education on the subject of computer science for primary school students;

- Formulate the principles of learning content selection for primary school students;

- Develop educational and methodological program of education for computer science in primary school.

*The methodological basis of the research* are the achievements in the field of didactic and methodology of teaching in the primary grades, the basic provisions of the knowledge theory; student-activity approach; age, psychological and individual characteristics of elementary school students; theoretical propositions on the relationship of learning and development, education system development concept in Kazakhstan.

*The theoretical basis of research* was made from works of leading local and foreign psychologists, didactics and teachers: A.N. Leontiev<sup>7</sup>, S.L. Rubinstein<sup>8</sup>, J. Bruner,<sup>9</sup> J. Dewey,<sup>10</sup> J. Piaget,<sup>11</sup> P.Ya. Galperin,<sup>12</sup> S.Pepert,<sup>13</sup> B. Hanter,<sup>14</sup> etc.

The following research methods were used to achieve the goals: theoretical analysis and synthesis of psychological and educational literature; pedagogical

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<sup>7</sup> A.N. Leontiev, *The problem of psyche development*, Moscow, Mysl, 1965.

<sup>8</sup> S. L. Rubinstein, *Genesis and consciousness. Human being and world*, St. Petersburg, Piter, 2003.

<sup>9</sup> J. Bruner, *Cognitive psychology: Outside of direct information*, Moscow, Progress, 1977.

<sup>10</sup> J. Dewey, *School and society*, Moscow, Rabotnik prosvesheniya, 1965.

<sup>11</sup> J. Piaget, *Selected psychological works. Psychology of intelligence. Logic and psychology*, Moscow, Prosveshenie 1969, p. 9-53.

<sup>12</sup> P. Ya. Galperin. *Introduction to Psychology: formation of attention*, Moscow, Izdatelstvo, 1974.

<sup>13</sup> S. Pepert, *The Children's Machine: Rethinking School in the Age of the Computer*, Moscow, 1992; S. Pepert. *The Connected Family: Bridging the Digital Generation Gap*, Moscow, 1996.

<sup>14</sup> B. Hanter. *My students are working on computers*, Moscow, Prosveshenie, 1999.

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supervision of students work; interviews with primary school teachers; questionnaire survey of teachers; study of students creative products.

## **Results and discussion**

*Scientific novelty of the research:*

- Purpose and goals of computer science for primary school students are determined to form their information culture;

- Educational and methodological program was developed for the formation of information culture of primary school students.

*The theoretical significance of the research* consists of justification for new theoretical postulates revealing the content and method of teaching primary school students based on student-active approach.

*The practical significance of the research* is the ability to use the research results in schools with the introduction of mathematics, language and computer science for elementary school students, the development of teaching aids for primary school teachers of the Republic of Kazakhstan and as a basis for further research on the issue of computer science in primary schools.

According to the Concept of development of Kazakhstan education system today methodical system of computer science education is undergoing significant changes. The problem of content selection for computer science education, especially in the elementary grades is one of the most important.<sup>15</sup>

One of the most important criteria by which the educational content should be selected is teaching principles. The basic principles of general didactic and methodological teaching, took as a basis for selection of content for education in computer science programs for elementary school students are listed below.

*Principle of humanity*, i.e., priority of human values and health of a child, idea of free development.

*Principle of scientificity*, manifested in accordance with offered to students knowledge and latest achievements of scientific progress, consistency of science.

*Principle of consistency* is to plan the content in the ascending line, where subsequent knowledge builds on previous knowledge.

*Principle of systematicity*, which means systematization of the studied knowledge and formed skills in the system.

*Principle of compliance with the goals of the educational content:* The goal of education determines the content of computer science course. In this regard, the content of the course, in addition to the basic concepts of computer science, such as "algorithm", "information", "technology" should also include questions on planning the actions needed to achieve a certain goal by using a fixed set of resources; questions on the organization of research information needed to solve the problem; questions on information structure for the description of objects and systems; technical skills of interaction with the computer.

*Principle of individual education:* the pace of studying computer science, levels of difficulty and creative education activities must match the interests, the

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<sup>15</sup> \*\*\* , *Concept of Education Development of Kazakhstan till 2015*, Kazakhstanskaya, Pravda., 2003, p. 11-15.

possibility and necessity of each student.

*Principle of availability, age and connection with life:* content of computer science for primary school students must comply with their age and physiological characteristics, their life experience. Educational material should lead student's life experience in accordance with the scientific level of social experience in the mainstream of computer science. Therefore, the study of child's personality through his work is one of the most important methods of the educational process in elementary school.

*Principle of clarity:* computer science for primary school students is based on the specific samples (tables, diagrams, drawings, demonstrations, crosswords), which are perceived by students not only through the visual, but also motor and tactile sensations. This principle enriches the range of ideas for students, develops observation and thinking, helps to deeply absorb educational material.

Development prospects of the country and each region is determined not only by historical past, current situation, but also by attitude of the younger generation, its vision of the real and proper, internal openness, tolerance and the degree of social communication skills.

Speaking about the future of the younger generation head of the state Nursultan Nazarbayev stressed that: "... in the upbringing of the new generation we should refer to the most simple, understandable and at the same time deeply moral and spiritual life of every nation, to the traditions. Their role in life of people is undeniable. Cultural traditions have always been a source of social renewal ... that is why traditions allow a person "not to be lost" and adjust their lifestyle to the rapid changes of the modern world".<sup>16</sup>

Primary school students cannot be considered as a blank page, which can be filled with anything. A child before coming to school spends a certain period of their lives at home or at preschool institution. Because of this, a child is a member of the social environment, even though unconsciously he or she formed a view on the environment, and get some experience. It is this individual, personal experience of a child, acquired at home and in preschool institutions should be used and developed at computer science lessons. Naturally, in this case we must take into account his age and psycho-physiological characteristics.<sup>17</sup>

The first feature of the younger students is their inability to think abstractly. This is reflected in the method of selecting the content of computer science subject for primary school students.<sup>18</sup>

The content of computer science subject is based on the concept of information. This is due to the fact that the information is related to a lot of

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<sup>16</sup> N.A. Nazarbayev, "Ideological consolidation of society as a condition for progress in Kazakhstan," in *FPE. Kazakhstan*, XXI (1993), p. 10-15.

<sup>17</sup> E.Y. Bidaybekov, A.B. Ibashova. *Condition and prospects of computer science development in primary schools of the Republic of Kazakhstan. Proceedings of the Great Moscow seminar on the methodology of early education to computer science*, edited by Yu.A. Pervin, 3<sup>rd</sup> volume, Moscow, publ. RSSU, 2012, p. 29-42.

<sup>18</sup> A.B. Ibashova, G.K. Nurmuhambetova. *Psycho-pedagogical features of young students at studying computer science MIIMNMK "Mathematical modeling and information technologies in education and science"*, 2<sup>nd</sup> volume, Almaty, Kazakh National Pedagogical University named after Abai, 2003, p. 275-280.

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modern life, and the information is the basis for many of the concepts and phenomena. Without the information there is no life for a person and many careers depend on how quickly information comes on state of affairs in a company, how quickly large amounts of information are examined and processed, it depends on the speed and accuracy of accepted decision. Students should realize that the information they are interested in is easy to find, with a minimum of effort and time.<sup>19</sup>

Introduction of computer science subject for primary school students provides the ability to tell children about computer, show the whole range of its capabilities, and prepare children to use a computer. At the computer science lessons the system of world perception is formed, and understanding of common information connections for variety of natural and social phenomena. In this regard, lessons of computer science are widely using various forms of lessons, games and visual methods of training and control of knowledge, connection to daily life, as well as materials of such school subjects as mathematics, natural sciences, Kazakh, Russian and English languages, etc., interdisciplinary connections are disclosed.

Computer science courses in primary school are very important:

*Firstly*, for forming various types of thinking, including operational (algorithmic). The learning process combines the development of logical and creative thinking.

*Secondly*, for carrying out the practical work with information, and for acquiring skills to work with modern software. Mastering computer for primary school students will help them to use computer as a tool for their activities in the classroom.

*Thirdly*, for the idea of the universal possibilities for using computer as a tool of learning, counting, image editing, and other entertainment.

The content of computer science subject deepens in subsequent grades and consists of the following topics:

1. *Introduction. Safety instructions in computer classroom.*

2. *Information and information processes:*

3. What is information? Ways to transfer information. What can you do with the information? Saving information. Save to search.

Lesson repetition. Competitions "Ways to transfer information", "Saving of information". Distortion during transmission of information. Information handling. Information processing algorithm. Information processes. Lesson repetition. Competitions "Transmission of information", "Information processes. Information handling", "Information Processing Algorithm". Information coding. Information encryption. Lesson repetition. Competitions "Encoding and encryption information."

4. *World of computers and computers:*

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<sup>19</sup> A.B. Ibashova, Yu.A. Pervin, *Sources, guidelines, prospects of informatization concept of primary education in the Republic of Kazakhstan. Natural Sciences*, Yaroslavl, Yaroslavl Pedagogicheskiy Vestnik, 2013, p. 19-27.

Basic computer devices. Input and output devices. Pointers and cursors. Mouse cursor. Text cursor. What is an icon? Types of icons. Icons on computer screen. How does window works. Name of the window. Menus and Toolbars.

Workspace, scroll bar, status bar. What is a menu?

Computer Menu. Lesson repetition. Competitions "Cursors", "Icons", "Programs and its window", "Menu".

#### *5. Information and communication technologies:*

Working with text cursor. Window of text editor. Editing of text information. Graphic editor. Window of graphics editor. Tools of graphic editor menu. Storing information in a graphical editor. Processing graphic information.

Lesson repetition. Competitions "WordPad", "Paint". The concept of Internet, Information processing.

Students should know the following:

- the concept of information, diversity of its forms;
- information media;
- information processes (transferring, processing, storage of information);
- purpose of the main computer components;
- safety instructions when working on the computer;
- application, role and capabilities of computer in various fields of human activity;

– comprehension of action;

– main action sequences (linear, branching, repetition);

– purpose and main features of text and graphics editor;

– presentation forms of information on computer.

Students should be able to do the following:

– provide examples of information and information processes;

– give examples of information media;

– give examples of actions;

– use to draw with random "colors" and "brushes";

– use text editor to set, edit and format a simple text.

Content includes theoretical (definitions of certain concepts, properties, rules, etc.) and practical materials, relevant life experience of students, which are arranged in order of complexity of their components. This is logical pivot of the course. Questions of a practical nature are disclosed on the basis of real-life actions and abstracting by calculation methods, filling tables, etc., it goes up to the level of theoretical knowledge. Also there is a system of tasks with which students should learn both theoretical knowledge and acquire skills defined by the program.

Tasks are available in various forms, which stimulate the activity of the children, and arouse their interest. Often these tasks are an entertaining and comprehensive. With the help of these tasks mistakes are prevented made by



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students as a result of mixing the similar questions of discipline; in this case we offered tasks to identify different by comparison.<sup>20</sup>

Teaching aids are given to help teachers, there teachers can find a thematic planning for each section of the course, the requirements for knowledge, skills of students at the end of the school year; material for the oral exercise and plans for the majority of lessons. Planning and lesson plans are exemplary, i.e. the teacher, in accordance with his students, can make changes to the order of issues introduction, or change the time allowed for the study of a topic. However, the material should be studied, provided by the program for each academic year and at the appropriate level.

At each lesson different tasks are performed aimed at the development of memory, attention and logical thinking. It stimulates independence and the activity in solving problems. Introduction of a computer is seen as a way to activate the creative development of the personality. Computer software in a form of a game creates a learning environment, which provides feedback in the process of solving problems.

A computer promotes the formation of self reflection for students. It allows students to visualize the results of their actions. At the same time students more carefully choose options for action to be taken in emergency situations. This contributes mainly by training software that helps to improve mastering of the material, and stimulate cognitive activity of students in the classroom. It is useful to combine the training software with other teaching aids (devices, drawings on blackboard, tables).

There is the algorithm at the core of any software for its implementation. Thinking through the sequence of computer programs implementation, it is necessary to pay attention to the complexity of the algorithm used and the possibility of its implementation depending on the formed skills of students. In other words, it is necessary to comply with such didactic principle as accessibility (adequacy of previously acquired knowledge). From one software to other software there is a complication of not only the methods of working with a computer, and a variety of ways, but also the complexity of the algorithm on which the software is built. Thus, introduction of material follows the formula "from simple to complex".<sup>21</sup>

In the absence of such computer didactic materials, we have developed a package of educational software (PES) for information support of our methodology.

In PES, except software designed for learning computer science and technology of information processing on computers for elementary school students, there is a computer software both dynamically forming didactic materials and tasks on information technologies, Kazakh, Russian, English languages and

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<sup>20</sup> A.B. Ibashova, Yu.A. Pervin, *Informatization concept of primary education in Kazakhstan. Proceedings of the II research and practical conference "The Russian teacher in the system of modern education*, Moscow, Moscow State Pedagogical University, 2013, p. 146-153.

<sup>21</sup> *Ibidem*, p. 153-160.

arithmetic, and computer software promoting the harmonious and comprehensive development of the personality.

Thus, the solution for tasks is a set of software as a whole; it can be represented as a set of the following educational goals. Firstly, it is learning of computer science and information technologies on the computers in the primary school. Secondly, computer skills are connected with the examples of the material covered by Kazakh, Russian and English languages, literature and arithmetic. Thirdly, when working at a computer, student develops attention, learns the basics of algorithmic approach to solving problems, creates an abstract perception of objects and logical thinking, enhances memory, learns to find new things, and realizes the potential of the creative imagination.

We use methodical chain of specially designed software that consistently fulfils skills with increasingly expanding set of keys, without using a typing tutor.

"Information" software attracts cognitive interest of children and positive emotional attitude towards computer technologies, preparing them for further structured education.

The concept of information is a basic element of the theoretical (information) line of the course. One of the basic concepts of computer science course is a philosophical category of information. Therefore, the course does not give a strict definition of this concept.

The basis for this feasibility is the primary nature of concept. This unusual feasibility for a young person is illustrated by examples on time of year definition and making story according to these examples.

This software provides individual perception of the world, using a subjective experience of children in the interpretation and evaluation of the facts, phenomena, events and surrounding reality.

Creatively working primary school teacher can use this software in addition to its direct purpose. The software has the ability to generalize, organize and find practical applications for received skills of students.

"Text editor Balbobek" software.

This software has a non-intrusive operation speed, it makes possible to work out the correct pressing of computer keys and allows children to use the cursor keys, information input key, and mouse. The software takes into account involuntary memory, which plays an essential role for primary school children.

With the help of this software students see how to store the information they need, transfer it in the database (input, write) and get it from the database by the user (output, read).

"Cell" software.

"Cell" software helps students to solidify their knowledge on "Commands" topic. This software can also be used as a graphics editor with simple interface.

At the same time, it is no coincidence that the study of computer graphics tools in nearly all school curricula follows by the development of the text information processing methods. It is connected, in our opinion, with two reasons. The first reason is that the graphics, such elementary parts of the graphic

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information, as points, lines, figures, despite of their simplicity for children, according to the methods of computer reproduction is still inferior to simply and easily typing letters, symbols, words.

The second reason is that the most of the fundamental concepts of computer science required for children as the primary tool of thinking formation in information society today have more methodical parallels with text information processing technology, rather than with computer graphics. Text discretisation and its subdivision on structural elements such as paragraphs, lines, and symbols can cause the association with a structured description of the algorithm divided into stages, items, commands.

Thus, the serial arrangement of two topics in the general education course of early computer science learning (first text processing information, and only after that technology of computer graphics) is the most natural, at least at the current level of applied didactic tool such as information editor and teaching methodology of computer science.

“Balbobek’s Adventure to the Land of Knowledge” software helps to study such subjects as mathematics, Kazakh, Russian and English languages, computer science. This software is specifically forms the notion of "algorithm" and aimed at the development of algorithmic style of thinking. There is a meta-knowledge of knowledge with the use of this software at the lessons on the organization of scientific information, methods of information search, transformation rules, i.e., actualization of mental efforts that ensure the mastery of scientific knowledge of objective reality.

The introduction of computer science in primary schools with the aim to teach a growing person to think independently, develop imagination and practically realize their creative ideas, largely fills this gap. Computer science lessons and their difference from other lessons give children, not only pleasant moments of creative play, but also serve as a key to their own creativity.

The goal of learning computer science is the introduction and use of new advanced information technologies, awakening of desire to experiment in children, create and test hypotheses and learn from their own mistakes. Primary school students develop thinking and creative abilities.

## **Conclusion**

The modern period of society development is characterized by the strong influence of computer technologies, penetrating all spheres of human activity. An integral and important part of these processes is the informatization of education. Currently, there is a new system of education forming in Kazakhstan, focused on the entry into the international information and educational space.

In modern conditions a graduate must have knowledge in the fields of science and technology, which took shape in the form of scientific disciplines in recent years. First of all, computer science is the most dynamic of the school disciplines. In this regard, the achievement of computer literacy, which is closely associated with the user aspect of using computer, is not sufficient for the realization of educational functions of computer science. The aim of education

becomes the formation of student's information culture, the main component of which is operational, algorithmic style of thinking.

The operating style of thinking includes forming skills of planning, information search used in solving tasks, building information models, discipline of communication and messages structuring, instrumentation of all activities. The following main components of the operating style of thinking were distinguished:

- Ability to plan the structure of actions required to achieve a certain goal by using a fixed set of resources. This ability is often referred to as the ability to think algorithmically, although the term "structure of action" somewhat broader than the classical definition of the algorithm.

- Ability to build information models to describe objects and systems. A person using the accumulated data of machine systems, liberated from the description of the data structures must, however, always be aware of the used value ranks and their interrelationships. It is important to imagine the structure of information objects in a formalized manner. The value of this skill is increased due to the proliferation of integrated information systems,

- Ability to organize a search for information needed to solve the problem. The solution can only be effective when volume of information needed for its solution is correctly defined, and the search is properly organized.

- Discipline and structuring of communication language means is the ability to properly, accurately and clearly articulate the idea in an understandable form, and the other party should correctly understand the text message.

- Technical skills of interaction with computer.

Most experts agree on the need for implementation in primary schools the propaedeutic course of computer science starting with primary school or preschool. Expansion of the list of general learning skills of students is mainly due to the skills related to the use of information and communication technologies (ICT), which is reflected in the " Education Development Concept of the Republic of Kazakhstan till 2015."

According to this document it is planned to switch to a new model of secondary education with a 12-year course of study. The first stage is starting from the age of six. The content of education at this stage is completed earlier (from the beginning of schooling) with study of computer science fundamentals. Restrictions of age in early computer science education are now considered obsolete. They were based on the fact that for learning the basic concepts of computer science it is necessary to form the basic skills of working with information (reading information from the screen, writing, typing information into the computer). Today, computer graphics and animation are not rely on basic skills, but more than that, are used effectively during the development of basic skills in the first grade when working with graphical coloured moving objects on the screen.

In connection with the earlier study of computer science it is a real opportunity at an early stage of education to establish a process for the formation of general skills of ICT. This approach promotes purposeful preparation of

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students to the systematic use of ICT in continuous individual study in a variety of  
educational, creative and practical activities.

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## **Comparative-Contrastive Analysis Of Phraseological Units In English And Kazakh Fairy Tales**

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**Abstract.** *Fairy tales have had very long history and they reveal ethnocultural values and dreams of any language. Initially they are composed for children, but, in fact they reveal truth in the world. The language of fairy tales have their own language, even when they start they have a very different ways. Fairy tales are based on comparativeness. They are about rich people and ordinary poor people, animals and birds, war and peace, nature and space and so on. Fairy tales might be positive and negative such as: happiness and misfortune, friends and enemies, love - hatred and many other characters of people. Therefore, very rich and stylistically individual colourful language is used in fairy tales to make them very fascinating and colourful for the reader or a listener. This article is based on comparative and contrastive analysis and through the expressions, like phraseological units we try to compare English and Kazakh fairy tales. Through the comparative and contrastive analysis we reveal differences and similarities of national ethno-cultural aspects of two languages. The main aim of the article is to give comparative-contrastive features of phraseological units in Kazakh and English fairy tales. It is given by the authors in revealing the formation of cultural and moral values of the compared languages which formed the results of the research.*

**Key words:** fairy tales, Kazakh and English languages, comparative and contrastive analysis, national ethno-cultural aspects.

### **Introduction**

In the age of science and technology, when humanity begins to move away from spiritual values more than ever, we appeal to the folk tales. In this article the author considers cognitive-educational characteristics of Kazakh and English fairy tales in teaching children. Phraseological unit is an aphorism which has a very broad sense: its meaning is to teach a person to find his own way in his life and be useful for others to form a society like a brick to build up a house. Mostly these kind of word-groups are compiled in special dictionaries of phraseological units. Phraseological units are divided into several groups according to different points of view in syntax. They are: idioms, clichés, proverbs and sayings, epigrams, allusions, puns, quotations and soon. Mostly American and British lexicographers call such phraseological units as idioms. We can also mention such dictionaries as: L. Smith "Words and Idioms", V. Collins "A Book of English Idioms" in Kazakh by Akhmetova S.G. 'Dictionary of English proverbs, sayings, phraseological units and methods of transmission in Russian, Kazakh and German languages' and etc. In these dictionaries we can find words, peculiar in their semantics (idiomatic), side by side with word-groups and sentences. In these dictionaries they are arranged and subdivided into different semantic groupings and themes. Phraseological units can be classified according to the ways they are formed, according to the degree of semantic meaning, according to the structure. In the present research we analyze phraseological units according to the functional peculiarities under some linguistic-cultural topics.

### **Methodology of the research**

This article is considered with the development and formation of phraseological units in the genre of fairy tales in Kazakh and English languages. The authors use the comparative- historical and contrastive research methods and gives comparative analysis. Comparative and contrastive analysis have been used in the ethno-cultural research and comparison of non-related languages: English and Kazakh on the basis of latest dictionaries of English-Kazakh phraseology and proverbs and sayings (more than 2000 units). As we have conducted research and the linguistic analysis of English and Kazakh fairy tales, we also selected other available methods for the research, like: descriptive analysis, statistical methods and etc. And the research comprises information on modern in old fairy tales in a contrastive manner. Here we follow the diachronic and synchronic approaches in the analysis of phraseological units in fairy tale development. The materials of the research work that represent studies in the classification of phraseological units. The material is based on fairy tales of the two languages. We also found different interesting stories and included them into the general materials, classic and traditional fairy tales.

### **Results and findings**

The knowledge of separate subtleties of language, including fairy tales, is one of ways of integration of the person in the system of world and national culture. In the history of studying phraseological units, mainly, phraseological units were attempts to find distinctive features. As we have analyzed and compared phraseological units in English and Kazakh from structural, functional and semantic aspect. We tried to give definitions of phraseological units from comparative and contrastive point of view. Here, we come to the following results:

Phraseological units are brief statements that contain some specific conclusions from social life. And despite of different culture and different languages tales can have the same plots, similar characters or their plots can differ totally, but they would have a similar moral value. Both cultures have used a variety of unreal people like Zhalmayiz kempir, The Beauty and the Beast or fairies, elves or trolls (in Kazakh and English tales), magical animals and trees that are highly intelligent and able to communicate with people. Fairy tales like a mirror reflect culture, traditions, history and mentality of the country.

The research studied phraseological units in folklore from both cultures. Based on the existing research results, the study compared a few classic traditional tales from both languages. Phraseological units are popular wisdom, code of rules of life, experiences, outlook about the outer world, practical philosophy, and historical memory.

Phraseological units are short, clever expression that usually contain some obvious truth coined by people whose names we don't know.

Phraseological units represent special interest for researches as they embody cultural-national outlook of every nation.

In general, English and Kazakh languages phraseological units have an unique character. On the whole phraseological units, even if they present a certain



pattern, do not generate new phrases. The main difference between the phraseological units in fairy tales is that they are based on the linguistic norms of the languages, word-order and grammatical peculiarities of compared languages.

### Discussion

Interlanguage comparison has the aim of which is the exposure of phraseological units and forms on the basis of a number of theoretical and practical trends of modern linguistic research. This includes the theory and practice of phraseography. But the question of determining the factors of interlanguage phraseological units as the main concept and the criterion of choosing phraseological equivalents and analogues as the aspect concepts is still at issue.

The analysis of special literature during the last decades shows that the majority of linguists consider the coincidence of semantic structure, grammatical (or syntactical) organization and componential (lexeme) structure the main criteria in defining the types of interlanguage phraseological conformities/disparities with the undoubted primacy of semantic structure. For example: "...*Once upon a time*", "*Kunderdin bir kuninde*".

Both Kazakh and English tales have the same beginnings with "*Once upon a time...*" – "*Kunderdin bir kuninde ...*" and same endings – "They all lived happily ever after" – "*Olar bakhitty gumir keshty*". All fairy tales discuss the events that happened in the long ago. Moreover fairy tales have a problem that needs to be solved and it often takes three tries to solve the problem. In both cultures tales have clearly defined Good characters vs. Evil characters. And they are characterized by similar expressions, like "*Sly as a fox*" – "*Tulkidey ku*", "*Enormous as a giant*" – "*Tauday dau/alyp*" and etc.

By phraseological units we know the branch of linguistics which deal with non-motivated or partially motivated expressions, idioms or word-combinations characterized by a certain transference of meaning. English and Kazakh fairy tales are rich in phraseological units. Phraseological units are used in speech in the aim of giving a certain air of loftiness and individual style. The style of writing and telling fairy tales has its own set expressions. As fairy tales are based on fantasy and imagination of peoples, they reserve a great variety of expressions. But they are also concerned with dreams of people in social life. While comparing phraseological units we give classification of phraseological units by giving example from English and Kazakh fairy tales. Most authors consider common characteristics of phraseological units as the distinctive features of phraseological units:

1. *Integrity* (or transference) of meaning means that none of the idiomatic components are separately associated with the objective reality. The meaning of the whole phraseological unit cannot be deduced from the meanings of its separate components: "*to kick the bucket*", "*to pass away*", "*to join the majority*", "*to give up the ghost*" in English – "*kaza taby*", "*mert bolu*", "*bahulik boly*" in Kazakh, "*to come into existence*" in English – "*dunyeye kelu*" in Kazakh.

2. *Stability* (lexical and grammatical) means that no lexical substitution is possible in a phraseological unit in comparison with free or variable word-combinations (with an exception of some cases when such substitutions are made

by the author intentionally): “to give a smile”, “to smile” (English)- “*kulimsireu*”(Kazakh). The experiments conducted in the 1990s showed that, the meaning of an idiom is not exactly identical to its literal paraphrase given in the dictionary entry. That is why we may speak about lexical flexibility of many units if they are used in a creative manner. Lexical stability is usually accompanied by grammatical stability which prohibits any grammatical changes;

3. *Separability* means that the structure of an idiom is not something indivisible, certain modifications are possible within certain boundaries. Here we meet with the so-called lexical and grammatical variants. To illustrate this classification we shall give some examples: “*as hungry as a wolf (as a hunter)*”, “*as safe as a house (houses)*” in English, “*kaskirday ash*”, “*Oz uym- olen tosegym*” in Kazakh.

4. *Expressivity* and *emotiveness* means that phraseological units are also characterized by stylistic colouring. In other words, they evoke emotions or add expressiveness to the unit: “*careful attention*”, “*heart burning smile*” in English – “*kulagina kuir aldi*”, “*kulkisi zhuregindi elzhiretedi*” in Kazakh.<sup>1</sup>

Comparing the three peculiarities of phraseological units discussed above (semantic, structural and contextual) we have ample ground to conclude that have very much in common as, the main criteria of phraseological units appear to be essentially the same, i.e. stability and idiomaticity or lack of motivation. It should be noted however that these criteria as elaborated in the three approaches are sufficient mainly to single out extreme cases: highly idiomatic non-variable and free (or variable) word- groups.

Thus “*red tape, mare's nest*” in English – “*kusting uyas?*” in Kazakh and etc. according to the semantic approach belong to phraseology and are described as phraseological fusions as they are completely non-motivated. According to the functional approach they are also regarded as phraseological units because of their grammatical (syntactic) inseparability and because they function, in speech as word-equivalents. According to the contextual approach “*red tape, mare's nest*” in English – “*kusting uyas?*” in Kazakh etc. make up a group of phraseological units referred to as idiomatic expressions because of the impossibility of any change in the 'fixed context' and their semantic inseparability.

The status of the bulk of word-groups however cannot be decided with certainty. They are formed with the help of these criteria because we have to deal not with complete idiomaticity and stability, but with a certain degree of these distinguishing features of phraseological units. No objective criteria of the degree of idiomaticity and stability have as yet been suggested. Thus, for example: *to win a victory* in English – *zheniske kol zhetkizu* in Kazakh, according to the semantic approach is a phraseological combination. Thus, because this type of phraseological unit is almost completely motivated and allows of certain variability *to win, to gain, a victory* in English – *zhetu, zhenip alu* in Kazakh. According to the functional approach it is not a phraseological unit as the degree of semantic and grammatical

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<sup>1</sup> S. G. Akhmetov, *Dictionary of English proverbs, sayings, phraseological units and methods of transmission in Russian, Kazakh and German languages*, Almaty, Mektep, 2009; V. Modestov, *English Proverbs and Sayings with their Kazakh equivalents*, Moscow, Khudezhstvennaya Literatura, 2000.

inseparability is insufficient for the word-group to function as a word-equivalent. Small hours according to the contextual approach it is literal meaning. However, we classify them according to the the functional approach. Phraseological units are partially motivated is decided differently depending on which of the criteria of phraseological units are applied. For example, in English *to have butterflies in the stomach*. This phraseological unit can cause an image like: *to be hungry* in Kazakh, as these languages have identical phrases like: “*shinde it ulidy, ishi shurildady*” in Kazakh language.

Another classification of phraseological units was suggested by acad. V.V. Vinogradov for Russian phraseological units. He developed some points first advanced by the Swiss linguist Charles Bally and gave a strong impetus to a purely lexicological treatment of the material. According to him the phraseological units were defined as lexical complexes with specific semantic features and classified accordingly. Phraseological units can be classified according to the degree of motivation and idiomaticity of their meaning. He pointed out three types of phraseological units:

1) phraseological fusions are completely non-motivated word-groups where the meaning of the whole expression is not derived from the meaning of components, it's highly idiomatic, e.g. *show the white feather* – *akirin soyleu, to talk through one's hat* – *auzina kelgendi aytu, a fishy story* – *akimak bolu, on Shank's mare* – *zhayau zhalpi*;

2) phraseological unities are partially non-motivated word-groups where the meaning of the whole can be guessed from the meaning of its components, it's less idiomatic, e.g. *to show one's teeth* – *birange tisin kairau, to stand to one's guns* – *rayinan kaitpau, to skate on thin ice* - *basin baygege tigu, to be caught napping* – *basi katu*. Phraseological unities can vary structurally, substitutions of their components are sometimes possible, e.g. *to stick to / hold / stand one's ground* – *oz oyinan kaitpau, old boy / chap / fellow* – *zhigit/ bozbala/ zhasospirim, against / for a rainy day* – *basina is tuskende*.

3) phraseological combinations (collocations) are relatively stable motivated word groups which contain one element used in its direct meaning, while the other is used metaphorically, e.g. *to meet the demand / the requirements / the necessity / the needs* in English – in Kazakh there are also exist these types of expressions: *talapka, khabzhettylikeke say bolu*. Another expressions, like *to break a word / a promise / an agreement / a rule* in English coincide with - *sozinde/ uadesinde/ oyind turmau or sozin/ isin/ uadesin buzıu* in Kazakh. These above substitutions are not synonymic as the meaning of the whole changes, while the meanings of the verbs ‘meet’, ‘break’ – *turmau, buzıu* are kept intact.<sup>2</sup>

While analyzing phraseological units we noticed that all these three aspects of phraseological units are widely used in fairy tales. They are used according to peculiarities of languages, morphological, semantic and syntactic norms. The problem of the classification is that it's difficult to distinguish between the phraseological fusions and phraseological unities based on the principles of motivation only. They are used according to situation and content of discourse.

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<sup>2</sup> S. S. Kuzmin, N. L. Shadrin, *Russian-English dictionary of phraseological unities*, Lan, 1669.

There is still another approach to the problem of phraseology. Here, the attempt is made to reveal the shortcoming of the phraseological theories discussed above. The main idea of this new approach which is now more or less universally accepted by Russian linguists are as follows:

1. Phraseology is accepted as a self-contained branch of linguistics and, not as a part of lexicology;

2. Phraseology deals with a phraseological subsystem of language and not with separate phraseological units;

3. Phraseology is concerned with all types of word-combinations and set expressions;

4. Phraseological units are divided into three classes: phraseological units (e.g. , *once in a blue moon, to cry for the moon, under the rose* in English and *aiga kol sozu, teniz tubinde* in Kazakh and etc.), phraseomatic units (e.g. *win a victory – zhaniske zhetu* and etc.) and borderline cases belonging to the mixed class. The main difference between the first and the second classes is semantic: phraseological units have fully or partially transferred meanings while components. Mostly phraseomatic units are used in their literal meanings: They are used English and Kazakh fairy tales very widely, for example: *to come to one's sense – oinyan kaitu; to come home – esin zhyu; to fall into a rage – ashuga minu.*

5. Phraseological and phraseomatic units are not regarded as word-equivalents but some of them are treated as word correlates: *a millstone round one's neck – auyr zhuq koteru;*

6. Phraseological and phraseomatic units are set expressions and their phraseological stability distinguishes them from free phrases and compound words: *at one's own sweet will – oz erkimen;*

7. Phraseological and phraseomatic units are made up of words of different degree of wordness depending on the type of set expressions they are used in, for example: *to fall in love- gashyk bolu.* Their structural separateness, an important factor of their stability, distinguishes them from compound words (for example: *sing like a lark- bulbulday sayrau;*).

Other aspects are stability of using set expressions are lexical stability and semantic stability.<sup>3</sup>

8. Stability of use means that set expressions are reproduced ready-made and not created in speech. They are not elements of individual style of speech but language units: *as good as gold – altynday sary; red as a cherry kulpinaidai kizil.*

9. Lexical stability means that the components of set expressions are either irreplaceable (e.g. *red tape, mare's nest*) or partly replaceable within the bounds of phraseological or phraseomatic variance:

- lexical valency (e.g. *a skeleton in the cupboard – a skeleton in the closet – yu artinda kisi bar*).

- grammatical valency (e.g. *to be in deep water – to be in deep waters – yndemegennen uidey pale shigady*),

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<sup>3</sup> \*\*\*, *English-Russian proverbs and saying with illustrations*, Moscow, 1995.

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- positional valency (e.g. *head over ears – over head and ears – basinan ayagina deyn*),

- quantitative valency (e.g. *to lead smb a dance- to lead smb a pretty dance – bireudy buge shakiru*),

- mixed variants (e.g. *raise (stir up) a hornets' nest about one's ears- arouse (stir up) the nest of hornets – tynish otyrgan burkitti kuirigi shukip urkaity*).<sup>4</sup>

10. Semantic stability is based on the lexical stability of set expressions. Even when occasional changes are introduced the meaning of set expression is preserved. It may only be specified, made more precise, weakened or strengthened. English proverb “*The last straw breaks the camel's back*” has the same meaning in Kazakh understanding: “*Songy tyuenin zhubgi aur*”. Here we can confirm that this proverb took its beginning from Islamic countries, as Muslims used camels to carry things on camels. Another proverb: Eng. “*Like husband, like wife*” – Kazakh: “*Apama zhabzdem say, apama zhandgem say*” are linguistic universals. Because one can't say than this proverb from this or that language, and origin of the proverb is not clear.

According to linguists Kazakh Alipova A. T., Bekkozhanova G. H.: “Some phraseological units of the source language and the target language may express the same idea and be based on similar though not identical images. In such cases it is possible to ignore slight differences between the meanings. And even if the meaning is partially changed in comparison with that of the source language, it can still be accepted: burnt child dreads of the fire – *ayzy kyigen ypin iuedi* (Kazakh). In this example the difference between the English, Russian and Kazakh variants seem to be rather serious: there is no lexical correspondence between the words.”<sup>5</sup>

All peoples have families and the understanding of a husband and a wife is similar according to their roles and places in families. In other words in spite of all occasional phraseological and phraseomatic units, as distinguished from free phrases, remain semantically invariant or are destroyed.<sup>6</sup> For example, the substitution of the verbal component in the free phrase to raise a question by the verb *to settle* – “*to settle a question*” changes the meaning of the phrase, no such change occurs in “*to raise (stir up) a hornets' nest about one's ears*” – in Kazakh “*surak tudi- surak tuyndadi*” have the similar meaning.

Saifutdinova A.S, Tastemir A.A, Adilova A.N, Abieva D.N consider “Phraseological units or idioms as they are called by most western scholars represent, what can probably be described as the most picturesque, colorful and

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<sup>4</sup> T. Baimakhanov, A. A. Baytelyev, N. I. Utesheva, N. Taytuleuova, *English set expressions with Russian, Kazakh equivalents*, Almaty, Mektep, 2008.

<sup>5</sup> <http://ubplj.org/index.php/bjll/article/view/210>, accessed 12. 06. 2017. A. T. Alipova, G. H. Bekkozhanova, "Some peculiarities in the usage of Kazakh, English and Russian phraseological units: proverbs, sayings and idioms," in *Journal of Buckingham*, 2011.

<sup>6</sup> S. G. Akhmetova, *Dictionary of English proverbs, sayings, phraseological units and methods of transmission in Russian, Kazakh and German languages*, Almaty, Mektep, 2009; Dashevskaya V. L. Mueller, V. A. Kaplan et al. V.A. et al. - 7 th edition, *A stereotype*, 7<sup>th</sup> edition, Moscow, Eng. lang., 2000; \*\*\*, 880s. *Outi Laubakangas, The Matti Kuusi International Type System of Proverbs. FF Communications No. 275*, Helsinki, Suomalainen Tiedeakatemia (Academia Scientiarum Fennica), 2001.

expressive part of the language's vocabulary. In folklore among all the variety and richness of its poetical significance and form it is difficult to find more interesting and researchable genre than phraseological units: proverbs and sayings. It was the subject of deep study of scientists in most different ideological branches".<sup>7</sup> Proverbs and sayings are also part of phraseological units. In this research we dealt with general phraseological units, without paying attention special types of phraseological units, like: proverbs and sayings, idioms, epigrams, quotations and etc.

Writers use a lot of phraseological units in their works, because they supply informative and descriptive functions. The study of the Kazakh and English phraseological units is very important, especially, for interpreters of these languages. The correct usage of phraseological units while translating any other work of art we should pay close attention to this point, and that is the reason of the study of the theme we have taken under discussion.

So, we express any idea or plot of the work in translation as in original that demands a person's high skill and deep knowledge. Phraseological units are not translated, but they are only transferred through equivalents. This article is considered with comparative analysis of phraseological units of fairy tales in Kazakh and English languages. As a result of the research we can confirmly state that the fairy tales are formed by means of using definite phraseological units of literary language. Their use and functions are same in two compared languages.

### **Conclusion**

The research results provide important support to categorizing the tales from two cultural systems, to identify the similarities and differences in phraseological units. Phraseological units in fairy tales of two countries have almost the same elements and types.

The article comprises information on modern and old fairy tales in a contrasting manner. The importance of the present article is in the possibility of development of the best mutual understanding and rapprochement of the people through detailed acquaintance with the history of the origin of fairy tales, and also for outlook expansion.

So, this article is considered with the conceptual mapping of myths in fairy tales of Kazakh and English languages. The authors use the comparative- historical and contrastive research methods and comparative analysis is given through phraseological units. Fairy tales themselves are universal features of language, because all languages have fairy tales having similar contents and forms.

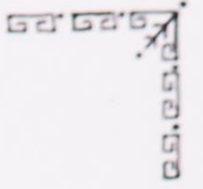
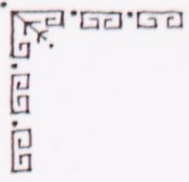
Having analyzed and compared the word-stock of proverbs and sayings in English and Kazakh languages we revealed the following tendency: the considerable number of paremias is devoted to peoples' experiences and most of them contain rich national wisdom and experience. The lingua-cultural aspect of

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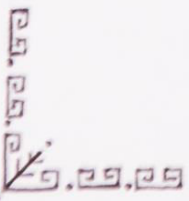
<sup>7</sup> A. S. Saifutdinova, A.A. Tastemir, A. N. Adilova, *Abieva Some similarities and differences in the usage of English and Kazakh phraseological units// D.N// <http://group-global.org/ru/publication/44752-some-similarities-usage-kazakh-and-english-phraseological-units>, accessed 12. 06. 2017.*

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proverbs and sayings is the multi-faceted phenomenon and some aspects of it can be the subjects of the research of different sciences. In the scope of functional and semantic aspect of phraseological units in compared languages, we can say that in all languages phraseological units are complex language units that should be studied from different positions. In future the main types of phraseological units according their semantic, structural and syntactic patterns should be taken into consideration as they are complex language units.



# *Education and Pedagogy*







## The Impact Of Science Museum On Education In Iranian Schools

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**Abstract.** *In this study, the effect of the Museum of Science on Iranian school education has been studied. Considering that each year, due to various reasons such as lack of time and space and laboratory facilities in Iranian schools, the process of conducting research and laboratory activities is weaker than before; in this article, the effect of science museum on education from the perspective of influence Personal impacts, social impacts, political impacts, and economic impacts. The findings show that the Science Museum can be effective in education.*

**Key words:** science museum, Iranian school, Personal impact, Economic impact, Social impacts, Political impacts, Education.

### History of the Science Museum

The public museum as understood today is a collection of specimens and other objects of interest to the scholar, the man of science as well as the more casual visitor, arranged and displayed in accordance with the scientific method. In its original sense, the term 'museum' meant a spot dedicated to the muses - 'a place where man's mind could attain a mood of aloofness above everyday affairs.'"

As early as the Renaissance, many aristocrats collected curiosities for display to their friends. Universities and particularly medical schools also maintained study collections of specimens for their students. Such collections were the predecessors of modern natural history museums. The Utrecht University Museum, among others, still displays an extensive collection of 18th-century animal and human "rarities" in its original setting.

Another line in the genealogy of science museums came during the Industrial Revolution, with great national exhibits intended to show case the triumphs of both science and industry. For example, the Great Exhibition in The Crystal Palace (1851) eventually gave rise to London's Science Museum.

A science museum or a science centre is a museum devoted primarily to science. Older science museums tended to concentrate on static displays of objects related to natural history, paleontology, geology, industry and industrial machinery, etc. Modern trends in museology have broadened the range of subject matter and introduced many interactive exhibits. Many if not most modern science museums - which increasingly refer to themselves as 'science centers' or 'discovery centers' - also put much weight on technology.<sup>1</sup>

#### • The Science Museum in America

In America, various Natural History Societies established collections in the early 1800's, which evolved into museums. Notable was the early New England Museum of Natural History which opened in Boston in 1865.

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<sup>1</sup> A. Shekarbaghani, *Design and development of mechanisms for creating museum and science and technology exhibitions in each of the country's cities. Full research reports*, Educational research Studies, Tehran, 2016.

The modern interactive science museum appears to have been pioneered by Munich's Deutsches Museum in the early 20th century. This museum had moving exhibits where visitors were encouraged to push buttons and work levers. The concept was taken to the U.S. by Julius Rosenwald, chairman of Sears, Roebuck and Company, who visited the Deutsches Museum with his young son in 11011. He was so-captivated by the experience that he decided to build a similar museum in home town of Chicago. The Chicago Museum of Science and Industry opened in phases between 11033 and 11050.

In the mid-twentieth century, Frank Oppenheimer included interactive science exhibits at San Francisco's Exploratorium. The Exploratorium made public the details of their own exhibits in published "Cookbooks" that served as an inspiration to other museums.

Opened in 11067, the Ontario Science Centre continued the trend of featuring interactive exhibits, instead of just static displays. Most science centers have emulated this since.

Four years after the Exploratorium opened, the first OMNIMAX theater opened as the Reuben H. Fleet Space Theater and Science Center in San Diego's Balboa Park. The tilted-dome Space Theater doubled as a planetarium. The Science Center was an Exploratorium-style museum included as a small part of the complex. This combination interactive science museum, planetarium and OMNIMAX Theater set the standard that many major science museums follow today.

As the flavor of interactivity crossed the Atlantic, the massive Cite des Sciences et de l'Industrie opened in Paris in 11086, and smaller but no less influential national canthers soon followed in Spain, Finland and Denmark. In the UK, the first interactive centers also opened in 11086 on a modest scale, but the real blossoming of science centers was fuelled by Lottery funding for projects to celebrate the millennium<sup>2</sup>.

The mission statements of science centers and modern museums vary. But all are united in being places that make science accessible and encourage the excitement of discovery. They are an integral and dynamic part of the learning environment, promoting exploration from the first 'Eureka!' moment to today's cutting edge research.<sup>3</sup>

- The Science Museum in London, United Kingdom

Universally known as just "The Science Museum." Unlike many other institutions referred to as science museums, the Science Museum is primarily a historical museum and not a demonstration exhibit (although it does contain such science centre installations as well). It includes such famous items as many of the

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<sup>2</sup> T. H. Krakauer, *The North Carolina Museum of Life and Science: Economic Impact Analysis*, Durham, North Carolina, The North Carolina Museum of Life and Science, 2011, p. 1.

<sup>3</sup> J. H Falk, L. D. Dierking, *Learning from Museums: Visitor Experiences and the making of Meaning*, Walnut Creek, AltaMira Press, 2000.

first steam engines, Stephenson's Rocket steam locomotive, the original models of DNA, the first MRI machine, the first jet engine, and more<sup>4</sup>.

Iranian National Museum of Science and Technology (INMOST)

Iranian National Science and Technology Museum (INMOST) is the key historical, scientific and cultural project. INMOST is the national tourist spot of important science education and leisure travelling base.<sup>5</sup>

With the theme of “History of Science and Technology” demonstrated by modern digital and interactive methods, INMOST works for promoting scientific and cultural quality of the whole citizens and sharpening the comprehensive competitive edges of Iran.

Iranian National Science and Technology Museum currently has opened 6 thematic exhibition halls to the public. They are: Alternative Energy, Ancient Indigenous Technologies, Physics, Surgery and Astronomy Instrument, Communication and Science center.

The building, designed by French architect André Godard and completed in 1937, is one of the more attractive modern buildings in Tehran, blending Sassanian principles with art deco–style brickwork.

### **Goals**

- Improve the public understanding of science and technology
- Shaping the future by preserving our heritage, discovering new knowledge, and sharing our
  - resources with the world
  - Encourage inquisitiveness and curiosity.
  - Scientific communication with young inventors and those offering new ideas.

### **Values**

- Discovery: Explore and bring to light new knowledge and ideas, and better ways of doing business
- Creativity: Instill our work with imagination and innovation
- Excellence: Deliver the highest-quality products and services in all endeavors
  - Diversity: Capitalize on the richness inherent in differences
  - Integrity: Carry out all our work with the greatest responsibility and accountability
  - Service: Be of benefit to the public

### **The aims of the study**

1. To collect reports and studies on the roles played by science centers in different communities.
2. To summarize and present these studies in a useful, accessible way.
3. To identify the impact of science centers on education.

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<sup>4</sup> P. Greene, *Reinventing the science museum - The Museum of Science and Industry in Manchester and the regeneration of industrial landscapes. The European Museum Forum Annual Lecture 2001*, Gdansk, 2001.

<sup>5</sup> www.irstm.ir, accessed 12. 06. 2017.

### **The methods**

I began by gathering existing reports of studies into the impact of science centers on their communities. To acquire these studies, I sent emails to science centers and museums in science center networks requesting copies of published and unpublished reports relating to the impact of their institutions on their surrounding communities. I also wrote to Iranian colleagues who had recently carried out research in science centers, asking them to recommend relevant articles on the impact of science centers. I also identified and listed a small number of key papers in the field that I considered particularly useful for the aims of the study.

### **The impact of science museums**

The *impact* of a science museums or science center is defined as the effect or influence that a science center has on its community of interest.

The *community of interest* is the group of people and organizations that the science center considers to be its clients or potential clients<sup>6</sup>.

The *Personal impact of a science center* is defined as the change that occurs in an individual as a result of his/her contact with a science center<sup>7</sup>. It includes factors such as:

- Science learning
- Changed attitudes to science
- Social experience
- Career directions formed
- Increased professional expertise
- Personal enjoyment

The *Societal impact of a science center* is defined as the effect that a science center has on groups of people, organizations, and on the built and natural environment.<sup>8</sup> Examples of societal impact are:

- Local/regional/international tourism
- Community leisure activities
- Youth employment
- Community partnerships
- Volunteer schemes
- Local clubs and societies
- Urban redevelopment
- Environmental restoration

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<sup>6</sup>E. P .Persson, "Community Impact of Science Centers: Is there Any? Curator," in *The Museum Journal*, VIII (2000), no. 1, p. 9-18.

<sup>7</sup>B . Piscitelli, D. Anderson "Young children's learning in museum settings", in *Visitor Studies Today*, III (2000), no. 3.

<sup>8</sup> .B Sheppard, "Do museums make a difference? Evaluating programs for social change. Curator," in *The Museum Journal*, VIII (2000), no. 1, p. 63 - 74.

- Infrastructure: roads, parking, transport

*The Political impact of a science center* is its influence on government policies and priorities. It is its impact on all levels of Government.

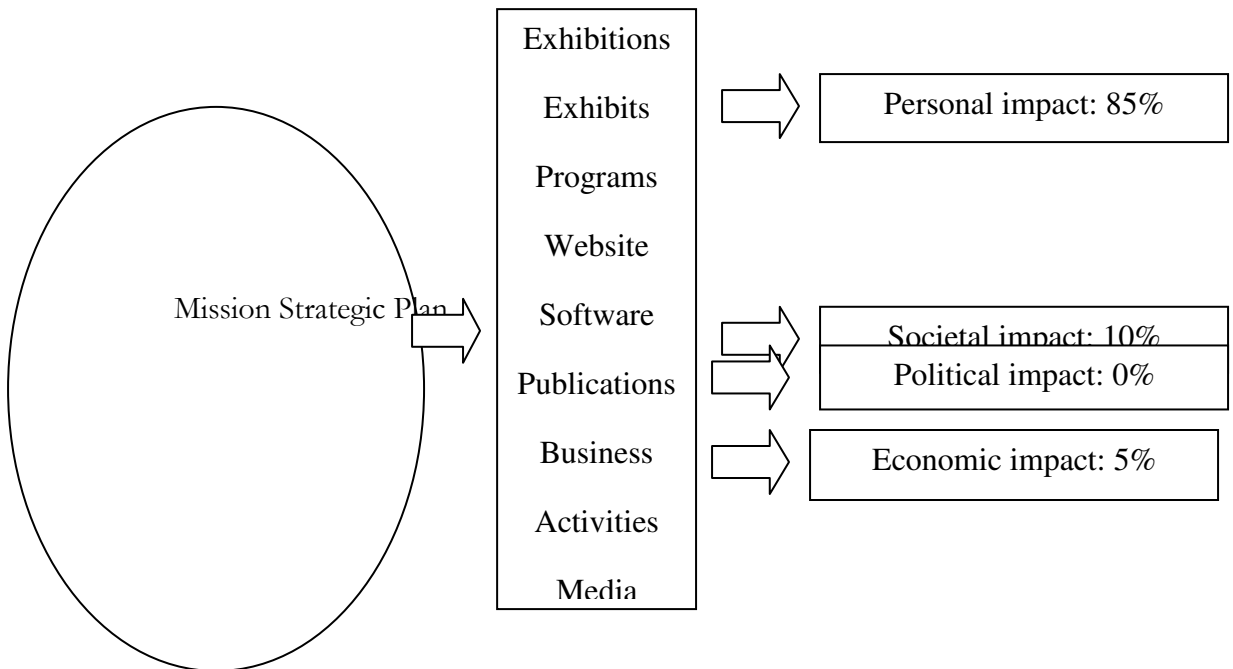
*The Economic impact of a science center* is the direct and indirect effect it has on employment and the local economy.<sup>9</sup> It includes measures such as:

- Income brought into the science center from visitors
- Income brought into community by visitors
- Science center expenditure
- Job creation for staff and outside providers

## RESULTS

The number of studies of the impact of science centers has increased greatly in recent years. Science centers themselves are taking greater initiative in generating such research, as the need to be accountable to their funding bodies and the pressure to reach wide, diverse audiences has increased. The analysis in this report is based on the reports provided by science centers and colleagues rather than from a complete survey of the literature in the field.

### ScienceCenter



<sup>9</sup> .I Morey and Associates, I. (2001). "Economic Impact Analysis of The Tech Museum of Innovation on Santa Clara County 1999," in *The Tech Museum of Innovation*, I (2001), p. 30.

Published and unpublished reports seen in this study

By far the majority of the reports received (85%) focus on aspects of 'Personal impact'. Some studies relate to Societal impact (10%) and Economic impact (5%) and, perhaps predictably, there were no published or unpublished studies on the Political impact of science centers.

The Personal impact of science centers Percentage of reports relating to different categories of personal impacts

Science Learning	Change Attitudes To Science	Enjoyment	Career Choice	Other
52%	20%	12%	9%	7%

Within the Personal impact category most studies are concerned with science learning in science centers. Some studies look at the effect of science centers in changing attitudes to science and the enjoyment of visitors. A very few are concerned with the impact of science centers on career choice and on the professional development of teachers.<sup>10</sup>

The figure above shows that 50% of the research studies collected focused on students (primary, secondary and tertiary students). Studies of families, teachers and young children were much fewer. The frequency of research studies for particular audiences does not reflect the frequency that these groups visit science centers.

Rennie and Williams (2000)<sup>11</sup> studied the effect of a visit to a science center on the image of science held by adult visitors. 'In summary, the findings of this research are very encouraging. Clearly, a visit to the Center makes a measurable impact on most of the visitors. Given the short time of the visit, that adults often were in charge of children, and that they all bring unique combinations of background knowledge and experiences and consequently have different visit experiences, it is surprising that any effect was measured.' However, the authors express some concern that, as a result of the visit, visitors became stronger in their opinion that scientists agree with each other and that science provides definite answers – views that do not reflect an increased understanding of the way that progress in scientific knowledge is made.

<sup>10</sup> .D. H Salmi, *Career choices and Heureka. Unpublished memo*, Heureka The Finnish Science Center, 2000.

<sup>11</sup> .L. J Rennie, G. F. Williams, *Science centres and the image of science. Annual meeting of the American Educational Research Association*, New Orleans, 2000.

Falk (2001)<sup>12</sup> have stressed the important role of 'free-choice learning' in the public understanding of science i.e. learning from out-of-school educational experiences. As part of a ten year L.A.S.E.R. project that they are undertaking in collaboration with the Californian Science Center, they interviewed over a thousand Californian residents and found that they had a high level of interest in science and technology, regardless of age, race ethnicity, income, education and gender. The people they interviewed also considered that their knowledge of science was average or slightly higher than average. Almost everyone could name at least one area of science that really interested them and nearly half of all those surveyed said they had learned their science and/ or technology during their leisure time<sup>13</sup>. Museums ranked fourth, after books, life experiences, TV and school as a source that interviewees used 'some or a lot' for learning about science and technology.

In summary, what do we know about the impacts of informal learning in science museums, zoos and aquariums, and where should we go from here?

1. That there are some impacts, and they are intellectual, emotional and physical, planned and unplanned.

2. The orientation, both psychological and spatial, is a very important factor that can influence impacts, positively and negatively.

3. That impact are socially influenced and enhanced, most positively by exhibit characteristics that are appropriate to informal learning such as interaction, sharing, parental guidance and intimacy between visiting group members.

4. That impact are environmentally influenced and enhanced, most positively by exhibit characteristics that are suitable to informal learning settings, such as concrete experiential activities, reinforcement of concepts and efficient communication techniques.

5. The measurements of specific impacts with the traditional tools of experimental design are often inappropriate for the confounding variability of informal settings, making the results of such assessment often disappointing or insignificant.

6. That impact can be positively enhanced by using visitor feedback during the planning and development stages of exhibit design through front-end and formative evaluation.

7. That evaluation is essential to increasing the success of informal science learning in museums.

8. That future research on impact in museums needs to combine multiple, systematic methods and strategies that are appropriate to the voluntary, social, intrinsically motivated experiences that visitors have.

9. That there is a lot of room for improvement, even though visitors are coming to museums in droves and rarely complain.

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<sup>12</sup> .J. H Falk (ed.), *Free-choice science education*, New York and London, Teachers College, Columbia University, 2001.

<sup>13</sup> J. H Falk, "The contribution of free-choice learning to public understanding of science," in *Interciencia*, XXVII (2002), p. 62-65.



10. That improvement in the amount of impact on informal science learning in museums - and its objective appraisal - is essential if museums are to be held accountable to their claims of having an educational role in society.'

### **Conclusion**

In this project, over 100 papers were collected in response to a request for reports on the impact of science centers on their surrounding communities. The majority of research studies were found to concentrate on the impact of science centers on individuals. There is a need for more *long-term* studies of the impact of science centers on individuals. Some recent, long-term studies demonstrate that visits to science centers foster further interest in science and stimulate further enquiry far into an individual's life. New ways of questioning visitors are showing that almost all visitors gain some degree of learning from their experiences in science centers.

There are a small number of studies of the economic impact of science centers. These show that considerable employment and income is generated by science centers. More economic impact studies would contribute to a stronger public awareness of the positive effects that science centers have on employment and income creation in their local area.

The results of research into the impact of science centers are particularly valuable for the science centers that commission the research. However, it is helpful for other science centers if the initiators share their findings so that other science centers can quote the findings to substantiate their own cases. It is also beneficial for science centers to share the methodology they use for their research so that the results of several studies can be combined to make a stronger case for science centers as a whole.

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Gulmira MAILYBAEVA, Kuralay TULEUZHANOVA  
**Formation Of Teacher Readiness To Work With Disabled Children**  
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Gulmira MAILYBAEVA, Kuralay TULEUZHANOVA  
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**Abstract.** *The article deals with the problems of institutional preparation of teachers for primary grades to work with disabled children. The author reveals the goals, objectives and methods of research, and considers the qualification requirements for the training of graduates from higher educational institutions with a degree in "Pedagogy and methodology of primary education". Particular attention is paid to the formation of professional readiness of primary grades future teachers in the concept of a continuous education system development. Based on analysis of the current state of training the author proves the need of model development for the future primary grades teachers, which contains criteria and levels of preparation for future primary school teachers to work with disabled children. The readiness is considered as the formation of personality, formed during professional preparation, integrating motivational, informative and procedural components.*

**Keywords:** inclusive education, primary school teacher, disabled children, formation of readiness, model of specialist, integration.

## **Introduction**

Today, educational policies in many countries are characterized by orientation towards the expansion of access to regular schools for disabled children. These changes are expressed in the concepts of “early correction and pedagogical intervention”, “mainstreaming”, where the main focus is expansion of social contacts for disabled children with their peers during leisure activities. “Inclusion” suggests co-education, correctional and educational services.

“Inclusive education” characterizes modern educational policies in the United States and many countries in Europe, it means that regular schools creates an adaptive educational environment that meets the needs of all children without exception. “Barrier-free environment” creates fewer restrictions and promotes the inclusion. It can be seen that the concept of "inclusion" refers to the next step in the progressive movement towards creating a common educational space.

A significant event for the international education community was held under the auspices of UNESCO in 1994 in Spain (Salamanca city) The World Conference on Education for persons with disabilities. At this conference a declaration was adopted that proclaimed “inclusive education” as the main direction for development of education. The basic principle of inclusive education, defined by UNESCO, is acceptance of “all children in regular schools, regardless of their features and the creation of appropriate conditions for their learning through teaching methods focused primarily on the needs of children”<sup>1</sup>.

Kazakhstan over the past decades systematically and consistently carries out the education policy for disabled children, aimed at quality education. The widespread introduction of the integration and inclusion ideas in regular schools,

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<sup>1</sup> \*\*\*, *Salamanca Declaration: on the principles, policies and practices in the education of persons with special needs*, 1994.

especially primary schools in Kazakhstan is largely dependent on the personnel skills, that requires a change in the process of preparing future teachers for primary grades.

In this regard the need for new methodological training approaches and development of future specialist is determined, which result in the adjustment for training of the future teacher of primary grades working with children in an “inclusive” education.

Training of the future teacher to work with disabled children in primary grades is becoming one of the important tasks of pedagogical universities and teacher education as a whole, as the primary school is the first and main stage of learning in school. At this very stage knowledge and skills foundations are formed and student will multiply and develop them in the future. Therefore, the work system of each teacher and the school as a whole should aim for maximum disclosure and the formation of personality traits for each child, including a child with disabilities.

Improving the qualifying requirements for preparation of graduates in institutions of higher education, including primary school teachers leads to the development of structure for permanent refreshment of requirements.

Development of the content for training specialists on the basis of the structural and functional analysis of their activity allows us to solve a number of practical problems such as: the construction of a specialist model, the development of the conceptual foundations for the educational system development and organizational aspects of the educational activities in higher education.

## **Methods**

One of the main objectives of the study is development and justification of structural and content model of readiness formation for primary school teachers to work with disabled children.

The following groups of methods were used during the study:

- Theoretical: literature analysis, modeling general and private hypotheses of research, design of results and processes to achieve them at various stages of search;

- Empirical: interrogatory diagnostic methods (surveys, interviews, conversations), expert evaluation, the study of the pedagogical documentation, analysis of tests, observations, generalization of pedagogical experience, diagnostics of individual components of the teacher professional readiness, experimental work, diagnostic and formative experiments on individual educational opportunities means and their groups;

- Statistical: mathematical and statistical analysis of the study results, calculation of distribution, correlation of coefficients, evaluation of statistical significance of the hypothesis, etc.

To execute the research of teachers’ activities in primary grades it is necessary to carry out structural and functional analysis of readiness level for graduates of higher education institutes in addressing their issues in a particular direction of profession with the definition of the most important types (knowledge,

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skills, abilities, personal qualities). During the professional activities study of future primary school teachers the education system is considered in the concept of development for personality and profession, etc. The aim of the structural and functional analysis of future teacher activity is the ratio of each activity in the generalized content with the definition of level importance and selection of more significant criteria.

In this context the study of primary school teachers activities in a regular school is conducted. Formation of sample will be performed in organizations and institutions of general education. The students with a degree in "Pedagogy and methodology of primary education" are respondents who will participate in the study. In addition, the study involved specialists of all levels of qualification, who work with disabled children. These specialists are principals and teachers of primary grades in schools, which educate disabled children, as well as a psychologists, special education teachers, speech therapists, social teachers in schools offering correction pedagogic support. Thereby we form set of samples that will help to provide a sufficiently high accuracy for the main objective.

To improve further the training of future primary school teachers it is necessary to create and use an expert system based on the study and forecasting of future activities, this includes the gradual application of expertise and the development of appropriate tools (questionnaires, lists, tables, statistics, expertise requests, etc.) and if necessary add the mathematical modeling.

Development of questionnaires for survey of specialists teaching disabled children should aim to systematize the content of their activities on the functional and problematic principles. It is known, that the components for the development of the graduate training content is profессиogram. For that purpose a method of questioning the presence of components is established (design, research, management, organization, education and methodic, innovative, correction, etc.).

Analysis of the the functions performed by primary school teachers, allow us not only explore the professional activity, but also to build a model of its preparation, since the functions structuring serves as a basic principle in the determination of specialties and specialization.

Before the study, all the tools in the form of questionnaires and checklists are checked by the control group of respondents and the results of the experiment are formed for each institution or organization. Region specificity is clearly shown when comparing the lists. Of course, this specificity is reflected in profессиogram of future primary school teachers.

In the course of further study a generalized list of problems is created, types of professional activity, function, which is a generalized activity model of the future primary school teachers. Choosing a professional model training level depends on the ultimate objective of the study:

- design and implement the model in the educational process of the high school for readiness of the future teachers to work with disabled children;
- develop methodical support for formation of readiness of the future teachers to work with disabled children, justify educational environment for the

effective formation of professional readiness of the future teachers to work with disabled children.

### **Literature Review**

In relation to the training and education of disabled children in international practice the terms “integrated education”, “inclusive education”, are interpreted in many meanings. Foreign practice of inclusion in education has a great experience. It is worth noting such works as “Improving Education” (Improving Education. The Promise of Inclusive Schools) released by National Institute of improvement of the US urban education,<sup>2</sup> “Inclusive education with limited resources” (Sue Stubbs. Inclusive Education Where There are few resources, 2002).<sup>3</sup>

Various aspects of education problems for disabled children are considered in modern researches in the field of inclusive education (F. González-Gil, E. Martín-Pastor, N. Flores, C. Jenaro, R. Poy, M. Gómez-Vela, F. Kurniawati, A. Minnaert, F. Mangunsong, W. Ahmed, M. Semago, Loshakova II, Alekhine, N.E., Alekseeva M.N., E.L. Agafonov, Yu.V. Shumilovskaya)<sup>4</sup> and in the field of integrated education (N.N. Malofeev, L.M. Shipitsyna, N.M. Nazarova, M.I. et al.)<sup>5</sup>

Problems of Inclusive Education were studied by Kazakh scientists such as R.A. Suleimenova,<sup>6</sup> Zh.I. Namazbaeva,<sup>7</sup> Z.A. Movkebaeva,<sup>8</sup> A.A. Baytursynova,<sup>9</sup> Oralkanova<sup>10</sup> and others.

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<sup>2</sup> *Improving Education. The Promise of Inclusive Schools. The manual of National institute of improving the USA Urban Education.* Site: <http://perspectiva-inva.ru>, accessed 12. 05. 2017. \*\*\*; Sue Stubbs, *Inclusive Education Where There are few resources. Manual*, Oslo, 2002.

<sup>3</sup> Francisca González-Gil, Elena Martín-Pastor, Noelia Flores, Cristina Jenaro, Raquel Poy, María Gómez-Vela. Teaching (eds.), *Learning and inclusive education: the challenge of teachers' training for inclusion. 3rd World Conference on Learning, Teaching and Educational Leadership – WCLTA 2012*, Elsevier Ltd, 2013.

<sup>4</sup> Farida Kurniawati, Alexander Minnaert, Frieda Mangunsong, Wondimu Ahmed, *Empirical study on primary school teachers attitudes towards inclusive education in Jakarta, Indonesia. International Conference on Education and Educational Psychology (ICEEPSY)*, 2012; M.M. Semago. "Interdisciplinary cooperation for inclusive education specialists", Site: <http://www.f-nashideti.ru/inklusiya/182-mezhdisciplin.html>, accessed 12. 06. 2017; I.I. Loshakova, *Problems of differentiated education for disabled children. Socio-psychological problems of education for disabled children*, Saratov, Published by Pedagogical Institute of SSU, 2002, p. 15-21; N.E. Alekhina, M.N. Alekseeva, E.L. Agafonova, "Readiness of teachers as a key factor of success in the formation of an inclusive process," in *Psychological Science and Education*, I (2011), p. 83-92; Yu.V. Shumilovskaya, *Preparation of the future teachers to work with students in the conditions of inclusive education. Ph.D. thesis in Pedagogical sciences*, Shuya, 2011; N. N. Malofeev, "Current state of correctional pedagogy," in *Defectology*, I (1996), p.3, p. 10.

<sup>5</sup> *Ibidem*; L.M. Shipitsyna. "Unteachable" children in the family and society: socialization of children with intellectual disabilities, Sankt Petersburg, SPb, 2002, p. 496; N.M. Nazarova, *Special pedagogy*, Moscow, Asadema, 2000.

<sup>6</sup> R.A. Suleimenova, *Organizational and technological bases of pedagogical correction assistance children with disabilities (based on material gathered in the Republic of Kazakhstan). Thesis of Ed. D.*, Moscow, 2011.

<sup>7</sup> Zh. I. Namazbaeva. *Psychological problems of modern higher education*, Almaty, DOIVA, 2007.

<sup>8</sup> Z.A. Movkebaeva, "The development of inclusive education in the Republic of Kazakhstan," in *Bulletin of Kazakh National Pedagogical University named after Abay ("Special pedagogy")*, XXXII-XXXIII (2013), no. 1-2, p. 67-70.

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Readiness for the professional activity is described in pedagogical science by the following scientists: N.D. Khmel,<sup>11</sup> V.A. Slastenina,<sup>12</sup> K. M. Durai-Novakova,<sup>13</sup> M.N. Sarybekova,<sup>14</sup> N.N. Khan, K.K. Zhampeisova, S.Z. Kolumbaeva,<sup>15</sup> and others.

In studies of such scientists as Mira Aliza Rachmawati, Thobagus Muh. Nu'man, Nur Widiasmara, S. Wibisono<sup>16</sup> the readiness of teachers to work with disabled children is mainly investigated to identify the attitudes of teachers towards inclusive education.

Regarding the problem of our study the following scientific works are worth noticing, that dedicated to the formation of an inclusive readiness and competence of teachers (I.N. Khitryuk, S.V. Alekhin, M.N. Alekseeva, E.L. Agafonov et al.),<sup>17</sup> preparation for work with children with developmental disabilities (D. Bjekiü, S. Obradoviü, M. Vuþetiü, M. Bojoviü, etc.),<sup>18</sup> integrated education (S.N. Churakova et al.);<sup>19</sup> work with children who experience learning difficulties (O.F. Baybakova et al.);<sup>20</sup> work with disabled children (David Mitchell, T.L. Korzhenevich et al.).<sup>21</sup>

## Results

Formation of readiness for primary school teachers to work with disabled children requires a theoretical foundation and development of pedagogical support

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<sup>9</sup> A.A. Baitursynova, *Organizational and pedagogical conditions of children with disabilities inclusion into the educational process of regular school: Thesis of Cand. Ed. Sc.: 13.00.03*, Almaty: 2010.

<sup>10</sup> I.A. Oralkanova, *Readiness formation of primary school teachers to work in the conditions of inclusive education. Thesis of Ph.D. Almaty*. 2014.

<sup>11</sup> N.D. Khmel, "Methodology of teacher training," in *Materials of the International scientific and practical conference "Scientific support of the functioning 12 years secondary education", in 2 volumes (April 20-21)*, Almaty, Kazakh National Pedagogical University named after Abai and Republican Research and Practice Centre of 12-year Education problems, 2007, p. S.55-60.

<sup>12</sup> V.A. Slastenin, "The dominant of activity," in *Narodnoe obrazovanie*, IX (1997), p. 41-42.

<sup>13</sup> K.M. Durai-Novakova. *Formation of professional readiness for the future teachers-defectologists to the pedagogical activity: Author's thesis Ed.D.*, Moscow, 1983, p. 42.

<sup>14</sup> M.N. Sarybekov, "Modernization of the higher pedagogical education in the Republic of Kazakhstan [Text]", in *Reports of the Kazakh Academy of Education*, II (2010), p. 4-7.

<sup>15</sup> N. N. Khan, K. K. Zhampeisova, Sh. Zh. Kolumbaeva, "Professional standard as a condition of effective activity of the modern teacher," in *Pedagogical dialogue*, I (2012), p. 176-181.

<sup>16</sup> Dragana Bjekiü, Svetlana Obradoviü, Milica Vuþetiü, Milevica Bojoviü.

<sup>17</sup> V.V. Hitryuk, "Pedagogical system of readiness formation of inclusive teachers," in *PSTGU IV Bulletin: Pedagogy. Psychology*, II (2015), no. 37, p. 17-18; N.E. Alekhina, M.N. Alekseeva, E.L. Agafonova, "Readiness of teachers as a key factor of success in the formation of an inclusive process," in *Psychological Science and Education*, I (2011), p. 83-92.

<sup>18</sup> Dragana Bjekiü, Svetlana Obradoviü, Milica Vuþetiü, Milevica Bojoviü.

<sup>19</sup> S. N. Churakova. *Preparation of the teacher to the integrated education of children with disabilities in the regular school. Thesis of Cand. Ed. Sc.*, Volgograd, 2003.

<sup>20</sup> O.F. Baibakova, *Readiness formation of the teacher in primary grades with children experiencing learning difficulties. Cand. Ed. Sc. Thesis*, Kursk, 2005.

<sup>21</sup> David Mitchell, *Effective educational technologies of special and inclusive education (Usage of research-based strategies of teaching in inclusive educational system)*, Translated by I.S. Anikeev, N.V. Borisova, Moscow, ROOI "Perpektiva," 2009.

for formation of readiness due to the fact that in scientific studies, this problem was not considered properly. The solution to this problem involves overcoming a number of contradictions between the following points:

- the trend of teaching disabled children in regular school and the problems of creating a special educational environment in educational institutions;
- the requirements of educational policy of the Republic of Kazakhstan imposed on the level of training for primary school teachers to work with disabled children and the insufficient development of the theoretical, methodological and practical approaches to its formation in the learning process;
- The need for theoretical training of primary school teachers, and unwillingness to work with disabled children.

These contradictions actualize the *research problem* of pedagogical support of readiness formation for the future teacher of primary grades to work with disabled children.

*The goal of our study* is theoretically justify pedagogical support of readiness formation for the future teacher of primary grades to work with disabled children and experimentally verify its effectiveness in professional education.

The main *objectives of the study* are an analysis of the modern state of readiness formation for the future teacher of primary grades working with disabled children; development and justification of structural and content model of readiness formation for the future teacher of primary grades to work with disabled children.

Preparation of the future teacher for primary grades to work with disabled children is determined today by one of the most important and significant tasks of pedagogical universities and the education system as a whole. Research analysis showed that future teachers are not adequately trained to work with children with learning difficulties in regular school. There are serious deficiencies in pedagogical practice of primary school teachers for the understanding of inclusive education, poor awareness of personal role in teaching children with special educational needs, low diagnostic competence, lack of knowledge and inability to use the psycho-pedagogical methods etc.

Educational practice in Kazakh schools proves that most of the teachers are not prepared to work effectively with children in the conditions of inclusive education. The strategic plan of the Ministry of Education and Science of the Republic of Kazakhstan for 2017-2021 noted, that "in 2015-2016 there are 141,821 or 2.7% of children with special educational needs out of 5.4 million children from 0 to 18 years. Among them 130 475 children (92%) are educating on programs with pedagogical correction support in educational institutions, health care organizations, social protection. 3210 schools around Kazakhstan created conditions for inclusive education in 2015-2016 that is 44.8% of the total number of state regular schools (in 2013-2014 - 29%, in 2014-2015 - 30%) ".<sup>22</sup>For this work with children it is necessary to have a qualified teaching staff, but over 70%

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<sup>22</sup> Order of the Minister of Education and Science of the Republic of Kazakhstan dated December 29, 2016 № 729 On approval of the Strategic Plan of the Ministry of Education and Science of the Republic of Kazakhstan for 2017-2021 years.

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of regular school teachers (as in traditional classes and in classes with inclusive education) have no sufficient ability for proper work in the conditions of inclusive education. In pedagogical practice, there are contradictions between the social procurement of competent teacher who is ready for productive interaction with children who have special educational needs, with their parents, supporting family in the conditions of inclusive education and the lack of science-based mechanism for the formation of the necessary psychological and pedagogical competence in the process of high school preparation; and between the needs of educational institutions in the teachers focused on humanistic interaction with a student's family, teachers and the underestimation of this aspect in their professional activity.

There are negative and positive trends in the development of the national inclusive education system. The negative trends are that the inclusive practice is spontaneous, boosting inclusive processes by increasing the number of inclusive institutions and the optimization of the network of special (correctional) educational institutions through their closure. There has been a formal transfer of foreign organizational models for inclusion into the national education system, the total inclusion of disabled children in general education organizations, lack of provisions to meet the special educational needs of students.

Positive trends are expressed in the organization of early intervention system for disabled children; availability of special conditions at educational institutions; implementation of psycho-pedagogical support.

Currently, a new approach to the training of future primary school teachers based on competence approach should be aimed at improving theoretical and practical aspects of Pedagogy course for elementary education and pedagogical practice in higher education institute.

In the system of professional training for future teacher it is important to create conditions not only for learning by pedagogical knowledge, but also to promote the development of creative activity that can generate new ideas to implement humanistic position that is based on involvement, empathy, understanding, acceptance of a child with disabilities. In the context of teacher's professional competence it is necessary to form humanistic life stance that defines professional guidance, the type of behavior and activity in work with disabled children.

In this regard, on the one hand, it is important to add information about inclusive education in university course content for preparation of primary school teachers in Kazakhstan, on the other hand, at seminars, during the teaching practice it is necessary to form professional competence in working with disabled children.

According to qualification characteristics of primary school teacher should be prepared to teaching, educational, methodological and organizational types of activity in the system of general education. On this basis, the specialist should have a set of general knowledge, erudition and culture, see the purpose of their professional activities, moral views, fundamental scientific and practical training, and master their profession. In addition to the professional knowledge of students with a degree in "Pedagogy and methodology of primary education" there should



be perfectly developed speech, sensitivity, artistry. These qualities have particular relevance today, when there is a global reassessment of the relationship to the children with special educational needs. In addition, an elementary school teacher must have a deep scientific, pedagogical and methodological training, high level of cognitive, social and political activity, since his professional activity is connected not only with the search for best practices to impact on healthy child, but also for a child with special educational needs, and with the ability to carry out teaching, research and administrative functions, as well as possess diagnostic skills and abilities.<sup>23</sup>

Inclusive education for disabled children is a process of inclusion in society and ensuring clear access to education. An important factor in the preparation of future teachers in conditions of inclusive education is to match their personal qualities with the requirements of the work with the students.<sup>24</sup>

It is obvious that this job description of the future primary school teachers should be the foundation for the development of the content, forms and methods of training such specialists in higher pedagogical education at the present stage of society development. It is necessary to consider both the empirical evidence and the scientific basis for the training of future primary school teachers, which will provide logic and sequence of study the disciplines, provide the creation of optimal conditions for the realization of interdisciplinary connections, and contribute to an adequate selection of the most effective forms of work with students.

There is no doubt in fact that the formation of readiness for primary school teachers to work with disabled children is implemented with the creation of the necessary conditions in the educational environment of high school, when students based on the knowledge and abilities are able to carry out the functions of socialization.

Conditions of the complex structure must be flexible, dynamic and meet the state of the system at this time. It should be developed according to the goals and objectives that face higher education. The process of readiness formation for future elementary school teachers is a pedagogical system, ensuring the efficiency of readiness formation. The process of readiness formation for students to this type of includes the following activities: training, scientific research, professional.

To conduct the study a methodological scheme was developed, which includes philosophical, general scientific, scientific and technological levels.

*Philosophical level* of research methodology is presented by dialectical approach, *general scientific level* by activity, systemic and constructivist approaches, scientific level by axiological, competency, personality-oriented and acmeological approaches, *technological level* by modeling.

During the study we relied on the *dialectical approach* that takes into account the basic laws of dialectics mechanisms of scientific knowledge. This approach is

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<sup>23</sup> \*\*\*, *State general education standard of the Republic of Kazakhstan*, Astana, 2010.

<sup>24</sup> G.S. Mailybaeva. *Features of the inclusive education organization. Materials of regional scientific and methodical conference "Introduction of innovative technologies in the educational process is the basis of quality education."* The Republic of Kazakhstan, Taldykorgan. February 12, 2016.

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recognized as the most productive and versatile in the work on the problems of education of children with special educational needs. As a general scientific base, this approach has allowed us to consider the socio-cultural phenomenon of conditioning training of teachers.

Under the *activity approach* we understand the theory, which is based on the idea of studying the mind and consciousness in various forms of objective activity. On the basis of the activity approach training is considered by us as an activity in the unity of its structural components, which ensures consistent formation of professional work in certain situations, pedagogical interaction.

For the study of complex biological and social autonomous systems we use a *constructivist approach*, which is based on the idea of knowledge as a model in which it is a state of the cognitive system as part of an observer own reality, socially and historically conditioned mechanisms of adaptation to it. This approach recognizes the active role of the subject, constructing reality in the process of organizing their own experience.

Constructivist approach will take into account the personal-cognitive self-reflexive and self-regulatory aspects of professional conduct; ensure the formation of professional identity of teachers for primary school and the effectiveness of their professional interaction, based on the professional value systems and norms of behavior.

The study also used the *axiological approach*, which allows us to consider professional education with the humanistic position as a process aimed at assigning human system of professional values. Axiological approach will provide the essence of humanistic study through the relationship to the person, including developmental disorders, as a subject of humanistic-oriented activities. On the basis of this approach hierarchical system of professional values and professional valuable qualities are defined and investigated for the future teacher of primary school.

*Competence approach*, which refers to the modeling results of education and representation them as standards of education quality, is an important methodological basis of the study. The semantic core of competency approach represented by the category of "competence", which is regarded as a level of readiness to the activities, the degree of mastery and ways of activity.

Using a personality-centered approach implies a consistent attitude of the teacher to the student as an individual, as a self-responsible subject of pedagogical activity, it leads to the conclusion that the formation of professional readiness should be focused on personal and professional development of future primary school teachers and the humanization of all kinds of teaching interaction. From the position of the approach it is intended to include every student in an active professional activity and reliance on his life experiences.

Personality-oriented approach provides the opportunity to study the process of readiness formation of primary school teachers in the context of personal and professional development of future graduates, develop a constructive humanistic foundations of pedagogical interaction with the priorities of the future teacher and priorities of students with developmental disorders.

As the professional competence of future graduates is considered as one of the main components of their initial professionalization, so as the methodological basis of study we used *acmeological approach*, which in pedagogy study a fruitful work of the teacher, which becomes the main criterion for his professionalism. We have analyzed the professionalism of the primary school teacher as a system composed of interconnected subsystems of individual and activity professionalism, which are formed in the process of professional development.

On the technological level the methodology of modeling is highlighted, the aim of which is to provide a structurally functional model of the system for training the future teacher of primary grades to work with disabled children. Modeling is the basis to organize and structure the information about the preparation of the future teacher of primary grades to work with disabled children.

During the modeling organizational and pedagogical conditions are formulated. These conditions contribute to the effective preparation of the future teacher for primary grades to work with disabled children:

- orientation of the subjects in teaching and educational process to form the competence during the interaction of primary school teacher with a disabled child; inclusion validated methods of diagnosis and self-diagnosis of students in the learning process, which is the basis for personal and professional growth, meeting their needs for self-observation and self-knowledge, prevention of learning crises, stimulation of the motivation development;

- personal involvement of each student in the professional activities and real correctional and pedagogical process throughout the period of study at the university; integration of psychological and pedagogical competent interaction of primary school teachers and children with special educational needs on the basis of interdisciplinary connections;

- Use of design method based on the formation of competence in interaction with disabled children, executing such functions as: diagnostic, self-knowledge, cognitive, programming, personal and meaningful.

"The laws underlying the readiness formation of the future teachers to work with disabled children, based on a number of psychological theories, one of which is the theory of D. Myers (David G. Myers) on the mutual influence of attitudes and behavior. It is clear that the results of the readiness formation in the conditions of inclusive education are due to the following aspects:

- 1) Content and organization of educational process for preparation of future teachers and psychological mechanisms of attitudes formation (associations, encouraging, understanding of personal profits and other.);

- 2) Reliance on psychological tools of changing the attitudes, namely, the central path of the probabilistic model of information processing, providing motivation conditions for the upcoming professional activities, as well as the formation of practical professional experience, etc .;

- 3) Reliability of the professional behavior forecast of the teacher (in communication situations, interactions, didactical solutions, methodical and other problems). Stability of the formed inclusive readiness of teachers and the possibility of its influence on professional behavior depends on the minimization degree of

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other influences (stereotypes, prejudices, xenophobia, etc.), the specificity and relevance in inclusive models of teacher readiness for professional behavior, as well as the force of inclusive readiness."<sup>25</sup>

The study of specialized literature allows us to develop a model, criteria and levels of future readiness for teacher to work with disabled children, where readiness is seen as a holistic education of the personality that has been formed as a result of training, integrating together motivational, informative and procedural components.

*Motivational component* determines the motives of future elementary school teachers in professional work and positive attitude working with disabled children. This attitude manifests itself in:

- Awareness of importance and necessity of knowledge of children developmental disorders;
- Availability and interest in learning children disorders, creative search for new ways and work methods;
- improving the willingness to work with disabled children.

*Substantial component* of teacher readiness for primary school includes combination of knowledge in diagnosing disorders in the development of primary school children, the content of methods, means and forms of organization of work with disabled children. The indicators of this criterion are:

- Knowledge of the goals, objectives, content, methods, tools and organizational forms of Correction and Development Education of disabled children;
- Knowledge in the field of disabilities development diagnosis in primary school;
- Knowledge of the characteristics development of primary school children;
- Knowledge of ways to improve self-education in working with disabled children.

*Procedural component* involves the formation of practical skills to use the best technologies working with disabled children, which are expressed in the following terms:

- The ability to apply knowledge in work with disabled children;
- The need for creative search of new ways to work with disabled children;
- Improving the willingness to work with disabled children;
- The ability to analyze and evaluate the results of activities with disabled children;
- The ability to carry out educational work and promotion of knowledge about the features of disabled children;
- The ability to monitor and critically evaluate activity in work with disabled children.

The implementation of the goal and objective of professional readiness formation for future teacher of primary grades to work with disabled children is possible when creating certain pedagogical conditions.

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<sup>25</sup> E-teacher in inclusive e-education for students with specific learning disabilities.

The following points are distinctive to such conditions:

- a) *Organizational*, providing direction in all teaching and educational processes of pedagogical high institution to develop the professional knowledge and skills of future primary school teacher working with disabled children;
- b) *Substantial*, suggesting the introduction of the updated programs in the educational process of elective courses that promote the readiness formation of the future primary school teacher working with disabled children;
- c) *Technological*, providing the establishment of the system for readiness formation of future primary school teacher working with disabled children, based on active learning methods, the use of educational programs and context-modular teaching.

On the proposed model basis of readiness formation of future primary school teacher with disabled children we create a pedagogical experiment, the results of which will justify the effectiveness of the proposed pedagogical conditions.

### **Discussion**

According to the opinion of the majority of foreign experts, the success of inclusion depends on the proper use of a whole range of pedagogical and psychological resources. This includes the professional competence of teachers; reorganization of the educational system and professional support of teachers; attitude toward the phenomenon of disability in teachers and children with regulatory developments and its impact on the productivity of inclusive education; changes in curriculum structure and space in the class in order to meet the needs of all categories of children.

In the theoretical and empirical studies conducted by specialists from the USA, UK and Europe, the main problems of inclusive education implementation was reflected, the solution of these problems is important for the professional community of experts in developed countries. It is noted that the success of inclusion depends on a positive attitude to it by teachers. In the study by B. Kagan, M. Schmidt used the technique "The Impact of Inclusion Questionnaire" ("The Impact of Inclusion Questionnaire", IIQ; Martinez and Hastings, 2004) .<sup>26</sup> It turned out that those teachers who were trained in various training courses had more positive attitude towards inclusion influence on all the parameters of the educational environment.

The article by T. Brandon and D. Charlton "The experience of Britain in the creation and development of teacher training center for inclusive education" examines the theory and practice of Centre for Excellence in Teacher Training creation (Centre for Excellence in Teacher Training, CETI) based at the University of Northumbria in England. The research activities of one of the new English centers involved the preparation of teachers for inclusive education, based on a partnership of teachers in high schools, colleges, training courses and the teachers

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<sup>26</sup> M. Schmidt, B. Kagan, "Psychological climate in the classrooms with children with special needs at the regular schools," in *Educational Studies*, XXXII (2006), no. 4.

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working with students with learning difficulties and/or disabilities, in order to provide practical experience. Relying on the expertise and experience the authors analyze the challenges and opportunities included in the project, and the changes that it can bring to the wider professional community.<sup>27</sup>

When we turn to international experience in the field of inclusive education (as in any other field) we do not mean simply copying the models that have worked successfully in one country or another. Logic and approaches to the implementation of inclusive education in different countries are very different. However, there are some general points which are useful and important to take into consideration. For example, experience of many countries shows that the key features of success in the implementation of inclusive education are the following: the availability of a well-organized parent community; substantial revision of curriculum development and teacher training; changes in the educational achievements evaluation system that would give the opportunity to all children, including children with limited development opportunities to work on individual training programs; search for optimal ways of contingency and mutual exchange of knowledge and resources between general and special education system. In all of these areas the world community has a great experience, but it should be used correctly and consistently, taking into account our realities.

Today in seven of eight school types (except schools for children with intellectual disabilities) Kazakhstani children receive education corresponding to state standards. This feature of special education in our country is preserved as a legacy of the Soviet system. The USSR was the only country in the world, giving children with limited development opportunities in special education schools, corresponded to standard.

But the transition to the "inclusive education" raises other challenges for the educational institutions. In regular schools, students there are children with limited development opportunities, and it is necessary to organize the same support for children in special education.

In accordance with the State program of education development until 2020, 70% of regular schools must create the conditions for educating children with special educational needs.

For this purpose the National scientific-practical center of correctional pedagogy (NSPC CP) has a team of professionals who are engaged in development, testing, implementation of scientific, regulatory, training and methodological creation and improvement of social system and correctional - pedagogical support for children with special educational needs in the Republic of Kazakhstan.

Republican Institution of Advanced Training for academic staff and management of the education system in Kazakhstan held an advanced training course in recent years for primary school teachers, but this is not enough to cover all the teaching staff in schools and short courses, seminars cannot give a full inclusive education to working teachers.

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<sup>27</sup> T. Brandon, D. Charlton, "Experience of England in the creation and development of teacher training center for inclusive education," in *International Journal of Inclusive Education*. XV (2011), no. 1.

Therefore, the preparation of the future teacher for primary grades should begin within the walls of a higher educational institution, in order to promptly develop the necessary competencies to work with disabled children.

### **Conclusions**

In this article, the content is determined by the scientific aspects to build a model of future elementary school teachers working with disabled children in terms of continuing education.

With the inclusion of the Republic of Kazakhstan in the process of forming european higher educational system, in accordance with the contemporary challenges of social, correctional and educational support for disabled children and to meet the growing demands of the society for trained teaching staff. Further design of the educational process in high schools determines the need to fulfill the following conditions:

- change of the goal in the approach to the acquisition of students and the educational process at the department of "Pedagogy and methodology of elementary education", ensuring competence and student-centered approaches in education;

- application of mastered competencies by students in the field of diagnostic and consultative, organizational, administrative, cultural and educational, teaching and research activities;

- providing students with the possibility of selecting an individual trajectory of education in accordance with the specialization of their choice within the specialty "Pedagogy and methodology of elementary education", and work on a personal schedule;

- extensive use of personality-oriented, information and communication technologies and interactive methods, etc..

Implementation of these conditions will allow to organize a system of scientific and pedagogical education for future teachers in such a way that it will provide academic mobility of graduates in the departments of "Pedagogy and methodology of elementary education" of Kazakhstan universities into the international educational system and demand on the international labor market. The graduates will gradually saturate the system of special and general education of highly qualified specialists, who are able to effectively conduct correctional and pedagogical process, based on the latest achievements of world and national science and practice, coupled with creative and reflexive attitude towards teaching. "Specialist of modern integrated school must not only have knowledge of the goals, essence, and content of training, but also act as a regulator of society behavior towards children with developmental disorders." <sup>28</sup>

The scientific novelty of the study results is the following:

1. Define and justify the components, criteria, indicators and levels of professional readiness of the future teachers working with disabled children;

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<sup>28</sup> S.S. Zhakipbekova, "Inclusion conditions of disabled children in education system," *Spisaniya Sofia University for obrazovatelni izsledvaniya*, I (2016).

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3. Design and implement into the educational process of the university the model of readiness for future teachers working with disabled children;

4. Develop and implement a methodical provision for readiness formation of future teachers working with disabled children, identify, substantiate and verify the pedagogical conditions promoting effective formation of professional readiness of the future teachers working with disabled children.



*Formation Of Teacher Readiness To Work With Disabled Children, Astra Salvensis, V*  
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**The Development Of Teacher's Multicultural Competence In The Context  
Of Modern Higher Education**

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**Abstract.** *Multicultural teacher education is relatively new in Kazakhstan. The reality of a multicultural world requires including cultural diversity training in pre-service teacher education programs. Currently teacher-training programs are oriented towards preparing teachers who are multicultural in their practice and in their perspective. The article focuses on the need of developing teachers' multicultural competence. The key components for multicultural competence, from the point of view of the authors, include the development of cognitive, behavioral and motivational awareness, knowledge and skills with respect to culturally diverse contexts. Awareness involves recognition of the differences; knowledge about the nature and uniqueness of cultural groups; and skill acquisition focused on the quality of interaction between those cultures.*

**Key words:** multicultural competence, higher education, development, teachers, multiculturalism, dimensions, approach, models, components of the multicultural competence, multicultural programs, multicultural programs, multicultural narratives.

### **Introduction**

A widely accepted goal of teacher education is to prepare culturally competent practitioners who are ready to serve diverse student populations.<sup>1</sup> Novice teachers' lack of familiarity with students' cultures, learning styles, and communication patterns may result in negative assumptions and expectations of students, use of culturally inappropriate or insensitive materials, and poor student-teacher interactions.<sup>2</sup> When facing cultural conflicts in real-life classrooms, novice teachers who are inadequately prepared for diversity often feel a sense of helplessness and frustration. Teacher educators, therefore, have an obligation to broaden pre-service teachers' knowledge bases and experiences and to help them develop skills and attitudes that can support the creation of empowering classroom interactions with diverse students.<sup>3</sup>

The National Council for the Accreditation of Teacher Education (NCATE) requires that some form of teacher training in multicultural education be incorporated in pre-service teacher education. A much-debated question is how multicultural education should be taught in order to produce competent specialists

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<sup>1</sup> P. Pedersen, *A Handbook for Developing Multicultural Awareness*, Alexandria, VA: American Association for Counseling and Development, 1988; E. M. Guyton, M. V. Wesche, "The multicultural efficacy scale: Development, item selection, and reliability," in *Multicultural Perspectives*, VII (2005), no. 4, p. 21-29.

<sup>2</sup> B. C. Wallace, "A call for change in multicultural training at graduate schools of education: Educating to end oppression and for social justice," in *Teachers College Record*, CII (2000), no. 6, p. 1086-1111.

<sup>3</sup> J. Phillion, M. F. He, "Using life-based literary narratives in multicultural teacher education," in *Multicultural Perspectives*, VI (2004), no. 3, p. 3-9.

who are capable of meeting the needs of diverse student populations. We believe that a sound multicultural pedagogy must demonstrate that multicultural concerns are personally relevant and have immediate impacts on teaching. In addition, powerful multicultural education cannot be passive and must engage pre-service teachers in critical dialogues and reflections that lead to social change and action.<sup>4</sup>

In this self-study, we make analysis of the meaning of multicultural education, give definition and structure of multicultural competence, describe our own experiences of using what we believe is a potentially powerful effect, the use of multicultural narratives in a foundation course "Multicultural education". We also then advocate for greater use of narratives in preparing culturally conscious and competent future teachers.

### **What is multicultural education?**

Multicultural, a term first attested in 1941, is defined as "relating to or containing several cultural or ethnic groups within a society", "of, relating to, or including several cultures; of or relating to a social or educational theory that encourages interest in many cultures within a society rather than in only a mainstream culture" and "(*Sociology*) consisting of, relating to, or designed for the cultures of several different races".

Multiculturalism, attested at the beginnings of the 1960s, is defined as "the state or condition of being multicultural;<sup>5</sup> the policy of maintaining a diversity of ethnic cultures within a community," "the state or condition of being multicultural; the preservation of different cultures or cultural identities within a unified society, as a state or nation," "the view that the various cultures in a society merit equal respect and scholarly interest",<sup>6</sup> "a philosophy that appreciates ethnic diversity within a society and that encourages people to learn from the contributions of those of diverse ethnic backgrounds".<sup>7</sup>

The National Association for Multicultural Education defines multicultural education as "a philosophical concept built on the ideals of freedom, justice, equality, equity, and human dignity as acknowledged in various documents, such as the U.S. Declaration of Independence, constitutions of South Africa and the United States, and the Universal Declaration of Human Rights adopted by the United Nations".<sup>8</sup>

Multicultural education relates to education and instruction designed for the cultures of several different races in an educational system. This approach to teaching and learning is based upon consensus building, respect, and fostering cultural pluralism within racial societies. Multicultural education acknowledges and incorporates positive racial idiosyncrasies into classroom atmospheres.

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<sup>4</sup> L. L. de Ramirez, *Voices of diversity: Stories, activities, and resources for the multicultural education*. Upper Saddle River, OH, Merrill Prentice Hall, 2006.

<sup>5</sup> <http://oxforddictionaries.com/definition/english/multicultural>, accessed 12. 06. 2017.

<sup>6</sup> <http://dictionary.reference.com/browse/multiculturalism>, 12. 06. 2017.

<sup>7</sup> <http://www.citizenwarrior.com/2008/09/definition-ofmulticulturalism.html>, 12. 06. 2017.

<sup>8</sup> <http://www.nameorg.org/resolutions/definition.html>, accessed 12. 06. 2017.

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1. Multicultural education has several goals. It endeavors to ground students with multicultural knowledge, to adopt educational equity and cultural pluralism as philosophies, to empower students and promote student social action, and to teach from a multicultural perspective. 1. Multicultural knowledge increases students' sense of self-worth and belief that they have a chance for a successful future. Multicultural knowledge lays the foundation for developing cultural pluralism, inter group harmony, and the ability to think, work, and live with a multicultural perspective.

2. Educational equity has three fundamental conditions: (a) an equal opportunity to learn; (b) positive educational outcomes for both individuals and groups; and (c) equal physical and financial conditions for students to grow to their fullest potential cognitively, academically, and affectively.

3. Working with cultural pluralism in mind, educators modify fundamental educational conditions to promote equitable learning. When school personnel support cultural pluralism, they ask themselves the important question: How can I help my students develop understanding, respect, and appreciation for individuals who are culturally different from themselves?

4. Empowerment helps students become independent and interdependent learners. Empowerment connotes social action; it helps students take an active role in improving the quality of their (and other) communities.

5. Social action promotes inter-group and intra-group harmony. Thus, educators provide knowledge, skills, and a classroom environment that prepare students to live and work with members of their own cultural groups and members of other cultural groups. Instruction includes opportunities for students to work together, to learn from each other, and to rely on each other.

6. Teaching with a multicultural perspective means that teachers see that culture, race, gender, religion, and ability are powerful variables in the learning process and that important ideas about teaching can be gained from studying cultural systems. When teaching from a multicultural perspective, educators challenge assumptions and stereotypes; they examine curricula from a broader point of view and in an assertive, proactive manner. Essentially, educators endeavor to promote cultural continuity between the home and school of minority students and attempt to eliminate culturally assaultive classrooms.

Multicultural education encompasses theories and practices that strive to promote equitable access and rigorous academic achievement for students from all diverse groups, so that they can work toward social change. Multicultural education challenges oppression and bias of all forms, and acknowledges and affirms the multiple identities that students bring to their learning.

Scholars have provided a range of definitions of multicultural education since the late years of the civil rights movement. A common theme that researchers of multicultural education underscore is that to maintain its critical analysis of power, multicultural education must be constructed within its history and roots in

the civil rights movement<sup>9</sup>. To construct an analysis of power within school reform, several multicultural educators have defined multicultural education as a matrix of practices and concepts rather than a singular static notion. Three major definitions of multicultural educations are reviewed below.

James A. Banks (1979), a leading scholar in the field, argued in the early development of the field of multicultural education that “educators should carefully define concepts such as multiethnic and multicultural education and delineate the boundaries implied by these concepts”.<sup>10</sup> His later work continued to emphasize this point (2006). Banks has historically advanced a definition of multicultural education as a broad concept and extrapolated on five dimensions.<sup>11</sup> He formulated the five specific dimensions as *content integration*, *knowledge construction process*, *prejudice reduction*, *equity pedagogy*, and *empowering school culture and social structure*.

*Content integration* deals with the infusion of various cultures, ethnicities, and other identities to be represented in the curriculum. The *knowledge construction process* involves students in critiquing the social positioning of groups through the ways that knowledge is presented, for example in scientific racism or the Eurocentric view of the “discovery” of America. *Prejudice reduction* describes lessons and activities that teachers implement to assert positive images of ethnic groups and to improve intergroup relations. *Equity pedagogy* concerns modifying teaching styles and approaches with the intent of facilitating academic achievement for all students. *Empowering school culture* describes the examination of the school culture and organization by all members of school staff with the intent to restructure institutional practices to create access for all groups. While highlighting the interrelatedness of the five dimensions Banks promotes deliberate attention to each.

Another leading scholar, Sonia Nieto, offered a definition of multicultural education in 1992 that continues to influence discourse in the field.<sup>12</sup> Nieto's

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<sup>9</sup> J. A. Banks, J. A. "Multicultural education: Historical development, dimensions, and practices," in J. A. Banks & C. A. McGee Banks (eds.), *Handbook of research on multicultural education*, 2<sup>nd</sup> edition, San Francisco: Jossey-Bass., 2004, p. 3-29; G. Gay, "Beyond Brown: Promoting equality through multicultural education," in *Educational Leadership*, XIX (2004), no. 3, p. 192– 216; C. A. Grant, A. R. Elsbree, S. Fondrie, "A decade of research on the changing terrain of multicultural education research," in J. A. Banks, C. A. McGee Banks (eds.), *Handbook of research on multicultural education*, 2<sup>nd</sup> edition, San Francisco: Jossey-Bass., 2004, p. 184-207; S. Nieto, P. Bode, *Affirming diversity, The Sociopolitical context of multicultural education* (5th ed.). Boston, Allyn & Bacon, 2008; C. E. Sleeter, D. D. Bernal, (2004). "Critical pedagogy, critical race theory, and antiracist education: Implications for multicultural education," in J. A. Banks, C. A. McGee Banks (eds.), *Handbook of research on multicultural education*, 2<sup>nd</sup> edition, San Francisco: Jossey-Bass., 2004, p. 240-258.

<sup>10</sup> J. A. Banks, (1979). "Shaping the future of multicultural education," in *The Journal of Negro Education*, III (1979), p. 237–252.

<sup>11</sup> J. A. Banks, "The dimensions of multicultural education," in *Multicultural Leader*, IV (1991), p. 5–6; J. A. Banks, J. A. (2004). "Multicultural education: Historical development, dimensions, and practices," in J. A. Banks, C. A. McGee Banks (eds.), *Handbook of research on multicultural education*, 2<sup>nd</sup> edition, San Francisco: Jossey-Bass., 2004, p. 3-29; J. A. Banks, *Cultural diversity and education*, 5<sup>th</sup> edition., Boston, Allyn & Bacon, 2006.

<sup>12</sup> S. Nieto, *Affirming diversity: The sociopolitical context of multicultural education*. Mahwah, NJ, Erlbaum, 1992.

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definition of the characteristics of “multicultural education in a sociopolitical context” addresses the context of communities, and the process of education, in terms of elasticity rather than as a fixed and static form. She focuses on seven characteristics of multicultural education: “*antiracist, basic, important for all students, pervasive, education for social justice, a process and critical pedagogy*”.

*Antiracist education* makes antidiscrimination explicit in the curriculum and teaches students the skills to combat racism and other forms of oppression. *Basic education* advances the basic right of all students to engage in core academics and arts; it addresses the urgent need for students to develop social and intellectual skills to expand understanding in a diverse society. That multicultural education is *important for all students* challenges the commonly held misunderstanding that it is only for students of color, multilingual students, or special interest groups. Rather, all students deserve and need an education that is inclusive and rigorous. The *pervasive* nature of multicultural education emphasizes an approach that permeates the entire educational experience, including school climate, physical environment, curriculum, and relationships. In education for *social justice* teachers and students put their learning into action. Students learn that they have the power to make change as apprentices in a democratic society. *Multicultural education* as a process highlights the ongoing, organic development of individuals and educational institutions involving relationships among people. It also points to the intangibles of multicultural education that are less recognizable than specific curriculum content, such as expectations of student achievement, learning environments, students' learning preferences, and cultural variables that influence the educational experience. *Critical pedagogy* draws upon experiences of students through their cultural, linguistic, familial, academic, artistic and other forms of knowledge. It also takes students beyond their own experiences and enables them to understand perspectives with which they disagree, as well as to think critically about multiple viewpoints, leading to praxis, or reflection combined with action.<sup>13</sup>

Nieto's emphasis on critical pedagogy draws on the work of Freire, linking multicultural education with wider issues of power, including socioeconomic and political equality, in what May<sup>14</sup> calls “critical multiculturalism.”

Christine Sleeter and Carl Grant connect the role of sociopolitical power to define multicultural education. Sleeter and Grant's article in *Harvard Educational Review* (Sleeter & Grant, 1987) provided an extensive review of the literature on multicultural education and explained five approaches. This work became a cornerstone of the field, upon which Sleeter and Grant (2006) continue to build. A brief overview and analysis of the five approaches articulated by Sleeter and Grant is provided here.

The goal of the first approach, which Sleeter and Grant call *Teaching the Exceptional and the Culturally Different*, is to equip students with the academic skills, concepts, and values to function in American society's institutions and culture. The

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<sup>13</sup> P. Freire, *Pedagogy of the oppressed*, New York, Continuum, 2000.

<sup>14</sup> S. May, (1999). "Towards critical multiculturalism," in S. May (ed.), *Critical multiculturalism: Rethinking multicultural and antiracist education*. London, Falmer Press, 199, p. 1-9.

positive attribute of this approach is that it spurred the movement toward modifying instruction and curriculum, commonly called differentiated instruction. Critics, however, claim that it has a tendency to emphasize an assimilationist perspective that positions students as holding deficits.

The second approach, *Human Relations*, consists of developing positive relationships among diverse groups and individuals to fight stereotyping and promote unity. Reducing prejudice and hostility are admirable goals, but according to its critics this approach tends to simplify culture and identity and avoids analyzing the causes of discrimination and inequality. Without a critical perspective, the Human Relations approach runs the risk of falling into the trap of feel-good tactics that are too soft on academic achievement.

*Single-Group Studies* is the third approach in the Sleeter and Grant analysis.<sup>15</sup> The goal is to engage in an in-depth, comprehensive study that moves specific groups from the margins by providing information about the group's history, including experiences with oppression and resistance to that oppression. The hope is to reduce stratification and create greater access to power. While there are many positive components to this approach, viewing it as a beginning or entry level approach to multicultural education may be the most appropriate appraisal of it. Criticism of this approach cites the unintentional effect of keeping groups such as people of color, women, people with disabilities, and working class people segregated and out of the mainstream curriculum. Other potential pitfalls are the possibility of promoting cultural separatism and the tendency for this approach to be implemented as a mere add-on.

The fourth approach to multicultural education is self-reflexively dubbed *multicultural education*. Sleeter and Grant use this seemingly redundant title to clarify this approach since so many other practices, such as those described in the first three approaches, are sometimes referred to as multicultural education. They cite Gollnick<sup>16</sup> to explain that the multicultural education approach promotes a range of goals: the value of cultural diversity, human rights, respect for differences, alternative life choices, social justice, equal opportunity, and equitable distribution of power. There are several criticisms of this approach that are discussed later in this entry. The most severe criticism argues that multicultural education promotes "particularism" and weakens social unification and academic rigor.<sup>17</sup> Some scholars within the field of multicultural education point to the need for more attention to social structural inequalities and for teaching students the skills to challenge the disparities resulting from inequitable power structures.

The fifth approach, which is the approach Sleeter and Grant advocate, is *Education that is Multicultural and Social Reconstructionist*, which describes a complete

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<sup>15</sup> C. E. Sleeter, C. Grant, "An analysis of multicultural research in the United States," in *Harvard Educational Review*, LVII (1987), no. 4, p. 421-445; C. E. Sleeter, C. Grant, *Making choices for multicultural education: Five approaches to race, class, and gender*, 5<sup>th</sup>, Hoboken, NJ, Wiley, 2006.

<sup>16</sup> D. M. Gollnick, "Multicultural education," in *Viewpoints in Teaching and Learning*, LVII (1980), p. 117.

<sup>17</sup> D. Ravitch, "Diversity and democracy: Multicultural Education in America," in *American Educator*, CIXL (1990), no. 1, p. 16-20, p. 46-68.

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redesign of an educational program. The notion of recon-structionism draws from Brameld's framework to offer a critique of modern culture. Such a redesign recommends addressing issues and concerns that affect students of diverse groups, encouraging students to take an active stance by challenging the status quo, and calling on students to collectively speak out and effect change by joining with other groups in examining common or related.

In summary, the scholars in the field have asserted that multicultural education is a matrix of several dimensions, qualities, and approaches that encompass theories and practices as a process of educational reform. Multicultural education promotes equitable access and rigorous academic achievement for all students so that they can work toward social change.

### **Defining Multicultural Competence**

Scientific literature points to the need of increasing the core competencies necessary for the individual to live in a multicultural world. These scholars cover a wide range of concerns that are addressed in multicultural education.<sup>18</sup>

Multicultural competence should be seen in a wider framework. It should not be seen as adding components of cultures to the existing curriculum. Rather multicultural education should be seen as a philosophy, a way of looking at the world .Banks (1993) outlined even a wider goal 'to help students to develop knowledge, skills, and attitudes to function within their own micro-cultures, other micro cultures, and with the global community'.

Sue et. el (1982) was the first who outlined the core of multicultural competence, which are the awareness, knowledge and skills.<sup>19</sup> *Multicultural awareness* involves a belief that differences are valuable and that learning about others who are culturally different is necessary in teacher training; a willingness to change one's own values, assumptions and biases; a belief in value of one's own cultural heritage; an acceptance of other worldviews and willingness to acknowledge that we do not have all right answers. *Multicultural knowledge* means knowing one's own culture and other cultures; knowledge about how gender, class, race, ethnicity, religion and disability affect one's experience and knowledge about multiple identities and multiple oppressions. *Multicultural skills* involve ability to openly discuss cultural differences; capacity to emphasize and genially connect with individuals who are

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<sup>18</sup> R. Pope, A. Reynolds, "Student affairs core competencies: Integrating multicultural awareness, knowledge, and skills," in *Journal of College Student Development*, XXXVIII (1997), p. 266-277; J. J. Irvine, "Asking teacher education culturally responsive," in M. E. Dilworth (ed.), *Diversity in Teacher Education: New Expectations*, San Francisco, Jossey Bass, 1991, p. 79-82; G. Gay, (2002). "Preparing for culturally responsive teaching," in *Journal of Teacher Education*, LIII (2002), no. 2, p. 106-116; G. Gay (ed.), *Becoming Multicultural Educators*, San Francisco, Jossey-Bass, 2003; J. A. Banks, *Multicultural Education: Issues and Perspectives*, 3<sup>rd</sup> edition, Boston, Allyn & Bacon, 1993; C. Diaz (ed.), *Multicultural Education for the 21st Century*, Washington, National Education Association, 1992; S. Nieto (ed.), *Affirming diversity: The Sociopolitical Context of Multicultural Education*. (Ed.) New York, Longman, 2000.

<sup>19</sup> D. W. Sue, R. T. Carter, J. M. Casas, N. A. Fouad, A. E. Ivey, M. Jensen, et al., *Multicultural Consoling Competencies: Individual and Organizational Development*, Thousand Oaks, Sage, 1998.



culturally different from themselves; ability to challenge the individuals, and to make sensitive interventions.

A great number of multicultural competence models are based on this theoretical framework. Several revisions and expansions of the Sue et al (1982) model took place over the last ten years. Pope-Davis & Dings (1995) have identified four aspects of multicultural competence: multicultural awareness and beliefs, knowledge, skills and relationships.<sup>20</sup> According to Pope-Reynolds (1997), '*multicultural competence* is a necessary prerequisite' to effective and affirming pedagogical work.<sup>21</sup>

The survey contained six statements in each of three thematic areas to be investigated: cultural awareness, cultural knowledge and cultural skills. Six questions related to teachers' cultural heritage awareness and knowledge about their own cultural and religious traditions.

L.Danilova states "Multicultural competence is professionally significant integrative quality of the personality which unites motives of cognition, acceptance of the general and specific in each of cultures as values; knowledge of laws, ways of vital activity and development of the multicultural world; abilities to apply them in practice of education of student as the person of culture".<sup>22</sup>

In the structure of multicultural competence, L.Danilova identifies the following components:

1. *motivational and value component* includes motives, goals, value orientations of the student, suggests the attitude to future professional activity as a value, the need of the student in the formation and self-education of his own multicultural competence; the personal desire for self-improvement;

2. *cognitive component* characterizes the body of knowledge about the culture, nature and ways of self-multicultural competence, practical knowledge of foreign language; the capacity for organization and synthesis of knowledge;

3. *activity component* requires the ability to engage in intercultural communication with native speakers of the foreign culture, to convey tools of self-knowledge and self-development to another, to reflect own activities and behavior;

4. *emotional component* determines the positive evaluation of educational phenomena based on socially and personally-significant values, the ability to perceive the inner world of another and identify himself with it.<sup>23</sup>

I. V. Vasyutenkova gives the following definition "multicultural competence – the integrative characteristic reflecting ability to carry out multilingualism policy in multicultural space; the system of qualities helping to be

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<sup>20</sup> D. B. Pope - Davis, J. G. Dings, "The assessment of multicultural counseling Competencies," in J. G. Ponterotto Suzuki L. A. Cases, C. M. Alexander (eds.), *Handbook of Multicultural Counseling*, Thousands Oaks, Sage, 2001, p. 287-311.

<sup>21</sup> D. B. Pope - Davis, A. L. Reynolds, J. G. Digs, T. M. Ottavi, "Multicultural Competencies of doctoral interns at university counseling centers: An exploratory investigation. Professional psychology," in *Research and Practice*, XXV (1994), p. 466-470.

<sup>22</sup> L. Y. Danilova, "The formation of students' multicultural competence," in *Uchitel*, III (2007), p. 12-15.

<sup>23</sup> *Ibidem*, p. 12-15.

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guided with the cultural relation of native and the foreign language countries which has synthetic character, it includes a set of the features providing achievement of goals of education of the person of culture.

According to I.V.Vasyutenkova, multicultural competence includes professional, cultural and personal components.

1. *professional* - culture of communication, technological (methodological), informational, reflective cultures.

2. *cultural* involves knowledge and understanding of native, world, foreign cultures, culture of intercultural communication and culture of conflict-free existence.

3. *personal* defines set of the qualitative characteristics reflecting a moral position which penetrates all components of multicultural competence.<sup>24</sup>

According to E. M. Shcheglova, “multicultural competence – the complex, personal quality which is formed in the course of professional training on the basis of a tolerance, characterized by awareness of own multicultural identity and shown in ability of the solution of professional problems of constructive interaction with representatives of other cultural groups”.

E.M.Shcheglova identifies several components in the structure of multicultural competence of future specialist:

1. *cognitive* - development of samples and the value of world culture, including various national cultures, cultural and historical and social experience of various countries and the nation;

2. *value-motivational component* is aimed at the formation of value-orientation and social and adjusting readiness of students for intercultural communication and exchange, and development of tolerance in relation to representatives of other cultural groups;

3. *activity-behavioral component* is aimed at developing the ability to solve professional tasks in interaction with representatives of various cultural groups.<sup>25</sup>

The formation of multicultural competence includes several *directions*:

– formation of culture of knowledge which means high standard of knowledge about cultural diversity of civilization both in space, and in time;

– development of cultural behavior, its types and forms corresponding to the multicultural environment;

– formation of emotional culture in the adequate multicultural environment;

– formation of culture of self-development in the multicultural environment.<sup>26</sup>

Considering multicultural competence as a component of competence in communication, allocating its three components, analyzing the phenomenon from

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<sup>24</sup> I. V. Vasyutenkova, *The development of teacher's multicultural competence in the conditions of postgraduate pedagogical education: Dissertation abstract for the Candidate of Pedagogy degree*, Sant Petereburg, SPb., 2006.

<sup>25</sup> I. M. Shcheglova, *The development of future experts' multicultural competence: Dissertation for the Candidate of Pedagogy degree*, Omsk, 2005.

<sup>26</sup> *Ibidem*.

the perspective of competency model, helps us to define the concept. It is important to include in this concept all three components of communication, and motivation for building relationships with representatives of other cultures successfully. All of this allows us to identify multicultural competence as the sum of knowledge about one's and others' cultures, which could be seen through the attitudes and behavior in order to ensure effective interaction with representatives of these cultures. In order to summarize the phenomenon, we would perform the existing models of intercultural competence and present our vision of it. W. Gudikunst proposes the following model of intercultural competence: motivational factors (the needs of the participants of intercultural communication, social norms, self-images, and openness to new information), knowledge factors (expectations, perceptions of more than one point of view, which could occur during the cross-cultural contact, knowledge of alternative interpretations and knowledge of cultural similarities and differences) and skills factors (the ability to show empathy, tolerance to ambiguity and uncertainty, adaptability in communication, the ability to modify behavior and create new categories).<sup>27</sup>

Model of M. Hammer and H. Nishida is also the three-part model. In their view, intercultural competence has three levels: understanding situations and behavior caused by specific rules, the understanding of other cultures in general, emotional attitude towards another culture.<sup>28</sup> According to D. Matsumoto, the basic components of intercultural competence are the thoughtfulness and the ability to control emotions, primarily negative ones.<sup>29</sup>

Thus, these models show the four main factors of multicultural competence: cognitive, motivational, behavioral and emotional. However, taking into consideration the close connection between motives and emotions, the selection of the last component seems superfluous. Generalizing and systematizing the components, which were mentioned above (excluding those that relate to meta-competence), we propose the following model of multicultural competence, consisting of three factors – cognitive, behavioral and motivational:

Factor	Components of the multicultural competence
<b>Cognitive</b>	<ul style="list-style-type: none"> <li data-bbox="450 1286 1151 1383">– Knowledge of one's own culture and the culture of others (traditions, customs, values, norms, rules, roles, etc.);</li> <li data-bbox="450 1383 1151 1450">– Views about the similarities and differences between one's own culture and culture of others;</li> <li data-bbox="450 1450 1151 1514">– Awareness of the importance of cultural differences;</li> </ul>

<sup>27</sup> W. B. Gudykunst, S. Ting-Toomey, "Culture and Interpersonal Communication," in *Sage Series in Interpersonal Communication*, VIII (1990).

<sup>28</sup> M. R. Hammer, H. Nishida, "The Influence of Situational Prototypes on Dimensions of Intercultural Communication Competence," in *Journal of Cross-Cultural Psychology*, XXVII (2002), no. 3, p. 213-229.

<sup>29</sup> D. Matsumoto, *Culture and Psychology*. Pacific Grove, Brooks, Cole Publishing Company, 1996.

	<ul style="list-style-type: none"> <li>– Knowledge, that helps to interpret the behavior of different ethnic groups;</li> <li>– Language competence;</li> <li>– Knowledge, that helps to provide adequate encoding and decoding nonverbal messages from representatives of other cultures;</li> <li>– Adequate notion about the cultural distance.</li> </ul>
<b>Behavioral</b>	<ul style="list-style-type: none"> <li>– Ability to adapt behavior for different cultures;</li> <li>– Skills that contribute in presenting an adequate non-verbal reactions in foreign culture;</li> <li>– The ability to control emotional feelings, associated with differences in cultures;</li> <li>– Ability to adjust the level of anxiety in intercultural interaction.</li> </ul>
<b>Motivational</b>	<ul style="list-style-type: none"> <li>– The necessity of intercultural communication;</li> <li>– Willingness to show empathy to the people from other cultures;</li> <li>– Willingness to engage into cross-cultural interaction;</li> <li>– Willingness to follow the norms and rules of behavior, which exist in other cultures;</li> <li>– The need to obtain knowledge about the people from the other culture;</li> <li>– High level of attraction to the representatives of other cultures;</li> <li>– Willingness to collaborate based on the position of ethnic and cultural universalism.</li> </ul>

In order to achieve multicultural competence, the individual must acquire and develop skills in each of these areas.

Thus, multicultural competence being one of the aspects of competence in communication, contributes a lot to the formation of an attitude to pluralism, tolerance to high levels of uncertainty, flexibility of thinking (e.g., ability to create new categories) and behavior (e.g., choice of behavioral responses), ability to decentralize, openness to new experience, etc.

## **Teacher-Training Programms In Development Of Multicultural Competence**

### **1. Content-oriented programs**

Content-oriented efforts are the most common and immediately recognizable variety of multicultural education.

Their primary goal is to include content about different cultural groups in the curriculum and educational materials in order to increase students' knowledge about these groups. In its simplest form, this type of program adds a multicultural

patina to a standard curriculum, perhaps incorporating a few short readings or a few in-class celebrations of cultural heroes and holidays within the school year. Other versions of content-area programs take a more thorough approach, adding numerous multicultural materials and themes to the curriculum.

More sophisticated versions actively transform the curriculum. According to Banks, these programs have three goals:

1. to develop multicultural content throughout the disciplines;
2. to incorporate a variety of different viewpoints and perspectives in the curriculum;
3. to transform the canon, ultimately developing a new paradigm for the curriculum.

## **2. Student-oriented programs**

Because multicultural education is an effort to reflect the growing diversity of Kazakhstan's classrooms, many programs move beyond curricular revisions to specifically address the academic needs of carefully defined groups of students, often minority students. Primarily, as Banks (1993) notes, while curricular programs attempt to increase the body of knowledge about different ethnic, cultural, and gender groups, student-oriented programs are intended to increase the academic achievement of these groups, even when they do not involve extensive changes in the content of the curriculum .

As Sleeter and Grant describe them, many of these programs are designed not to transform the curriculum or the social context of education, but to help culturally or linguistically different students make the transition into the educational mainstream. To do this, these programs often draw upon the varied linguistic and cultural backgrounds of their student bodies. As a result, student-oriented programs can, themselves, take many forms, some of which are not typically thought of as types of multicultural education. Banks (1993) outlines four broad program categories:

- programs that use research into culturally-based learning styles in an attempt to determine which teaching styles to use with a particular group of students;
- bilingual or bicultural programs;
- language programs built upon teaching the language and culture;
- special science programs for minority or female students .

As a result of this variety, they attempt to help students make the transition into the mainstream of many student-oriented programs can be viewed as compensatory in nature; in fact, they can often be nearly indistinguishable from other compensatory programs which may not be multicultural in their emphasis.

## **3. Socially-oriented programs**

These programs seek to reform both schooling and the cultural and political contexts of schooling, aiming neither simply to enhance academic

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achievement nor to increase the body of multicultural knowledge, but to have the much broader impact of increasing cultural and racial tolerance and reducing bias.

According to Banks (1993), this category of program encompasses not only programs designed to restructure and desegregate schools, but also programs designed to increase all kinds of contact among the races: programs to encourage minority teachers, anti-bias programs, and cooperative learning programs.

As Sleeter and Grant describe it, this type of multicultural education emphasizes "human relations" in all its forms, and incorporates some characteristics of the other two program types; that is, it can entail curricular revisions in order to emphasize positive social contributions of ethnic and cultural groups, while using research on learning styles to enhance student achievement and reduce racial tensions within the classroom.

But Sleeter and Grant also extend this type of multicultural education to include a much broader spectrum of programs with socially-oriented and social activist goals. The programs they refer to, which are much less common and which can be much more controversial emphasize pluralism and cultural equity in the society as a whole, not simply within the schools. In order to reach their goals, such programs can employ a number of approaches. Many emphasize the application of critical thinking skills to a critique of racism, sexism, and other repressive aspects of modern society; some emphasize multilingualism; others attempt to examine issues from a large number of viewpoints different from that of the predominant culture; still others can utilize cooperative learning approaches and decision-making skills in order to prepare students to become socially-active citizens.

### **Multicultural narratives as a pedagogical technique in formation of multicultural competence**

*Multicultural narratives* are defined as vignettes or short case studies featuring one or more multicultural themes or issues.<sup>30</sup> Using vignettes or short case studies as a pedagogy is as old as ancient storytelling and has been employed successfully in schools of business, law, and medicine; however, their applications in teacher education, and especially, in multicultural education are still relatively new.<sup>31</sup> Although systematic study of the effects of use of multicultural narratives in pre-service teacher education is limited, a few recent studies brought our attention to this potentially powerful pedagogy. Clark and Medina (2000) reported that the reading and writing of literacy narratives increased pre-service teachers critical and multicultural understandings of literacy, demystified stereotyped, dominant, and generalized discourse on minority students, and bridged the gap between personal narratives and multicultural theories.<sup>32</sup> Milner (2007) reported that race-related

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<sup>30</sup> C. A. Seguin, A. L. Ambrosio, "Multicultural vignettes for teacher preparation," in *Multicultural Perspectives*, IV (2002), no. 4, p. 10-16.

<sup>31</sup> M. Gartland, T. Field, "Case method learning: Online exploration and collaboration for multicultural education," in *Multicultural Perspectives*, VI (2004), no. 1, p. 30-35.

<sup>32</sup> C. Clark, C. Medina, "How reading and writing literacy narratives affect preservice teachers' understandings of literacy, pedagogy, and multiculturalism," in *Journal of Teacher Education*, LI (2000), no. 1, p. 63-76.

narratives transformed pre-service teachers' thinking about racism and racial discrimination, from a position of resistance and rejection to one of compassion, understanding, and acceptance of its pervasiveness and prevalence.<sup>33</sup>

Why multicultural narratives are valuable additions to teacher educators' repertoires of classroom strategies? In Dewey's (1938) emphasis on the quality of experiences in facilitating meaning construction in the development of individuals, he put forth that educators should carefully select those experiences that are educative, meaningful, and significant.<sup>34</sup> An educational narrative must not only tell a story but also contains affective, practical, and theoretical descriptions of a situation, which provides a meaningful path for the development and sharing of educational knowledge in context.<sup>35</sup> In addition, Dewey urged educators to pay more attention to the formation of "enduring attitudes, of likes and dislikes," and asserted that "these attitudes are fundamentally what count in the future".<sup>36</sup> We believe that reflecting on multicultural narratives fit Dewey's description of "an educative experience" because narratives foster positive attitudes in times of frustration and help preservice teachers develop theory-based, professional competencies in solving repeating or emerging problems.

Phelan (2009) defines practical reasoning as "teachers' capacity to discern particulars and make judgments about how to act in different situations and contexts". She argues that practical reasoning is largely neglected in today's outcome-based, government-mandated curriculum, but practical reasoning is often more important than generalized propositional knowledge when teachers are faced with moral dilemmas in educational settings. The uncertainty reflected in authentic narratives forces preservice teachers to weigh alternative solutions and help them foresee the long-term consequences of their decisions. Therefore, multicultural narratives support teachers' development of much needed practical-reasoning skills for sound ethical decision-making.

Finally, narrative analysis provides powerful non-cognitive experiences in formation of multicultural competence because it allows teachers access to rich, multifaceted, complex, personal, and emotional data. Phillion described "narrative multiculturalism" as "a person-centered, experiential, and relational way of thinking about the everyday experience of multiculturalism". We agree with Phillion and He (2004) that teacher educators have to work at not only a cognitive level but also an emotional level in order to foster true commitment to multiculturalism that lead to change and action.

## **Discussions and findings**

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<sup>33</sup> H. R. Milner, "Race, narrative inquiry, and self-study in curriculum and teacher education," in *Education and Urban Society*, XXXIX (2007), no. 4, p. 584-609.

<sup>34</sup> J. Dewey, *Experience and education*, New York, Macmillan, 1938.

<sup>35</sup> M. Dolk, J. den Hertog, "Narratives in teacher education," in *Interactive Learning Environments*, XVI (2008), no. 3, p. 215-229.

<sup>36</sup> A. M. Phelan, "The ethical claim of partiality: Practical reasoning, the discipline, and teacher education," in *Journal of Curriculum Studies*, IXL (2009), no. 1, p. 93-114.

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James A. Banks's *Dimensions of Multicultural Education* is used widely by school districts to conceptualize and develop courses, programs, and projects in multicultural education. The five dimensions are: (1) content integration; (2) the knowledge construction process; (3) prejudice reduction; (4) an equity pedagogy; and (5) an empowering school culture and social structure. Although each dimension is conceptually distinct, in practice they overlap and are interrelated.

**Content integration.** Content integration deals with the extent to which teachers use examples and content from a variety of cultures and groups to illustrate key concepts, principles, generalizations, and theories in their subject area or discipline. The infusion of ethnic and cultural content into a subject area is logical and not contrived when this dimension is implemented properly.

More opportunities exist for the integration of ethnic and cultural content in some subject areas than in others. There are frequent and ample opportunities for teachers to use ethnic and cultural content to illustrate concepts, themes, and principles in the social studies, the language arts, and in music. Opportunities also exist to integrate multicultural content into math and science. However, they are less ample than they are in social studies and the language arts. Content integration is frequently mistaken by school practitioners as comprising the whole of multicultural education, and is thus viewed as irrelevant to instruction in disciplines such as math and science.

**The knowledge construction process.** The knowledge construction process describes teaching activities that help students to understand, investigate, and determine how the implicit cultural assumptions, frames of references, perspectives, and biases of researchers and textbook writers influence the ways in which knowledge is constructed.

Multicultural teaching involves not only infusing ethnic content into the school curriculum, but changing the structure and organization of school knowledge. It also includes changing the ways in which teachers and students view and interact with knowledge, helping them to become knowledge producers, not merely the consumers of knowledge produced by others.

The knowledge construction process helps teachers and students to understand why the cultural identities and social positions of researchers need to be taken into account when assessing the validity of knowledge claims. Multicultural theories assert that the values, personal histories, attitudes, and beliefs of researchers cannot be separated from the knowledge they create. They consequently reject positivist claims of disinterested and distancing knowledge production. They also reject the possibility of creating knowledge that is not influenced by the cultural assumptions and social position of the knowledge producer.

In multicultural teaching and learning, paradigms, themes, and concepts that exclude or distort the life experiences, histories, and contributions of marginalized groups are challenged. Multicultural pedagogy seeks to reconceptualize and expand the Western canon, to make it more representative and inclusive of the nation's diversity, and to reshape the frames of references, perspectives, and concepts that make up school knowledge.



**Prejudice reduction.** The prejudice reduction dimension of multicultural education seeks to help students develop positive and democratic racial attitudes. It also helps students to understand how ethnic identity is influenced by the context of schooling and the attitudes and beliefs of dominant social groups. The theory developed by Gordon Allport (1954) has significantly influenced research and theory in intergroup relations. He hypothesized that prejudice can be reduced by interracial contact if the contact situations have these characteristics: (1) they are cooperative rather than competitive; (2) the individuals experience equal status; and (3) the contact is sanctioned by authorities such as parents, principals and teachers.

**An equity pedagogy.** An equity pedagogy exists when teachers modify their teaching in ways that will facilitate the academic achievement of students from diverse racial, cultural, socioeconomic, and language groups. This includes using a variety of teaching styles and approaches that are consistent with the range of learning styles within various cultural and ethnic groups, such as being demanding but highly personalized when working with American Indian and Native Alaskan students. It also includes using cooperative learning techniques in math and science instruction to enhance the academic achievement of students of color.

An equity pedagogy rejects the cultural deprivation paradigm that was developed in the early 1960s. This paradigm posited that the socialization experiences in the home and community of low-income students prevented them from attaining the knowledge, skills, and attitudes needed for academic success. Because the cultural practices of low-income students were viewed as inadequate and inferior, cultural deprivation theorists focused on changing student behavior so that it aligned more closely with mainstream school culture. An equity pedagogy assumes that students from diverse cultures and groups come to school with many strengths.

Multicultural theorists describe how cultural identity, communicative styles, and the social expectations of students from marginalized ethnic and racial groups often conflict with the values, beliefs, and cultural assumptions of teachers. The middle-class mainstream culture of the schools creates a cultural dissonance and disconnect that privileges students who have internalized the school's cultural codes and communication styles.

Teachers practice culturally responsive teaching when an equity pedagogy is implemented. They use instructional materials and practices that incorporate important aspects of the family and community culture of their students. Culturally responsive teachers also use the "cultural knowledge, prior experiences, frames of reference, and performance styles of ethnically diverse students to make learning encounters more relevant to and effective for them".

**An empowering school culture.** This dimension involves restructuring the culture and organization of the school so that students from diverse racial, ethnic, socioeconomic, and language groups experience equality. Members of the school staff examine and change the culture and social structure of the school. Grouping and labeling practices, sports participation, gaps in achievement among groups, different rates of enrollment in gifted and special education programs

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among groups, and the interaction of the staff and students across ethnic and racial lines are important variables that are examined and reformed.

An empowering school structure requires the creation of qualitatively different relationships among various groups within schools. Relationships are based on mutual and reciprocal respect for cultural differences that are reflected in school-wide goals, norms, and cultural practices. An empowering school structure facilitates the practice of multicultural education by providing teachers with opportunities for collective planning and instruction, and by creating democratic structures that give teachers, parents, and school staff shared responsibility for school governance.

### **Conclusion**

Multicultural competence involves a sufficient shift in attitude, and the acquisition of a behavior consistent with successful interaction with a diverse population. The goal of multicultural competence is to increase understanding and full inclusion of all people.

Multicultural competence is more than inclusion. This is a process of learning about and becoming allies with people from other cultures. It broadens one's understanding and ability to participate in bringing forwards a sustainable society. Multicultural competence is never a fully attained state, but continues to develop throughout teachers' lifetime.

Multicultural competence is not a destination. Cultural issues are constantly changing, and teachers are constantly developing new awareness, knowledge, and skills about multicultural issues, it is a long-term commitment to a process of change within an individual, institution and the community.

Teacher training programs should provide opportunities for teachers to explore their beliefs pertaining cultural diversity, to become conscious of their own cultural values and beliefs and how these effect their expectations towards students of different backgrounds. Teachers need to receive adequate training to be prepared to address the myriad multicultural concerns in our contemporary society.

By educating students about diversity of the world around them, the students will become more global. When teachers are ignorant about the differences in other groups, there is a greater probability of homophobia and conflicts. Teachers need to become role models, demonstrating fairness and teaching students that difference is normal.

*The Development Of Teacher's Multicultural Competence In The Context Of Modern Higher Education, Astra Salvensis, V (2017), no. 10, p. 279-295*

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**Content And Language Integrated Learning In Terms Of Multilingualism:  
Kazakhstani Experience**

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**Abstract.** *The multilingual education policy was federally mandated in the Republic of Kazakhstan. The implementation of such policy imposed a heavy burden on school system. So the article is focused on students of high school, who are the participants of the transitional multilingual educational program, which suggests learning some senior-classes' subjects in Kazakh language by Russian-speaking groups. Multilingual education on the basement of content and language integrated learning (CLIL) is under consideration. We argue that the learning environment created by CLIL would increase the learner's general learning capacities, his motivation and interest. The integration of content subject and language would create a learning environment, which cannot be set up within isolated subject or language teaching. CLIL will be able to provide learners with a more natural, meaningful way for language development; they would be more motivated when studying Kazakh language integrated in a content-based subject.*

**Key words:** multilingual education, high school, content and language integrated learning, transitional multilingual educational program, development, teachers, approach, methods, principles, multilingual area, content-obligatory language, content-compatible language, co-teaching.

### **Introduction**

One of the most important multilingual area lied within the borders of the former Soviet Union. With at least 200 distinct languages, the Soviet government has made Great Russian the language of intercommunication. When Kazakhstan became independent, the government declared Kazakh language to be overall "union" language, but also granted the official status to Russian one. There are tremendous obstacles to be overcome whenever the use of a "new" language is extended to old fields. All terminology, all reference books, all written precedents in Russian language could not be erased, forgotten or translated overnight. Kazakhstani lexicographers have simply not been able to coin and popularize new vocabulary rapidly enough to keep up with needs of the country, its growing industrialization and intellectual development. As a result, people resort to the use of the Russian language entirely in their everyday life and Russian-speaking people perceive Kazakh language as a foreign one.

Nowadays Kazakhstan is a multilingual area. The multilingual education policy was federally mandated. The people of the country have always been language conscious, with a consciousness derived from the concept that an educated person knows more than one language. There is a growing tendency to pay more attention to the Kazakh language taking into account its governmental and social significance, Russian language is considered as a language of

intercommunication and English one has the status of integration into global world economy and science.<sup>1</sup> The scholars have asserted that multilingual education is a matrix of several dimensions, qualities, and approaches that encompass theories and practices as a process of educational reform. Multicultural education promotes equitable access and rigorous academic achievement for all students so that they can work toward social change.

At the same time, the implementation of any language policy imposes a heavy burden on school system. Multilingual education and the manner in which it can be implemented for the benefit of all societies in the Republic of Kazakhstan, remains a topic of much concern. Perhaps the most serious problem is that multilingual education is mainly designed for teaching “different” language user rather than for creating a population of multilinguals. Our pupils are the participants of the transitional multilingual educational program, which suggests learning some senior-classes’ subjects (Kazakh literature, Kazakh history) in Kazakh language by Russian-speaking groups. As a result, Russian-speaking pupils have difficulties in understanding presentations by teachers of the Kazakh dialects accordingly.

What are the factors that curriculum planners and teachers should consider and understand when establishing such multilingual educational programs? Theoreticians maintain that teaching can be viewed as a division consisting of an approach, a set of methods that follow from an approach, and a set of techniques that implement a method.<sup>2</sup> The new philosophy of education proclaims pupil-centered approach that is the focus; the main figure is the pupil with all his cognitive mechanisms: memory, perception, thinking and its operations .<sup>3</sup> Lerner-centered paradigm is a basic conceptual approach of education aimed at the development of the personality of the pupil, his determination, self-realization and social adaptation. The determination of the method and techniques of teaching demands the identification of the function of the stage of learning and principles of teaching.

The main function of the senior stage in the system of secondary education means: to complete general secondary education and prepare school leavers for life and work in a modern industrialized informational society; to help to choose the course of life in accordance with interests, capacities and inclinations of pupils; to stimulate senior pupils to continue their education and create conditions for favorable transition from one link to another and underline the importance of self-education.<sup>4</sup> I. L. Bim suggests the following principles of

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<sup>1</sup> \*\*\*, *State Compulsory Standard of Education of the Republic of Kazakhstan. Languages of Triunity (Kazakh, Russian and Foreign language)*. SCSE RK 6.08.085-2010, Ministry of Education and Science of the Republic of Kazakhstan, Astana, p.2.

<sup>2</sup> Curtis W. Hayess, Jacob Ornstein, William W. Gage, *The ABC's of Languages and Linguistics. National Textbook of NTC Publishing Group*, Lincolnwood, 1975, p.131.

<sup>3</sup> Carl Rogers, Harold C. Lyon, Reinhard Tausch, *On Becoming an Effective Teacher - Person-centered Teaching, Psychology, Philosophy, and Dialogues with Carl R.*, 2013.

<sup>4</sup> A.A. Mirolyubov, *Methods of Foreign Languages Teaching: Tradition and Modernity*, Obninsk, Title, 2010, p. 297-299

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teaching in senior classes of the secondary school: principle of differentiation and individualization of teaching; principle of professional orientation of senior pupil's development; principle of autonomy of senior pupils; principle of intensification of speech and social cooperation of pupils by means of foreign language (project work, role play); principle of realization of linguistic education succession between school and higher educational institutions; principle of productivity - decision making; skills, habits and knowledge gaining.<sup>5</sup>

### **The Identification Of The Problem**

Two main factors have been repeatedly identified as the source of the problem: the lack of relevance of current methods of foreign language lessons and an extreme interpretation of the communicative approach to language teaching.<sup>6</sup> It is widely acknowledged that the contexts, in which foreign language lesson is presented, still based on the notional-functional curricula, are far removed from learners' interests. This is compounded by an emphasis on transaction rather than genuine communication and on rote learning instead of grammatical progression.<sup>7</sup> From our point of view, CLIL (content and language integrated learning) helps to realize transitional multilingual educational program. CLIL is a dual-focused educational method in which an additional language is used for the learning and teaching of both content and language.<sup>8</sup> The term CLIL was coined in 1994 in Europe. The essence of CLIL is integration. This integration has a dual focus: language learning is included in content classes (e.g., math, history, geography, computer programming, science, civics, etc). This means repackaging information in a manner that facilitates understanding. Charts, diagrams, drawings, hands-on experiments and the drawing out of key concepts and terminology are all common CLIL strategies; content from subjects is used in language-learning classes. The language teacher, working together with teachers of other subjects, incorporates the vocabulary, terminology and texts from those other subjects into his or her classes. Students learn the language and discourse patterns they need to understand and use the content. The language teacher takes more time to help students improve the quality of their language than the content teacher does. However, finding ways in the CLIL context to inject content into language classes will also help improve language learning. Thus, in CLIL, content goals are supported by language goals. In addition to a focus on content and language, there is a third element that comes into play. The development of learning skills supports the achievement of content language goals. Learning skills goals constitute the third driver in the CLIL triad.

The three goals of content, language and learning skills need to fit into a larger context. Therefore, the ultimate goal of CLIL initiatives is to create

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<sup>5</sup> I. L. Bim, *The Conception of Second Foreign Language Teaching (German language on the basement of English)*, Moscow, Ventana-Graph. 1997, p.24

<sup>6</sup> E. Macaro, "The decline in language learning in England: getting the facts right and getting real," in *Language Learning Journal*, XXXVI (2008), no. 1, p. 101-108.

<sup>7</sup> J. Seikkula-Leino, "CLIL learning: achievement levels and affective factors," in *Language and Education*, XXI (2007), no. 4, p. 328-341.

<sup>8</sup> \*\*\*, *Uncovering CLIL*, Mehisto, Marsh, Frigols. Macmillan books for teachers, 2008. p. 7-24.

conditions that support the achievement of the following: grade-appropriate levels of academic achievement in subjects taught through the CLIL language; grade-appropriate functional proficiency in listening, speaking, reading and writing in the CLIL language; age-appropriate levels of first-language competence in listening, speaking, reading and writing; an understanding and appreciation of the cultures associated with the CLIL language and the student's first language; the cognitive and social skills and habits required for success in an ever-changing world. One overwhelming feature of CLIL is to replicate the conditions to which infants are exposed when learning their first language. CLIL sets out to expand the student's learning capacity by tuning into the natural way the child learnt his or her first language. A young child's environment is full of resources that the child learns to use as tools. Children learn to use language, and use language to learn. Although CLIL does involve a new approach and a certain degree of change, it can easily fit into the parameters established by the national or regional curriculum. Moreover, CLIL cannot be separated from standard good practice in education. CLIL is a valued-added method that seeks to enrich the learning environment. The CLIL method encourages teachers to keep using their favorite strategies and to apply standard best practice in education. However, it does require an understanding of those strategies that are essential for CLIL, such as having a three-way focus on content, language and learning skills. Most strategies that are essential for CLIL can also be considered good practice in education. It is the need to take simultaneously into account standard good practice in education and teaching/learning strategies unique to CLIL that can be difficult for teachers.<sup>9</sup>

Core features of CLIL methodology: multiple focus - supporting language learning in content classes, supporting content learning in language classes, integrating several subjects, organizing learning through cross-curricular themes and projects, supporting reflection on the learning process. Safe and enriching learning environment - using routine activities and discourse, displaying language and content throughout the classroom, building student confidence to experiment with language and content, using classroom-learning centers, guiding access to authentic learning materials and environments, increasing student language awareness. Authenticity - letting the students ask for the language help they need, maximizing the accommodation of student interests, making a regular connection between learning and the students' lives, connecting with other speakers of the CLIL language, using current materials from the media and other sources. Active learning - students communicating more than the teacher, students help set content, language and learning skills outcomes, students evaluate progress in achieving learning outcomes, favoring peer co-operative work, negotiating the meaning of language and content with students, teachers acting as facilitators. Scaffolding - building on a student's existing knowledge, skills, attitudes, interests and experience, repackaging information in user-friendly ways, responding to different learning styles, fostering creative and critical thinking, challenging students

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<sup>9</sup> Paul Davies, Eric Pearse, *Success in English teaching*, Oxford, Oxford University Press, 2008, p. 43-60.

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to take another step forward and not just coast in comfort. Co-operation - planning courses/lessons/themes in co-operation with CLIL and non-CLIL teachers, involving parents in learning about CLIL.<sup>10</sup>

Good CLIL practice is driven by cognition. Thinking (cognition) is the mental faculty of knowing, which includes perceiving, recognizing, judging, reasoning, conceiving and imagining. In order to acquire new knowledge and skills, people usually need to not only access new information, but also connect that information with their own existing knowledge, skills and attitudes. Discussion and reflection, and the drawing of conclusions related to the experience associated with the application of new knowledge and skills, help to cement learning. Learning in a second language can actually facilitate comprehension because learners have to work harder at understanding and articulating the essence of what is being taught/learned. This forces them to be more precise and organized in their communication. Every subject has its own terminology. A useful first step is to decide what language the students absolutely must know (content-obligatory language) to master the content. The language that could be helpful, but is not absolutely necessary (content-compatible language) for learning the subject takes a back seat, although it needs to be accommodated.<sup>11</sup>

Content-obligatory language includes technical vocabulary, special expressions, multiple meanings of words, syntactical features and language functions, which predominate in a particular content area of a lesson (informing, defining, analyzing, classifying, predicting, inferring, explaining, justifying). These language abilities are necessary for students to acquire concepts, ask questions, explain understanding, demonstrate mastery and prepare for future learning in the content area.<sup>12</sup> Whether it is content-obligatory or content-compatible language, there need to be plenty of opportunities for oral interaction among students. The multi-faceted nature of the CLIL approach involves an extra focus on student interests, peer co-operative work and the fostering of critical thinking, among other methodological strategies. These foster the learning of content and provide increased forums for discussing and otherwise communicating about content. Those increased opportunities support language learning. In CLIL programs, students' language develops quickly. Content teachers are partners with language teachers. They provide students with additional opportunities for language learning. CLIL students almost inevitably understand and master a language much faster than those who only learn it as a subject. Nonetheless, the language curriculum still needs to be taught and often enriched. The content teacher often provides the materials, or the language teacher proposes them. The materials would sometimes need to be rewritten. Language teachers can find electronic support materials about content topics that can easily be adapted for language learning.

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<sup>10</sup> Jeremy Harmer, *How to Teach English*, London, Longman, 2008, p.156-178.

<sup>11</sup> Gladis Kersaint, Denisse R. Thomson, Mariana Petkova *Teaching Mathematics to English Language Learners*, New York and London, Routledge, 2009, p. 341.

<sup>12</sup> N. Cloud, F. Genesse, E. Hamayan, *Dual language instruction: A handbook for enriched education*, Boston, Heinle&Heinle, 2000, p.170-171.



The projects are recommended as a tool of assessment: projects provide outlets for students to demonstrate their understanding of a concept in a manner that often is less language intense. Students can be expected to build a model or design a poster that illustrates a concept; students could research information on the internet, such as finding pictures with particular types. Depending on the nature of the project, students can be encouraged to use their own cultural background as the basis for the project.<sup>13</sup>

### Discussion and findings

The Ministry of Education and Science of the Republic of Kazakhstan initiated the courses of qualification improvement for teachers of secondary schools on the basement of leading Kazakhstani universities on November 2016. Our team was responsible for CLIL presentation at the Kazakh Ablai Khan University of International Relations and World Languages for language teachers. We analyzed critically the literature devoted to content and language integrated learning and understood that there was a possibility to divide this method into 4 stages: presentation, practice, production and assessment (*see table 1*). For each stage, we identified the technologies and devices. During the lessons with Kazakh language teachers within the frame of qualification improvement courses, we worked out all technologies and devices in detail and found the most efficient.

Table 1. The stages of content and language integrated learning

Presentation Stage		Practice Stage		Production Stage		Assessment Stage	
<i>T</i>	<i>D</i>	<i>T</i>	<i>D</i>	<i>T</i>	<i>D</i>	<i>T</i>	<i>D</i>
<i>Technology</i>	<i>Device</i>	<i>Technology</i>	<i>Device</i>	<i>Technology</i>	<i>Device</i>	<i>Technology</i>	<i>Device</i>
Mini-lectures	Text circles	Case-study	Odd one Out	Case-study	Add to this	Case-study	Fill in the gaps
Presentations	Correct me	Role play	Right in one	Role play	Ask me, tell me	Test-technology	Multiple choice questions
Listening and note-taking (podcast)	Parrotting	Laboratory work	Define it	Creating a video-blog	Tell me what you know	Role-test	Problem task

<sup>13</sup> R. P. Milrood, *Methods of English Language Teaching*, Moscow, Drofa, 2005, p. 220-243.

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ideo-lectures	V L Listening with key words	A Annotated bibliography	S Student-generated jumbled words	P Problem analysis	ear and say	P Portfolio	atching
lock-scheme	B C Co-operative listening	“Field” research	S Student-generated word puzzle	C Causal analysis	hoose from your list	P Project work	h-questions
Corporate education	C G Getting the right order	P Problem analysis	U Using mind maps	E Essay	ini-talks	P Problem analysis	
	S Students as words	C Causal analysis	W Walk and Swap	D Debates	Visual dictation	E Essay	
	A BC dictation	C Conducting experiments	D Definition Bingo	D Discussion	ixed language functions	B lock-scheme	
	M Mutual dictation	E Exercises to form meta-language	O On target	V Video conference	xactly fifty words	C Causal analysis	
	B Brainstorming	W Web Quest	Q Questions to answers	C Conducting experiments	ought sand crosses	P Pagma-professional tasks	
	C Corporate education	H Hot List	J Jumbled sentences	B Block-scheme	rue False dictat	P Posters	

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All of us have understood the high pedagogical potential of CLIL and insisted that a specific CLIL methodology should be realized in high school. The methodological discussion focused on several general issues: promoting reading comprehension, writing and developing methods in which language sensitive teaching and learning plays a central role. Reading skills are regarded as highly important in the CLIL classroom. Although reading strategies play an important role in all learning contexts, in CLIL they decide on the students' success or failure. Learners do not read texts in order to learn language but in order to acquire knowledge in the content subject. This makes the whole learning process more skill-oriented both with respect to language and to content. In CLIL classrooms, writing skills take up a highly significant role. From very early on, learners have to use the target language to write down the results of what they have studied: they compose reports, definitions, compile results of observations. CLIL can provide effective opportunities for learners to use their new language skills and to develop oral communication skills. The most important point is the integration of content and language in the CLIL classroom. This is the reason why CLIL teachers look for an approach, which is content-oriented, but at the same time language-sensitive. It is the content of the subject, which is in the center of the learning-teaching process. However, in order to deal with the content in the target language learners have to acquire both knowledge and skills, which are necessary to manipulate this content. Dealing with terminology, which has lost its overwhelming importance in the classroom, CLIL specialists insist that CLIL should begin by providing more general content subject-oriented terminology and should then slowly move towards more and more specific vocabulary.<sup>14</sup>

After the courses, the language teachers had a chance to try CLIL in their classes. Based on careful research of a questionnaire conducted for Kazakh language teachers on CLIL they integrate into their lessons of Kazakh history for Russian-speaking groups we came up with the chart, which shows teacher's attitude to CLIL. From the results of the questionnaire, it is clear that all of the ten teachers who took part in our investigation used CLIL in their lessons in senior classes of high school (*see table 2*). However almost 30% of teachers complained on troubleshooting problems, which occurred when they used CLIL. 70% of teachers confided that technology has changed the way they teach. They say that their students collaborate more and have bigger amount of motivation. Approximately 40% of teachers consider CLIL unreliable to check students' competences. More than half of

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<sup>14</sup> Sheelagh Deller, Christine Price, *Teaching Other Subjects Through English*, Oxford University Press Resource Books for Teachers, Penguin, 2002, p.15-26.

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teachers think that they need more hours for CLIL training. Some teachers believe that CLIL is a good tool for collaboration with subject teachers when conducting lessons and making up the plans of the lessons.

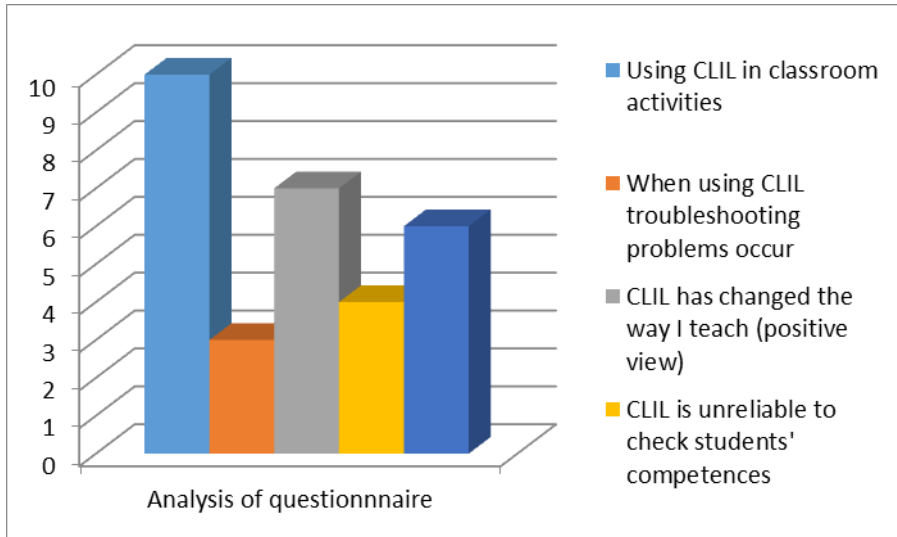


fig 2. The results of questionnaire of Kazakh language teachers

### Conclusion

The dual focus of CLIL means that the relationship between language and content has to be totally transparent. Language is seen as a tool for learning and one that needs scaffolding and progression as much as content. In this sense, CLIL exposes the linguistic issues in subject content in a way that is often absent in non-language subjects. This makes CLIL teachers more aware of the linguistic needs of the learners and thus more effective at ensuring comprehension. If education is a “language socialization of learning”, this approach addresses issues of equity and inclusion, and has potentially a socially equalizing effect. In this respect, CLIL can in all fairness be described as an entitlement for all. The so called “double processing” refers to how CLIL learners process speech in a foreign language in order to take in new information, while at the same time integrating the new knowledge in an existing corpus. While this provides learners with a motivating challenge, it also has a number of potentially negative side effects.

Firstly, it means that a lack of linguistic proficiency may be a serious barrier to understanding and learning, particularly in secondary schooling. The problem can be made worse if coupled with insufficient teacher proficiency or a limited range of teaching strategies to support linguistic development. It must be noted that the vast majority of cross-curricular CLIL programs are selective or self-selective based on linguistic ability in the language and general academic performance. Interestingly, this “voluntary nature” is often described a key feature

of successful CLIL programs. It begs the question to what extent this type of self-selection, which traditionally attracts motivated, middle-class learners, has eschewed perceptions of the relative difficulty of CLIL. Over the next few years, it will be interesting to see results from the CLIL programs in Kazakhstan, which have been intentionally implemented in secondary schools. The challenge, if CLIL is to become an entitlement for all, will lie in developing approaches that can cater for all linguistic abilities instead of falling back onto exclusion.

A second implication of “double-processing” is that it can lead to a longer teaching process and a concentration on the basics to the exclusion of the wider elements of the subject. However, this may not necessarily have a negative impact. It can lead, in the perception of both teachers and learners, to a deeper understanding of concepts. Learners benefit from having to engage more actively with the material to overcome the linguistic barrier and, at the same time, teachers report avoiding overloading students with unnecessary information. The result of both strategies is that learners remember more of the material taught.

To sum up, English language does not have a monopoly position in content and language integrated learning in higher educational institutions. It appears to become wide spread especially in mainstream general education. An important issue in various CLIL attempts is often a question of what type of competence in which languages. CLIL does not exist in a vacuum, but in the social and cultural contexts of different countries. If CLIL has a chance of success, the whole school community must engage in shifting social attitudes to language learning beyond the classroom.

## Development Of teachers' Information Competency In Higher Education Institution\*

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**Abstract.** *In modern conditions of continuous development of world technologies and changes in public life, an important component of education is the development of information competency. For successful self-realization in the information-oriented society, the teacher's information competency becomes one of the most important components of professional activity.*

*In Elabuga Institute of Kazan (Volga region) Federal University, there is an extensive experience in teacher training. At the same time, the issues of development of information competency of future teachers are of special importance and urgency.*

*The issues of development of teachers' information competency in higher education institution are considered in the article. They provide for the solving of a large number of tasks, among which the most important is the problem of development of information educational environment and the possibility of its use in professional activity. In this regard, the main stages of development of teachers' information competency in Elabuga Institute of KFU are the following: description of the features of teacher's information competency; revealing the main directions and conditions for the formation of students' skills in the development and active use of e-resources of the educational environment in the educational process, on the basis of modern information communication technologies. The obtained results substantiate the significance and expediency of the conducted research; determine the range of issues for further resolution.*

**Keywords:** higher education institution, future teacher, information and communication technologies, information competency, educational process.

### Introduction

The modern stage of society development is characterized by the process of informatization of all spheres of life. This sets the most important goal for the system of higher professional education - the development of a high level information competency of future teachers, who are intended to prepare the younger generation for life and activity in a modern information society, filled with means of storage, processing and transfer of information, on the basis of information technology.

A lot of definitions of the term "information competency" can be found in scientific literature. The analysis of the investigations on the problem of information competency development shows, that in each of them, depending on the field of scientific knowledge and the types of professional activities, the emphasis lays on one aspect or another. Thus, for example,<sup>1</sup> in the issues of information knowledge development are considered in the context of computerization and informatization of education. The problems of forming the

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\* The work has been performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> R. Bednarova, J. Merickova, "Learning and teaching with technology e-learning as a motivation in teaching physics," in *Procedia - Social and Behavioral Sciences*, CXXXI (2012), p. 105-110; B. E. Starichenko, I. N. Semenova, A. V. Slepuhin, "Concerning the Interrelation of E-learning Concepts in Higher Education," in *The Education and Science Journal*, IX (2014), p. 51-68.

"information culture" were discussed in the study.<sup>2</sup> The peculiarities of intensification and activation of training, based on the advantages of modern information technologies, were described in.<sup>3</sup>

The consideration and the analysis of works, devoted to the problem of development of information and communication (ICT) competencies of university graduates shows, that currently there is an important trend, which determines the requirements for the level of ICT competency of the modern teacher, in the form of shifting the emphasis from the tasks of technological level, related to mastering of specific tools, specific software products, to the tasks of pedagogical level, in the form of skills in the application of ICT technologies in the professional activities. In this regard, the ICT competency of teacher should ensure the implementation of new goals of education, innovative forms of organization of the educational process, the relevant content of educational activities.

At the same time, the following three main components of ICT competency are identified:

- sufficiently high level of functional literacy in the field of ICT;
- effective, justified application of ICT in educational activities for solving professional issues;
- the understanding of ICT as the basis of a new paradigm in education, aimed at the development of trainees as subjects of the information society, capable of creating new knowledge, able to operate with arrays of information to obtain a new intellectual and activity results.

Proceeding from the above, it is possible to distinguish two levels of requirements for the teacher's ICT competency-technological and methodological. It is obvious, that the formation of appropriate ICT competencies of future teachers of higher education institution should be carried out by different specialists: technological - from information technology departments, methodical ones - from the departments of pedagogy and methodology, in a specific direction.

In 2011, UNESCO, in partnership with the world leaders in the field of information technology (in particular, Microsoft Corporation) and leading experts in the field of informatization, developed international recommendations, where the requirements for ICT competency of teachers (or academic staff) were presented - UNESCO's ICT Competency Framework for Teachers.<sup>4</sup>

The importance of relevant teachers' information competencies for the successful implementation of educational process in the ICT-intensive educational

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<sup>2</sup> F. Ekici, I. Kara, E. Ekici, "The primary student teachers' views about a blended learning application in a basic physics course," in *The Turkish Online Journal of Distance Education*, XIII (2012), no. 2, p. 291-310.

<sup>3</sup> T. Martín-Blas, A. Serrano-Fernandez, "The role of new technologies in the learning process: Moodle as a teaching tool in physics," in *Computers & Education*, LII (2009), no. 1, p. 35-44; V. Y. Shurygin, L. A. Krasnova, "Electronic learning courses as a means to activate students' independent work in studying physics," in *International Journal of Environmental and Science Education*, XI (2016), no. 8, p. 1743-1751.

<sup>4</sup> Structure of ICT competency of teachers. UNESCO Recommendations.(2011). Retrieved from <http://iite.unesco.org/pics/publications/ru/files/3214694.pdf>, accessed 12. 06. 2017.

environment of higher education institution is analyzed in the recommendations of UNESCO.<sup>5</sup>

Thus, all the above, emphasizes the importance of searching for new forms and approaches to the development of information competency of future teachers in higher education institution.

### **Materials and methods**

The importance of the problem of development the information competency of future teachers and the further organization of systematic and consistent work on the resolution of certain issues are based on the following important steps.

The stage of the study of self-assessment of teachers' ICT competency was carried out within the framework of the qualification upgrading courses and professional retraining, organized at Elabuga Institute of KFU in 2016-2017. The study involved 345 teachers of secondary schools and teachers of secondary vocational education.

The stage of determining and studying the level of formation of ICT competency of future teachers was carried out as part of the course works on the development of electronic educational resources, and their approbation during the students' pedagogical traineeship. 48 students of the final year of the training course "Vocational training, profile: energetics" took part in the study, performing in 2016-2017 academic year at Elabuga Institute of KFU.

### **Results and discussion**

The results of self-assessment study of educators' ICT competency show that teachers are increasingly aware of the advantages of using information and communication technologies in the field of education.

So, 79% of respondents systematically apply the available skills of using ICT in a daily and professional context. Only 50% of respondents carry out pedagogical activity in the information environment and constantly display it in the information environment. However, it was found, that the respondents' understanding of the educational process on the basis of ICT is quite heterogeneous. By the organization of educational process on the basis of ICT, respondents mean:

- development and use of the task for students/pupils during the lesson - 28%;
- check of students/pupils tasks - 27%;
- fixing the intermediate and final result - 24%;
- remote consulting - 21%.

Based on the respondents' answers, currently, the following aspects are significant factors in the process of ICT competency formation:

- introduction of new standards - 13%;

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<sup>5</sup> B. E. Starichenko, "Professional standards and ICT-competency of the teacher," in *Pedagogical Education in Russia*, VII (2015), p. 6-15.



- availability of sufficient technological base of educational institutions - 15%;
- availability of broadband Internet channel - 12%;
- constant access to a mobile computer -13%;
- tools of the information environment, implemented in the educational organization - 8%;
- existence the need in teachers to increase ICT competency - 16%;
- establishment of the administration of educational organization - 5%;
- adoption of local normative acts on the work of collective of the educational organization in the IP - 5%;
- initial mastering by the teacher of basic ICT - competency in the system of professional development - 9%;
- expert assessment of the teacher's activity in the IP of educational organization - 4%.

It should be noted, that most of the teachers consider, that at present a qualitative educational process is inconceivable without the use of information and communication technologies, the main characteristic of which is an increased degree of interactivity, manifested in the use of network computer technologies, activating the educational process.

Interactive forms of education are considered in the researches.<sup>6</sup> In these works, it is emphasized that the use of interactive teaching methods contributes to the organization of educational process, in which the learner becomes a full, active participant in the learning and perception process.

Thus, the development of information competency of teachers is based on the strategy of solving a large number of tasks, among which the task of forming an information educational environment and the possibility of its use in educational activities are particularly significant.

At the same time, electronic educational resources are important elements of the information educational environment. Considering e-learning courses (ELC), it should be noted that, on the one hand, they represent a certain set of information (graphic, text, digital, speech, music, video, photo, etc.). On the other hand, the e-learning course is a software and information component of the educational system, where the users are teachers, students and the administration of the educational institution.

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<sup>6</sup> T. I. Anisimova, L. A. Krasnova, "Interactive Technologies in Electronic Educational Resources," in *International Education Studies*, VIII (2015), no. 2, p. 186-194; Y. V. Gushchin, "Interactive teaching methods in higher education," in *Psychological Journal of International University of Nature*, II (2012), p. 1-18; E. M. Ljubimova, E. Z. Galimullina, R. R. Ibatullin, "The development of university students' self-sufficiency based on interactive technologies by their immersion in the professional activity," in *International Education Studies*, VIII (2015), no. 4, p. 192-199; E. A. Reutova, *The use of active and interactive teaching methods in the educational process*, Novosibirsk, NSAU Publishing House. 2012; M. N. OSamedov, G. S. Aikashev, V. Y. Shurygin, A. V. Deryagin, I. A. Sahabiev, "A study of socialization of children and student-age youth by the express diagnostics methods," in *Biosciences Biotechnology Research Asia*, XII (2015), no. 3, p. 2711-2722; R. N. Shaidullin, L. N. Safullin, I. R. Gafurov, N. Z. Safullin, "Blended learning: leading modern educational technologies," in *Procedia - Social and Behavioral Sciences*, CXXXI (2014), p. 105-110.

In this regard, the issues of preparing future teachers for the development of electronic educational resources, on the basis of modern ICT technologies and the corresponding computer programs, acquire particular urgency.

The innovative features of e-learning courses are the following:

- ensuring the functioning of the components of educational process;
- acquisition of information;
- availability of feedback;
- interactivity;
- possibility of organization of various types of educational activities;
- attestation (control of educational achievements);
- possibility of remote (distant) fully functional training.

In the information space there is a wide variety of technologies, software, both for the formation of ICT competency, and for the use in professional activities.

A number of modern and advanced information and communication technologies can be distinguished.

Cloud technologies allow the teacher and the student to create information resources and to store them in the network information stores. The examples of integrated cloud-based free solutions for education are Google Apps for Education and Microsoft Live@edu, which have communications support tools in the form of instant messaging programs, along with the address book and task scheduler.

Web of the second-generation (Web 2.0) – is a kind of sites, where online content (internal content of the site) can be created by the users themselves. With regard to the education, Web 2.0 presents qualitatively new opportunities for building the educational process, since it allows to attract all students not only as consumers of educational content, but also as its active creators. Web 2.0 technologies help to put the student in the center of pedagogical process. As a result, he becomes more active in the creation of educational information and in the interaction with other participants of the training process. Services Web 2.0 include social networks, social bookmarks, online games, blogs, forums, communities, groups, comments, chats, online-encyclopedias (wiki), etc.

When solving a number of didactic tasks, Learning Management Systems (LMS) can be used. Modular Object-Oriented Dynamic Learning Environment (Moodle) is one of the most common. This system allows to create e-learning courses (network courses), including all necessary training, support and monitoring materials (or links to them), as well as methodological instructions, in accordance with the specifics of academic discipline and its work program.<sup>7</sup>

The main features of the system LMS Moodle are the following:

- wide opportunities for placement and updating of educational and methodological support of the e-learning course;
- the tools for counseling of trainees, the organization of problems discussion via forums and chats;

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<sup>7</sup> J. Cole, H. Foster, *Using Moodle. Teaching with the popular open source course management system*, 2<sup>nd</sup> edition, Sebastopol, O'Reilly Media Inc., 2008.

- the ability to monitor the work of listeners regularly, by viewing the statistics of visits;
- communication opportunities, the existence of active feedback, allowing the teacher quickly receive the works of the trainees, review them, correct mistakes and send them for revision;
- system of supporting the exchange of files of any format;
- distribution service, allowing to inform all participants of the course about current events;
- the possibility of implementation of distance learning form.

Within the framework of the problem of development the information competency of future teachers in the process of performing scientific-research, course and final bachelor's works, the research subjects are focused on the development of electronic educational resources, based on the above-considered modern computer programs and educational environments.

The work on the designing of electronic educational resources in specific areas and topics involves resolving the following issues: 1) identification of characteristics of the problem approach to the topic; 2) definition of information needs; 3) tactics of information gathering; 4) the ability to work with information sources; 5) the ability to synthesize and to structure information, received from different sources, in a certain sequence, 6) creative approach to solving the posed tasks.

The students of the program track "Vocational training (branch-wise), profile: energetics" developed e-learning courses on the subjects of general energetics and electrical engineering, in accordance with normative documents and educational programs of secondary vocational education.

The structure of the developed courses is represented by the following categories: normative documents; glossary; guidelines; theoretical materials; didactic materials for practical training and independent work, monitoring and evaluation; video materials; literature and electronic sources.

During the development of relevant e-learning courses, the future teachers acquire the basics of interactive learning, the variety of ways and forms of presentation of teaching materials, the possibility of modular structuring of content, the creation and implementation of individual educational plan in professional activities, activation of various types of educational and cognitive activities. In addition, students not only learn to manage the educational process quickly and effectively, but they also acquire a certain vision of the position of modern teacher, his role as a mentor, assistant in the process of self-development of students.

Approbation of the developed e-learning courses was carried out during the period of students' pedagogical practical training, where developed courses were used as additional educational resources for traditional forms of education.

It should be noted, that modern students are psychologically ready for this form of work, and they get in gear with great pleasure.

## **Summary**

The results of the conducted research on the problem of development of information competency of teachers in higher education institution allow to make the following conclusions:

- the information competency of a modern teacher is one of the most important indicators of the success of his activity, and at the same time it is a necessary prerequisite for further raising the level of his professional competency;
- in modern conditions, the development of information educational environment by teachers and the ability to actively use the resources of such environment in the educational process is of particular importance; and this determines the importance of students' preparing for the designing and development of electronic educational resources, focused on the systematic use of ICT tools;
- the listed methodological and technological aspects of the development of teachers' information competency are actively implemented into the educational practice of the institute, and allow to specify the content of teacher's professional standard in terms of his ICT competencies.

### **Conclusion**

Thus, the organization of work on the designing and development of e-learning courses on the basis of ICT tools, discussed above, contributes not only to mastering the relevant knowledge of ICT sphere, scientific-research activities, but, on the whole, it forms ICT competency of future teachers, raises the level of their teaching and methodical literacy, ability and readiness to organize an effective educational process.

In our opinion, the problems, considered in the article, are topical and require further study.

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## **Speech-Communicative Function In The Structure Of Predictive Competence Of Young Schoolchildren With Musculoskeletal Disorders\***

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**Abstract.** *The urgency of the problem of studying the formation features of speech-communicative function of prognostic competence in children of primary school age with musculoskeletal disorders, without intellectual insufficiency, is determined by the need to identify the emerging communicative difficulties, which can be the predictors of various deviations, and hinder successful socialization of children. This determines the purpose of the research - to study the development of speech and communication skills in primary school-aged children with disabilities of musculoskeletal system, and to identify factors, which adversely affect their prognostic competence. The basic methods of this study are the constructive and comparative analysis of modern works and the experiment, which includes a set of complementary tasks, the quantitative and qualitative method for analyzing empirical information.*

*The results of the research have shown the limitations of communicative abilities of children with musculoskeletal disorders. This problem does not allow the child to fully understand the norms, rules, models of behavior, and implement them in interpersonal relationships, hindering his successful socialization. However, as the analysis of modern domestic and foreign studies has shown, the question of the role, essence, structure of the speech-communicative component of prognostic competence remains open and little studied, especially for primary school-aged children with motor disturbances. The essence of speech-communicative function of prognostic competence is not fully revealed; its structure is not determined; the method of diagnostics is not developed.*

**Keywords:** successful socialization, prognostic competence, speech-communicative function, children of primary school age with musculoskeletal disorders.

### **Introduction**

The socialization of primary school-aged children with disorders of the musculoskeletal system is one of the fundamental problems of special pedagogy and psychology, the relevance of which only increases with the passage of time. Many domestic psychologists consider socialization as the acquisition of social experience, as the entry into the social environment, familiarization with the system of social relations, which are formed in the course of labor activity. They identify pre-labor, labor and post-labor stages of socialization. The most significant, according to G.M. Andreeva, is the pre-labor stage, in particular, the primary school age,<sup>1</sup> in connection with the transition to a new kind of leading activity (from play to learning), acquiring the socially significant status of the pupil with the rights and obligations to the society, where the most significant is the formation of communicative abilities of the child.

Successful socialization of primary school-aged children is directly related with the formation of prognostic competence. To date, a large number of the

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University. The study was carried out with the financial support of the RFBR and the Government of the Republic of Tatarstan, in the framework of the research project №17-16-16004: "Predictive competence of junior schoolchildren with limited health capacities in the prevention of deviations".

<sup>1</sup> G.M. Andreeva, *Social Psychology*, Moscow, Aspect Press, 2001.

researches, devoted to the study of prognostic abilities, have been carried out in the psychological, medical, psychological and pedagogical areas. The analysis of modern scientific works has shown, that in the structure of predictive competence, many researchers distinguish a communicative component, which includes knowledge of the language system and the possession of language material (speech), as well as observance of social norms of communication, rules of speech behavior, experience of their application. The communicative needs of children with disabilities, including motor disturbances, are described in the works of<sup>2</sup> Summarizing the structural and functional analysis of psychological and pedagogical research on the problem under study, we have identified the essential characteristics of the speech-communicative component of prognostic competence, in the context of the emergence of a socially successful personality. These include: the ability of a person to predict the communicative situation, to orientate in it; to implement a communicative plan, using an adequate speech utterance; accurately and correctly recognize (diagnose) the psychological state of the partner in communication, to understand his ideas and intentions; to foresee the interlocutor's reaction to the emotions and reaction to the words of the partner in communication; the ability to prevent conflict situations, to overcome psychological barriers in communication, emotionally regulate the situation, to distribute own efforts in communication.

At the primary school age, the speech-communicative component of prognostic competence is improved by being included in the educational activity, thanks to which all the psychic properties and qualities of the individual are developed. Such psycho-physiological features of children with musculoskeletal disorders, as insufficient coordination of limbs, limiting free movement in space and manipulative function of hands; disorders of the muscle tonus of the body, face, articulatory apparatus, leading to speech defects; combined visual, hearing and secondary impairment of personality characteristics, expressed in infantilism, aggression, weakness of strong-willed features, isolation, rapid exhaustion and fatigue, certainly lead to a slowdown development of prognostic competence of children, in particular, its communication component. This, in turn, can cause unsuccessful socialization or social maladjustment of children. Many primary school-aged children with disabilities of the musculoskeletal system are not able to build social relationships independently, to master communicative skills, due to the existing speech disorders, social and emotional deprivation, as well as due to the violations of motor functions, limiting the child's interaction with the surrounding world, in communication with adults and peers.

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<sup>2</sup> K. Bunning, "Investigation of practices to support the complex communication needs of children with hearing impairment and cerebral palsy in a rural district of Kenya: a case series," in *International Journal of Language & Communication Disorders*, III (2013), p. 689–702; S. G. Batyрева, "The model of formation of communicative competence of junior schoolchildren in the educational process," in *News of VSPU*, VI (2015), no. 101, p. 28-31; L. N. Bulygina, "Formation of communicative competence of adolescents," in *Innovative projects and programs in education*, III(2014), p. 23-27.

Difficulties in adaptation to new social conditions, lack of consistency in predictive competence, low level of communicative opportunities, inappropriate conditions for the education of primary school-aged children with limited health capacities and the existing malfunctions of physical and mental health can contribute to the development of deviations in adolescence. Unfavorable social conditions (deprivation, conditions of upbringing in the family, pedagogical neglect, antisocial behavior of parents, conflicts and divorce in the family, limited verbal contacts, etc.) cause a reaction in the form of deviant behavior in younger adolescents.

### **Methods**

We conducted an experiment to study the communicative abilities of primary school-aged children with disorders of the musculoskeletal system, with the aim to determine the dependence of the prognostic capabilities of the child with musculoskeletal disorders (MSD) on the level of his communicative abilities. We selected 12 tasks, proposed by<sup>3</sup> 54 pupils of grades 2-4, at the age from 8 to 13, took part in the experiment. They studied at the State budget educational institution "Kazan boarding school №4 for children with disabilities", Kazan, Republic of Tatarstan; and the Municipal budgetary general education institution "Secondary school № 60" Cheboksary, the Chuvash Republic. 2 samples of research subjects were formed: schoolchildren with musculoskeletal disorders and normative development.

The answers of the subjects were entered in the survey protocols. They were estimated according to the point-level system: 12-20 points - low level; 21-28 points - base level; 29-36 points - high level. The high level was ranked at 3 points, the base level - 2 points, the low level - 1 point. The basic level presupposes readiness of schoolchildren to listen to the interlocutor and to conduct a dialogue, state their point of view and argue it, adequately assess their capabilities and the abilities of others. A low level is revealed in cases, when schoolchildren do not show themselves in joint activities, are not interested in taking into account peer opinions, are not able to use speech tools to solve communicative and cognitive tasks. High level corresponds to the ability to organize educational cooperation and joint activities with the teacher and peers, to find a common solution and resolve conflicts, on the basis of positions coordinating and taking into account interests, to formulate, argue and defend own opinion.

### **Results**

The analysis of the obtained results made it possible to reveal features of speech-communicative skills of younger schoolchildren with disorders of the musculoskeletal system (Table 1).

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<sup>3</sup> E. L. Cherkasova, *Speech communication of children of primary school age: study, diagnosis, development*, Moscow, Natsionalny Knizhny Centr, 2011.



Table 1. Level of formation of speech and communication skills in primary school-aged children with normative development and disorders of the musculoskeletal system

The sample of respondents		The levels of speech prediction		
		Low level (persons/%)	Average level (persons/%)	High level (persons/%)
Primary school-aged children with musculoskeletal disorders	8-9 year-old The 2 <sup>nd</sup> grade	6/86	1/14	0/0
	9-10 year-old The 3 <sup>rd</sup> grade	2/29	3/42	2/29
	10-11 year-old The 4 <sup>th</sup> grade	4/31	4/31	5/38
<b>Total</b>		12/44	8/30	7/26
Primary school-aged children with normative development	8-9 year-old The 2 <sup>nd</sup> grade	0/0	2/29	5/71
	9-10 year-old The 3 <sup>rd</sup> grade	0/0	1/14	6/86
	10-11 year-old The 4 <sup>th</sup> grade	0/0	0/0	13/10 0
<b>Total</b>		0/0	3/11	24/89

The correlation analysis of the studied parameters, carried out with the help of Student's t-test, showed statistically significant differences between the samples, in the formation of speech-communication skills, in primary school-aged children with normative development, and disorders of the musculoskeletal system. So in the group of schoolchildren with normative development, the indicators of speech

communication state ( $t = 8,054, p \leq 0,001$ ) are significantly higher, than in the group of peers with musculoskeletal disorders.

Quantitative and qualitative analysis of the results showed, that the most of pupils of the 2<sup>nd</sup> grade with musculoskeletal disorders, had a low level (86%) of speech-communicative skills formation. Base level was established in 14% of schoolchildren. A high level was not revealed. Second-graders experienced the greatest difficulties in the process of performance of tasks, aimed at finding an explanation in the discussion, and drawing up the continuation of the story. Performing these tasks, schoolchildren showed 100% low level. Children couldn't make a connected meaningful continuation of the story, they did not orient in the text, they could not determine the question in the reasoning, they answered, making multiple grammatical and lexical mistakes. The schoolchildren could not make a coherent narrative continuation of the story, they did not orient in the text, sometimes they did not even try to correct the wrong sequence of replicas, and if they did, the dialogue was not drawn up correctly. Children could not give reasons for their point of view. They understood the text only partially. Pupils also experienced great difficulties in determining the situation of communication. They could not distinguish the official appeal from everyday communication. To perform the task, hints were required in the form of pictures with scenes of the situation, depicted on them, but the children made mistakes after the prompts. Second-graders coped better with tasks in pairs and groups. Most likely, this is due to the fact, that the beginning of schooling leads to a change in the social situation of the child's development; a complex system of relationships with peers and adults is formed. When working in groups, leaders were immediately identified, which controlled the work of the entire team. However, all the children took part in the joint work.

The most of third-grade students with musculoskeletal disorders had the basic level (42%) of the formation of communicative skills. A high level was revealed in 29% of students, and 29% of students had a low level.

The third-graders experienced the greatest difficulties when performing the task of finding an explanation in the discussion. The children either could not formulate the question, or made it incorrectly. When working in groups, there was the leadership of some and passive participation of other students. Most likely, this was due to the fact, that the leaders were the children with developed coherent speech, and more passive children had serious speech disorders.

The most of fourth-grade pupils with musculoskeletal disorders had a high level (38%) of the formation of communicative skills. 31% of the students had an average level, and the same percentage of children had a low level. Many fourth graders did not understand the sequence of phrases in the dialogue, made up the dialogue incorrectly and said they were right. Also, it was difficult for them to make the right question after reading the text. The students also had difficulties in determining the situation of communication, getting wrong informal and official speech. All the students took part in the joint work, even those with poorly developed communication skills. Children quickly agreed and worked together.

When working in pairs, students asked each other questions, supported the conversation.

As it was revealed, a high level of speech-communicative skills is achieved to the fourth grade, as a result of remedial-directed teaching in school. Children in the classroom and during extracurricular activities are taught the skills of interacting with peers, adults, and younger ones. Further, the leader is revealed in each grade (for example, in the third and fourth grades), and in the primary grades all childhood to stand out all. For this reason, quarrels, conflicts, misunderstandings can sometimes arise. The predominance of low level speech-communicative skills in second-graders can be explained by the lack of experience of cooperation, interaction with each other, as well as the presence of coherent speech disorder, the inability to put ideas into words. By the third and fourth grade, the speech of many children is developed, so they have hardly any difficulties with the expression of their thoughts. Children are ready to listen to the interlocutor and conduct a dialogue with him, state own opinion, argue it, adequately assess the own behavior and the behavior of others, use speech tools to solve communicative and cognitive tasks.

Insufficient level of speech and communication skills of primary school-aged children reflected in the state of their prognostic competence. Children, when communicating with peers and adults can not predict the answers of the interlocutor, do not recognize the psychological state of the partner, accordingly they are not oriented in the situation of communication and they can not build a productive dialogue. The low level of speech-communicative skills leads to a delay in the formation of prognostic competence, that deprives children of the opportunity of successful socialization, since it is one of the most important components.

The limit of physical capacities narrows not only the social circle of child, but also their own potentials and prospects. A child without communication with peers has difficulties in prediction, planning his activities, life, and sometimes, it is impossible to imagine life outside home, outside the boarding school. This greatly affects the development of predictive competence, since the child does not need to worry about anything; everything is decided by parents, relatives, teachers.

Speech disorders primarily affect the ability to foresee. Firstly, without a formed internal speech, the child can not realize the internal planning of actions, words, expressions, which he wants to realize. Secondly, the defects in expressive speech do not allow the child to express his or her predictions, the desired results of actions. There again, speech disorders narrows the child's social circle, puts the role of planning to mother. Without insufficient communication, the child does not learn to predict the actions and statements of the interlocutor, accordingly, he has no need to predict own actions and statements. Dependence on other's views, and social deprivation cause the adaptive behavior of children, delay the formation of speech-communicative skills. Children with cerebral palsy prefer to communicate in small groups, often have a grudge against others, fearing of ridicules and

neglecting from them, deliberately avoid social contacts, still more limiting their experience of interpersonal interaction.

Specific for cerebral palsy is the disorder of the motives of social interaction. The motivational level acts as one of the components of the structure of speech-communicative function. The specificity of cerebral palsy often reduces the need for communication in these children, due to the presence of dysarthritic speech disorders, and hyper protection of adults. Speech-communicative function assumes an adequate assessment of one's own psychological potential, as well as the partner's potential, orientation in the situation and task. Problems with the social interaction of children with musculoskeletal disorders lead to underdevelopment of all these components of speech-communicative function. Children have difficulties in expressing their thoughts; and the analysis, evaluation and prognosis of the interlocutor's speech are inconceivable for them.

### Discussion

In the modern literature on the problem of prognostic competence, primary attention is paid to preschool and adolescent<sup>4</sup> age. The contingent of children of primary school age remains without sufficient attention, especially children with disabilities, as evidenced by the findings, presented in modern studies.<sup>5</sup> The results of our experiment are also confirmed by the work of Manijeh Firoozi.<sup>6</sup> The ability of children to reconstruct past events (experience) and to predict the future is studied there. In this work the author says, that children under the age of 7 see the changes in the future only in physical terms. Since the age of 7, they are beginning to realize the changing social role over time. The emphasis on the physical aspect is already ignored. Manijeh Firoozi associates this with the rapid growth of hippocampus from 7 to 12 years, which is involved in the prediction of future events and the reconstruction of past, as well as changing the social interaction of children.

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<sup>4</sup> V. D. Mendelevich, *Psychology of deviant behavior. Textbook*, Sankt Petersburg, Rech, 2005.

<sup>5</sup> B. Karen, "Developing the personal narratives of children with complex communication needs associated with intellectual disabilities: What is the potential of Storysharing((R))?", in *Journal of applied research in intellectual disabilities*, XXX (2016), no. 4, p.743-756; J. Marshall, "Language development, delay and intervention the views of parents from communities that speech and language therapy managers in England consider to be under-served," in *International journal of language & communication disorders*, LII (2016), no. 4, p. 489-500; A. A. Mrachko, "Examining Paraprofessional Interventions to Increase Social Communication for Young Children with ASD," in *Topics in early childhood special education*, XXXVIII (2017), no. 1, p. 4-15; A. Melissa Sreckovic, "Examining the Efficacy of Peer Network Interventions on the Social Interactions of High School Students with Autism Spectrum Disorder," in *Journal of autism and developmental disorders*, IIII (2017), no. 8, p. 2556-2574; A. Sylvestre, "Social participation of children age 8–12 with SLI," in *Disability and Rehabilitation*, XXXVIII(2016), no. 12, p. 1146-1156.

<sup>6</sup> Firoozi Manijeh, "Ability of "time traveling" in children," in *Procedia – Social and Behavioral Sciences*, XXX (2011), p. p. 1515-1518; A. Tvardovskaya, A.I. Akhmetzyanova, T. V. Artemyeva, I. A. Nigmatullina, "Anticipation Phenomenon in the Structure of Deviance: Analytical Research Review," in *International Journal of Humanities and Cultural Studies (IJHCS)*, III (2016), no. 1, p. 418-425.

The results obtained are important both for the work of primary school teachers, and for narrow specialists, dealing with children with musculoskeletal disorders in general educational institutions.

### **Summary**

This experimental study contributes to the confirmation of the opinion, that the development of speech-communicative function of primary school-aged children with musculoskeletal disorders lags behind the age norm.<sup>7</sup> We have established, that the formedness of the ability of a child to predict the communicative situation and to orientate in it, to find an adequate communicative structure and to implement a communicative plan, to understand his own psychological potential and partner's potential, affects his prognostic competence.

### **Conclusions**

The existing in modern studies data on the interrelation between the difficulties of communication of children with musculoskeletal disorders and their socialization give grounds to consider the specific communicative skills of primary school-aged children with musculoskeletal disorders as the predictors of prognostic abilities disorders. This proves the need for further empirical study of specific features of the prognostic competence of primary school-aged children, taking into account the peculiarities of their communication in normogenesis and dysontogenesis. One of the important tasks is the need to create a diagnostic tool, allowing to assess the formation of prognostic abilities, in particular, communicative, with the aim to prevent deviations in the system of psychological and pedagogical support for children with musculoskeletal disorders.

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<sup>7</sup> Socially-perceptive anticipation in children with cerebral palsy // NaukovabibliotekaUkraini (Electronic resource). - URL: <http://www.info-library.com.ua/libs/stattya/2994-sotsialno-pertseptivnogo-peredblchennja-u-ditej-3-tserebrllnim-paralichem.html>), accessed 12. 06. 2017.

## Substantive Confixation As An Object Of Academic Research\*

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**Abstract.** *The article examines the ways of substantive confixation emergence as an independent way of word-production in the Old Russian language (XI-XIV centuries), and also they prove the position that confixation is not primordial, but a later phenomenon in Russian language. The study of confixation development ways leads to the understanding of Russian confix appearance mechanism as the result of a peculiar composition of the former suffixal formations that appeared on the basis of prepositional and case forms and later reoriented to the motivation by the original forms of a producing word. The data of the Old Russian language historical dictionaries are used as the material for analysis. The study is carried out taking into account the structural, semantic and stylistic characteristics of derivative formations on the basis of nominal historical word formation ideas developed by the Kazan Linguistic School.*

**Key words:** Old Russian language, substitution confixation, confixation, word formation, morpheme, confix.

### Introduction

In our study, we proceed from the proposition that confixation is not a primordial, but a later phenomenon in Russian language. This is argued by the following arguments:

1) An argument is a general theoretical, a linguistic one: the Old Russian language was syncretic and syntagmatic. A basic unit text unit was a syntagma, there was no zero suffixation, a substitutive and non-changing truncation, and other morphological features peculiar to modern Russian word formation, and a two-element (bilateral) complication of a producing basis - later phenomena occurring at a higher level of linguistic thinking, and the development of linguistic categories. By the fourteenth century, due to the breakdown of syncretism, a word becomes the basic unit of language and text, the language paradigmatic becomes stronger, on the basis of which rethinking and re-motivation of the suffixal formations that appeared on the basis of non-original prepositional-case combinations, from indirect forms to the original ones. This, in its turn, led to a specific re-adaptation of the former suffixal words and the development of a new way of morphemic word-production, which we qualify as a confixation following V.M. Markov, that is, the method of the producing basis complication in pre and postposition of a two-element intermittent morpheme simultaneously - a confix.

2) An argument is a textual, a verbal one: the ability to correlate a word in which an emerging noun confix appears with one-root development in a text. Our opinion that some formations in the Old Russian language can be qualified as confixal one is based on the fact that they meet with the original forms in one text and enter into relations of correlation with them. Since the XIIIth century we can talk about the typical nature of the in-text correlation of considered nouns with the original forms. In fact, during this period (the end of the Old Russian period) a

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new motivation acquired the status of word-formation relations and it began to serve as the model for the development of words with a confix structure.

The study of substantive confixation ways emergence fills in the gaps in the description of confixation development historical process as a relatively independent way of morphological word-production in Russian language. Confixation as an independent way of word development could appear only in the period of linguistic unit semantic syncretism destruction, during which the language paradigmatic strengthening took place. And for this, in its turn, it is necessary that some changes occur in the language associated with the development and the change of native speaker thinking type. In this regard, watching the Russian word-formation system of the 11th-14th centuries, it is necessary not only to investigate the emergence of a new way of word-production, but also to think about the transformations in the ethnos worldview that could lead to the emergence of a new naming matrix - confixation.

### **Materials and methods**

An integrated approach was used in this article. Its basis is a multidimensional method of confixation description: from the point of view of confixation interaction with the system of the Old Russian language word development as a whole; from the point of view of the semantic potential of generating and derived words; from the point of view of contextual semantic modifications of confixes - when a linguistic unit leaves the system and turns into a specific speech situation, where structural links may look different. The latter aspect is especially important, since it is textual motivation that often indicates the change of the internal form in the derivatives under study, and therefore, one of the ways of confixation appearance in Russian language.

The correctness of the observation results interpretation in the word-forming system of the Old Russian language is determined on the one hand by the combination of the diachronic approach with the synchronic one, and, on the other hand, by the formal approach with the semantic one. The examples are found in the historical dictionaries as an empirical basis for research: "The dictionary of the Old Russian Language (XI-XIV centuries)" - hereinafter referred to as DicORL, "The materials for the Dictionary of the Old Russian Language" by I.I. Sreznevsky - further "The dictionary index to the Old Russian language dictionary".

### **Results and discussion**

An important theoretical issue is the choice of a term: traditional science says that there are the prefix-suffix and the prefix-postfix way of word-formation in these cases, singling out two affixal morphemes in a derived word. But at the end of the sixties of the 20th century a new confixal interpretation of these formations appeared. In the scientific literature the term "confix" was used by N.V. Yushmanov in 1928 during the description of Semitic languages. Concerning Russian language, the term "confix" was introduced by V.M. Markov in 1967 and

substantiated the legitimacy of its use with reference to intermittent morphemes.<sup>1</sup> Later, in order to substantiate the existence of confixation, many arguments are given in the works.

### Conclusions

The Old Russian period of Russian language development marked the potential ways of confixed word-production appearance. The confixation in Russian language appeared in the second half of the fourteenth century, using a number of linguistic possibilities for this purpose.

The main way was the primordial Slavic development of confix structures on the basis of a peculiar re-development of prepositional form suffix complications in the course of the Old Slavic semantic syncretism collapse and the strengthening of the original forms in the paradigm. The Old Russian language has strong correlation with prepositional and case forms, this is confirmed by the widespread and frequent use of the adnominal forms like *перед городом, без бора, за рекой, при мосте*, etc. The number of confix types in the Old Russian language was determined by the number of so-called primary prepositions, since the source of the confix prepositive element are prepositions, and not prefixes. These are the prepositions *безъ, въз, за, изъ, между, на, надъ, о, объ, передъ, по, подъ, при, с(о), оу*; less often the prepositional case forms with the prepositions *отъ, про* were formed with suffixes.

It is significant that two systems - the first components of confixes and prepositions - turn out to be closer to each other than prepositions and prefixes, which again confirms that we do not deal with the prefix-suffixed word-formation but with the suffixation of prepositional forms and the further confixation, developing by reintegration into the suffixal derivatives arising on the basis of prepositional-case forms. The coincidence of the same prepositional elements of the structures under consideration with the prefixes is historically conditioned and is associated with the existence of prepositional-prefixing parallelism in the Slavic languages since ancient times.

Let's note that in the process of language evolution the South and East Slav variants of prepositions participated in the development of confixation:

- the book preposition between - *междоушци*.
- folk conversational *меж, между, меж* – *межимисць*.
- a book preposition *предъ* – *предъолтари*.
- a folk colloquial *передъ* – *передъгородъ*.

G.A. Nikolaev (1991)<sup>2</sup> wrote that confixation developed in the XI-XIV centuries is "one of the means of text syntagm compression into a word". This compression was formalized by the means of suffixation, and the prepositional-

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<sup>1</sup> V. M. Markov, "Remarks on confixation in modern Russian," in *Selected works on Russian language: Coll. of articles*, Kazan, DAS, 2001, p. 104-109.

<sup>2</sup> G. A. Nikolaev, G.A. 1991. "The forms of nominal word-formation in the language of the XIIth century, in V. V. Kolesov (ed.), *Old Russian language of pre-Mongolian time. University collection*, Leningrad, The publishing house of Leningrad State University, p. 155-162.



case forms were complicated in the Old Russian language by certain suffixes: -и-ь (порди), -ьство (безчадьство), -ьникъ (нарамьникъ), -ьница (възглавьница), -ница (завьница), -, -ькъ (бездомькъ), -ьщина (Задонщина), -ька (подъшьяка). Such book suffixes as -тие, -ение, -ние, -ость, -тель did not participate in the formation of confixation, because they had not prepositional-case forms as a producing basis, but were formed on the basis of verbs or adjectives. The most regular suffix is the suffix -и-ь, and it actively works with both book and folk-conversational basic elements. So, in the "Index Dictionary of the Old Russian Language (XI-XIV centuries)" they fixed about 300 names, which from the standpoint of further relations could be qualified as confixal ones, 148 of units were with the postpositive -и-ь.

The substantive with the following structure: безъ...и-ь, безъ...ьство, безъ...ькъ ь, въз...ьница, за...и-ь, за...ица, изъ...и-ь, между-меж...и-ь, на...ьникъ, надъ...и-ь, не...ьстви, о...и-ь, о...ькъ, предъ-передъ...и-ь, передъ...ьница, по...и-ь, по...ька, подъ...и-ь, подъ...ьникъ, при...и-ь, при...ица, с(о)...ьникъ, съ...ьница, оу...и-ь, оу...ина are referred to the genetic basis - the prepositional-case forms of a noun. For example, the substantives formed by the suffixation of the prepositional-case form with безъ signify the absence of the producing basis; The substances formed by means of the prepositional-case form with the preposition за have a spatial meaning (the thing that is behind the object called the producing base); между-меж means the thing between the objects called the producing base; на - an object that is on the producing basis; под - an object that is under the producing basis; при - the thing at the producing base, etc. In the Russian formations with a forming confix structure, the basic semantic load is borne by the initial element of the confix, the final element forms the part of speech, generic and stylistic affiliation of a word.

Turning to the other way of the confixal way of word formation appearance in the Old Russian language, let's note that calquing was of great importance for the development of the Russian word-formation system of the literary and written language. For example, a significant layer of abstract vocabulary of the Old Russian language, characteristic of its use for church literary monuments of translated works of Byzantine writers is made precisely by calquing. A translator, trying to convey an original meaning of an original, created calques, which were fixed in the dictionary and widely used in the original literary monuments of the Old Russian language.

Calqued structures of the confix type were distributed in the book texts, promoting the development of a confixation way of morphological word-production, at that the calques gave already prepared confix structures. This is due to a high probability that at the borrowing of a number of morphologically divided words from a typologically close language, these units will be perceived not as monoliths, but as the forms that have certain parts.

The units on *и* were especially productive. In favor of this assertion<sup>3</sup> cites the following argument: most units of this type are found in Old Russian written monuments of translated origin and have Greek correspondences.

We believe that at the end of the XIIth century we deal with a similar word-building process, which is ensured by the use of the word-formation series model, since "a word model and its morphological structure are reproduced at similar word-formation, only they are filled with new lexical material"<sup>4</sup>. The consequence of this process is the repeatability of a word structure with the borrowing of some common word-formation value of a model, associated with the word-forming elements represented in it. But there was no blind imitation here. A translator used the word-forming abilities of the Old Russian language. You can see in the monuments that the calqued formations, pouring into the speech of the ancient Russian society, created the models for the development of new words from the East Slavonic lexical material.

Since the calqued confixal structures were not characteristic of the derivational system of the Old Russian language of the 11th-12th centuries and did not have support from it at first, then the confixal units were perceived as occasional. The speakers of the language tried to comprehend the calques as suffix ones, to interpret through prepositional-case forms and through adjectives: *безълоби* – *безълобьни* – *безъ зълобы*; *безправди* – *безъ правды*. Calqued forms turned out to be in the circle of close words, and a word began to be mastered in the word-formation relation. Besides, the calqued words, like *созвучь*, *соцветь*, "provoked" the comprehension of Russian words, such as *подворь*, as confusional ones, for example: *а на которьмь подворьи стоятъ немци... не поставити на томь двор князю. ни татарина. ни иного которого посла и велель еси товарь его розграбити на д капи воску. Гр 1229 сп. 1270–1277 (DicORL)*. In the course of the word-building mastery of these words, they received the motivation in Russian and strengthened the structure, not characteristic for the word-forming system of the Old Russian language: *городъ* – *погородъ*, *дождь* – *бездождь*, *родъ* – *сьроди*, *мзда* – *възмзди*, etc.

A part of the confix types was developed by the interaction of primordially popular suffixation of prepositional case forms and Greek calques of the confix type. For example, the words *възгорь* (Ig.Dan.16), *възводь* (Novg.chron., 1176), etc., on the other - such explicit calques as *възглави* - (Jur. ev., 1119), *възмзди* (Verse 1156-1163, 104), *възбращьстви* - (Amart., XIII-XIV centuries). S.H. Khekmeneva draws attention to the fact that "often two or more Greek words, somewhat different from each other, correspond to several Russian ones *αρχνομία* – *безакони*, *безаконьно*, *безаконьстви* (Chr. Georg. Am. 124, 384, 570)<sup>5</sup>».

<sup>3</sup> S. P. Obnorsky, "Prefix "без-" in Russian," in *Selected works on the Russian language*, Moscow, State Educational and Pedagogical Publishing House of RSFSR Ministry of Education, 1960, p. 195-206.

<sup>4</sup> E. S. Kubryakova, *The types of linguistic meanings: semantics of a derived word*, Moscow, Nauka, 1981.

<sup>5</sup> S. Kh. Chekmeneva, *The development of nominal suffixation in Russian language (based on the material of nouns with a finite element -ue/ -ье): Dis. by the cand. of philol.*, Kazan, 1974.

### Summary

This study allows us to recreate the picture of the nominal substantive resource evolution, in which the spiritual information extracted and processed by an ethnos is preserved above all. In essence, we talk about the forms in which an ethnos tried to embody the accumulated knowledge about the world and about itself, the way the most suitable matrices of substantive names were created and selected. On the one hand, as is known, no further process of cognition is possible without a nomination.<sup>6</sup> And on the other hand, the nominative formula determines and assigns the logic of the verbal content organization and, consequently, the proper arrangement of the semantic accents, which is subsequently projected into the ethnos culture and mentality.<sup>7</sup>

We turned to the substantive confixation, since the study of this word-production method allows us to identify the most characteristic processes of its formation and development: the interaction of the calqued structures and primordial suffixal forms; the strengthening of linguistic paradigmatics associated with the destruction of syncretism, and its impact on the re-motivation of former derivative units; the emergence of qualitatively new word-formation means and, accordingly, new word-formation structures.<sup>8</sup>

Summarizing the abovementioned results, it should be noted that confixation is the result of previously fixed object relations complex rethinking.<sup>9</sup> The emergence and further development of nominal confixation in the Old Russian language was organized by two sources: 1) East Slavic one - the suffixation of prepositional-case forms of nouns - the primordial Slavic path; 2) Greek - the calquing of ancient Greek formations - the path of structural borrowing. The interaction of the Slavic and Greek material led to the fact that the units appear by the end of the Old Russian period, using an original form of a noun as the producing basis.<sup>10</sup>

Thus, the confixation formed in the Old Russian language is the result of a complex rethinking of previously fixed object relations in the observed and perceived world of ancient Russians.

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<sup>6</sup> N. V. Yushmanov, *The Grammar of Literary Arabic language*, 5<sup>th</sup> edition, 2008, p. 168.

<sup>7</sup> E. Donalies, "Das Konfix. Zur Definition einer zentralen Einheit der deutschen Wortbildung. Deutsche Sprache, Zeitschrift für Theorie," in *Praxis H, II* (2012), p. 144-159.

<sup>8</sup> J. Erben, *Introduction to the German word formation. Enlarged edition*, Berlin, Erich Schmidt Verlag GmbH & Co., 2009, p. 65-66.

<sup>9</sup> E. Donalies, *The word formation of Dechen: an overview*, Tübingen, Narr Franke Attempto Verlag GmbH+Co. KG, Tübingen, 2008, p. 192.

<sup>10</sup> A. Seifert, 2008. *Antonomie und Isonomie fremder*, 2008, p. 41, p. 95-96.

## Features Of Estimating The Effectiveness Of Implementation Of Labor Actions In The System Of Secondary Vocational Education\*

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**Abstract.** *At this stage of the development of society as a whole and the educational process in particular, the problem of assessing the quality of pedagogical activity of a teacher acquires particular relevance for pedagogical activities since the results of the teacher's activity are expressed primarily as a result of learning activities of the students and the teacher's ability to analyze and evaluate his activities and their results, his professionally significant qualities. In this regard, the study purpose is to assess the effectiveness of implementation of the teacher's labor activities in the system of secondary vocational education.*

*The analysis of scientific developments and researches in the field of pedagogical activity allows saying that the studies of influence of the teacher's activities evaluation are practically not conducted, which determines the particular relevance of the issue under consideration. The data are partly examined in the works of Bespalov M. (Bespalov, 2013), Samygin S. I. (Samygin, 2012), Gin A.A. (Gin, 2014), Rudenko A.M. (Rudenko, 2015), Mayer A.A. (Mayer, 2012) et al.*

*The study methodology is constructed both on the basis of empirical (observation, comparison) and experimental-theoretical methods of scientific cognition (analysis).*

*In the article the authors come to the conclusion that the introduction of federal standards of new generation led to a reassessment of the teacher's role and the application of his knowledge and skills in the educational process in the system of secondary vocational education. Global world processes force the teacher to apply new competencies in the educational process, taking into account modern dynamic processes, and to distribute their labor activities in a new way.*

**Keywords:** Russia, education, teacher, educational process, efficiency, labor actions.

### Introduction

Pedagogical activity is the activity of adult members of society whose professional goal is to educate the younger generation. It is a special kind of social activity aimed at transferring the culture and experience accumulated by mankind from older to younger generations, creating conditions for their personal development and preparing for the performance of certain social roles in society.<sup>1</sup>

The content and psychology of pedagogical activity is determined by the social factors: place and functions of the teacher in society, the requirements of society to the teacher; by the socio-psychological factors: social expectations of people surrounding the teacher in relation to his personality and activities, his own expectations and attitudes in the sphere of his pedagogical activity.<sup>2</sup>

The purpose of pedagogical activity is developed and formed as a reflection of the trend of social development, presenting a set of requirements for a modern person, taking into account his spiritual and natural capabilities. It contains, on the

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> A. M. Rudenko *Fundamentals of Psychology and Pedagogy: General Issues*, Rostov-on-Don, Feniks, 2015, p. 22.

<sup>2</sup> E. B. Vasina, *Organizational-Economic Bases of Managing the Competence Identification in the System of Vocational Education. Abstract of a Doctorate Thesis on Economics*, St.Petersburg, 2011.

one hand, the interests and expectations of various social and ethnic groups, and on the other hand, the needs and aspirations of the individual.

The main functional unit, through which all the properties of pedagogical activity are manifested, is the pedagogical action as the unity of goals and content.

Pedagogical actions are the actions aimed at solving pedagogical tasks carried out by pedagogical means, methods and techniques. Such categories include: pedagogical observation; pedagogical study of a person (compilation of a "pedagogical portrait" in the unity of his main characteristics - manner, educatedness, development and training) and a group; pedagogical analysis; pedagogical evaluation; pedagogical decision; development of a pedagogical scenario for the upcoming action or event; pedagogical behavior; pedagogical communication; pedagogical impact; pedagogical requirement; pedagogical consultation; pedagogical assistance; pedagogical interaction, etc.<sup>3</sup>

The skills of a teacher, an educated specialist to competently perform pedagogical actions and use them in their lives, professional activities and teaching work constitute an essential part of technical arsenal underlying his practical pedagogical skill.

The pedagogical technique of performing actions is based on the technique of mastering a word, voice, gesture, facial expressions, posture, poise, gait, clothing, manners by a person, a teacher. Visual aids, educational instruments, educational devices, educational equipment are additionally used when performing pedagogical actions. The pedagogical technique of performing actions is often presented in an algorithmized form - as an interrelated series of tools, techniques and operations used, which facilitate its development and use.

Some other means are used (in particular psychological ones) in the pedagogical actions, where a real result is needed. The combination of techniques often makes them and the actions themselves psychological and pedagogical, for example: psychological and pedagogical observation, psychological and pedagogical analysis.

## **Results**

### *System for assessing the effectiveness of implementation of teacher's labor actions*

The current system of national education is at a difficult stage of its development. The demands made by the society today on education no longer allow it ignoring the processes taking place both within the state and at the international level. All of the above leads to the need to determine the main criteria for assessing the activities of people involved in the implementation of one of the most important social tasks - education.

Evaluation of pedagogical personnel is an important task in the process of leading a pedagogical team, a necessary condition for improving the efficiency of teachers' work. It is implemented in three directions: administrative, informational and motivational.

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<sup>3</sup> S. I. Samygin, *Psychology and Pedagogy: Study Guide*, Moscow, KnoRus, 2012, p. 103.

Administrative direction involves changing the teacher's status (promotion, reduction in position, transfer to another job), extension or termination of the employment contract. Implementation of this direction helps to increase the efficiency of organization as a whole, as it allows attracting qualified specialists to work, and also meets the interests of teachers, as it helps to satisfy their desire for success, the need for achievement and self-esteem.

The information direction of personnel evaluation is necessary in order to inform them about the relative level of their work, which allows determining the directions for improving the professional skills of teachers.

Evaluation of the results of teachers' work is an essential factor in motivating their organizational behavior, since the achieved high results in labor are noted by the administration by material or moral incentives stimulating high self-reliance in labor.<sup>4</sup>

To perform the personnel evaluation, we need the criteria that determine how to evaluate the methods of collecting, processing and analyzing information, organizational evaluation procedures that determine the functions performed, and the subjects performing evaluation.

The criteria for assessing the effectiveness of the educators' work are difficult to determine, given the nature of their work. A considerable number of scientific and journalistic publications and a number of regulatory legal acts are devoted to this issue today.

The latter includes the documents of various levels: laws setting general direction for the development of this sphere; decisions of the education committee governing the activities of all levels included in this process; state standards; here the requirements concerning structure, volume, conditions of implementation and development of documents of the following level are specified; programs that are developed on the basis of previous papers by the educational institutions themselves; provisions where the requirements and criteria for assessing the effectiveness of workers' activity in the education of a particular educational organization are clearly formulated.

As we can see, the process of determining the qualitative indicators of the teacher's work attracts a whole system of state bodies. Naturally, it also involves the educational organizations themselves.

The purpose of this process is to gain an opportunity to assess the quality of teaching activities, to influence it, and to economically motivate workers in this field on this basis. However, it should be noted that the entire system is still far from perfect to date.<sup>5</sup>

Every self-respecting teacher, as a rule, has his own ideas on how to implement the learning process. It is clear that at a certain stage of activity he forms his methods, teaching techniques, which can be presented as the pedagogical

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<sup>4</sup> S. S. Donetskaya, *Objective Assessment of the Teachers' Qualification in the Russian Universities*, Moscow, 2014, p. 22.

<sup>5</sup> M. Bespalov, "Analysis of the Reform of Educational System and Monitoring the Effectiveness of Secondary Vocational Schools," in *The Tax Bulletin: Comments on Regulatory Documents for Accountants*, VIII (2013), p. 18.

technologies in general. The effectiveness of implementation of the latter largely depends on the system that will be formed, which will reflect the relationship between the features of these technologies and the indicators that allow assessing the degree of their implementation. It should necessarily undergo an experimental check by the pedagogical staff, which will identify its shortcomings and allow them being adjusted.

*Criteria and indicators for assessing the quality of teacher's work in pedagogical activity*

The system of assessing the quality of labor pedagogical activity should include the main criteria for assessing the effectiveness of the educators' work. There are two types of evaluation: current (formative) and final (attestation, or summative).

The current evaluation is carried out periodically throughout the school year. The forms used in this evaluation, as a rule, do not cover all the teacher's activities, but focus on the evaluation of individual sections of his work.

The final (summative) evaluation is designed to determine the extent to which the teacher meets professional requirements in terms of qualifications and the quality of professional activity.

The evaluation is conducted on a wide range of developed and agreed criteria covering all aspects of the teacher's activities.

The overwhelming number of existing evaluation systems suggests that an overall assessment is made on the basis of evaluating the results of various aspects of the teacher's work. Certain criteria are developed to evaluate various activity aspects. Each criterion consists of an estimated figure and a corresponding scale.

Evaluation indicators are determined based on the content of the work performed. They can be divided into three groups:<sup>6</sup>

- indicators of educational activities;
- innovation activity;
- work indicators on teachers' self-development.

As a basis for the development of indicators, it is advisable to use clearly stated goals of the educational institution and clearly defined functional duties of the teacher. There is no single set of evaluation indicators for all educational institutions. Depending on the general orientation of the institution, its type and form, different requirements are imposed on teachers, on which the evaluation indicators should be built.

Within each activity aspect, it is possible to conditionally distinguish a group of indicators of its results and indicators of professional behavior creating the conditions for achieving the necessary results.

The indicators of professional conduct determine the actions that should be performed by the teacher to obtain the final results, as well as his behavior in the team, which affects the effectiveness of joint activities (responsibility, participation in management, compatibility, etc.).

When developing the criteria, it is important that each of the indicators used can be measured, that is, included in the evaluation scale. Just as there are no

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<sup>6</sup> S. D. Polyakov, *Psycho pedagogy of Education*, Moscow, Novaya Shkola, 2014, p. 214.

unified indicators, there are no generally accepted scoring scales. Therefore, they should be specially built in each educational institution.

The main principles of building an effective system for assessing pedagogical staff are:<sup>7</sup>

- staff development in the process and the result of evaluation (each teacher should be improved regardless of whether it works satisfactorily, well or perfectly, the difference is only in the individual starting level and the scope of improvement tasks);
- comprehensiveness (consideration of evaluation at different stages of a career or evaluation with different goals at the same stage as interrelated elements of a common system);
- respectful attitude to the person being evaluated (personality, his rights, interests and needs are put on the first place);
- democracy (the respondents are actively involved in the evaluation process in a particular form: they participate in the development of the criteria and content of the evaluation, terms agreement and discussion of the results, which makes them complicit in this process and forms a positive attitude towards it);
- differentiation (the personnel assessment system is considered as a set of evaluation subsystems for different groups of teachers);
- continuity (the evaluation is made up of the current and final evaluation and ongoing control of the teachers' work by the school management during the school year).

A competently built staff evaluation system allows teachers increasing their job satisfaction, feel their worth and thereby increase the potential stability of the team through:

- positive impact on staff motivation (feedback favorably affects motivation, allowing the employees adjusting their organizational behavior);
- planning the training of team members (the assessment allows identifying shortcomings in the qualification level of each employee and stipulate measures to correct them);
- planning the professional development and career (the assessment of employees reveals their weak and strong professional qualities, which allows preparing the individual development plans and planning the career effectively);
- making decisions on remuneration, promotion, dismissal (regular and systematic staff evaluation system gives the manager the opportunity to make informed decisions on salary increase, employee remuneration, promotion or dismissal).<sup>8</sup>

In cases where the manager seeks to motivate the innovative activity of teachers, as well as their professional development, the quality assessment system will be focused on obtaining information about what assistance is needed by a particular teacher. At the same time, it is important how such a system is perceived by the teachers themselves.

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<sup>7</sup> I. A. Zimnyaya, *Pedagogical Psychology: Study Guide*, 6<sup>th</sup> edition, Rostov-on-Don, Feniks, 2015, p. 312.

<sup>8</sup> A. A. Mayer, *Supporting the Professional Success of the Teacher*, Moscow, TTS Sfera, 2012, p. 98.



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The evaluation system is capable of performing a motivating function only if it meets the following conditions: the teacher should be convinced of the evaluation objectivity, perceive it as useful for himself, know what needs to be done to eliminate the identified shortcomings, want to eliminate them, know that the manager will help him in this.<sup>9</sup>

### **Analysis of the organization and planning of labor activities of teachers in the system of secondary vocational education of the Republic of Tatarstan**

The document determining the organization and planning of academic load in the system of secondary vocational education is the "Regulations on Planning the Teaching Load of Teachers", which establishes requirements for the structure, functions, responsibilities and liabilities of the training part. It refers to the number of organizational documents and is mandatory for use in planning the teaching load of teachers.

The Regulations are developed in accordance with the legislation of the Russian Federation on the basis of several regulatory documents and local acts, among which an important place is given to the Labor Code of the Russian Federation, the Federal Law of the Russian Federation, the Federal State Educational Standards for Secondary Vocational Education, the Charter of Educational Organization.

The academic year begins on September 1 and ends according to the educational process schedule for a particular profession, specialty and form of training.

At the same time, the start date of the academic year may be shifted by order of the director of the educational institution for not more than 1 month for the evening form of training and for up to 3 months for the extramural form. Vacation with a total duration of 8-11 weeks a year, including at least 2 weeks in the winter, is established at least two times during the full academic year for students. The work of teachers within the working time established by the labor legislation amounts to 36 hours per week for a full time, and includes training and extracurricular work. The teaching work of the teaching staff includes lecture classes (lectures, practical classes, seminars, laboratory works), monitoring the students' independent work, training and production practices, final qualification works, as well as attestation tests of all levels. The extracurricular work includes: educational and methodical, organizational and educational, scientific research and scientific methodical work.

The educational load for the academic year is determined by the academic disciplines, professional modules, practices, final state attestations and other types of academic work in the curricula for the specialties of secondary vocational education.

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<sup>9</sup> A. A. Gin, *Techniques of Pedagogical Technology: Freedom of Choice. Openness. Activity. Feedback. Ideality: Teacher's Guide*, 8<sup>th</sup> edition, Moscow, Vita-Press, 2014, p. 114.

The training load for each academic discipline includes classroom, extracurricular work (consultations, exams, control of review works, course works (projects), practice at the enterprises). The division of classroom hours into lectures, practical classes (seminars) and laboratory work is carried out in accordance with the specialty curriculum. It is stipulated the removal of hours for public holidays when distributing the training load.

The extracurricular work is compulsory for the teacher and is included in his work without additional payment: educational-methodical and scientific-methodical work, organizational and educational work, scientific research work. At the end of each semester, the teacher reports on the workload instructed to him. Failure to fulfill the workload instructed to a teacher without valid reasons is considered as a violation of labor discipline and entails the measures of influence provided for by labor legislation.

The planned extracurricular workload and its implementation is reflected in the teaching load instruction, by the order of the director of secondary technical school and is paid additionally in the form of a monthly surcharge to the official salary from the wage fund.

The schedule of training sessions is the main document regulating the academic work and is compiled for each semester on the basis of specialty curricula and schedules of teaching and production process, approved by the director of the secondary technical school and subject to unconditional fulfillment by both teachers and students.

### **Problems of the teacher's workload in the system of secondary vocational education**

For the educational institutions, there were no draft templates to determine the number of teachers of different specialties. The number of teachers is not established on the basis of staff schedule, but it is based on the volume of training load in the specialty. This is explained by the fact that teachers receive their monthly salary rates for a certain norm of hours of pedagogical work per day or week, which are the calculation units in determining their monthly salary, depending on the established volume of training load.

Thus, the volume of training load is an essential condition of the employment agreement (contract) with the teacher, which cannot be changed unilaterally by the administration without the teacher's consent, so it is very important to draw the attention of the administration of educational institutions to this fact when recruiting new teachers and distributing load for the new school year, etc.

If the amount of teaching load of the teacher has not been stipulated in the employment agreement (contract) concluded for an indefinite period, then the teacher is considered to have been accepted for the volume of training load that has been established by the order of the head of educational institution when applying for a job.

The volume of teaching load (pedagogical work) established at the beginning of the academic year cannot be reduced during the school year on the

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administration's initiative, except for the cases of reducing the number of hours under the curricula and programs, reducing the number of classes (groups of extended day).

The reduction in teaching load of teachers of supplementary education is allowed only in the event of dropout of students, which has been the reason for closing, for example, a project team in the institutions of supplementary education for children.

Provision of teaching work to persons performing it in addition to basic work, as well as pedagogical workers of other educational institutions and employees of enterprises, institutions and organizations (including employees of education management bodies and teaching and methodical offices) is possible only, if the teachers for whom this educational institution is a place of basic work, are provided with teaching work in the volume not less than the salary rate.

The teaching load of teachers being on leave to care for a child before the age of three years old is established on general grounds and is transferred for this period for execution by other teachers, which is recorded in the order of the head.

Depending on the number of hours stipulated in the curriculum, the teaching load of teaching staff may be different in the first and second academic semesters.

### **Recommendations for reducing the teacher's workload in the system of secondary vocational education**

With the transition to the Federal State Educational Standards (FSES), the priority task of methodical work in the system of secondary vocational education is to help educators improve the quality and efficiency of educational process, create favorable conditions for the development of teachers' self-education.<sup>10</sup> For the effective work, it is very important that all teachers are involved in creative activity, which is based on self-education.

The teacher's self-education will be productive if:

- the teacher's need for his own development and self-development is implemented in the process of self-education;
- the teacher masters the ways of self-knowledge and self-analysis of pedagogical experience. The teacher understands both positive and negative aspects of his professional activity;
- the program of teacher's professional development includes the possibility of research, search activity;
- the teacher has a readiness for pedagogical creativity;
- there is a correlation between personal and professional development and self-development.

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<sup>10</sup> A. A. Askhamov, A. V. Konyshva, A. R. Gapsalamov, "Use of E-resources of the Learning Environment in Teaching Mathematics to Future Engineers," in *International Journal of Environmental & Science Education*, XI (2016), no. 5, p. 673-684.

The personal self-education plan of a teacher should necessarily include a list of results that should be achieved within a certain time. The results of teacher's self-education are tracked at certain stages (self-education is continuous, but you need to plan it step-by-step): improving the quality of subject teaching (indicate the indicators by which efficiency and quality will be determined); developed or published methodical manuals, articles, textbooks, programs, scripts, studies; development of new forms, methods and techniques of teaching; reports, speeches; development of didactic materials, tests, visibilities; development of methodological recommendations for the application of new information technology; developing and conducting open lessons on their own, innovative technologies; creation of kits; pedagogical developments; experience generalization on the investigated problem (topic).

As experience and observations show, not all teachers are able to independently take the initiative to rethink and restructure their activities, sometimes they need help. The teacher does not always know how to put emphasis on the main thing, that is, on a thing providing him with success in his activities, on a thing affecting his result and on the things interacting within it, how to measure it, diagnose it, notes some difficulties in translating pedagogical ideas and tasks to a practical level. Therefore it is very important to know: whether the teacher is ready for self-education as a kind of activity that promotes professional excellence, which is necessary to improve the quality of educational process and enhance the image of secondary technical school.

The system of work on the self-education organization begins with an analytical work, that is, with diagnostics. It is for this purpose that the teachers should be regularly interviewed.

The effective work on oneself requires not only the necessary knowledge and skills, but also high motivation. It should be remembered that being a person means constantly building oneself, striving for self-development, self-realization, self-actualization.

It is necessary to practice non-traditional forms of organization of methodical work with teachers more often. They may include festivals, holidays of teachers' successes, which help to unite the team and reveal the creative potential of teachers, create a creative atmosphere in the team. There is a need to systematically spend the days of psychological unloading for teachers.

Self-education will be productive if the teacher is satisfied with his work. And his need for self-development is implemented in the process of self-education. To increase the effectiveness of educational process, the leadership should pay special attention to the factors stimulating self-development of the teacher. These factors include the following: interest in work; increasing responsibility for the results of labor; example of colleagues; novelty of activity; training at courses; example and influence of the administration; organization of methodical work; possibility of obtaining recognition in the team.

## Summary

Thus, the key condition for the success of this program development is the modernization of the educational institution management. It is necessary to:

- build a new system of relations between the employers and an educational institution, thereby ensuring the transition from the formula of "participation" of the representatives of employers, professional communities in the organization of practices and final state attestation to the delegation of a number of important powers and responsibilities, including participation in the procedure for assigning qualifications and examining educational programs;

- develop and implement a model of the formation of professional and pedagogical competence of secondary technical school teachers able to perform certain labor functions productively, theoretically and practically ready to carry out pedagogical activity and master the means of solving professional problems in accordance with the requirements of the FSES of new generation;

- provide methodological and organizational-methodological conditions for the introduction of the federal educational standard of new generation and programs;

- form a modern independent assessment of the quality of vocational education of graduates, able to provide all interested parties with reliable information.

To achieve these results, the following tasks should be solved:

- to ensure the high quality of vocational education;

- to determine the requirements for the professional competence of mid-level specialists in the oil profile in accordance with the real needs of industrial enterprises in the industry, to develop training and programming documentation for the training direction, to create competencies for the model of graduate student of the secondary technical school;

- implement a system of technological monitoring, including the development and implementation of a set of evaluation procedures, structurally and functionally related to each other, providing a comprehensive measurement of the quality of vocational training of the graduate student, the quality of curriculum project, the level of competence declared, that is, the preassigned properties;

- to create open information environment for the consumers about the quality of vocational education, its compliance with the expectations of customers and consumers of educational services;

- to create favorable conditions for the interaction of all participants in the educational process, which determine the development of an independent creative individual, oriented toward professional and personal development and worldview decisions;

- to improve the management system of pedagogical team and the development of students' self-government;

- to make social support of all subjects of the educational process.

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## **Marketing Services Of The Kazan Federal University In Chemical Education\***

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**Abstract.** *Today, the education is increasingly spoken about and written about as a service sector. In this regard, the educational institution is treated as an enterprise providing educational services.*

*Each institution tries to take a significant place in the market. Therefore, there is a need to develop an effective marketing strategy. Marketing in the field of education is aimed at strengthening the relations between the consumer and the university. First of all, it is interested in ensuring that the university has a good reputation and long-term relationship with the consumer. The specific measures in this direction include the improvement of the quality of services for the most complete satisfaction of students' needs and the active competition between educational institutions. In this connection, we studied the education market in the Republic of Tatarstan and the situational situation in the market of the educational institution "Butlerov Chemical Institute".*

**Key words:** marketing, marketing in the education field, educational services and products, subjects and objects of marketing, marketing methods, regional market of educational services.

### **Introduction**

In the classical sense, marketing is, first of all, an entrepreneurial activity related to the promotion of goods and services from the producer to the consumer. Marketing is used to solve a wide range of problems in the social sphere, including in the system of education.

To understand the essence of marketing in the education field and to see how it manifests itself in the market of educational services, it is necessary to analyze a wide range of its elements and aspects. These are, first of all, the subjects of marketing relations and the objects of marketing of educational services, its target orientation and problem content.<sup>1</sup>

The main subjects of marketing in the education field are the educational institutions forming and implementing the supply of educational services to the market.

The real participants in marketing relationships are the consumers (individuals, institutions and organizations), a wide range of intermediaries (including employment services, labor offices, the registration, licensing bodies and the accreditation bodies of educational institutions, etc.), as well as public institutions and structures involved in promoting the educational services on the market.

The role of the state and government is of particular importance in the marketing of educational services. The state finances education, establishes the lists of professions and specialties, conducts certification and state accreditation of

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> I. V. Vankina, A.P. Egorshyn, V. I. Kucherenko, *Marketing of Education. Study Guide*, Moscow, 2007.

educational institutions, i.e. acts as a guarantor of the quality of educational services, their compliance with the educational standards.

The competence of administrative bodies includes information support for the educational institutions, formation of an information and consulting base for the marketing of educational services, scientific and methodological and other support, as well as satisfaction of educational needs.

The government and administrative bodies are also responsible for organizing the system of training and retraining of pedagogical and managerial staff for the education system, including the formation of a contingent of education marketers, - professionals in this field.<sup>2</sup>

The traditional objects of marketing are the goods and services, as well as the ideas. The organizations, territories, as well as individuals are among other objects.

Marketing in the education field deals with all the mentioned categories of objects. The location place of the educational institution is very important for the students (territory marketing). A public prestige, the status of the very educational institution (marketing of organizations) and its teachers (personality marketing) are of great importance. The most important component of the educational process is the marketing of ideas. The marketing of goods (training equipment, facilities, etc.), as well as the products of practical activities of the educational institution, its personnel and students, is also widely applicable in education.<sup>3</sup>

Together with the educational services, it is sold the intellectual property of employees and collectives of the educational institutions - inventions, patents, research programs, training and practical works, other innovative services and products, as well as trade symbols of the manufacturers of such services - names, logos, trademarks, etc.

All this is implied by the collective term "educational services and products" representing a set of marketing objects in the education field.

The following questions are traditional for describing the problematic content of marketing: What should we produce and offer? What quality? How many? Where should we sell it? When? At what price and on what terms and conditions? Strictly speaking, the interrelationships of market entities, which form the subject of marketing, are organized precisely for the optimal resolution of these issues.

Based on the above, we can distinguish the following problems, the solution of which directly determines the properties and parameters of the educational service: desired characteristics of the future contingent of learners, the goals of training, the duration and stages of training, the type of educational institution, the technology of learning and monitoring its results, the characteristics of personnel, the types of teaching aids and the directions of their use.

## Methods

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<sup>2</sup> A. P. Pankrukhin, *Pedagogical Marketing*, St. Petersburg, Publishing House of the SPbGU, 2006.

<sup>3</sup> A. M. Kukushyn, *Management of Educational Systems: Study guide*, Moscow, IKTS 'MarT', 2003.

We used the following methods during the study: analysis of publications and statistical data, macro- and microeconomic analysis, marketing analysis of the market, content analysis, expert evaluation and forecasting methods, SWOT-analysis, methods of management theory.

## Results

"If you like chemistry, want to get a higher chemical education, to become a real scientist and be in demand not only in Russia, but all over the world, the Butlerov Chemical Institute (Chemical Faculty) of the Kazan Federal University - one of the oldest and most authoritative centers of chemical science and chemical education in Russia and in the world - is waiting for you", so the appeal to the applicants sounds.<sup>4</sup>

In the year of the formation of Kazan University (1804), the Charter of the University stipulated the creation of the departments of "Chemistry and Metallurgy" and "Technology and Sciences Related to Trade and Factories" at the Faculty of Physics and Mathematics. Actually, these departments began to function only in the 1830s, when the chemistry was taught by such Professors as A. Ya. Kupfer, N.N. Zinin and K.K. Klaus at the university. Here N.N. Zinin received the synthetic aniline, K.K. Klaus discovered a new chemical element, unique in Russia, which was named ruthenium in honor of Russia, for the first time. A.M. Butlerov created a theory of the chemical structure of organic compounds. The names of V.V. Markovnikov, E.E. Wagner, A.M. Zaitsev, F. Flavitsky, A.E. and B.A. Arbuzovy are well-known. It is the fundamental works of N.N. Zinin, K.K. Klaus and their pupil A.M. Butlerov that initiated the creation of the world-famous Kazan Chemical School.

The successes of the Kazan chemists contributed to the organization of the Butlerov Chemistry Research Institute (CRI) at the Kazan University (1929). In 1933, a chemical faculty was opened in the KSU as a result of the reorganization of Soviet universities. The Butlerov Chemistry Institute was established on April 21, 2003 on the basis of the decision of the Academic Council of the Kazan State University by merging the Butlerov CRI and the Chemistry Faculty of the KSU.

Today the Institute is the successor and continuer of the glorious traditions of the Kazan Chemical School, one of the leading scientific and educational centers in Russia.

Let us carry out an analysis of the marketing environment of the educational institution "Butlerov Chemical Institute". An important part of the SWOT analysis is the evaluation of strengths and weaknesses. Let us compile a list of internal strengths and weaknesses of the institution, as well as define the external threats and opportunities in Table 1.

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<sup>4</sup> W. Sarges, F. Haerberlin, *Marketing für die Erwachsenenbildung*, Hannover, Dortmund, Darmstadt, Berlin, 1980.





Table 1. The list of strengths, weaknesses, opportunities and threats for building the SWOT analysis of an educational institution "Butlerov Chemical Institute"

Potential internal strengths	Potential internal weaknesses
<ul style="list-style-type: none"> <li>- Experienced and qualified teaching staff</li> <li>- Developed infrastructure</li> <li>- Stable material resources</li> <li>- Great experience in training specialists</li> <li>- Presence of vacancies for graduates</li> <li>- Recognized leader among the universities in the region</li> <li>- Demand for the Institute's graduates in the labor market</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of new directions in the activity of educational services (courses, seminars for outside organizations, etc.)</li> <li>- Disadvantages in the system of modern school education</li> </ul>
Potential external opportunities	Potential external threats
<ul style="list-style-type: none"> <li>- Ability to train the students and audience from the near abroad (Korea, Turkmenistan, etc.)</li> <li>- Rise in the cost of training in the universities-competitors</li> <li>- Opportunity of development in connection with expansion of educational directions, opening of new specialties</li> </ul>	<ul style="list-style-type: none"> <li>Entering the market of foreign and domestic educational institutions with cheaper services</li> <li>Dependence of the number of services on the state's need for specialists</li> <li>Adverse demographic changes</li> </ul>

On the basis of Table 1 we construct the SWOT-analysis matrix of the educational institution "Butlerov Chemical Institute"

External environment	Capabilities	Threats
Internal environment	1, 2, 3	1, 2, 3
1. Recognized leader among the universities in the region 2. Experienced and qualified teaching staff 3. Developed infrastructure	<ul style="list-style-type: none"> <li>- Ability to train the students and audience from the near abroad (Korea, Turkmenistan, etc.)</li> <li>- Rise in the cost of training in the universities-competitors</li> <li>- Opportunity of development in connection with expansion of educational directions, opening of new specialties</li> </ul>	<ul style="list-style-type: none"> <li>Entering the market of foreign and domestic educational institutions with cheaper services</li> <li>Dependence of the number of services on the state's need for specialists</li> </ul>

<p>4. Great experience in training specialists</p> <p>5. Stable material resources</p> <p>6. Presence of vacancies for graduates</p> <p>7. Demand for the Institute's graduates in the labor market</p>	<p>specialties</p>	<p>Disadvantages in the system of modern school education</p>
<p>1. Lack of new directions in the activity of educational services (courses, seminars for outside organizations, etc.)</p> <p>2. Low demand for a profession in the region</p>	<p>Ability to train the students and audience from the near abroad (Korea, Turkmenistan, etc.)</p> <p>The possibility of development in connection with the discovery of new, more popular specialties</p> <p>Rise in the cost of training in the universities-competitors</p>	<p>Entering the market of foreign and domestic educational institutions with cheaper services</p> <p>Dependence of the number of services on the state's need for specialists</p> <p>Disadvantages in the system of modern school education</p>

The institution has the main advantage - experience and fame in the region. The ability to train students and audience from the near abroad is the best opportunity in the development, as it cuts all the weaknesses associated with the excess of specialists, the lack of vacancies in the region.

### **Discussion**

The educational institution "Butlerov Chemical Institute" has two types of orientation: production and market.

With "production" orientation, it is provided the services traditional for this educational institution.

The Institute prepares chemists for work in the scientific laboratories of higher educational institutions, academic and industrial scientific research institutes, factory laboratories, schools, colleges, gymnasiums.

Advertising and other forms of communication with the consumers and possible intermediaries in the promotion of services to the regional education market are developed, since the distribution and marketing occurs both centrally and through graduates.

The educational institution "Butlerov Chemical Institute" cooperates with all leading chemical enterprises of Kazan and the republic. The closest connections in the applied aspect were formed with Nizhnekamskneftekhim OJSC, the largest petrochemical plant in Europe. (13, p. 19)

A significant role in cooperation and development is played by highly skilled management personnel.

The market orientation of the educational institution is quite developed.

- The graduates of the Institute are in demand on the labor market. The graduates-bachelors of chemistry work as laboratory chemists, engineers, technologists at the enterprises and institutions in Kazan, the Republic of Tatarstan and the Russian Federation.

- The graduates-bachelors of teacher education work in the management bodies and institutions of the Ministry of Education (schools, technical schools, colleges, lyceums, gymnasiums of the Republic of Tatarstan and the Russian Federation).

- The graduates-bachelors can continue their studies in the magistracy of the Chemical Institute of the KFU, or other universities in the country, near and far abroad.

- The specialists and masters of chemistry work as research workers in the laboratories of higher educational institutions, academic and industrial research institutes, forensic experts in the structure of the Ministry of Internal Affairs and other ministries and departments of the Republic of Tatarstan.

- The specialists and masters enter the postgraduate course of the KFU or other universities and research institutes and can work as teachers in the higher educational institutions. (11)

The Institute closely works with teachers of chemistry of general education institutions, revives the work of the Club of Young Chemists, distant school of chemistry. Such actions are already affecting the regional composition of first-year students - 40% from Tatarstan, 40% more - from outside the Republic. The equipped laboratories, the best equipment cause a keen interest among schoolchildren. (12)

## **Conclusions**

When considering the situation of educational services and the marketing features of the educational institution "Butlerov Chemical Institute", we identified the following problems:

- dependence of the number of services on the state's need for specialists;
- disadvantages in the system of modern school education;
- low level of competition.

Accordingly, the main areas for improving the use of marketing in the field of educational services will be the transition to a market-oriented marketing of educational services in which:

- the assortment of products of the market of educational services is quite wide and is intensively updated taking into account the requirements of the society,

Viktoriya Andreevna BOLDYREVA, Farid Djamaletdinovich YAMBYSHEV

scientific and technical progress. Accordingly, the processes and technologies for the provision of services are flexible, easy to reconfigure.

- The prices for educational services are formed under the significant impact of the regional market, the competitors operating on it, the magnitude of effective demand.

- The communication activities are being actively pursued in the region, directed at the specific target groups of consumers of educational services, on possible intermediaries.

### **Summary**

Thus, the main function of the marketing system of the educational institution "Butlerov Chemical Institute" is to identify the need for specialists in the context of strategic and tactical development of economic and cultural components of the region, which ensures the adaptation of the university's educational programs to the existing demand for specialists in a particular area and readiness for its change.

*Marketing Services Of The Kazan Federal University In Chemical Education, Astra Salvensis,*  
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## School Teachers: Motivation Direction And Strategies Of Behavior In The Conflict Situation\*

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**Abstract.** *It is no secret that high pedagogical results are achieved by teachers with high professional motivation. It is very important that the teachers get pleasure from working with children, strive for personal and professional growth, have motivation for success and flexible motivational sphere. It is also important for them to have conflictological training, to be able to manage school conflicts, using constructive methods and techniques.*

*Study objective: to study what strategies of behavior in conflict situations are chosen by teachers with different motivational orientation?*

*The study was attended by teachers from the schools of Kazan. We used the questionnaire "Motivation for Success and Fear of Failure" (A.A. Rean), questionnaire "Diagnosis of Partial Orientation of the Teacher's Personality", questionnaire "Diagnostics of Motivational Tendencies in the Self-Concept of Personality" (S.M. Petron) as the diagnostic material.*

*In order to evaluate the statistical significance of difference between the sample arithmetic mean of two data distributions, we used the statistical Student's t-test in our study.*

*We obtained the following results. The teachers focused on success often use the tactics of "cooperation" and "compromise" in a conflict situation. The strategy of "competition" is the least used by the teachers. A typical strategy of teachers focused on avoiding failures is the strategy of "avoidance", the second position is occupied by the "adaptation" strategy.*

*The teachers with a motivation for success are labor-oriented, they try to overcome difficulties in their work, they are guided in their work by accomplishing their tasks through overcoming difficulties, treat people positively and appreciate kindness in people.*

*The teachers with motivation to avoid failures do not believe in well-being in life, adhere to pessimistic fatalism, do not seek self-development and self-improvement. With a high degree of probability, we can argue that the respondents of the second group tend to avoid trouble with the outside environment, threats, dangers, think always about themselves.*

**Key words:** school teachers, motivational orientation, conflict situation, strategy of behavior.

### Introduction

The problem of motivation is a key one in domestic and foreign psychology. The problem of motivation of school teachers is of particular interest.<sup>1</sup> Under the motives of pedagogical activity, it is customary to understand the "motives associated with its implementation; internal needs to work in the field of this subject; the need to work with people, based on the realization of own pedagogical abilities; necessity, which led to forced choice of profession" (12). Motivation for the teacher's profession is called pedagogical orientation.

The problems of motivating teachers are considered by scientists from different angles. For example, the issue of relationship between the motivation of

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> A. Bishay, "Teacher Motivation and Job Satisfaction: A Study Employing the Experience Sampling Method," in *Journal of Undergraduate Sciences*, III (1996), p. p. 147-154; C. A. Czubaj, "Maintaining Teacher Motivation," *Education*, CXVI (1996), no. 3, p. 372-379.

teachers and their professional self-study was addressed by a group of scientists:<sup>2</sup>, Lia M. Daniels (2017). Skaalvik, SidselSkaalvik, Einar consider the problem of motivation and emotional burnout of teachers in their studies. The motivation of math teachers was studied.

The formation and development of professional orientation of teachers was studied by<sup>3</sup> and others.

Despite the fact that the problem of motivating specialists, including school teachers, has been studied for a long time, the relevance of this topic does not exhaust itself. In our opinion, this is connected with the social mission of the teacher's profession. Pedagogical activity renders teaching and educating influence of the teacher on the pupil with the purpose of his personal, intellectual and activity development". The motivation, which determines the content, direction and character of an individual, his behavior, is determined in the structure of pedagogical activity. If we talk about the motivational orientation of the individual as the main characteristic of the labor motivation of a person, it is divided into two types: "Motivation for success and motivation for avoiding failure".<sup>4</sup> Motivational orientation is predetermined by various factors. For example,<sup>5</sup> proved in his works that the effectiveness of teacher-educator depends on the presence of creative motives in the motivation structure. The works of <sup>6</sup> presented the results of studies in which it was experimentally proved that the motivation of teachers influenced the effectiveness of teaching and educational process, leading to an increase in school performance.

Thus, the strength and structure of the teacher's professional motivation determines the productivity of pedagogical activity. It is very important that the teachers enjoy the work with children, strive for personal and professional growth, being motivated by their success, self-actualization. The learning process will be effective only if the teachers working in this school have a high degree of motivation for achievement, flexible motivational sphere, high conflictological training, are able to manage school conflicts, find effective ways to prevent and overcome them, interact constructively with the participants in the educational process.

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<sup>2</sup> L. Tracy, T. L. Durksen, R. M. Klassen, L. M. Daniels L. M., "Motivation and collaboration: The keys to a developmental framework for teachers' professional learning," in *Teaching and Teacher Education*, LXVII (2017), p. 53-66.

<sup>3</sup> S. V. Kulnevich, "Personality Orientation of the Teacher's Methodological Culture," *Pedagogika*, V (1997), p. 108-115; V. A. Slastenin, *Diagnostics of Professional Suitability of the Model for Pedagogical Activity*, Moscow, Publishing House of the MGPI, 1991, p. 102..

<sup>4</sup> N. N. Kalatzkaya, Drozdikova-Zaripova Kostyunina, "Motivational peculiarities of schoolteachers in Russia," in *Life Science Journal*, XI (2014), no. 55, p. 243-247.

<sup>5</sup> A. A. Derkach, *Acmeological Foundations of Professional Development*, Moscow, Publishing House of the Moscow Psychological and Social Institute; Voronezh, Publishing House of the NGO MODEK, 2004.

<sup>6</sup> C. J. Brumback, *The Relationship Between Teacher Job Satisfaction& Student Academic Performance*, *Unpublished Doctoral Thesis*, Georgia State University, 1986; M. L. Maehr, "Meaning and motivation: toward a theory of personal investment," in R. E. Ames, C. Ames (eds.), *Research on Motivation in Education*, New York, Academic Press, 1984, p. 115-144.



Despite the fact that a number of scientific works are devoted to the problem of motivational orientation of the teacher, the choice of constructive strategies of behavior in conflict situations, it can be asserted that it has not yet been solved to the end. Therefore, we set the following objective: to study what strategies of behavior in conflict situations are chosen by teachers with different motivational orientation?

### **Methods**

Our study was attended by 68 teachers from the schools of Kazan. The age of the respondents is from 23 to 45 years old.

We used a survey method in our study. We used three methods to study the motivation of teachers' professional activity. To study the motivational orientation of teachers, we used the questionnaire "Motivation for Success and Fear of Failure".

The second method is "Diagnosis of Partial (lat. - partialis, partial, part of something) Orientation of the Teacher's Personality". There are five scales in the methodology - sociability, organization, focus on the subject, intelligence, motivation for approval (deception scale). If the respondent has one factor, then we will talk about the monodirectionality of the teacher's personality. If there are several factors, then this fact is interpreted as the polydirectionality of the personality.

We used the technique "Diagnostics of Motivational Tendencies in the "Self-Concept" of Personality" (S.M. Petrov) to study the motivational sphere of the teacher's personality. The polymotivational "self-concept" of the personality was represented by 16 paired motivational tendencies: "acquisition (material) motivation, hedonistic motivation, optimistic motivation, communicative motivation, cognitive motivation, labor motivation, normative motivation, moral motivation, humorous motivation, pugnic motivation, motivation for positive attitude towards people, motivation for avoiding troubles, motivation for individualization, egocentric motivation, altruistic motivation expressing an orientation toward others, a desire to think about others even to the detriment of oneself, or an orientation toward oneself, a desire to think about oneself, even to the detriment of others".<sup>7</sup>

The types of behavior strategies in conflict situations were studied using the technique "Behavior Tactics in Conflict" (K.U. Tomas). There are five typical strategies in this questionnaire: competition, cooperation, avoidance, adaptation, compromise.

In order to evaluate the statistical significance of difference between the sample arithmetic mean of two data distributions, we used the statistical Student's t-test in our study.

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<sup>7</sup> N. N. Nikitina, *Introduction to Pedagogical Activity: Theory and Practice*, Moscow, Publishing Center "Akademiya", 2007.

Dependent variable is represented by the strategies of teachers' behavior in a conflict situation. The motivational orientation of teachers is an independent variable.

### **Results and discussion**

The survey result according to the method of A.A. Rean allowed identifying the following trends. 60% of teachers participated in the survey were motivated for success. Such teachers formed the first group (Gr. 1). The respondents of this group may be characterized as self-assured and confident in their own strengths, responsible, initiative and active, purposeful and persevering in achieving the goals.

33% of teachers surveyed are motivated for avoiding failures. They are characterized by fear of a possible failure, they often think about the ways to avoid this hypothetical failure, and not about the ways to achieve success, are not sure of their abilities. The respondents of this group are characterized by increased situational anxiety combined with a very responsible attitude. The teachers with motivation for avoiding failures made up the second group (Gr. 2).

7% of teachers are not adequately motivated. The respondents of this group were subsequently withdrawn from the survey.

Then we attempted to study what the motivational sphere was for the teachers of each group. To do this, we studied the motivational trends in the "Self-concept" of a person (the method of S.M. Petrova) and the partial orientation of teachers of both groups.

The teachers of the first group are characterized by the following polymotivation tendencies in the Self-concept. 40% of teachers in this group are focused on material well-being. They are guided by material rewards during their work. The profession is most likely a mean of achieving material well-being, high incomes, etc. for them.

37.5% of respondents had egocentric motivation. The teachers with this motivation are distinguished by the desire for self-affirmation, personal achievements and goals. Pedagogical activity for such teachers gives recognition from others, authority, fame, opportunity to build their professional careers.

37.5% of respondents in this group who have labor motivation are satisfied with the very process of pedagogical work. Such teachers are not afraid of difficulties, they are taken without fear for solving any pedagogical tasks.

32.5% of teachers have cognitive motivation, which is characterized by a heightened interest in acquiring new knowledge. The teachers with this motivation are distinguished by the desire to develop cognitive abilities, a constant craving for new knowledge. Teaching activities allow them receiving satisfaction from intellectual activity.

Motivation for a positive attitude toward people is expressed in 25% of teachers in this group. This motivation is characterized by the fact that the respondents are positive about people, believe in kindness and a good beginning.

15% of teachers are guided by the observance of moral norms, strive to live in truth, in conscience, in fairness.

Other motivational tendencies in the "Self-concept" of the teacher's personality are presented to an insignificant degree or are not formed at all.

The teachers with motivation to avoid failures (Gr. 2) expressed the following poly-motivational tendencies in "Self-concept" of the individual.

91% of teachers have pronounced acquisition (material) motivation, they are attracted by the material side of life.

73% of respondents expressed pessimistic motivation, which reflected a passive expectation of well-being in life, pessimistic fatalism.

- 82% of respondents expressed the motivation to avoid trouble, avoiding trouble with the outside environment, threats, dangers.

- 55% of teachers have no moral motivation, presupposing observance of moral norms, such teachers do not want to live in truth, in conscience, in fairness.

- 50% of respondents have no desire for improvement.

- 41% of teachers have the motivation opposite to communicative, expressed in the absence of needs for communication, friendship, and focus on interaction.

- 36% of respondents are characterized by the motivation of individualization, expressed by the desire to focus on themselves.

According to the second method (the method of S.M. Petrova), we found reliable differences in such indicators as "pessimistic motivation" ( $p \leq 0.01$ ), "cognitive motivation" ( $p \leq 0.01$ ), "anti-cognition motivation" ( $p \leq 0.01$ ), "labor motivation" ( $p \leq 0.01$ ), "anti-moral motivation" ( $p \leq 0.01$ ), "anti-abusive motivation" ( $p \leq 0.05$ ), "motivation of a positive attitude toward people" ( $p \leq 0.05$ ), "avoidance of trouble motivation" ( $p \leq 0.01$ ), "egocentric motivation" ( $p \leq 0.01$ ), "altruistic motivation" ( $p \leq 0.01$ ).

The next step in the study was our study of partial orientation of teachers in the schools of Kazan with different motivational orientation. The study results are presented in Tables 1, 2.

Table 1- Distribution of teachers with motivation for success by types of a particular orientation (number of people)

Form of field-specific education	So ciability	Organiz ation	Orientation for subject	Int elligence
norm	30	33	27	27
below norm	6	3	5	2
above norm	4	4	8	11

Table 2 - Distribution of teachers with motivation for avoiding failures by types of a particular orientation (number of people)

For m of field-specific	So ciability	Organiz ation	Orientation for subject	Int elligence

education				
normal	12	18	15	14
below norm	8	2	3	5
above norm	2	2	4	3

The results indicate that the majority of teachers have all the indicators within the norm in both groups. 95% of teachers of the first group have a strong emphasis on intelligence and organization (92.5%). Such people are characterized by high moral qualities, aspiration for self-education. The teachers of the first group tend to adhere to a clear order, discipline, and to allocate the time resource in detail in their work.

As for the teachers of the second group, 91% of them have orientation towards organization and 87% - are guided by their subject.

The statistical treatment did not reveal any significant differences in the "partial orientation" parameter.

Then we tried to identify what behavior strategies are chosen by the teachers in conflict situations, if they are motivated for success. We revealed that the teachers of the first group are dominated by the "cooperation" tactic. The second place is occupied by the "compromise" strategy. The strategy of "competition" is the least used by the teachers.

The teachers with the motivation for avoiding failures, according to the results obtained, have the following behavior strategies in conflict situations. A typical strategy in this group of respondents is the strategy of "avoidance", the second position is occupied by the "adaptation" strategy. The strategy of "cooperation" is the least used by the teachers.

We have found reliable differences between the indicators of "cooperation" ( $p \leq 0.01$ ), that is, the teachers with motivation for success most often adhere to the cooperation strategy in conflict situations.

### **Summary**

The obtained results allowed formulating the following conclusions.

1. According to the results, the majority of respondents are striving for success. Such teachers are distinguished by medium and low level of risk, the person shows a higher level of activity for achieving success.

2. The teachers with a motivation for success are labor-oriented, they try to overcome difficulties in their work, they are guided in their work by accomplishing their tasks through overcoming difficulties, treat people positively and believe in people's kindness.

3. The teachers with motivation to avoid failures do not believe in well-being in life, adhere to pessimistic fatalism, do not seek self-development and self-

improvement. We can assume that the fear of failing forces them sometimes to act dishonestly. Due to various circumstances, they lack faith in the good, in the people's kindness. With a high degree of probability, we can argue that the respondents of the second group tend to avoid trouble with the outside environment, threats, dangers, think always about themselves.

4. The teachers of the first group most often use the tactics of "cooperation", "compromise". The strategy of "competition" is the least used by the teachers. A typical strategy of teachers with the motivation for avoiding failures is the strategy of "avoidance", the second position is occupied by the "adaptation" strategy.

It should be noted that the results obtained cause some concern. According to the specialists it is important to learn how to apply all five tactics for resolving conflict situations. However, the teachers of both groups do not master the same tactics to the same extent. Perhaps, it is necessary to think over the organization of training sessions with teachers. The training program will be focused on teaching teachers using all tactics of behavior in conflict situations, depending on the specific conditions. It is important to orient the teachers towards more constructive tactics and behavior strategies in conflict situations.

5. We are also concerned with the fact that there were no sociable teachers in both groups (15% - from GR-1, 36% - from GR-2). 12.5% from GR-1 and 13.6% from the second group are not focused on the subject. These results suggest that the teachers with these motivations will experience difficulties in their professional activities. We need further work to improve the professional competence of these respondents.

### **Conclusions**

The aim of the author of this article is to reveal what behavior strategies are used by the school teachers oriented to success and failure.

Experimentally, we revealed that the teachers oriented to success most often use the tactics of "cooperation" and "compromise". The teachers focused on failure in conflict situations most often use the tactics of "avoidance". In addition, we studied the motivational sphere of teachers of both groups.

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## **Analysis Of Scientific And Technical Activity Resourcing In Russia\***

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**Abstract.** *The article analyses the resourcing of scientific and technical activities in the Russian economy. We identified the influence of crisis phenomena of 2014-2015 on the state of scientific and technological potential, which manifested itself in the following: the outflow of highly skilled specialists abroad and the reduction in the number of personnel engaged in scientific research and development, which reduced the provision of scientific and technical potential with human resources; the decline in the number of advanced technologies used by Russian researchers and scientific organizations, due to increased tensions in the geopolitical situation affecting the trade relations of the countries; the increasing risk of lagging by the Russian science development from the rest of the world's scientific community; the reduction in the volume of financing of scientific and technical activities in real terms, etc.*

**Key words:** scientific and technical activity, scientific and technical potential, resources, scientific research, development, science.

### **Introduction**

There is a rather wide variety of interpretations of the "scientific and technical potential" category in the scientific literature. For example, a large economic dictionary defines it as "...a set of personnel, material, technical, information and organizational resources designed to solve the tasks of scientific and technological development faced by the society".<sup>1</sup>

In many respects, a similar but more detailed definition is presented in the scientific works of Krayukhin and Proskuryakov, where the emphasis is on the general definition of the "potential" concept as a set of resources, stocks, means and sources that can be used for various purposes.<sup>2</sup>

In addition, there are more recent studies that determine the scientific and technical potential as a level of development of the country's scientific and technical system. In general, the scientific and technical potential is considered from the point of view of the development of specialized institutions that support the functioning of the scientific and technical system and the interrelations between them in this approach. In particular, the researchers, who determine the scientific and technical potential as a feature of the level of science development, include Zaitsev N.L., Gorfinkel V. Ya.<sup>3</sup>

In our study, the scientific and technological potential will be considered from the point of view of the first approach, since the scientific and the scientific and technical activity, like any kind of human activity, consists in the use and transformation of a set of resources.

### **The main part of the study**

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> A.N. Azriliyan, *Large Economic Dictionary*, Moscow, Institute of New Economics, 2007.

<sup>2</sup> G. A. Krayukhin, *Economic Problems of the Scientific and Technological Progress*, 3<sup>rd</sup> edition, Moscow, 1986; V. M. Proskuryakov, *Economic Statistics*, 3<sup>rd</sup> edition, Moscow, 1986.

<sup>3</sup> N. L. Zaitsev, *Economics of an Industrial Enterprise*, Moscow, 1998.

Let us take a resourcing analysis of the scientific and technical potential in Russia in the following classification: human resources; material and technical resources; informational resources; organizational resources; financial resources.

Table 1. The number of personnel engaged in research and development, by categories (persons) (6)

	00	00	00	00	00	01	01	01	01	015
	0	2	4	6	8	0	2	3	4	
The number of personnel - total	87,729	70,878	39,338	07,066	61,252	36,540	26,318	27,029	32,274	38,857
including:										
researchers	25,954	14,676	01,425	88,939	75,804	68,915	72,620	69,015	73,905	79,411
engineers	5,184	4,599	9,963	6,031	0,218	9,276	8,905	1,401	3,168	2,805
support personnel	40,506	3,263	23,356	13,579	94,769	83,713	75,790	75,365	73,554	74,056
other personnel	46,085	48,967	44,594	38,517	30,461	24,636	19,003	21,248	21,647	22,585

As can be seen from Table 1, the total number of personnel engaged in research and development decreased by 16.77%, while the number of direct researchers decreased by 10.93% from 2000 to 2015.

If we follow the dynamics by years, it becomes obvious that the number of personnel in this area has gradually decreased from year to year, and gradually increased in the next three years from 2000 to 2012. At the same time, in recent years, an increasing concern about the low indicators of the country's publication activity in the global flow of publications, which have undoubtedly objective reasons, is expressed in the Russian publications: a low proportion of domestic publications in the international indexes of the cited literature, the inclusion of references in English, the intensive reduction of productive researchers of the older



generation, etc.<sup>4</sup>) Thus, Russia accounted for 2.11% of articles in the world in 2014, 2.28% of articles - at the beginning of 2016 indexed in the Web of Science.<sup>5</sup>

Table 2. Movement of personnel involved in research and development, within the Russian Federation (persons)<sup>6</sup>

	availability at the beginning of the reporting year	Increased				Decreased				at the end of the reporting year
		total	including:			total	including:			
			from other scientific organizations	from other	from other		designated	in connection with the staff reduction	for other reasons	
<b>2011</b>	90,718	32,757	4,122	1,549	7,086	37,932	3,587	,542	0,803	85,568
<b>2013</b>	67,456	20,298	3,777	0,702	5,819	29,284	9,513	,917	3,854	58,470
<b>2015</b>	26,007	09,973	3,495	5,618	0,860	22,773	1,623	,598	4,552	13,207

<sup>4</sup> T. I. Volkova, I. A. Usoltsev, "Inventive Activity of Researchers: Intercountry Rating Assessments," in *Economy of the Region*, V (2017), no. 1, p. 290-307.

<sup>5</sup> \*\*\*, "Is activity growing?," in *Search. Weekly Newspaper of the Scientific Community*, VII(2016), p. 2.

<sup>6</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru> accessed. 01. 03. 2017.

<b>007</b>	14,329	05,758	4,150	9,778	1,830	18,952	0,536	,617	3,799	01,135
<b>009</b>	45,978	3,526	3,235	3,529	6,762	7,071	8,295	,776	3,000	42,433
<b>011</b>	41,183	4,939	3,725	1,881	9,333	00,849	2,848	,973	5,028	35,273
<b>013</b>	25,591	4,550	1,075	3,210	0,265	3,112	9,214	,015	1,883	27,029
<b>015</b>	37,210	00,290	1,662	4,026	4,602	8,643	8,285	,238	6,120	38,857

It is clearly seen from Table 1 that the number of persons employed has less than the number of retired employees, which created a decline in their total number until 2012. At the same time, it can be noted that the number of employees taken after graduating from the higher educational institutions has steadily decreased from year to year (except for 2015). Each year, the largest share of retired employees was represented by those who were resigned. It follows the conclusion that the scientific and the scientific and technical activity loses its attractiveness as a whole: fewer graduates with higher education apply to it, and many workers leave this sphere (the reasons for this can be dissatisfaction with wages, working conditions, obstacles in the way of career ladder, etc.).

An important problem in the staffing issue is the so-called "brain drain", which is reflected in the outflow of highly qualified specialists to the foreign countries, where they have more opportunities to implement their ideas and developments, better working conditions and higher wages. Unfortunately, it can be said that the scientific activity in Russia does not withstand competition with many foreign countries.

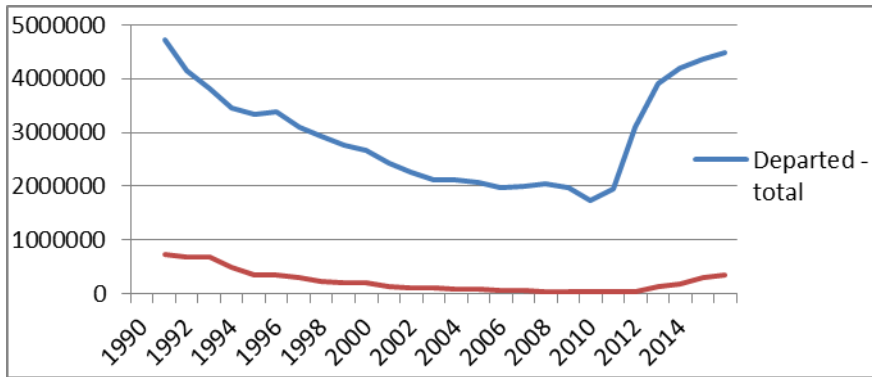
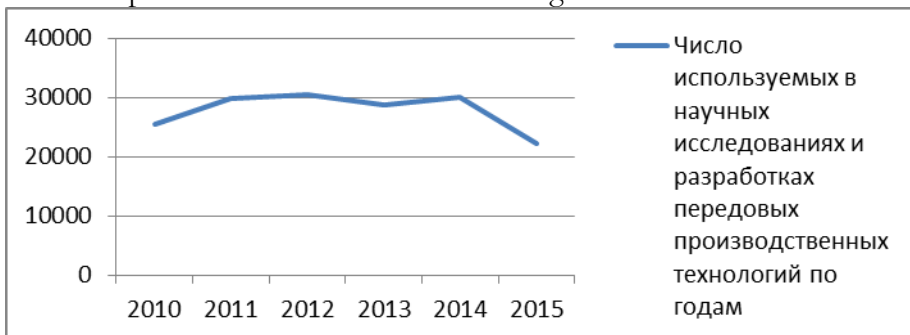


Fig. 1 Results of emigration in the Russian Federation by years (persons)<sup>7</sup>

Fig. 1 shows that the number of citizens, who have left the Russian Federation and have settled abroad, has dramatically increased in recent years. This phenomenon could be explained by a manifestation of the country's economic crisis, which led to inflation, a reduction in real wages of the population, a decline in living standards, a reduction in financing many sectors of the economy, etc. These factors led to the outflow of highly qualified specialists from the country (including from the sphere of scientific and scientific and technical activities).

If we trace the dynamics of the number of advanced production technologies used in the scientific research and development, then we can see weak fluctuations in the period from 2010 to 2014 and a significant decline in 2015.



Число используемых в научных исследованиях и разработках передовых производственных технологий по годам	Number of advanced production technologies used in the scientific research and development by years
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Fig. 2. The number of advanced production technologies used in the scientific research and development as a whole of the Russian Federation by years<sup>8</sup>

<sup>7</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru>, accessed 01. 03. 2017.

<sup>8</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru>, accessed 01. 03. 2017.

Such a sharp decline in 2015 can be explained, firstly, by the crisis phenomena in the country that has adversely affected the financial situation of the subjects of scientific and technological activity, and, secondly, the increased tension in the international relations that has led to restrictions on foreign trade. Due to these factors, the access of domestic researchers and institutions to advanced technologies and developments proved to be difficult.

It is difficult to express the information resources in the quantitative terms, unlike other types of resources. The information exchange and access to it, including in the scientific field, is much easier and faster due to various communication means (especially the global Internet network) in the modern world.

The Government of the Russian Federation ensures the creation of federal information funds and systems in the field of science and technology that collect, register, analyse, store and deliver scientific and technical information to the consumers, promote the publication of scientific and technological products, etc. However, at the same time, there is the problem of information security, especially when it comes to copyright or development, classified in accordance with the state, official or commercial secrets.

Patenting as a necessary condition for the market circulation of scientific and technical products is comprehensively analysed in the studies of foreign scientists.<sup>9</sup> Patent protection excludes illegal use of inventions by third parties and provides an opportunity for the inventor to recoup the costs incurred by him and receive some rent. Without going into the analysis of this, it should be noted that the effectiveness of patent protection requires the creation of appropriate institutional conditions, that is, the development of the market of intellectual products and venture capital in the country.<sup>10</sup>

It should also be noted that the scientific and other organizations that carry out scientific research and development can be considered particularly important subjects for the formation and implementation of the scientific and technological potential, since they are actually the units that carry out direct scientific and scientific and technical activities.

The number of such organizations can be judged from the data provided in the official state statistics.

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<sup>9</sup> O. Granstrand, *The Economics and Management of Intellectual Property: Towards Intellectual Capitalism*, Cheltenham, Edward Elgar Pub, 2000; E. Kaufer, *The Economics of the Patent System*, New York, GmbH Harwood Academic Publishers, 1989.

<sup>10</sup> W. Bygrave, M. Hay, J. Peeters, *The Venture Capital Handbook*, London, Financial Times-Prentice Hall, 1999; V. Ya. Gorfinkel, *Economics of the Enterprise*, 2<sup>nd</sup> edition, Moscow, 2000; P. Gompers, J. Lerner, *The venture capital cycle*, Cambridge, Massachusetts, USA: MIT Press, 1999; Z. Griliches, "Issues in assessing the contribution of research and development to productivity growth," in *Bell Journal of Economics*, X (1979; no. 1, p. 92–116; T. Hellmann, L. Bottazzi, M. Da Rin M., "Who are the active investors? Evidence from venture capital," in *Journal of Financial Economics*, LXXXIX (2008), p. 488–512.

Table 3. The number of organizations, having performed research and development, by types of organization within the Russian Federation (units) <sup>11</sup>

	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	01
	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	5
	0	1	2	3	4	5	6	7	8	9	0	1	2	3	4	
the number of organizations - total	,099	,037	,906	,797	,656	,566	,622	,957	,666	,536	,492	,682	,566	,605	,604	,175
including:																
research organizations	,686	,677	,630	,564	,464	,115	,049	,036	,926	,878	,840	,782	,744	,719	,689	,708
design organizations	18	89	57	28	94	89	82	97	17	77	62	64	38	31	17	22
design and design and survey organizations	5	1	6	8	3	1	8	9	2	6	6	8	3	3	2	9
ilot plants	3	1	4	8	1	0	9	0	8	7	7	9	0	3	3	1
higher education	90	88	90	93	02	06	17	00	03	06	17	81	60	71	02	,040

<sup>11</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru>, accessed 01. 03. 2017.

ional institu tions																	
ndustr ial organi zation s, havin g had the scienti fic resear ch design and engine ering subdi vision s	8 4	8 8	5 5	4 8	4 4	3 1	5 5	6 5	3 9	2 8	3 8	8 0	7 4	6 6	7 5	71	
ther	0 3	8 3	6 4	6 8	5 8	3 4	1 2	5 0	8 0	5 4	5 2	8 8	5 7	3 2	3 6	4	

According to the table presented, we can make a conclusion that the number of organizations under consideration is not constant in the country and is subject to varying degrees of fluctuation. However, there has been a generally upward trend since 2012, and the figure has even reached its peak for 16 years in 2015. If we look at the structure of the aggregate of these organizations, we can see a clear predominance in the total number of specialized scientific research organizations, as well as the higher educational institutions. It is worth noting a relatively small share of industrial organizations (less than 9%), which can be considered a problematic issue for the country.

The structure of the organizations under consideration can also be considered in the context of the activity sectors, in which they function.

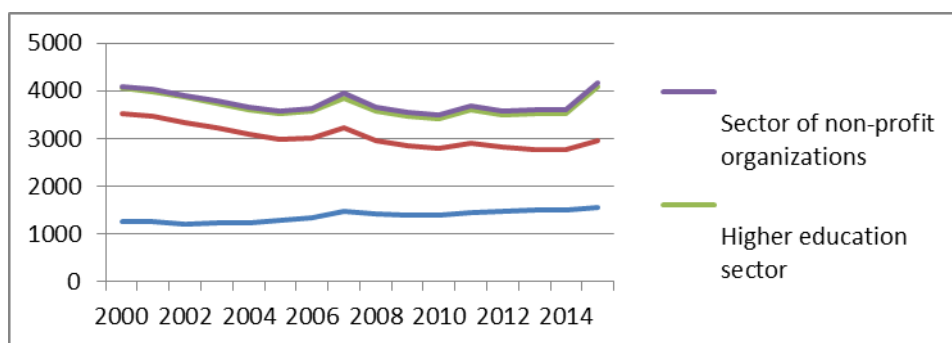


Fig. 3. The number of organizations, having performed research and development, by activity sectors (units)<sup>12</sup>

This table shows that the largest share is occupied by the state organizations, accounting for more than 37% of the total number of organizations in the country (not taking into account the state higher educational institutions). This again confirms the exceptionally high role of the state in forming and implementing the scientific and technical potential of the country.

There is a table below, showing the amount of state funding for science at the expense of the federal budget for 2011-2015.

Table 4. Science financing from the federal budget (Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru> (access date: 01.03.2017)

	2011	2012	2013	2014	2015
Expenditures for civil science from the federal budget, mln. roubles	313,89 9.3	355,92 0.1	425,30 1.7	437,27 3.3	439,39 2.8
including:					
for basic research	91,684. 5	86,623. 2	112,23 0.9	121,59 9.5	120,20 3.8
for applied research	222,21 4.8	269,29 6.9	313,07 0.8	315,67 3.8	319,18 8.9
in percentages:					
to the federal budget expenditures	2.87	2.76	3.19	2.95	2.81
to the gross domestic product	0.53	0.53	0.60	0.56	0.54

This table allows tracing the dynamics of state expenditures on science. There was a consistent increase in funding in both absolute and relative terms up to 2013: it was not only an increase in the nominal volume of expenditures on science,

<sup>12</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru>, accessed 01.03.2017.

but also their share in the total expenditures of the federal budget and in the gross domestic product.

In 2014-2015, the volume of science funding continued to increase, but it slowed down significantly, as a result of which a very small increase was observed in comparison with the previous years. It is worth noting that the basic research funding has been reduced. The shares of public expenditures in the GDP and the aggregate expenditures of the federal budget demonstrated an obvious downward trend in the same period. These processes can also be explained by the already mentioned crisis phenomena in the Russian economy and the aggravation of relations in the international arena.

However, the federal budget expenditures constitute only a part (albeit significant) of the total internal costs for the research and development, the amounts of which are presented in the following table.

Table 5. Internal costs for the research and development in Russia <sup>13</sup>

	<b>011</b>	<b>012</b>	<b>013</b>	<b>014</b>	<b>015</b>
Internal costs for the research and development, mln. roubles					
in actual prices	10,42 6.7	99,86 9.8	49,79 7.6	47,52 7.0	14,66 9.1
in constant prices of 1989	.75	.09	.23	.57	.58
in percentages to the gross domestic product	.02	.05	.06	.09	.13

Here we can trace a fairly similar picture: the volume of costs has been increasing at a moderate pace until 2013, but the growth has slowed significantly since 2014. Of course, in the nominal terms, that is, in actual prices, the financing volumes have been growing approximately equally throughout the five years. However, if we translate these costs into the constant prices of 1989, it becomes obvious that the financing has actually remained approximately at the same level, and the nominal increase could be explained by the price increase due to inflation in 2014 and 2015. An increase in the share of costs for the research and development in the gross domestic product is due to the GDP decline to a greater extent.

Nevertheless, it is important to note that the Russian Federation lags behind many other countries in terms of relative weight of domestic expenditures for the scientific and technical activities in the gross domestic product. For example, this indicator reached 4.29% in 2015 in the Republic of Korea, 4.11% - in

<sup>13</sup> Official Web-Site of the Federal State Statistics Service. URL: <http://www.gks.ru>, accessed 01. 03. 2017.



Israel, 3.59% - in Japan, 3.17% - in Finland, 3.16% - in Sweden, while the internal costs for the research and development amounted to only 1.13% as of 2015 in Russia, as can be judged from the table above.

The data of the last two tables make it possible to calculate the share of state expenditures in the total amount of expenditures for financing the scientific and technological activities as a ratio of the corresponding indicators. This share was about 51.42% in 2011, 50.86% - in 2012, 56.72% - in 2013, 51.59% - in 2014, and, finally, 48.04% - in 2015. We should not forget that these figures reflect the share of the federal budget expenditures, without taking into account the amount of funding from the budgets of other levels of the budget system of the Russian Federation.

Obviously, the state ensures the receipt of more than half of the financial resources received by the subjects of the scientific and the scientific and technical activities. In itself, this fact is not a negative factor, but it implies that the scientific and the scientific and technical sphere attracts a very small amount of private capital (especially in comparison with the developed countries), which indicates a low investment attractiveness of this sphere.

### **Conclusion**

Thus, summarizing the data on all the above indicators characterizing the formation of the scientific and technological potential (or the resource availability of scientific and technological activities) in Russia, one can come to the following conclusions. Firstly, there is a fairly strong impact of the crisis of 2014-2015 on the state of scientific and technical potential, as it has had the following consequence: the outflow of highly skilled specialists abroad and the reduction in the number of personnel engaged in scientific research and development, which reduced the provision of scientific and technical potential with human resources; the decline in the number of advanced technologies used by Russian researchers and scientific organizations, due to increased tensions in the geopolitical situation affecting the trade relations of the countries; in this regard, it has emerged the risk of lagging by the Russian science development from the rest of the world's scientific community; the reduction in the volume of financing of scientific and technical activities in real terms, etc.

Secondly, among the organizations engaged in the research and development, the share of state participation is significantly dominated, since most such organizations are state-owned or dependent on state funding or co-financing of their activities. This is also evidenced by the fact that the largest share is occupied by state expenditures, in particular, the federal budget expenditures, in the structure of state expenditures on the scientific and the scientific and technical activities in Russia.

Thirdly, the total state expenditures on the scientific and the scientific and technical activities in Russia represent the insignificant share of the gross domestic product, and Russia lags far behind this indicator from many developed countries.



**Poetic System Interaction By Yanka Dyaghileva And Egor Letov\***

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**Abstract.** *This research is devoted to the problem of mutual influence among two representatives of Siberian punk rock: Yana Stanislavovna Dyaghileva (Yanka) and Yegor Letov. The main methods of the study were the comparative-typological method of literary text study, which makes it possible to detect similarities and differences between them, as well as historical and literary method that helps to identify the available influences of art systems and develop the corresponding chronological chains. In the course of the analysis, we came to the conclusion that Yegor Letov's influence on Yanka can be distinguished on several levels of a poetic text: ideological-thematic, syntactic and strophical. The interaction of the poetic systems of these authors on the ideological and thematic level consists in the appearance of social problems in Yanka's lyric texts, where the main opposition is the socially engaged opposition "we/ them". The level of grammar allows you to discover the abundance of syntactic parallelisms in Yanka's texts. At the stropic level, Yegor Letov's influence is observed through the use of short vers libre by Yanka - one of the favorite Letov's forms. In his turn, Yegor Letov considers Yanka's creativity as a source of intertext: one can find references to the Yanka's poetic heritage in the compositions "Night", "Ophelia" and "Centennial Rain". Besides, Yegor Letov creates two dedications to Yanka: one lifetime ("About the Mishutka (The song for Yanka)") and one posthumous ("Ophelia"). The specificity of these texts lies in the fact that the image given in the title and somehow correlated with Yanka's life and work becomes the starting point for Letov's purely philosophical structures and reflections, not related to Yanka directly.*

**Key words:** Yegor Letov, Yanka Dyaghileva, influence, stanza, syntax, ideological and thematic complex, intertextuality, initiation songs.

### **Introduction**

Yegor Letov, of course, is the most significant and a key figure of Siberian punk rock. There is only one person from this get-together, which can be put side by side / together on a single pedestal. The thing in this case is about Yana Stanislavovna Dyaghileva (Yanka).

In Yegor Letov's biographical myth (as well as Yegor Letov in Yanka's biographical myth) Yanka takes the position far from the last one. Having acquainted at the First Novosibirsk Rock Festival in April 1987, they communicated until Yanka's death. At the end of 1988 after a year and a half of their life together they parted, but "they often played in joint concerts almost to the end. Sometimes Yanka addressed Yegor, he helped her".<sup>1</sup> Yegor Letov is also included in the "text of the death" by Yanka. Numerous Internet portals, including the official website devoted to Yanka Dyaghileva's memory, you can read the following facts from Y.S. Diaghileva's funeral: "There were tiresome dances, a sea of vodka and drugs, Egor's screams that Yanka's death is life-affirming, and therefore there is no need for tears and remorse, you need to have fun and enjoy life. They listened to Yanka's favorite music <...> After the funeral, the drunk Yegor came bursting into Yanka's house, where her father and stepmother were

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> Yanka Dyaghilevam, Biography, 2017: <http://yanka.lenin.ru/biography.htm>, accessec 30. 06. 2017.

sitting at that moment, silently walked into Yanka's room, took out all the boxes from the table, and poured them into his backpack ".

However, Andrey Mashnin, who attended Yanka's funeral, wrote in "My Kamchatka" community: "The Internet often says that the funeral was noisy and that Letov arranged a rally there. Olka and I do not remember anything like that. We attended funerals many times, and that was the same, the usual. If something were out of the ordinary, we would definitely pay attention and remember. But there was her farther and all her friends. Letov, would not arrange such a show there. Everyone was very depressed. And we left there quite quickly, and all together. So I do not know who remembers something unusual now" (My "Kamchatka" // URL: [https://vk.com/andreykamchatka?w=wall-140724076\\_2245](https://vk.com/andreykamchatka?w=wall-140724076_2245), free access. Checked on 30.06.2017.)

We do not intend to find out the true state of things that took place to be. In this "biographical" part of the study, we wanted only to fix the moment that a close enough communication between two artists of the word could not but affect their mutual influence in the sphere of creativity. Therefore, our goal can be identified as the identification of Yanka's text in Yegor Letov's works and Letov's text in Yanka's poetic heritage.

## Methods

This article continues the research of authors in the field of Russian rock poetry specifics study.<sup>2</sup> During the development of this problem, the main methods have been the comparative-typological method of literary text study, which makes it possible to detect similarities and differences between them, as well as the historical and literary method that helps to reveal the available influences of art systems and develop the corresponding chronological chains.<sup>3</sup>

## Results

In the course of the performed analysis, we came to the conclusion that Yegor Letov's influence on Yanka can be distinguished on several levels of a poetic text: ideological-thematic, syntactic and strophic. Already from this list it can be seen that Letov's form and not content found the largest reflection in Yanka's lyrics. This has its logical explanation: a poet-intellectual, the admirer of A.I. Vvedensky and V.V. Mayakovsky, the continuer of the Russian avant-garde

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<sup>2</sup> A. S. Afanasev, T.N. Breeva, "Gender picture of peace in Russian women rock-poetry (poetic novels «Sprinter» and «Stalker» by Diana Arbenina)," in *Journal of Language and Literature*, VII (2016), no. 1, p. 159–162; A. S. Afanasev, T. N. Breeva, "Gender worldview in modern Russian literature," in *Turkish online journal of Design Art and Communication*, VI (2016), special issue, p. 3043–3048; A. A. Sergeevich, "Culture code in biographical myth structure (a case study of poem collection «Notebook of words» by S.Y. Surganova)," in *Journal of Language and Literature*, VI (2015), no. 1, p. 262–266.

<sup>3</sup> S. A. Petrova, "Intermedial analysis of V. Tsoy's rock album «Blood Type»," in *Rupkatha Journal on Interdisciplinary Studies in Humanities*, VIII (2016), no. 3, p. 242–251; Y. B. Steinholt, "You can't rid a song of its words: Notes on the hegemony of lyrics in Russian rock songs," in *Popular Music*, XXII (2003), no. 1, p. 89–108.

traditions Yegor Letov creates the texts that challenge the social norm at an early stage of his work but these texts are shocking and extraordinary by form. The lyrical subject of this period of creativity is blurred and not defined clearly, and the dominants of the ideological and thematic level are alogism and absurdity.

The favorite figure of speech during this stage of Yegor Letov's creativity is syntactic parallelism. At that whole poems can be developed at this reception. Small poems will be particularly indicative here. Let's give two examples. The first is the poem "I fell down in the puddle with all my sky ...": "I fell in the puddle with all my sky / I fell out of the puddle with all my knock / I flew off to the puddle by all my evening / I flew in the puddle by all my whisper, The principle of repetition is semantic and structure-forming here: each line repeats the words "I", "puddle", "all my", action verbs and final nouns are varied. Thus, the lines built on syntactic parallelism include both constant and variational lexemes.

The second example is the poem "The gardens of unintelligible importance": "The gardens of unintelligible importance / Irons of unknown manufacture / Roads of unknown application / Water of unclear amount / Hair of incomplete capacity / Trees of ambiguous causality / And a caterpillar from the side", There are no lexical repeats here (although, as in the first case, there are phonetic repetitions). The specificity of this option is that phrases not sentences are syntactically paralleled here.

Yanka's lyrics has frequent examples of syntactic parallelism. According to the collection of poems by Yanka Dyaghileva compiled by Yakov Sokolov, Yanka created only 9 art texts before the acquaintance with Yegor Letov, and three of them ("Leave the wolf pack in the world ...", "Drew the icon - and forgot them under rain", "Little words for verses ... ") reveal syntactic parallelism, however, the marked Letov's structures are not observed.

The first changes of the figure of speech we are considering in Yanka's use belong to June 1987. We have in mind the poem "Classic depression": "The souls from repentance are all around / Despair without movements / Stillness without outcomes / Unacceptance without influences / Non reaction before leaving / Unnatural black phobia / Frivolous thinking of broken windows"<sup>1</sup>. In this example, a clear method of Yegor Letov's poetics - syntactically paralleled word combinations - is quite clear.

It should be noted that Yanka's syntactic parallelism Yanka is used at the beginning of the text very often. The most representative in this respect will be the late composition "Take feet from the ground", consisting of two parts: declamatory and song. An original origin is completely built on syntactic parallelism: one parallel replaces another, and this can be continued indefinitely.

Yanka's works, entirely built on this method are less frequent. Among such texts, you can distinguish the poem "Execute us with a firm hand ..." and one of the last creations "Hurried - / It turned out. / Refused - / Drowned. / Looked back - / No one. This small text is important for our research and the fact that it shows one more sign of Letov's poetry - a short vers libre.

Like most rock poets, Yegor Letov's poetic texts can be divided into two groups: the texts that make a verbal component of a rock composition, and

traditional poems. Yegor Letov has quite a lot of such poems - about 1/3 of all written works. In contrast to the verbal component of the rock composition, almost all the poems are astrophic, and they are free verses by form. A special place is occupied by short vers libre in Yegor Letov's poetry - the poems consisting of 2-6 lines, in which, as a rule, a deep philosophical thought is formed. The examples of such short vers libres can be: "Speeches slow down / Words are repeated / Intonations do not change / Phrases are closed / And all over again - Playing aircraft / Under the bed", "The sky is of meat color / When you stumbled / on a dead mouse",<sup>4</sup> "Everything I wrote / I lied about all this"<sup>5</sup>, "When I died / There was no one / Who would deny it", etc.

One of the favorite forms of poems for Yanka (not the verbal component of a rock composition!) was not so much vers libre as an astrophic white verse, at that some lines can be rhymed. There is a lot of examples of such texts: "Ch. K.", "A. B.", "The bucket was filled with lunar treacle to the edge...", "Unclear light through the snowstorm and meadow ...", "Wasteland - rags, smoldering smoke". Free verse is also found, but in small numbers, and unlike Letov's vers libre they are not short ("Wolves are fed - sheep are whole").

This situation changes in the works of 1989-1991, when the peak of activity has already been passed. In these years, Yanka creates several vers libra, which, no doubt, go back to Yegor Letov's poetic quest. Here are some of them: "The stars fall from the sky / with butts from the upper floors", "The cat melts on the fire / She knows how to scream / The man in himself knows how to be silent / the point of bitterness is dumb", "By the average circle / There's an escalator / And back along the rope / Path of the loop / Above all the beauties / Heights, emptiness and uncleanness". Here we observe the signs of Letov's style: unusual comparisons, the series of homogeneous terms, associativity.

A special place in this series is taken by the poem "The Oak rose...", dated on January 1991:

The oak rose I love you  
Took off a table and you.  
You can't understand.

We dare to assume that an original text of the poem mentioned above is Yegor Letov's poem "The Stairway to Heaven..." (1984):

The stairway to Heaven  
the angels of ruined faith,  
the church soldiers  
are dumped dead on the roof .

Here are two examples of so-called visual poetry. And these cases are single for Yegor Letov's and Yanka's creativity. These texts can be read both horizontally (like traditional poems) and vertically (this interpretation is facilitated by large spaces between words within a single line and the aligning of the second and the third word in a column). "The ladder to the sky ..." can be considered as a poetic

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<sup>4</sup> E. Letov, *Poetry*, Moscow:, Publishing House "Vyrgorod", 2016.

<sup>5</sup> *Ibidem*.

experiment by Yegor Letov, and the source for the poet was probably the poetry of the futurists, in particular, the poetry by A. Kruchenykh, V. Khlebnikov and V. Kamensky. "Yanka wrote her poem, focusing on Letov's text, and the last line ("You can't understand") can be read not only as an appeal to a conventional lyric object, but also as a game with a reader who must unravel the proposed Yanka poetic puzzle.

### **Discussion**

It is more difficult to identify the influence of Yegor Letov's creativity on Yanka's poetry within the ideological and thematic level than in the cases we have already considered. The fact is that the poetic worlds of two authors are unique, unusual, and, most importantly, these artistic systems were formed in different subcultures. For Yanka, such a subculture was the subculture of hippies, for Yegor Letov - the subculture of punks.

As we noted above, Yegor Letov's early works, record the absurdity of the world, but the lyrical subject not only contemplates absurdity, but tries to fight it. And if in the texts of 1982-1985 the protest by Yegor Letov is extremely abstract, then in the works of 1986-1989 nonconformism takes on a pronounced social-political character. The core construct of the ideological and thematic level of Yanka's creativity is the discovery of the total tragedy of being and the inability of a man to escape this existential tragedy. However, the texts appeared in Yanka's poetry from time to time, in which the social problems were stated rigidly. It is revealed declaratively in the compositions "To the declassified elements", "Along the tram rails", "How to live", "We are knee-deep" and some others, where the main opposition is the socially engaged opposition "us" (subculture representatives) and "them" ("state" people). The appearance of such texts can be explained precisely by the orientation of Yegor Letov's creativity and the immersion in a punk subculture. Besides, we can assume that Yanka's sporadic inclusion of obscene vocabulary in their texts is also associated with Egor Letov's influence on her poetic language.

So, we tried to trace, how Yegor Letov influenced Yanka's creativity. Now we will try to do a reverse operation and see Yanka's "traces" in Letov's work.

This part of the study will be much smaller than the previous one for one reason: Yegor Letov and Yanka met when Letov was developed as a poet, and a young girl who had just begun to create could not have had a strong impact on him. Besides, being confident of his genius, Yegor Letov, during Yanka's lifetime, treated her with leniency. In this regard, we were able to find Yegor Letov's references to Yanka's poetry and image. Here, first of all, the lexical / intertextual level and the songs of dedication to Yanka will be considered.

It is well known that Yegor Letov's poetry is filled with various reminiscences, allusions, explicit and hidden quotations. There are Yanka's works among the original texts, and all these texts were written by Yegor Letov in 1990-1991. So, for example, the poet introduces the image of coteyka in the poem

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<sup>6</sup> My "Kamchatka" // URL: [https://vk.com/andreykamchatka?w=wall-140724076\\_2245](https://vk.com/andreykamchatka?w=wall-140724076_2245), accessed 30.06.2017.

"Night" ("Koteyka's tail burned accidentally", "The gray coteyka puked with a cucumber", "The gray coteyka was pissing in a shoe". This lexeme goes back to Yanka's poetic (and everyday) language (see, for example, "Nyrka's Song": "Everything that happened, everything that she remembered herself / Koteyka swiped off the thing from the window sill with its tail"). Letov's song "Ophelia", which we will talk about below, has the following lines: "Rubber tram, galvanized May / Overdue ticket for a second session". Here are the references to Yanka's two poetic texts: the reader "Along tram rails" and the little-known "The form deforms the rubber lump of fatigue": "The Form deforms the rubber lump of fatigue / A cat on the windowsill erases everything by the tail" / "The exact command is we wake up gather and go / The black clothes obliges to dance at the stake / The forgotten city is the wasted limit / an overdue ticket. "Besides, there is also Yanka's biographical text in the quoted passage: the phrase "galvanized May" indicates the month of her death. Besides, another reference to Yanka's work is Yegor Letov's poem "One Hundred Years of Solitude" which goes back to Yanka's composition "The Centenary Rain". Of course, both texts are related to Marquez's novel "One Hundred Years of Solitude" genetically, but Yanka's poem is closer to the text by structure, the principle of associativity and an ideological complex.

In the context of the problem under consideration, it is impossible to pass by two compositions by Yegor Letov, which are songs of dedication to Yanka. We are talking about the poem "About the Mishutka (The song for Yanka)" (in vivo initiation) and the already mentioned "Ofelia" (posthumous dedication). The specificity of these texts lies in the fact that the image presented in the title and somehow correlated with Yanka's life and work becomes the starting point for purely Letov's philosophical constructions and reflections not related to Yanka directly. The title image of the first initiation, the mishutka, refers us to the general context of Yanka's creativity, in which the theme of childhood is one of the leading places, and to a separate poem "Stress on the syllable above the capital line...", where one of the main characters is the bear. However, in terms of its problems and spatial-temporal organization, it is the continuation of the composition "About the Fool" written earlier (compare similar grammatical constructions in the titles of both texts). In the second dedication, Yegor Letov addresses the literary context. The central image - Shakespeare's Ophelia - corresponds with Yanka's image through the motive of suicide and the way of its realization (drowning). Yanka's death here became the reason for the declaration of his philosophical conception - the statement of death as a life-affirming and joyful beginning ("Wonderful captivity, granite delight / The lemon path to the orange forest / An invisible lift to the floor without limits".<sup>7</sup>

### **Conclusions**

Thus, in the course of our research, we established the fact of Yegor Letov and Yanka Dyaghileva mutual creative influence. Yegor's influence on Yanka's poetry can be found on the ideological, thematic, syntactic and stropic levels of the

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<sup>7</sup> *Ibidem.*



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text. The reverse effect is observed through the songs of initiation and the situation of intertextuality.

*Poetic System Interaction* By Yanka Dyagileva And Egor Letov, *Astra Salvensis*, V (2017),  
no. 10, p. 367-373

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## Special Features Of Studying Modern Russian Poetry At School In The Context Of Russian And Tatar Cultures' Dialogue\*

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**Abstract.** *Article is devoted to studying the specifics of teaching modern Russian poetry in the context of the Russian and Tatar cultures' dialogue in system of school education of the Tatarstan Republic featuring teaching two state languages - Russian and Tatar.*

*Relevance of this research is caused by theoretical and practical readiness of a technique for teaching the Russian poetry of the second half of the XX century - the first decade of the 21st century in the senior classes of schools with native (Tatar) language of training. In this research the technique of teaching modern Russian poetry developed by us in the context of the Russian and Tatar cultures' dialogue approved in practice of teaching literature in the 11th class of the Tatar gymnasium No. 2 of Kazan is presented.*

*The conducted research allows us to draw conclusions that use of dialogue of cultures promotes increase in efficiency of studying the Russian literature by Tatar students due to activation of their bicultural potential. On the example of the out-of-class lesson devoted to I. A. Brodsky, A. S. Kouchner and O. G. Chukhontsev's philosophical poetry the technique of studying the poems of these poets taking into account features of perception by Tatar students of the Russian literature as nonnative is for the first time presented.*

*The analysis of skilled and experimental training results showed that the successful solution of the problem of teaching modern Russian literature in foreign-language audience is promoted use at lessons of convincing facts about the similar phenomena in Russian and native (Tatar) literatures, detection of the works similar on subject, close in the problem and genre relations, the appeal to the translations of works of the Russian writers on native (Tatar) language.*

*At a lesson of a home reading group methods of the student work organization, as well as various kinds of student activity were used: expressive reading of poems by I. A. Brodsky, A. S. Kouchner and O. G. Chukhontsev devoted to time subject, oral performances of students with reports and messages on creativity specifics of modern Russians and Tatar poets R. M. Haris, R. G. Fayzulin, Zulfat, carrying out complex, comparative, comparative and typological analyses of poems of the Russian and Tatar poets, professional literary poems' translations of the modern Tatar poets into Russian, as well as creation by students of the word for word translations of poems of I. A. Brodsky, A. S. Kouchner and O. G. Chukhontsev into Tatar (due to the lack of their professional literary translations)*

**Key words:** methods of teaching literature, Russian literature, Tatar literature, national school, polylingual school.

### Introduction

In article on the example of a lesson of the home reading devoted to acquaintance with I. A. Brodsky, A. S. Kouchner and O. G. Chukhontsev's philosophical poetry in the 11th class the technique of teaching modern Russian poetry in the context of the Russian and Tatar cultures' dialogue at schools with native (Tatar) language of training reveals. In philosophical poetry time subject acts

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\* Research is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

as one of the main subjects. In I. Brodsky's poetry the category of time is key. According to P. Vail and A. Genis's remark the poet "argues in the spirit of an existential view of the world: time is a condition of things' change, changes in the person, power, life, but time inevitably brings death as well. So, the subject "time and space" becomes inseparably linked with other major creativity subject of Brodsky - "life and death" .<sup>1</sup> I. A. Brodsky considered the only way of fight against time to be the poetic word. This understanding of time was embodied in poems "1972", "From Nowhere, with Love ...", "Monument", "I Entered instead of a Wild Animal a Cage ...", "Butterfly"). In A. S. Kouchner's poetry the subject of time is embodied in indissoluble unity of the past, present and future ("Times do not choose...", "These eternal scores, calculations, are long ...", "Snow flies up to a night window ...", "A century hostage, a Caine's press ..."). In the poetic world of O. G. Chukhontsev the subject of time is comprehended as a way of dying revival, spiritual regeneration of the lyrical hero leads to an eternal celebration of life. ("I hear, I hear the homeland ...", "Cuckoo", "Loud beep, wind in a face, a roar ...", "A century hostage, a Caine's press ...", "Having come back home. Having drunk tea ...", "The general photo", "Costs the village ..."). As A. E. Skvortsov in O. Chukhontsev's poetry notes the embodiment of an image of time optimistically: "Even the drama motive of personal mortality is neutralized in the final by other, metaphorical statement of eternity of Life in which general course each final individual destiny is valuable, so, from the highest point of sight private tragedies are dissolved in the general interconnected and intelligent harmony of the universe".<sup>2</sup>

Because the Tatar poetry developed in line with other east poetic context, at lessons of the Russian literature it is necessary to carry out not the comparative, but matching analysis of works of modern Russians and Tatar poets, revealing their typological similarities at the problem and thematic level. The image of time is the leader and in works of modern Tatar poets that allow carrying out the comparative analysis at a lesson, defining specifics of the embodied image of time in the modern Russian and the Tatar poetry. In R. M. Haris's poems ("The unexpressed word", "Who else?", "And here we live"), R. Fayzulina ("The mountain and the plain", "That for a thought secret at this break?", "I did not choose the homeland ...", "Tired from terrestrial cares - goes ..."), Zulfata ("Here so ...", "When I see awe of the wood ...", "Spring wind blows ...", "Point", "The sky full of star swarm ...") through space, historical and personal time is expressed a thought of difficult human nature, of relativity of any truth.

Thus, at literature lessons students bilinguals can establish and track dialogical communications of the Russian and native (Tatar) literature, each of which is self-sufficient as well as of its own unique value.

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<sup>1</sup> P. Vayl, A. Genis, "V okrestnostyah Brodskogo: K tvorcheskoy biografii poeta," in *Literaturnoe obozrenie*, VIII (1990), p. 23 - 29.

<sup>2</sup> A. E. Skvortsov, "Modern Russian elegy: about one poem of Oleg Chukhontsev," in *Literature at school*, IX (2016), p. 32- 34.

### Materials and methods

Specifics of a sociocultural situation in the Tatarstan Republic are defined by system of bilingual education and existence of a large number of schools, gymnasiums in which educational process is carried out in native (Tatar) language, at the same time in them full-fledged knowledge of the Russian and foreign languages for familiarizing of students with the Russian and world culture is guaranteed. Dialogue of cultures becomes a basis of educational system at schools with native (Tatar) language of training, promoting creation of humanitarian culturological model of literary education.

At literature lessons students-bilinguals can establish and track dialogical communications between Russian and native (Tatar) literatures. This technique of teaching literature is based on the principle of dialogue of cultures which is put forward by M. M. Bakhtin<sup>3</sup>, proved in V. S. Bibler, M. V. Cherkizova, R. Z. Khayrullin<sup>4</sup>, researches in relation to specifics of teaching literature in the context of dialogue of cultures. Education and development in the course of studying the Russian and literature define problems of literary education at school with native (Tatar) language of training which are developed by scientists-methodologists G. A. Golikova,<sup>5</sup> literary critics V. R. Amineva, D.F. (2015),<sup>6</sup> Zagidullina, L. I. Mingazova (2016)<sup>7</sup> also popular cross-cultural approaches which effectiveness is revealed in a number of linguistic researches.<sup>8</sup> Researches of scientists allow proving and introducing scientifically in practice of school literary education literature lessons on the basis of the Russian and Tatar cultures' dialogue.

Asking questions, observation over the organization of educational process at lessons of the Russian literature at schools with native (Tatar) language of training, a conversation with teachers and students of the Tatar schools and gymnasiums of the Tatarstan Republic, as well as own pedagogical experience allowed to formulate the research problem caused by a contradiction between new problems of literary education and old approaches to teaching the modern Russian

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<sup>3</sup> M. M. Bakhtin, *Literary critiques*, Moscow, Fiction, 1986, 1986.

<sup>4</sup> V.S.Bibler, *Dialogue of cultures and school of the 21st century - School of dialogue of cultures. Ideas. Experience. Problems*, Kemerovo, ALEPH Humanitarian center, 1993, p. 9-106; M. V. Cherkizova, *Problems of teaching the Russian literature in the foreign culture environment: methodical grant*, Moscow, Drofa, 2007; R. Z. Khayrullin, L.F. Surzhikova, "Education of civil, all-Russian and national consciousness of younger generation as social order to modern polycultural school," in *TsITISE*, I (2015), p. 36-44.

<sup>5</sup> G. A. Golikova, R. R. Zamaletdinov, A. H. Vafina R. F. Mukhametshina, "The "New" strategy in teaching literature in a multiethnic environment (As exemplified by the Tatarstan Republic)," in *International Journal of Environmental and Science Education*, XI(2016), p. 1237-1246.

<sup>6</sup> V. R. Amineva, "Phenomenon of border in interliterary dialogues," in *Journal of language and literature (JLL)*, VI (2015), no. 2, p. 246-249.

<sup>7</sup> L. Mingazova, R. Sulteev, "Tatar and English Children's Folklore Education in Folk Traditions," in *Western Folklore*, LXXIII (2016), no. 4, p. 410-431; D. Zagidullina, V. Amineva, "Avant-Garde Research in the Field of Verse Forms," in *XLinguae European Scientific Language Journal*, IX (2016), no. 1, p. 135-145.

<sup>8</sup> I. K. Safin, "Representation of gender concepts in the Russian and Polish languages," in *Social Sciences*, X (2015), no. 5, p. 562-565.

poetry at school. The reason for that became: 1) lack of the scientific and methodical researches devoted to studying the modern Russian poetry at the Tatar schools; 2) ignorance by teachers of ways of studying the modern Russian poetry in the context of dialogue of the cultures providing a possibility of full art perception of works of the Russian literature by students of schools with native (Tatar) language of training.

The basis of a research was made by historical and genetic, historical and functional, comparative and comparative and typological approaches to consideration of the embodiment specifics of subjects, problems, images in the Russian and Tatar poetry at the synchronic and diachronic levels.

Successful studying of the modern Russian poetry at schools with native (Tatar) language of training is carried out at introduction in educational process of interactive and information training technologies, as well as contextual training in literature at a culturological basis, integration of substantial components of the Russian and Tatar literatures in synchronic and diachronic aspects and their interrelation taking into account ethnocultural and bicultural orientation of literary education, as well as specifics of perception by Tatar students of the Russian literature as nonnative (the phenomena of a transposition, an interference, etc.).

### **Results and discussion**

Students of schools with native (Tatar) language of training, mastering works of the Russian literature, appear in a hermeneutical situation when their educational activity is directed to judgment of the principles and receptions of the art image of other literature. Studying the Russian literature in the context of native allows perceiving adequately obtained esthetic information. The Russian literature in the different-nation environment begins to be perceived not as "alien" but as "another". Consciousness of students fixes variety of the art principles and forms of the image.

As an example of realization is higher than the called methodical principles of studying the modern Russian poetry in the 11th class of schools with native (Tatar) language of training, we will provide the description of the integrated lesson devoted to creativity of I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev and modern Tatar poets on the subject "Image of Time in the Modern Russian and Tatar Poetry". As an epigraph to this lesson the first lines of the poem by A. Kouchner "Served times do not choose, live in them and die ...". At this lesson consecutive communication of integration at which the training material relating to various school objects is organized in semantic blocks is used. For example, the block 1 - the Russian literature, the block 2 - the Tatar literature. Two subject teachers ("a binary lesson") or the teacher of the Russian literature who well knows Tatar can conduct a lesson. By preparation for a lesson the teacher and students select poems of modern Russians and Tatar poets, prepare biographic material, repeat the literary terms necessary for carrying out the analysis of the poetic text. Materials of blocks at a lesson can sound both in Russian, and in Tatar languages. As the priority at a lesson is given to studying the modern Russian poetry an

analytical conversation and monological performances of students are conducted in Russian. Thus, the integrated lesson of literature allows making active language, literary and culturological knowledge of students of the Russian and Tatar literatures.

The lesson begins with a conversation during which knowledge of students of an originality of the Russian historic-and-literary process of the second half of the XX century is staticized. The conversation will be organized by the teacher's question: "How is it possible to define features of literary process of the end of the XX century and what ratio literary and out of literary factors there is in this process?"

Previously having divided into three groups, students by preparation of homework for a lesson got acquainted with life and creativity of I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev (each group studied works of one poet), made a small selection of philosophical poems on time and compared works of the Russian poet with works of the modern Tatar poet.

At a lesson the main attention concentrates on the comparative and comparative analysis of poems of three Russian poets I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev and the Tatar poets R. M. Haris, R. G. Fayzulina and Zulfat. One of positive features of carrying out such lesson in the conditions of a polilingval gymnasium is that an opportunity to study poems not through the translation is represented, and directly, adjoining to original language, so to try to analyse and apprehend the work without intermediary.

At a lesson the main task is set for students - to determine similarity and distinction of the embodiment of an image of time in creativity of modern Russians and Tatar poets, argumentir the answer by examples from poetic texts.

The main questions of a lesson are projected on the multimedia screen: 1) Name the Russian poets of XIX - the XX centuries addressing an image of time in the creativity. Reason the answer with examples from their poems. (Possible answers: M. Y. Lermontov, F. I. Tyutchev, A. A. Blok, S. A. Yesenin, V. V. Mayakovsky, O. E. Mandelstam, etc.); 2) Name the kind of time embodied in the Russian poetry (Possible answers: time is space, historical, personal); 3) Define lines of tradition and innovation in the embodiment of an image of time in creativity of modern Russian poets; 4) What is similar and what is different in the embodiment of an image of time in modern Russians and Tatar poets? How in their creativity the individual world view of the poet and his belonging to the Russian or Tatar culture correspond? The lesson begins with answers to the first two questions in the form of blitz warm-up, the third and fourth questions become through questions of this lesson.

The lesson continues with a performance of 3 groups student teams, each group briefly characterizes an originality of life and creativity of I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev. The performance of groups is followed by demonstration of multimedia the presentation, students of other groups write down the main dates of life and creativity in notebooks, as well as briefly

characterize poems in which the image of time is embodied. Then students compare poems of modern Russian poets with poems of modern Tatar poets R. M. Haris, R.G.Fayzullin and Zulfat. During the comparative analysis students come to a conclusion that in creativity of modern Russians and Tatar poets there is much in common in the embodiment of an image of time (space, historical and personal), all of them express concern about dramatic nature of life in modern society if modern Russian poets lift more "eternal" problems, then the Tatar poets along with it are concerned also about questions of preservation of Tatar and the Tatar nation. It is important that the Russian and Tatar poets, developing in line with traditions of the national literatures and cultures, at the same time fit also into a context of universal poetic tradition.

The main objectives of the integrated lesson is interface of creativity of modern Russians and Tatar poets, comprehension of their art world, identification of the general in their attitude, consideration of national caused originality in artistic realization of a subject of time and an image of time in creativity of modern Russians and Tatar poets.

### **Conclusions**

Skilled and experimental check of the offered technique efficiency in studying the works of modern Russian poets I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev in the context of the Russian and Tatar cultures' dialogue is offered. Quiz, testing and analysis of written examinations of 11th grade students in schools with native (non-russian) language of training revealed that during the comparative analysis of modern Russians and Tatar poets poems the steady ideas of an originality of the embodiment of an image of time in their creativity which are closely connected with their world view and attitude as well as the abilities necessary for the comparative and matching and typological analysis of poems by I. A. Brodsky, A. S. Kouchner, O. G. Chukhontsev introduced in practice of school studying for the first time were created. From 41 students of two 11 grades of the Tatar gymnasium No. 2 of Kazan, 28th pupil (68,3%) showed the average possession level of skills of the analysis of modern Russian poets' poems in the context of dialogue of the Russian and Tatar literatures, 9 students (21,9%) – showed high level. Thus, the final results of a pedagogical experiment testify to expediency of full-scale inclusion of a technique of studying the modern Russian poetry in process of students' literary education of the Tatar schools and gymnasiums.



## **Peculiarities Of Adolescent Depression Before Passing The General State Exam\***

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**Abstract.** *The problem of emotional distress of children and adolescents is one of the central problems that attracts the attention of parents, teachers and psychologists. A vivid manifestation of the emotional disadvantage of adolescents is a depressive state before passing the CSE and the USE. It is worth noting that depression in adolescents is not just a bad mood, but a serious emotional disorder that hinders its development, affects well-being and quality of life.*

*Modern scientists, such as Gatsonis & Covacs (1989), Puig-Antich (1986),<sup>1</sup> D.N. Isaev (2000), in their studies of the depressed states state the facts that psychotic and endogenous forms of depression are more common for children than for adults. Brent (1993),<sup>2</sup> Robbins & Alessi (1985),<sup>3</sup> have identified the links between depression and suicidal tendencies in adolescence.*

*In this paper, we consider the essence, causes and signs of depression in senior schoolchildren before passing the CSE.*

**Keywords:** depression, depressive disorder, CSE, prevention, late adolescence.

### **Introduction**

Despite a lot of research on the problem of depressive states of the individual, in modern science and practice the problem of adolescent depression remains topical and overarching, as the number of children with various personal abnormalities, such as autonomic disorders, poor academic performance, anxiety and fear, increases. These negative conditions often lead to additive behavior and, the most dangerous and irreversible, to the manifestation of suicidal behavior. According to G.Z. Batygina and N.M. Iovchuk (1998), A.A. Severnyi (1999),<sup>4</sup> the prevalence of depression in children and adolescents over the past 10-20 years has increased significantly. Scientists, in particular A.B. Smulevich (2001),<sup>5</sup> found that the incidence of depression in the general population is now approaching 3% in the general population, namely, the spot prevalence rates for severe depression are high enough (less than 1% for preschool children, 2-3% for school-age children and 3-8% for adolescents).

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> J. Puig- Antich, "Psychobiological markers: Effect of age and puberty," in M. Rutter, C. E Izard, P. B. Reads (eds.), *Depression in young people: Developmental and clinical perspectives*, New York, Guilford, 1986, p.341-381.

<sup>2</sup> D. A. Brent, "Depression and suicide in children and adolescents," in *Pediatrics1. Review*, XIV (1993), p. 380-388.

<sup>3</sup> D. R. Robins, N. E. Alessi, "Depressive symptoms and suicidal behavior in adolescents," in *American Journal of Psychiatry*, CVIII (1985), p. 588-592.

<sup>4</sup> N. M. Iovchuk, A. A. Severnyi, "Depression in children and adolescents," in *Curative pedagogy and psychology (attachment to the journal "Defectology")*, II (1999), p. 24-52.

<sup>5</sup> A. B. Smulevich, *Depression in general medicine: A guide for doctors*, Moscow, Medical News Agency, 2001, p. 256.

According to the WHO (World Health Organization), more than 350 million people of different age groups suffer from depression throughout the world.<sup>6</sup> Depression is a serious health disorder that can lead to significant human suffering and his poor performance at work, at school and in the family (4). According to the official website of the Scientific Center for Mental Health, the prevalence rates of depression increase not only among middle-aged people, but also quite often occur in childhood and adolescence (Age features of the clinic and course of depression in children and adolescents // Scientific Center for Mental Health. Federal State Budget Scientific Institution. Official site. URL: <http://www.psychiatry.ru/lib/1/book/38/chapter/16> (accessed date: 8.09.2017).<sup>7</sup>

In connection with the urgency of the problem, we conducted a research to study peculiarities of the manifestation of depressive states in high-school students before passing the CSE.

*Depression (from Latin, deprimō - to press, suppress)* is an oppressed, depressed mental state, accompanied by a decrease in mood and loss of the ability to experience joy (anhedonia), impaired thinking (negative judgments, pessimistic view of what is happening), and inhibited motor activity (2).

Any depression consists of three components - mood disorder, autonomic disorders and fatigue:

1) the component of depression is related to mood changes - a sad depressed mood lasts more than two weeks;

2) the depression component includes vegetative disorders (manifestations of vegeto-vascular dystonia);

3) the depression component - asthenic, includes fatigue, sensitivity to weather changes, irritability.

But we are most interested in adolescent depression. Note that adolescent (separation) depression is a condition where we can observe a deterioration of well-being in three vectors:

1) *lowering of mood*, which is marked by depression, tearfulness, fatigue, sadness, melancholy,

2) *sleep disorders*,

3) appetite disorder that manifests itself through fasting or excessive overeating (Age features of the clinic and course of depression in children and adolescents // Scientific Center for Mental Health. Federal State Budget Scientific Institution. Official site. URL: <http://www.psychiatry.ru/lib/1/book/38/chapter/16> (accessed date: 8.09.2017).

It is known that adolescence is characterized by a vivid manifestation of emotions, demonstrative behavior, a sharp change of various states.

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<sup>6</sup> Depression. Fact Sheet No.369. October 2012. URL: <http://www.who.int/mediacentre/factsheets/fs369/ru/>, accessed 09. 09. 2017.

<sup>7</sup> Age features of the clinic and course of depression in children and adolescents //2017. Scientific Center for Mental Health. Federal State Budget Scientific Institution. Official site. URL: <http://www.psychiatry.ru/lib/1/book/38/chapter/16>, accessed 08. 09. 2017.

Scientists, such as N.M. Iovchuk and A.A. Severnyi (1999),<sup>8</sup> D. I. Isaev (2000),<sup>9</sup> A. Kempinskii (2017),<sup>10</sup> and others, note that it is quite difficult to recognize adolescent depression, but adults need to pay attention to the following symptoms, such as a groundlessly depressed mood, anhedonia - loss of interest or pleasure from previously pleasant activities, expressed fatigue, pessimism, feeling of guilt, uselessness, fear, low self-esteem, inability to concentrate and make decisions, thoughts of suicide, sleep and appetite disturbances.

Among the behavioral manifestations of adolescent depressive disorders can be passivity, the difficulty of involving in a purposeful activity, avoiding contacts. In the intellectual and the volitional sphere, there are difficulties in decision-making, slowness of thinking. One of the most common symptoms of depression is a violated regulation of self-esteem.

The causes of depressive disorders can be both physiological and psychological: traumatic, *stressful situations due to overload*. We shall consider the last reason in more detail.

The CSE is a compulsory state examination, which a 9th-grade student must pass in Russia, according to FGOST. We (the authors of the paper) believe that the majority of students, teachers and parents experience psychological discomfort, resulting in the formation of persistent fears, anxious states of the adolescent's personality before the future, which can further lead to depression and entail disadaptation of the individual in society. It is impossible not to agree with the opinion by Iu.F. Andropov (2000), who argues that depression in adolescents imposes a strong imprint on all sides of the personality, leads to loneliness and alienation. If not preventing depression (in particular, before the CSE), this can lead in the future to various forms of deviant behavior.

### Materials and methods

Our research was conducted on the basis of a comprehensive school in Kazan. The experiment involved the 9th-grade students. For the diagnosis, we conducted a questionnaire survey "Soon CSE" among the students and used the technique of differential diagnosis – *Zung Self-Rating Depression Scale* (T.I. Balashova's version), which was developed at the University of Duke by a psychiatrist doctor William Zung. The test allows assessing the level of personality depression and determine the degree of depressive disorder.

Before the beginning of the survey, the subjects receive special forms, where they must make certain notes, as they are read. The corresponding instruction, containing information about what the subjects should do, is preliminary provided. The test contains 20 questions. Full testing with processing takes 20-30 minutes. The level of depression is calculated by the formula:  $LD = \Sigma dir. + \Sigma rev.$ , where  $\Sigma dir.$  is the sum of the crossed-out figures to the "direct"

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<sup>8</sup> N. M. Iovchuk, G. Z. Batygina, "Prevalence and clinical manifestations of depressions in the school-aged adolescent population," in *Journal of Neurology and Psychiatry*, IX (1998), p. 33-37.

<sup>9</sup> D. N. Isaev, *Psychosomatic disorders in children: a guide for doctors*, St. Petersburg, Piter, 2000, p. 512.

<sup>10</sup> A. Kempinskii, *Melancholy. Adolescent depression*, Sankt Petersburg, Nauka, 2002; <http://www.s-anxiety.ru/library/km/kempinsky-melanholiya105.html>, accessed. 08. 09. 2017.

statements No. 1, 3, 4, 7, 8, 9, 10, 13, 15, and 19;  $\Sigma_{rev}$  is the sum of the figures "reverse" to the crossed-out statements No. 2, 5, 6, 11, 12, 14, 16, 17, 18, and 20. As a result, we get *LD*, which ranges from 20 to 80 points.

If *LD* is less than 50 points, then a normal state is diagnosed. If *LD* is more than 50 points and less than 59 points, it means slight situational or neurotic depression. *LD* equal to 60-69 points means a subdepressive state or masked depression. A true depressive state is diagnosed when *LD* exceeds 70 points.

### **Results And Discussion**

At the ascertaining stage, the initial values of the studied traits in senior schoolchildren were evaluated according to the above described methods. Based on the results of the questionnaire, we found out the reasons that are especially worrisome for the 9th-grade graduates. Let us list them: doubts about the strength and richness of knowledge, doubts about one's own abilities (ability to analyze the material and concentrate attention). Also, high school students noted rapid fatigue, anxiety, lack of self-confidence, stressful and unfamiliar situation, fear of responsibility to parents and teachers. More than 90% of the interviewed students answered that they are most worried about the forecasts of teachers, parents and negative information in the media. Analysis of these reasons allowed us to identify a group of difficulties of the CSE. We will present them in Table 1.

Table 1. The group of the CSE-related difficulties

Cognitive	Difficulties associated with the specifics of the systematization of knowledge and information processing during the CSE. Difficulties related to the specifics of working with test tasks, insufficient knowledge, inability to flexibly and clearly operate with the system of learning concepts and definitions of the subject to be passed.
Personal	Difficulties due to the peculiarities of the psycho-emotional background of the adolescent's personality and the state, the lack of the opportunity to get adult support
procedural	associated with the procedure of the CSE itself (total control, video surveillance) and the absence of a clear strategy of activities

Here we present the results of Zung Scale test in Fig. 1.

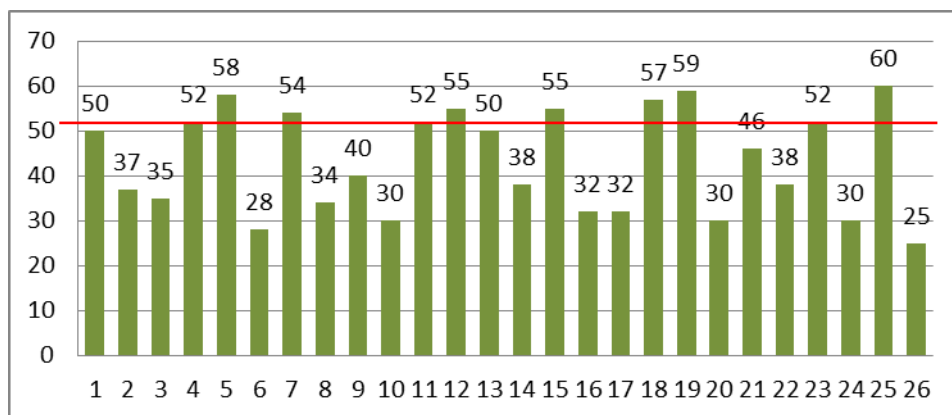


Fig. 1. Indicators of the level of depression according to Zung Self-Rating Depression Scale

Having analyzed the data obtained, we see that 42.3% of respondents have LD of more than 50 points, which indicates a slight situational or neurotic depression. This category of adolescents experiences irrational, indefinable and uncontrolled, clearly manifested mood swings, as well as the predominance of a state of depression, a feeling of oppressive anguish. Neurotic depression sometimes expresses excessive self-criticism, low self-esteem and self-incrimination are sometimes observed; in adolescents sometimes there is a loss of interest in events, in particular, in studies, in communicating with peers; however, working capacity often remains the same. As this manifestation aggravates, mood changes can become more pronounced, but emotional negative feelings do not take the form of a persistent, constant, intense depressed state. Students who have been diagnosed with mild depression are more likely to show signs of anger and aggression in the classroom. If we consider that they have a lower mood than they should, then the reactions to what is happening are much brighter. In this state there is a moderately manifested anhedonia and a lack of satisfaction.

Subdepressive state or masked depression (indicators of LD from 60 to 69 points) is common for 3.8%. This type of depressive state can manifest itself differently. It can be completely invisible to others. This group of respondents often complains about physical ailments and distinct pains in various parts of their body. The sub-depressive state or masked depression in addition to the physical level can manifest itself at the level of mental disorders in form of panic attacks, obsessions, various phobias and antisocial behavior.

### Summary

Thus, 46.1% of pupils susceptible to depressive states were detected during the ascertaining experiment, which indicates the need for preventive work with high-school students. We developed guidelines for teachers and parents on the organization of psychological support and prevention of depression before passing the state Final Examinations.

*Psychological support* is a process where an adult (teacher, parent) focuses on the positive aspects and advantages of a high-school student in order to strengthen

his/her self-esteem; helps him/her to believe in him-/herself, in his/her abilities; supports him/her in case of failure.

Methodological recommendations on psychological and pedagogical support and psychological support to students can be the following:

*For parents.* Timely education and organization of classes for parents: "Assistance in preparation for exams", "How to cope with anxiety", which discuss various issues, namely: the individual daily routine, the features of memorization, using relaxation and activation techniques, techniques for reducing exam anxiety. Classes can be conducted in the form of dialogues, lectures, workshops. Familiarization of parents with the ways of proper communication with a teenager, providing him/her with psychological support, creating a favorable psychological climate in the family.

*Subject teachers* throughout the entire school period must adequately assess knowledge, skills and abilities of their students in accordance with their individual characteristics and capabilities. They should organize a systematic activity for the preparation for the CSE during all years of study of the subject. It is advisable to regularly analyze own difficulties when performing test tasks and identify ways to eliminate them.

*Homeroom teacher* should try creating an emotional background for the development of the pupil in the conditions of the classroom, namely: exclude negative attitudes in relation to the CSE, conduct joint parent meetings with students, provide psychological and pedagogical assistance during the examinations, conduct individual work with students and close cooperation with subject teachers.

## **Conclusion**

Based on the results of our small study, we can state that high-school students, on the eve of the final state examination, are subject to mild depression. The causes of depression are both physiological and psychological: traumatic, *stressful situations associated with overloads*. Before the CSE, adolescents may experience the following changes: sudden mood swings, sleep and appetite disorder. In this regard, all general education institutions in Russia should provide psychological and pedagogical support to schoolchildren and parents in minimizing stressful situations and serious complications that can lead to disadaptation of the individual.

## Economic And Mathematical Modeling And Forecasting Of Key Performance Indicators Of Pjsc "Sberbank"\*

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**Abstract.** *This article explored the theoretical foundations of efficiency, describes methods of influencing bank performance. Today is becoming increasingly relevant in the transition to more modern forms of assessing the effectiveness not only of individual banks but of the banking system as a whole. Also predicted KPI of Russian commercial bank PJSC "Sberbank" is based on correlation and regression unit in the short term in terms of return on assets, market share by assets, transaction costs and turnover of staff. In the analysis it becomes evident that the unfavorable external economic situation continue to function systemically-important banks.*

**Key words:** key performance indicator, return on assets, market share from the contribution of the population, operating costs, staff stability index.

### Introduction

Commercial banks are the most important element of a market economy.<sup>1</sup> In the process of their activity is mediated by a large part of the money circulation in the state, is the formation of sources of capital for expanded reproduction through the reallocation of temporarily free funds of all participants in the reproductive process – the state, economic entities and population. The commercial banks facilitate the flow of capital from the least efficient industries and enterprises of the national economy in the most competitive.<sup>2</sup> From their clear and competent activities depends on the efficient functioning of the banking system and the Russian economy generally. Therefore, the development of KPI (key performance indicators) is not only the results but also the ability of the earlier stages to identify problems in activities of a commercial Bank, vital for financial and social stability of our state.<sup>3</sup>

KPI (Key Performance Indicators) came to us along with the American and West European companies, where it has been successfully used for several decades. KPI is a tool that helps to analyze the effectiveness of certain activities and the level of achievement of goals.

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> J. A. Klaas, A.A. Daryakin, "The indicative model of financial stability management of the banking sector," *Academy of Strategic Management Journal*, XV (2016), no. 2, p. 43-49.

<sup>2</sup> A. A. Daryakin, J. A. Klaas, "Identification of the regional banking systems sustainability as a key factor in the effectiveness of their integration," in *Journal of Economics and Economic Education Research*, XVII (2016), no. 2, p. 15-26.

<sup>3</sup> S. G. Partiw, P. Suwignjo, P. Eriyatno, A. M. Fauzi, K. Setyowati, "Design of key performance indicators for a comprehensive performance in marine agro-industrial clusters: A case study in Indonesi," in *International Journal of Business Performance Management*, XV (2014), no. 1, p. 72-86.

In Russia, KPI commonly translated as key performance indicator, a measure of success in certain activities or achieve certain goals. We can say that KPI is a quantifiable indicator of the achieved results.<sup>4</sup>

### Method

There is no single generally accepted methodological development of key performance indicators. Various authors suggest using their own development methods, they are recommended to follow any rules and principles. To study the efficiency of a commercial bank, the methodology for developing KPI based on the interpretations of modern authors is systematized and supplemented with a new classification group of KPI indicators - «Assumptions KPI»:

- economic;
- management;
- organizational.

This is the characteristic of the indicator (indicator), by which the assumption of belonging

Table 1

Assumptions KPI Direction	Economic	Management	Organizational
<i>Finance:</i>			
Return on assets	+		
Profitability of capital	+		
Liquidity rates	+		
Operating profitability	+		
Net% margin	+		
Assumptions KPI Direction	Economic	Management	Organizational
Quality Score of Loans	+		
<i>Clients:</i>			
Share of new customers		+	+

<sup>4</sup> A. A. Daryakin, S. G. Andriashina, "Problems Of Evaluation And Management Of Operational Risks In Banks," in *INTERNATIONAL CONFERENCE ON APPLIED ECONOMICS (ICOAE) 2015, XXIV (2015)*, p. 156-165.



Cost of customer service	+		
Customer Satisfaction Index		+	+
Share of the market (assets)	+		
Average sales per customer		+	+
<i>Processes:</i>			
Number of automated processes		+	+
Average customer service time per customer		+	+
The average complexity of performing individual operations		+	+
<i>Staff:</i>			
Staff turnover		+	+
Profit per employee		+	+
Administrative costs per employee		+	+
Percentage of employees with higher education		+	+
<del>Assumptions KPI Direction</del>	Economic	Management	Organizational
Productivity of personnel		+	+

### Results And Discussion

The key performance indicators of banking activity and their forecasting based on correlation-regression analysis were evaluated. The analysis used 4 directions of KPI indicators.

In order to study the prospects for the development of PJSC Sberbank, we will build a correlation-regression model for the following indicators: return on assets, market share from the contribution of the population, operating costs, stability index staff. The bank's data were selected according to the system-importance category. The following factors were used as independent variables for the assessment:

- lending volume (x1);

- attracted cash (x2);
- key rate (x3);
- level of administrative and management expenses (x4);
- profit per employee (x5).

When constructing multifactor models, the requirement of the least possible correlation of the factors included in the model must be observed. PJSC "Sberbank" has the following initial data on the factors and the resulting indicator, given in appendix 1.

As a result of the analysis, data were obtained on the tightness of the relationship between the factors and the resulting indicator of return on assets. From these data, we can conclude that the tightness of the connection between the "key rate" and "lending volume" is weak, so these factors are excluded from the analysis of the profitability of assets. The remaining factors have a moderate relationship with the resulting indicator.

The next stage in the analysis of the profitability of assets of PJSC "Sberbank" is the construction of a regression, which includes three factors. It is necessary to check the parameters for significance and model significance. Traditionally, such a check assumes the use of the F-criterion of Fisher and the Student criterion. The table value of Fisher's F-test is 3,59. With the value  $F_{\text{frac}} = 2,32$  the model is insignificant. The following results were obtained for T table = 2,1. The calculation of the actual values of the criteria is presented in table 2.

Table 2. Student criterion

Factor	Ttable	t statistics	Relevance
Attracted cash	2,10	0,06	Significant
Level of administrative and management expenses	2,10	1,22	Significant
Profit per employee	2,10	0,03	Significant

The quantity R - a square, also called a measure of certainty, characterizes the quality of the regression model. According to the analysis, the value of R-square of 0,59. This means that the model constructed explains the influence of the corresponding variables by 59%.

Multiple R - coefficient of multiple correlation R - expresses the degree of dependence of independent variables (x) and the dependent variable (y). Based on the results of calculations, the multiple R is 0,77, that is, the relationship between the variables is high. The regression equation was obtained, which has the following form:

$$Y = -0,54 - 0,33x_2 + 0,56x_4 + 0,49x_5$$

Was calculated prognostic values, starting from 3rd quarter 2017 to 2020, presented in figure 1.

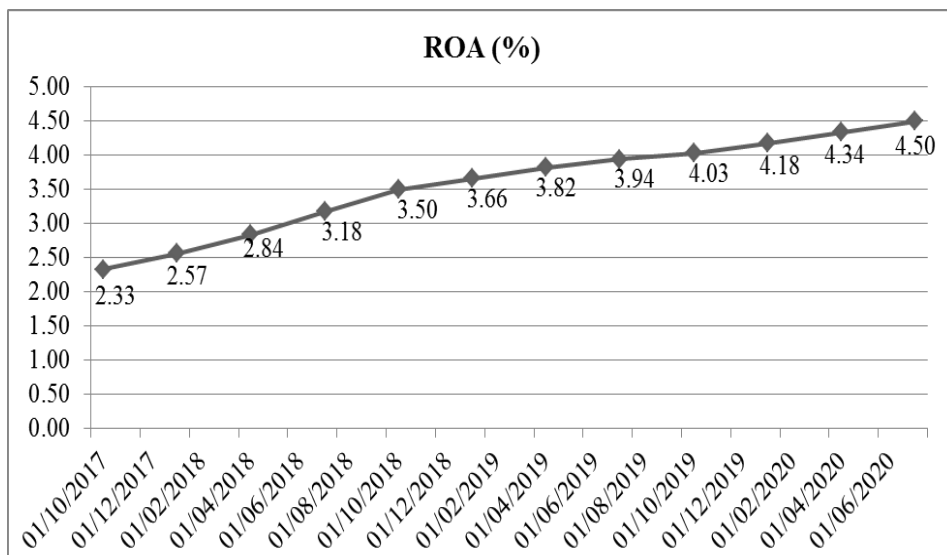


Fig.1 Forecast values of return on assets of PJSC "Sberbank", %

On the basis of these data, we can conclude that the positive dynamics of return on assets is forecasted and by the end of 2018 the forecast of return of assets should be 4,5%. Therefore, we can conclude that, with other stable conditions, the bank's return will continue to grow.

Next, consider the data obtained on the tightness of the relationship between the factors and the resulting indicator of market share from the contribution of the population. From these data, we can conclude that the tightness of the connection between the "attracted cash" and " key rate" is weak, so these factors are excluded from the analysis of the market share from the contribution of the population. The remaining factors have a moderate relationship with the resulting indicator.

The next stage of the analysis of market share from the contribution of the population, of PJSC "Sberbank" is the construction of a regression, which includes three factors. It is necessary to check the parameters for significance and model significance. Traditionally, such a check assumes the use of the F-criterion of Fisher and the Student criterion. The table value of Fisher's F-test is 3,59. With the value  $F_{calc} = 7,39$  the model is insignificant. The following results were obtained for  $T_{table} = 2,1$ . The calculation of the actual values of the criteria is presented in table 3.

Table 3. Student criterion

Factor	Ttable	t statistics	Relevance
Lending volume	2,10	1,88	Significant
Level of administrative and	2,10	1,04	Significant

management expenses			
Profit per employee	2,10	0,77	Significant

The quantity R - a square, also called a measure of certainty, characterizes the quality of the regression model. According to the analysis, the value of R-square of 0,82. This means that the model constructed explains the influence of the corresponding variables by 82%.

Multiple R - coefficient of multiple correlation R - expresses the degree of dependence of independent variables (x) and the dependent variable (y). Based on the results of calculations, the multiple R is 0,91, that is, the relationship between the variables is high. The regression equation was obtained, which has the following form:

$$Y=42,62-0,02x1+0,48x4+0,54x5$$

Was calculated prognostic values, starting from 3rd quarter 2017 to 2020, presented in figure 2.

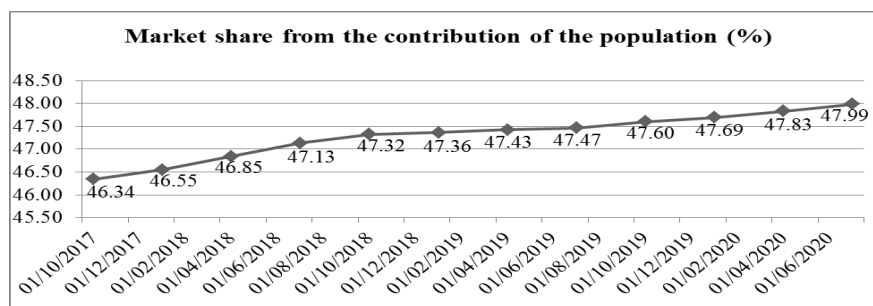


Fig.2 Forecast values of market share from the contribution of the population, of PJSC "Sberbank", %

On the basis of these data, we can conclude that the positive dynamics of the market share from the contribution of the population is forecasted and by the end of 2018 the forecast of the market share from the contribution of the population should be 47,99%. Therefore, we can conclude that, with other stable conditions, the bank's of the market share from the contribution of the population will continue to grow.

Next, consider the data obtained on the tightness of the relationship between the factors and the resulting indicator of operating costs. From these data, we can conclude that the tightness of the connection between the "lending volume" and "key rate" is weak, so these factors are excluded from the analysis of operating costs. The remaining factors have a moderate relationship with the resulting indicator.

The next stage of the analysis of operating costs, of PJSC "Sberbank" is the construction of a regression, which includes three factors. It is necessary to check the parameters for significance and model significance. Traditionally, such a check assumes the use of the F-criterion of Fisher and the Student criterion. The table value of Fisher's F-test is 3,59. With the value  $F_{calc} = 5,87$  the model is insignificant. The following results were obtained for  $T_{table} = 2,1$ . The calculation of the actual values of the criteria is presented in table 4.

Table 4. Student criterion

Factor	Ttable	t statistics	Relevance
Attracted cash	2,10	0,39	Significant
Level of administrative and management expenses	2,10	0,13	Significant
Profit per employee	2,10	2,19	Significant

The quantity R - a square, also called a measure of certainty, characterizes the quality of the regression model. According to the analysis, the value of R-square of 0,79. This means that the model constructed explains the influence of the corresponding variables by 79%.

Multiple R - coefficient of multiple correlation R - expresses the degree of dependence of independent variables (x) and the dependent variable (y). Based on the results of calculations, the multiple R is 0,89, that is, the relationship between the variables is high. The regression equation was obtained, which has the following form:

$$Y = -134\,698\,705 + 0,54x_2 + 0,58x_4 + 0,72x_5$$

Was calculated prognostic values, starting from 3rd quarter 2017 to 2020, presented in figure 3.

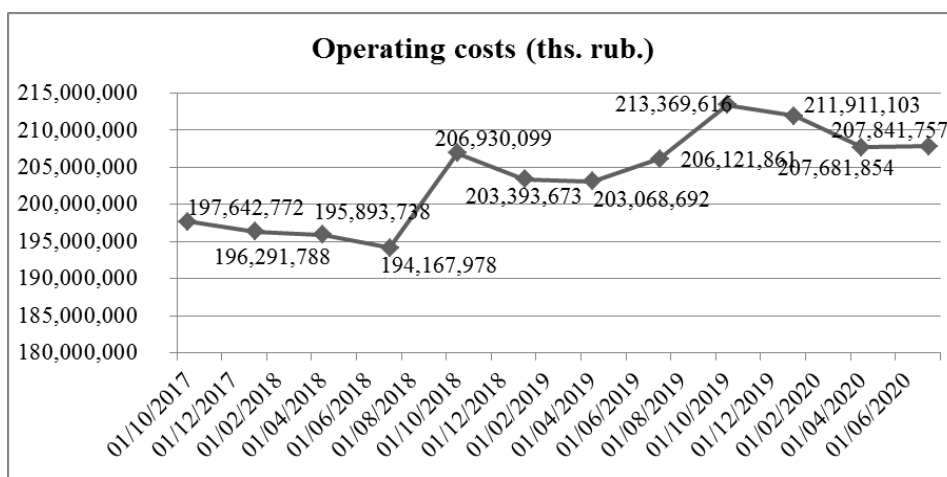


Fig.3 Forecast values of operating costs, of PJSC "Sberbank", ths. rub.

On the basis of these data, one can conclude that the fluctuation of operating costs and by the end of 2018 according to the forecast of operating costs should be 207 841 757 thousand. Therefore, we can conclude that, ceteris stable conditions costs the Bank will continue fluctuating.

Next, consider the data obtained on the tightness of the relationship between the factors and the resulting indicator of the stability index staff. From these data, we can conclude that the tightness of the connection between the "attracted cash", "lending volume", "level of administrative and management expenses" and "profit per employee" is weak, so these factors are excluded from the analysis of the stability index staff. The remaining factors have a moderate relationship with the resulting indicator.

The next stage of the analysis of the stability index staff, of PJSC "Sberbank" is the construction of a regression, which includes three factors. It is necessary to check the parameters for significance and model significance. Traditionally, such a check assumes the use of the F-criterion of Fisher and the Student criterion. The table value of Fisher's F-test is 3,59. With the value  $F_{\text{frac}} = 1,96$ , the model is insignificant. The following results were obtained for T table = 2,1. The calculation of the actual values of the criteria is presented in table 5.

Table5. Student criterion

Factor	Ttable	t statistics	Relevance
Key rate	2,10	2,28	Significan t

The quantity R - a square, also called a measure of certainty, characterizes the quality of the regression model. According to the analysis, the value of R-square of 0,55. This means that the model constructed explains the influence of the corresponding variables by 55%.

Multiple R - coefficient of multiple correlation R - expresses the degree of dependence of independent variables (x) and the dependent variable (y). Based on the results of calculations, the multiple R is 0,74, that is, the relationship between the variables is high. The regression equation was obtained, which has the following form:

$$Y=1,23+0,34x^3$$

Was calculated prognostic values, starting from 3rd quarter 2017 to 2020, is presented in figure 4.

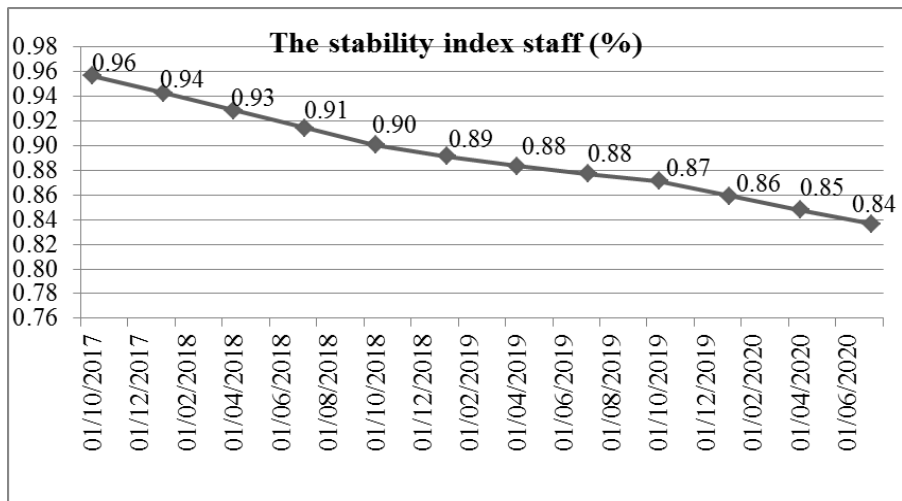


Fig.4 Forecast values of the stability index staff of PJSC "Sberbank", %

On the basis of these data, we can conclude that the projected decline in the index of stability of the staff and by the end of 2018 according to the forecast index of stability of personnel must be of 0,84%. Therefore, we can conclude that, ceteris stable conditions, the stability index Bank staff will continue to decline.

## Appendix 1

The original data of PJSC "Sberbank"

Period	ROA (%) (Y)	Market share from the contribution of the population (%) (Y)	Operating costs (ths. rub.) (Y)	Stability index staff (%) (Y)	Lending volume (ths. rub.) (X1)	Attracted cash (ths. rub.) (X2)	Key rate (%) (X3)	Level of administrative and management expenses (%) (X4)	Profit per employee (rub.) (X5)
01.04.2014	2,40	46,10	103 531 000	1,03	12 636 593 000	14 858 725 908	7,00	1,97	96204
01.07.2014	2,20	46,30	129 211 000	1,03	13 029 912 000	15 018 051 976	7,50	2,20	39373
01.10.2014	2,20	45,80	134 568 000	1,04	13 705 155 000	15 782 752 630	8,00	2,27	127223
01.01.2015	1,70	45,00	231 356 000	1,05	15 718 147 000	19 468 744 822	17,00	2,43	208650
01.04.2015	0,50	44,20	110 807 000	1,07	15 385 692 000	18 214 794 433	14,00	1,74	8160
01.07.2015	0,80	44,90	153 146 000	1,06	14 927 651 000	17 541 907 053	11,50	1,95	05579
01.10.2015	0,90	45,10	182 096 000	1,05	16 500 000 000	19 170 787 947	11,00	2,00	41106
01.01.2016	1,00	46,00	204 782 000	1,03	16 383 534 000	19 985 638 348	11,00	2,18	21382
01.04.2016	1,80	45,80	143 800 000	0,98	16 200 000 000	19 488 364 099	11,00	1,79	84017
01.07.2016	2,00	46,30	143 678 000	0,98	15 979 845 000	18 874 400 883	10,50	2,06	77325



01.10.20 16	2,20	46,40	188 188 000	0,98	15 895 578 000	18 646 790 443	10,00	2,1 7	443 113
01.01.20 17	2,20	46,60	289 110 000	0,98	15 664 837 000	18 546 167 659	10,00	2,3 8	916 159
01.04.20 17	2,90	46,60	147 300 000	0,96	18 043 000 000	17 838 997 475	9,75	2,2 4	
01.07.20 17	3,00	46,00	145 200 000	0,96	11 067 994 367	18 447 542 471	9,00	2,3 4	268 053

### Conclusion

Feature of KPI is that they all focused on strategic goals and objectives of the Bank, as well as interrelated and grouped according to certain criteria, and only the achievement of the totality of the criteria will allow to speak about efficiency of activity of commercial bank.

Correlation and regression analysis based on expert opinion, showed that the banking sector will grow at a moderate pace, sustained positions will be taken systemically-important banks in the banking sector of the Russian Federation. Therefore, the effectiveness of the commercial bank is not only the results of its operations, but the control system, based on the formation of evidence-based of the bank's strategy and monitoring its implementation.

*Economic and mathematical modeling and forecasting of key performance indicators of pjsc  
"sberbank", Astra Salvensis, V (2017), no. 10, p. 387-397*

# The Role Of Modern Educational Technology In The Process Of Teaching Chinese And The Development Of Communicative Competence\*

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**Abstract.** *The relevance of this work is determined by introducing new standards of teaching foreign languages as well as the severization of requirements to the quality of Chinese language acquisition by the students of higher educational institutions. The goal of this paper is to study modern innovative methods and technologies of teaching and then use them in the teaching and learning activities, as well as to increase the students' motivation to learning Chinese. The leading approach to this problem is the problem-thematic approach. The main material for the study was the following modern educational technologies: the project method, the debate method and the talk show technique. The key findings of the study are the systematization of the main mechanisms and principles of using modern educational technology at the classes of Chinese. The materials of this article may be helpful for school and university teachers of Chinese at the advanced level, as well as for educators and developers of educational materials.*

**Keywords:** education, language study, educational technology, foreign languages, the Chinese language, communicative competences, innovative methods.

## Introduction

In the recent decades there is an obvious upsurge of interest to Chinese culture in general and Chinese language, as its important part, in particular.<sup>1</sup> The number of schoolchildren and university/college students choosing to study Chinese as a foreign language is increasing every year.<sup>2</sup> At the same time it needs to be noted that acquisition of Chinese by Russian learners presents inevitable difficulties, especially at the beginner's level. These are difficulties related to learning the Chinese writing system (non-alphabetic, a large number of characters, the need to memorize the order of writing the lines, etc.) and issues associated with the language's phonetic structure, such as the presence of specific sounds uncharacteristic of Russian phonetics, the syllables having tones as well as some other nuances caused by the specific features of Chinese.<sup>3</sup>

Because of this, of special importance, in our opinion, is the task of introducing unconventional methods and technologies of teaching that would allow for maintaining the learners' interest and motivation, engage them in the process of language communication, stimulate their active unsupervised work with foreign

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> R. Moloney, Ling Xu Hui, "Exploring Innovative Pedagogy in the Teaching and Learning of Chinese as a Foreign Language," in *Springer*, CCXXI (2015).

<sup>2</sup> A. Alikberova, "Humanitarian communication in the system of Russian-Chinese relations: results of research work", in *The Turkish Online Journal of Design, Art and Communication. TOJDAC Special Edition*, 2016, p. 2358-2363,

<sup>3</sup> A. Bockareva, "Aktualnye voprosi metodiki prepodavaniya kitayskogo yazyka", *Topical Issues of the Methods of Teaching Chinese. Collection of teaching materials*, Vladivostok. URL: [http://confucius.dvfu.ru/files/upfiles/izdaniya/Aktualnie\\_voprosi\\_metodiki.pdf](http://confucius.dvfu.ru/files/upfiles/izdaniya/Aktualnie_voprosi_metodiki.pdf), accessed 06. 03. 2017.

*The Role Of Modern Educational Technology In The Process Of Teaching Chinese And The Development Of Communicative Competence, Astra Salvensis, V (2017), no. 10, p. 399-404* language material.<sup>4</sup> Teachers of foreign languages have always used a variety of techniques and technologies the goal of which is to develop the learners' communicative skills. In the recent time relatively new learning technologies are being actively used when studying foreign languages.<sup>5</sup> For instance, the debate technology, the case technology, the active learning methods, etc.<sup>6</sup> They help to make the classes more exciting and saturated as well as to raise the learners' motivation.<sup>7</sup> But the most important thing is that they help the learners to overcome the language barrier. Usually these technologies allow for the involvement of all four communication skills at once (speaking, listening, reading and writing).

## Methods

As part of the study we had to solve the following tasks: researching and analyzing the existing innovative technologies of teaching Chinese, each method's possibility of use in the educational process in the conditions that we had, as well as identifying positive and negative nuances of the studied forms of teaching Chinese that influence the development of communicative competences. To solve these tasks we used a complex of different methods mutually reinforcing each other, namely: the descriptive method; the analytical method; the comparative, contrastive and comparative-historical methods that helped us to disclose the content of every method under study and thoroughly analyze it. The main material for the study was the following modern educational technologies: the project method, the debate method and the talk show technique.

## Results

This article presents the results of the study and of the introduction of the two forms of innovative teaching into the educational process. And thus, the most promising and efficient methods in terms of solving the current teaching tasks are, in our opinion, the debate method and the talk show technique.

In the course of our research we used one of the relatively recent technologies of teaching Chinese, namely the debate technology. "The debate method is a modern educational technology that basically is a special form of discussion that effectively forms the students' universal acts of learning, because a

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<sup>4</sup> E. Polat, M. Bukharkina, "Sovremennyye pedagogicheskiye i informatsionnyye tekhnologii v sisteme obrazovaniya", in *Modern Educational and Informational Technology in the System of Education: learning guide for higher educational institutions*, Moscow: 'Academia' publishing house, 2012, p. 368.

<sup>5</sup> H. Foyle, "Interactive Learning in the Higher Education Classroom: Cooperative, Collaborative, and Active Learning Strategies", in *National Education*, CCXXXVII (1995).

<sup>6</sup> O. Litovchenko, "Tekhnologiya "Debaty" kak osnova formirovaniya universalnykh uchebnykh deystviy uchashchikhsya," in *The Debate Technology as the Basis for Forming Universal Learning Activities of Learners*, VIII (2016), p. 118-122.

<sup>7</sup> E. Mordvinova, "Ispolzovaniye tekhnologii debatov v uchebnom protsesse VUZa (Use of the Debate Technology in Teaching and Learning Activities at the University)," in *Lichnost, semya i obshchestvo: voprosy pedagogiki i psikhologii (Individual, Family and Society: Problems of Education and Psychology): collection of articles based on the findings of the II research and practice conference*. No 2. Part I, Novosibirsk, SibAK, 2010.

debate is a purposeful, structured and regulated exchange of ideas, statements and opinions".

In teaching Chinese the debate technology can be used at a more advanced level of language learning, when students already have acquired a sufficient vocabulary and learned the main grammar patterns. This technology facilitates the formation of the learners' key skills needed for public presentations in Chinese. It also helps them to formulate and enunciate their thoughts and ideas in front of other people.

As an example, let us examine the debate conducted with the 4<sup>th</sup> year students of the Institute of International Relations, History and Oriental Studies of Kazan (Volga Region) Federal University as a part of their practical course of Chinese. This debate became the final lesson of the topic "Education System of the People's Republic of China". "As confirmed by our experience, debates are best conducted as final lessons that summarize all the previous learning".

It should be noted that a debate needs to be preceded by preparatory tasks that help to activate the learners' new vocabulary. The debate technology will be much more effective due to such exercises.

The main stages of preparing and conducting a debate.

Preparatory stage.

1. Selecting the topic and supplementary materials.

In order to make the debate technology more effective, the teacher should pay substantial attention to selecting and wording the topic. The topic needs to be relevant and appealing to epystudents. It should raise the learners' interest.

At first the students that studied the topic "Education System of the People's Republic of China" were offered some basic materials with a detailed description of the Chinese education system. It is known that the issue of education in PRC is a debatable issue. There are vocal opponents of the system currently existing in the country. One of such opponents is writer, blogger and racing car driver Han Han (韩寒).<sup>8</sup> In 2000 Han Han published a book called Triple Door ("三重门") which became a bestseller very soon because it touched upon a very serious problem of the Chinese society, its system of education. In his novel, Han Han criticizes this system very severely. The 4<sup>th</sup> year students had not read this novel but for the supplementary materials they were offered some articles in which Han Han expresses his opinion on this issue. As these articles caused a heated discussion in the classroom, it became evident that the debate topic had been chosen correctly. The students also watched several scenes from the BBC documentary "Are Our Kids Tough Enough? Chinese School" and read the article of the same name which set forward a contrary opinion.<sup>9</sup>

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<sup>8</sup> Han Han, Relationship Leaders in the Post-"May 4th" Era. 后天安门时代的中国态度领袖  
URL: // <http://m.cn.nytimes.com/china/20160905/han-han-problem-with-me/>, accessed 26. 02. 2017.

<sup>9</sup> BBC Channel Special Broadcast: Are Our Kids Tough Enough? Chinese School 纪录片：中式教学 适 合 英 国 学 生 吗 ?URL: //

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2. Creation of a summary thesaurus spreadsheet.

After analyzing the basic material students used Google Spreadsheets to create a glossary on the topic "Education System of the People's Republic of China". Every student was given access to a table into which he/she entered all the words and expressions that he/she considered essential for this topic. The basis for creating the summary thesaurus spreadsheet was the material that the students had read. The learners also had an option of adding any other vocabulary on the topic if they saw it as important and relevant. As an example let's take a look at a fragment of such a glossary:

文盲	wénmáng	illiteracy, illiterate
高等教育	gāoděngjiàoyù	higher education
辍学	chuòxué	drop out from school/university

Creation of summary glossaries on one or several topics structures a large volume of vocabulary and helps the learners to memorize the main words. The ability to create such summary glossaries may be useful in the work of an interpreter.

3. Preparation of a preliminary presentation on another country's education system.

Having read about the system of education in PRC, students had to choose any other country and prepare a small presentation on the system of education in that country. The main condition that the teacher put before the learners was to use the vocabulary from the summary glossary as much as possible. This task can be seen not merely as revising the new vocabulary but also as a preparatory exercise for the debate or any other project tasks. Compiling a glossary could also be considered a part of the preparation for the debate.

4. Creating a table of arguments.

Based on the articles they had read, the students created a summary table together with the teacher. Then they entered all advantages and disadvantages of the Chinese education system into the table. Subsequently the table became the basis for the arguments during the debate. Here is a fragment of that table:

中国教育体制的优点 Advantages of the Chinese education system	中国教育体制的缺点 Disadvantages of the Chinese education system
中国的公立教育比较廉价，对于才能突出的学生给予很多优惠。 Education cost in China is low, and the most talented students can get fringe benefits.	没有自己的思维，听老师的指令而行事，在学习的过程中，渐渐迷失了自己的本质，以及创新的能力。 Students are never taught to think for themselves, they only do what their teacher tells them to do, so

[http://www.bbc.com/zhongwen/simp/uk/2015/08/150804\\_uk\\_chinese\\_school](http://www.bbc.com/zhongwen/simp/uk/2015/08/150804_uk_chinese_school), accessed 26. 02. 2017.

	gradually the students lose their ability to think creatively.
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5. Supplementary home assignment.

As their home assignment students polled some Chinese students on the Chinese and Russian education systems. At the next lesson the students shared the results of their poll. This was also a part of the preparation for the debate. The significance of this assignment was not only in the fact that the learners took hold of some data they could use during the debate, but also in that they used this data in practice.

6. "Final rehearsal".

The very last training task before the debate was the discussion of the education system in Russia. During the class the students had 5 minutes to prepare small presentations on the following topics: advantages of the Russian system of education, disadvantages of the Russian system of education, Soviet and modern educational models and suggestions on improving the Russian education system. These topics became the main themes of the round table discussion that the students had not prepared for, so they had to come up with things to say right away. The surprise effect is very important, because during the debate one has to not only reproduce some prearranged speech but also react to one's opponents as the debate progresses. For such an assignment the teacher chose a subject that every student had a definite attitude to.

Also, as an experiment, we had a few lessons of Chinese in the form of a talk show. This technology facilitates the realization of one's communication skills and the active use of one's vocabulary. The subject of "Food Preferences of the Russian and Chinese People: Common Features and Differences" was selected for the discussion. This talk show became the final lesson of the topic "Chinese Cuisine" for the 3<sup>rd</sup> year students of the Institute of International Relations, History and Oriental Studies, undergraduate degree program "Asian and African Studies. Languages of Asia and Africa: Chinese". The students were united into groups of 4 and their roles were distributed between them as follows: the talk show host/moderator, a restaurant chef, a housewife, an Asian cuisine aficionado, a foreign student, etc. They were given 40 minutes to prepare for the task, but the discussion itself lasted only 8-10 minutes. This time was sufficient to discuss the traditional dishes, determine the food preferences of the Russian and Chinese people and the differences between the Chinese and Russian cuisines. The subject of the talk was not the most complex, because the main purpose of a talk show is to achieve natural fluency when speaking the language of learning, to show the ability of expressing one's personal opinion, come up with arguments and get into discussion with the other participants of the talk show.

The presentations were assessed both for the students' teamwork ability and for the individual performances. The following criteria were taken into consideration: the content of the presentation, the interaction between the

*The Role Of Modern Educational Technology In The Process Of Teaching Chinese And The Development Of Communicative Competence, Astra Salvensis, V (2017), no. 10, p. 399-406* participants, the strength of the arguments, the vocabulary and grammar and the pronunciation.

This form of lessons was met very favorably by students. They took considerable interest in the lesson and also noted its effectiveness. A talk show is an educational technology aimed at not only increasing the communicative competences but also at improving the learners' personal qualities and maintaining their motivation at a high level.

### **Discussion**

Teachers of many European languages have already mastered the above mentioned technologies and effectively use them in learning.<sup>10</sup> The same is not true about Chinese: because it is much more time-consuming to learn, teachers of Chinese usually don't get a chance to do exercises on developing the communication skills.<sup>11</sup> As a result, all the assignments are reduced to preparing a presentation on a certain subject or to a question and answer type conversation: teacher to student. This, of course, is insufficient. Contrary to European languages, in the academic studies of the methods of teaching Chinese all the techniques and technologies aimed at developing communication skills are either designed badly or not designed at all. Only in the last decade Russian content developers and teachers began paying careful attention to innovative methods of teaching Chinese, which is due to the introduction of the last generation educational standards, as well as due to the modern society's demand in these methods.

### **Summary**

The debate technology motivates the learners to speak, think and formulate their own thoughts. The debates facilitate the students' increased motivation to learning. And that arguably is the main goal of every teacher: to excite the learners' curiosity, to put them in such conditions that will force them to speak, promptly react to their opponents' statements and think in the foreign language.

Recently the debate technology becomes increasingly popular as a method of learning foreign languages. This should not come as a surprise because the benefits and the efficiency of this technique are obvious. The students become highly interested and motivated; they actively work and speak during the classes. This is how the debate technology can be summed up.

### **Conclusion**

Our study has proved that if learners can argue in a foreign language, prove and defend their points and sometimes even admit being wrong, then these learners will never have any serious problems with communication. It is hard to

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<sup>10</sup> E. Papaioannou, "Optimize Your Teaching Competences: New Teaching Methodologies and CLIL Applications, in Foreign Languages: Content and Language Integrated Learning Techniques for Foreign Language Teachers", in *iUniverse*, CCXXXIV (2014).

<sup>11</sup> Zhiqun Xing, *Teaching and Learning Chinese as a Foreign Language: A Pedagogical Grammar*, Hong Kong, Hong Kong University Press, 2006, p. 336.



find a young person who does not like arguing, and a debate is basically an argument with certain rules applied to it. This is why such form of education is enjoyed by almost everyone.

In conclusion we would like to mention that using the project method and the debate technology as an alternative way of conducting lessons of Chinese not only serves as an effective means of improving phonetic and grammar skills as well as vocabulary expansion but also creates the learners' positive attitude to the subject and the country of the language of learning. It also helps students to master the skills of communication and public speaking and makes the process of learning more exciting and more effective.

**Technological Process Modeling For Castings According To Specified Parameters Of Output Production Quality Based On Production-Frame Model Of Knowledge Representation \***

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**Abstract.** *The article considers the modeling technique of casting technological process according to the required quality indicators of output products. They proposed the structure of an intellectual information system based on the presentation of knowledge using the frames and the rules of product selection. The system is designed to create and select the process parameters according to the required output product quality indicators, as well as to optimize the existing casting technological processes. The implementation of the developed system for the casting technological process from cast iron with vermicular graphite is presented using the built-in CLIPS programming language. As the initial information for the formation of the knowledge base the test results provided by PJSC "KAMAZ-Metallurgy" were used. The modeling of the technological process on the basis of the production-farm model of knowledge representation allows to eliminate the main disadvantages of the automated design systems used in the foundry industry at the present time: high requirements for necessary machine resources and personnel qualification. The application of the developed system will allow to reduce significantly time and financial costs for the preparation of production due to the reduction of real tests number necessary for the selection of optimal technological process parameters.*

**Keywords:** cast iron with vermicular graphite, frames, production model of knowledge representation, base of rules, knowledge base

### **Introduction**

The physical-chemical processes that take place during the casting of metals are closely interrelated. Therefore, the change of even one parameter of the technological process can significantly affect the quality of the resulting casting. This opens the prospect of the foundry process optimization, and also provides the possibility of a final product quality problem solution and the improvement of production economic performance.<sup>1</sup>

The possibility of modeling the process of casting obtaining reduces the number of real tests in practice during the preparation of production and reduces the efforts spent on the selection of technological process parameters for the organization of product output. Thus, it is possible to consider the problems of a method development for quantitative estimation of a casting real quality on the basis of trial tests and the technique of technological process optimization for casting obtaining, which requires a minimum number of experiments as relevant ones.<sup>2</sup>

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\* The work is performed according to the Russian Government Program of Competitive Growth of Kazan Federal University.

<sup>1</sup> I. Hahn, J. C. Sturm, "Versuchspläne in der gießtechnischen Simulation," in *GIESSEREI*, IVC (2009), no. 7, p. p. 86–100.

<sup>2</sup> C. Heisser, J. C. Sturm, I. Hahn, "Autonomous optimization of casting processes and designs," in *Transactions of the American Foundry Society. One Hundred Fifteenth Annual Metal casting Congress*, Aachen, Schaumburg, 2011, p. 1–20.

The modeling of casting obtaining process is a standard procedure nowadays performed by a qualified specialist in the field of foundry. Almost all large enterprises use CAE (Computer Aided Engineering) technologies to solve the problems of foundry process modeling. The results of simulations conducted in CAE systems supplement and clarify the practical skills of a specialist. Using the results of the performed simulation, it is possible, for example, to assess whether the selected process parameters provide the required casting quality. In addition, CAE systems allow for optimization - to sort out all other possible combinations of technological process parameters in order to achieve the best result.<sup>3</sup>

However, there are also problems when you use CAE systems in the foundry industry.<sup>4</sup> The most significant among them are the following ones:

- the need for a highly qualified specialist experienced in working with these systems;
- high requirements of CAE systems to computer system resources;
- high cost of software products of this category, and the modules for optimization are often delivered and paid separately.

The modeling of casting technological process according to the required quality indicators of output products will be considered using the example of cast iron with vermicular graphite (CIVG), which has a number of specific properties that make it one of new promising construction materials for the castings of various purposes. This material can be used instead of gray cast iron for a number of critical parts of general engineering, the material of which has high requirements by strength and plastic characteristics according to the conditions of their work. The combination of high mechanical properties and increased thermal conductivity for cast iron with vermicular graphite makes the use of this material for castings operating under thermal conditions and a significant temperature difference very promising, for example, in diesel building.<sup>5</sup>

The main difficulty in the production of CIVG is a narrow range of the modification effect stability. An incorrect selection of the technological process parameters leads to the development of either a purely spherical or plate-shaped graphite.<sup>6</sup> Besides, this material has an increased tendency to bleach, increasing the

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<sup>3</sup> H. Bramann, L. Pavlak, "Innovatives Produktdesign und robuste Prozessauslegung durch virtuelles Experimentieren mit der Gießprozess-Simulation," in *GIESSEREI*, CII (2015), no. 2, p. 87-89.

<sup>4</sup> L. R. Yusupov, V.V. Abramova, "The study of information systems to forecast the properties of materials," in *Collection of reports from scientific-practical. Conf. "VI Kamsky readings"*, Part 1. - Naberezhnye Chelny: Publishing house of Central Polygraphic Naberezhnye Chelny Institute KFU, 2014, p. 134-139.

<sup>5</sup> N. Girshovich, *Handbook on cast iron*, 3rd. Edition, Leningrad, Mechanical Engineering, Leningrad Branch, 1978.

<sup>6</sup> O. S. Komarov, V. N. Kovalevsky, A. S. Chaus (eds.), *The technology of structural materials: a textbook*, Minsk, New knowledge, 2005.

fragility of the product and hampering its machining, which causes special problems in the production of thin-walled castings.<sup>7</sup>

In this regard, the development of new techniques for casting technological process modeling from CIVG according to the required output quality indicators is an urgent task.

### **Materials and methods**

The starting material for the work was the certificate-report on the lots of CIVG nomenclature castings, which were cast on the automated molding line of PJSC "KAMAZ-Metallurgy".

On the basis of the experimental data, universal dependences of modified cast irons on their chemical composition and process parameters were obtained using regression analysis methods.<sup>8</sup>

The statistical analysis of the initial data was carried out in SPSS Statistics program.<sup>9</sup> CLIPS language<sup>10</sup> was used to implement the base of rules.

### **Results and discussion**

The modeling of casting technological process is carried out in 3 stages according to the required quality indicators of the output products.

#### *Creation of initial data*

In order to develop a prediction model the input of the unit is supplied with the following original data:

- required output product quality indicators;
- the values of the input criteria specified by a user (percentage of charge components, cast chemical composition, casting type).

The technological process of casting obtaining is modeled according to these values.

Depending on a task (the simulation of a new technological process or the optimization of an existing one), the initial data are generated for processing. At this stage, the data entered by an operator is checked for correctness. The decision on correctness is taken on the basis of check results for compliance with the acceptable ranges of chemical element content, the required norms by carbon equivalent and eutectics degree.

The data that passed the validation test is involved in the formation of the initial data, by which the process parameters will be predicted or the search is performed using the case base. All the parameters necessary for the development of the technological process, which were not specified by an operator, are taken from the database.

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<sup>7</sup> A. G. Panov, V. V. Konashkov, V.S. Tsepelev, D. A. Gurtovoy, A. E. Kornienko, "The study of cast iron melt structuring," in *Foundryman of Russia*, III (2010), p. 32-37.

<sup>8</sup> A. Gallo, H. Weekly, "A Refresher on Regression Analysis," in *Harvard Business Review*, 2015: <https://hbr.org/2015/11/a-refresher-on-regression-analysis>, accessed 14. 04. 2017.

<sup>9</sup> A. Field, *Discovering statistics using SPSS*, Dubai, Oriental Press, 2009.

<sup>10</sup> Joseph C. Giarratano, Gary Riley, *Expert Systems: Principles and Programming*, 3<sup>rd</sup> edition, Thomson Course Technology, 2005.

*Modeling of technological process parameters*

Using the database rules, a technological process is generated that will contain all the information needed to organize the production. The main tool for technological process modeling is the genetic algorithm (implemented in the base of rules).<sup>11</sup> Its main function is the selection of the technological process parameters by the means of mutation mechanisms. The choice of a casting method depends on the following product parameters: material, weight, structural complexity and overall dimensions. The determination of the rate and the conditions of solidification of cast iron is necessary, since the shape and the amount of inclusions of graphite depends not only on the modifiers, but also on crystallization time. The nature of cast iron solidification is determined by its composition and cooling rate. A delayed cooling promotes the formation of graphite, an accelerated cooling suppresses the release of graphite and promotes the formation of cementite partially or completely. The speed of cooling depends on the thickness of a product wall directly, therefore, the mechanical properties of the CIVG depend on it. The forecasting of an optimal quantitative ratio of chemical elements at different stages is based on the information entered by a user.

*Technological process optimization*

When the technological process is formed, its optimization is carried out using the base of rules. Alternative technological processes are developed, adhering to the conditions and the restrictions imposed by an operator. The parameters of the process are determined by the simulation results. If several technological processes are found according to the search results in the knowledge base, the best of them is determined using the genetics algorithm belonging functions.

Since the composition of theoretical and empirical knowledge is used to solve a problem, the combined methods of knowledge representation are used - frames which are an expedient form of rule base organizing.

The main components of an intellectual system knowledge base<sup>12</sup> are the base of facts and the base of rules presented in Figure 1. At that, the fact base reflects an initial state of a problem, and the base of rules contains the rules that help to analyze a problem state and find its solution.

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<sup>11</sup> L. R. Yusupov, K. V. Klochkova, L. A. Simonova, "The technique of cast iron chemical composition modeling with vermicular graphite based on a genetic algorithm," in *Mater. of Intern. scientific-tech. Conf. "Innovative machine-building technologies, equipment and materials - 2016"*, Part 2. – Kazan, Tome, 2016, p. 180-185.

<sup>12</sup> K. V. Klochkova, S. V. Petrovich, L. A. Simonova L. R. Yusupov, "Stages of vermicular cast iron properties modeling in the intelligent design system," in *IOP Conf. Series: Materials Science and Engineering*, LXXXVI (2015), no. 1.

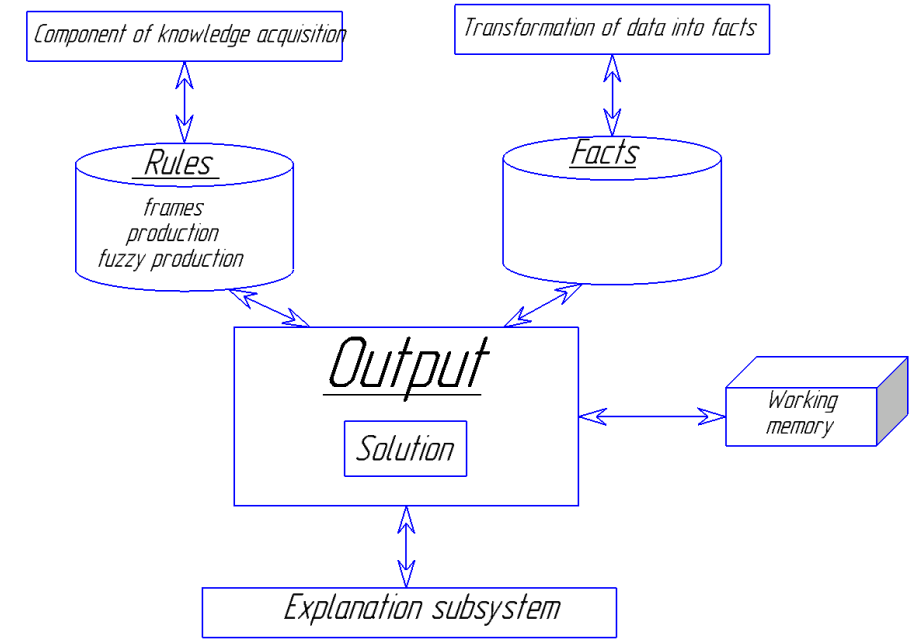


Fig. 1. Rule-based structure

The knowledge acquisition unit is responsible for the development of rules based on the database intellectual analysis, the processing and the generalization of expert assessments.

The data conversion unit is responsible for database rules integration with other applications so that the data can be presented in the form of facts.

The rules according to which the choice of a processing method is performed, the casting method and the choice of heat treatment, etc. are implemented using frame models.

As a rule, the frame model of knowledge has a complex hierarchical structure reflecting real objects (concepts) and the relations (the links) of a certain subject area. Slots are the elements of frame model knowledge representation. The rules are set for each slot to fill it in or/and attached procedures are established. When a request is interpreted into a particular frame sample, the required slot values and terminal data are determined.

The mechanism of logical inference is based on the exchange of values between the same slots of different frames and the execution of the attached procedures "if - added", "if - deleted" and "if - necessary". A conditional diagram of such actions is shown on Figure 2 for the simplest version.

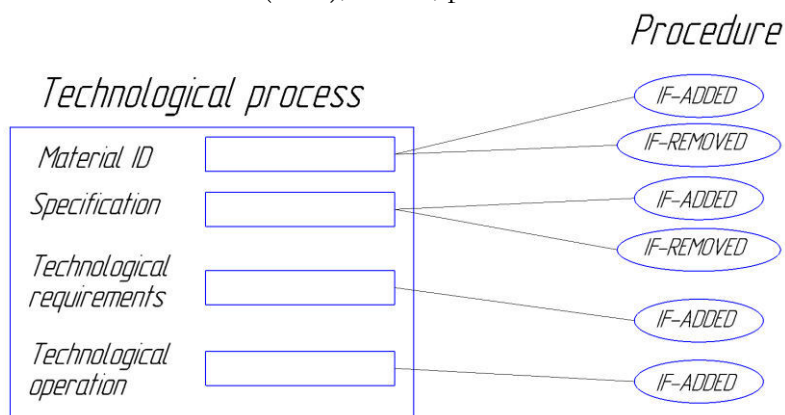


Fig. 2. Part of the Frame Description of a «Technological process»

The frame system functions as follows. For example, the system received a request from an authorized user: "It is necessary to model the technological process for the part "Interaxial differential carter".

The information is passed through a linguistic processor, analyzed and is entered in the "Description" slot of the "Technological process" node in the form of "Interaxial differential carter" value. Then, the attached procedures begin to work:

- "If-added" procedure associated with the "Description" slot is executed, since a value was entered in a slot. This procedure performs the search for information about a material code in a database (in this case - 5320-2506111) and enters this name in "Material code" slot.

- "If - added" procedure associated with the "Material code" slot is executed, since a value was entered in the slot. This procedure begins to compose the technological process and appeals to the nodes "Technological operation" and "Technological requirements.

The rules according to which the choice of the processing method, the casting method, the choice of heat treatment, the choice of modifiers are also realized using production models. Using the attached procedures, the database and the database of rules are accessed. Thus, a complex modeling process takes place, during which only the final result is recorded in the slots.

The development of the base of rules was carried out using CLIPS Object-Oriented Language, the built-in language of the CLIPS environment, which provides object-oriented capabilities.

The frame structure of the rule base is represented in the form of product rule set, the left part of which is the frame daemons, and the right part is responsible for the attached procedure performance.

The procedures running inside the CLIPS environment are written in the form of facts that fall into the working memory of the rule database after their activation.

The procedures that refer to other tools of an intelligent system (the integration of a rule base is required) are prescribed as external-address values representing the address of the data structure that are returned by an external function. An address is written as follows:

<Pointer-XXXXXX>

Where XXXXXX is the number representing an external address

Table 1 shows the structure of "Technological process" frame.

Table 1. – Frame structure Technological process

lot name	data type	Demons		
		IF-NEEDED	IF-ADDED	IF-REMOVED
material id	symbol	Accessing the Database	-	Fact reset
specific ation	symbol	Request from the user	Starting demon IF-NEEDED.Slots: Material id	Fact reset
technological requirements	frame-list	Starting demon IF-NEEDED.Slots: Ball-Hardness, Durability, Chill.	Starting demon IF-NEEDED.Slots: Technological operation	Fact reset
technological operation	frame-list	Starting demon IF-NEEDED.Slots: Burden, Smeltingfurnaces, Holdingfurnaces, Mold filling, Cooling.	Message to the user	Fact reset

The production rules consist of a left and a right part. The left part of the rule is the "Condition", and the right part is "Action". A condition may be the existence of a fact, the presence of variables, the observance of the required conditions. An action includes the adding of a fact, the calculation and the result display on a screen or in a file.

A production rule example implemented in CLIPS:

(defruleC :: korrektirovka-PK-Cu-nije; Copper adjustment rule in the Transfer Bucket when copper is below the required level according to the technological process

(PK (temperaturaPK ?T) (V-PK? V-PK) (Cu-PK? Cu-PK))



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(TP (Cu-PK-TP ?Cu-PK-TP)); Unordered facts should be introduced. Then the assignment of slots to the templates of certain variables takes place (test(<?T 1560)); According to the required conditions, the temperature of the alloy should be no more than 1560 degrees

(test (>?T 1500))

(test(< ?Cu-PK? Cu-PK-TP)); This rule is valid only if the copper content in the Transfer Bucket is below the required level according to the established technological process.

=>

(printout file "The copper in the transfer bucket is below the required value". It is necessary to add " (\* 1.34 (\* ?V-PK (\* (-?Cu-PK-TP? Cu-PK) 10)))" kg Cathode copper "crlf"); The output to a message file. The calculation of a required additive.

The structure of the frame has the following form:

$\Phi \{(c1, z1, n1), (c2, z2, n2), \dots (ck1, zk1, nk)\}$ ,

where:  $\Phi$  - a frame name; c is a slot name; z - values (data structure maybe); n is the name of the procedure associated with this slot.

The downloading the rule database is performed in the following scenario. Each unit of rules has its own file in .clp format, which includes rules, templates and created modules. The file in which the entered facts are stored is a dynamic one. The values of the facts depend on the values that an operator added through an interface.

The downloading of rule database in the CLIPS environment:

(open "otvet.txt" file "r +"); a file opening with reading and writing permissions

(loadbz1.clp); The creation of modules, the downloading of rules and templates.

Initialization of the facts entered by an operator and received by an intelligent system;

(reset); The downloading of facts

(focusA); The transition to Module A (Melting Furnace)

(run); the running of rule database

(closefile); the closing of a file with the received responses

## Conclusions

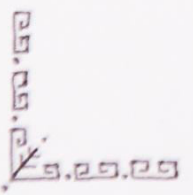
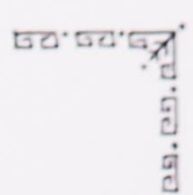
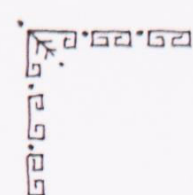
The developed base of rules, based on the product-frame model of knowledge representation, showed quite high accuracy and explanatory ability. In particular, when you process the contents of the report on the lots of CIVG nomenclature castings that were cast using the automated molding line of PJSC "KAMAZ-Metallurgy", the modeling accuracy was 95% and the explanatory power made 93%.

## Summary

In the course of the work, the technique was proposed to model the casting technological process according to the required output quality indicators, illustrated by the example of cast iron with vermicular graphite. The use of the elements of an artificial element allowed to eliminate the main disadvantages of currently used CAE systems: high requirements for machine resources and personnel qualifications. The results are planned to be implemented in the foundry industry.

*Technological Process Modeling For Castings According To Specified Parameters Of Output  
Production Quality Based On Production-Frame Model Of Knowledge Representation, Astra  
Salvensis, V (2017), no. 10, p. 407-415*

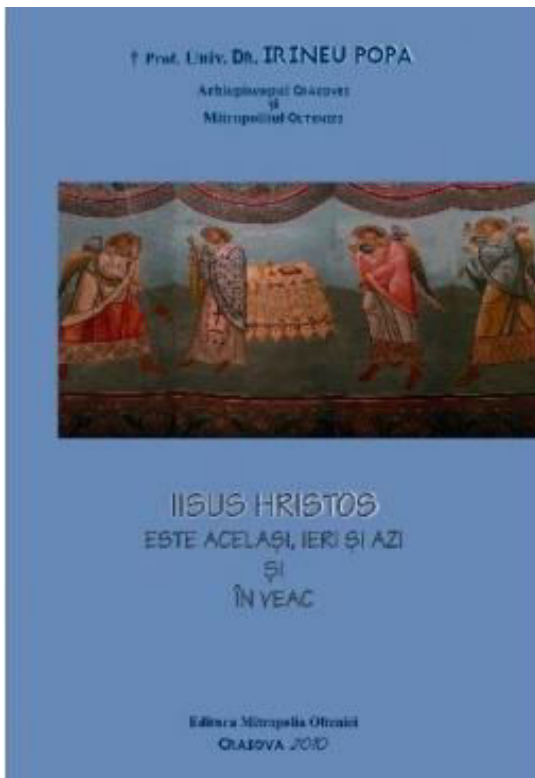
*Book Reviews*





IPS. Prof. univ. dr. Irineu Popa, *Iisus Hristos este Același, ieri și azi și în veac*, Craiova, Editura Mitropolia Olteniei, 2010, 485 p.

De curând, IPS Prof. univ. dr. Irineu Popa a publicat sub egida Editurii Mitropoliei Olteniei ultimul volum de hristologie dintr-o serie începută în anul 2010. Pentru a înțelege noutatea și necesitatea acestei întreprinderi teologice, trebuie să privim critic toată seria hristologică realizată de Înaltpreasfințitul Părinte Irineu. Un asemenea demers oferă teme discuției privind actualitatea, originalitatea și utilitatea întregului proiect. Având această miză, o să punctăm, de-a lungul a patru recenzii consecutive, atuurile expozeului hristologic publicat la Editura Mitropoliei Olteniei.



În anul 2010 a văzut lumina tiparului prima carte din serie: *Iisus Hristos este Același, ieri și azi și în veac*. Textul debutează printr-o caracterizare a problematicei hristologice. Învățătura Bisericii este condiție a mântuirii omului și în centrul acestei învățături stă dogma hristologică (p. 1-2). Din această cauză, cunoașterea și asumarea ortodoxă a doctrinei despre Iisus Hristos are o valoare incomensurabilă pentru viața fiecărui creștin. Această punctare, deși poate părea marginală, rezumă intenția întregii lucrări, care prezintă hristologia ca învățătură mântuitoare, nu ca tezaur filosofic al Bisericii. Întregul volum explică și contextualizează formulările Sinoadelor și ale Părinților, sublinind necesitatea acestora pentru viețuirea drept-slăvitoare. Este o abordare

apologetică a exprimării patristice și o recunoaștere a actualității acestor exprimări pentru Biserică. Demersul Părintelui Mitropolit părăsește cadrul definițiilor „tematice” – chenoză, unire ipostatică, consecințele unirii ipostatice etc. –, pentru a răspunde întrebărilor legate de motivele ce au condus la formulările hristologice ale Bisericii. „De ce?” este interogația care ghidează materialul istoric și bibliografic, întrebarea prin care rostirile biblice, sinodale și patristice sunt apropiate experienței contemporane. Privită din acest punct de vedere, cartea se aseamănă tratatelor realizate de Aloys Grillmeier (*Hristos în tradiția creștină*) și de părintele Dumitru Stăniloae (*Iisus Hristos sau restaurarea omului*), opere la care autorul face numeroase trimiteri.

*Iisus Hristos este Același, ieri și azi și în veac* a fost structurat în șase părți. Primul capitol – *Teologie și economie în Întruparea Fiului lui Dumnezeu* – prezintă așteptarea Mântuitorului așa cum apare ea în *Vechiul Testament* și în scrierile poetilor greci (cu referințe speciale la *Ecloga* lui Virgiliu), experiența Cuvântului în *Noul Testament*, învățăturile hristocentrice exprimate de Sfântul Ioan Evanghelistul și de Sfântul Apostol Pavel, precum și o analiză dogmatică a principalelor titluri mesianice. Pe scurt, capitolul studiază învățătura biblică despre Iisus Hristos. Două elemente ale acestei expuneri trebuie menționate, fiind extrem de importante pentru spațiul teologiei românești. Întâi, expunerea dogmatică rămâne tributară cuvântului scripturistic, deși folosește numeroase interpretări patristice – cu preponderență cele ale Sfântului Maxim Mărturisitorul. Pe cât de firesc este acest lucru, pe atât de greu este realizat în tratatele de teologie sistematică. Înaltpreasfinția Sa nu proiectează „probleme” ulterioare ridicate de ereziarhi, ci rămâne fidel narațiunii scripturistice. De aceea, capitolul se încheie cu analiza titlurilor mesianice, a numirilor care *explică* lucrarea Fiului Întrupat. Este o abordare de tipul celei pe care o întreprinde și Oscar Cullman în *Hristologia Noului Testament*. Totuși, narațiunea scripturistică este organizată într-o cheie răsăriteană. Acesta constituie cel de al doilea element al expunerii. Lucrarea mântuitoare a Fiului este încadrată de momentele Întrupării, Schimbării la Față și Învierii. În centrul hristologiei biblice este plasat evenimentul Schimbării la Față, care apare ca paradigmă a îndumnezeirii omului și a teologisirii ortodoxe (76-79). Este o lectură a iconomiei dumnezeiești propovăduită de Biserica Ortodoxă, o prezentare în care abundă optimismul antropologic al Părinților.

Al doilea capitol, intitulat *Formarea vocabularului și a terminologiei hristologice*, propune câteva considerații tehnice privind limbajul patristic. Se arată cum a preluat și cum a utilizat Biserica noțiuni ale filosofiei grecești, precum: ‘homousios’, ‘ousia’, ‘physis’, ‘hypostasis’, ‘prosopon’, ‘dynamis’ sau ‘exousia’. Precizia dogmatică nu este, însă, abstractizată. Nu este oferit un set de principii impersonale care să definească evoluția limbajului teologic, ci este evidențiat, prin particularizare, cum a fost criticată gândirea grecească și cum a fost nuanțat vocabularul filosofic asumat de Biserică. Înaltpreasfințitul Părinte Irineu face o analiză a vocabularului Sfântului Grigorie de Nyssa, comparându-l cu vocabularul Sfinților Vasile cel Mare și Grigorie Teologul (p. 155-162). Comparația reia câteva din concluziile mai vechi ale Înaltpreasfinției Sale (cf. *Iisus Hristos sau Logosul înomenit*, 1998), pe care le continuă și le dezvoltă. După cercetarea terminologiei Capadocienilor, sunt evaluate contribuțiile noționale ale Sfinților Chiril al Alexandriei (p. 178-184) și Ioan Damaschinul (p. 184-188). Imaginea generală asupra lexicului hristologic este construită prin exemplificări, fapt ce îngăduie observarea unității gândirii bisericești și a specificității fiecărui autor Sfânt. Este o metodă care apropie cititorul de semnificația cuvintelor și de spiritul propriu teologisirii patristice.

*Persoana Mântuitorului Hristos în gândirea Părinților și dascălilor Bisericii* este cel de al treilea capitol al cărții. Începând cu acesta, hristologia este abordată într-o manieră dogmatico-istorică, sub forma unor sinteze asupra figurilor emblematice și

asupra momentelor definitorii care au marcat gândirea ortodoxă. Pentru că dorește să surprindă esențialul, Înaltpreasfinția Sa este nevoit să opereze selectiv. Învățătura Părinților apostolici nu este expusă pe larg, deși texte aparținând Sfântului Irieneu de Lyon, de pildă, sunt utilizate în prima parte a cărții. Selecția este dublată de o analiză comparativă care facilitează sistematizarea critică a argumentelor vehiculate în cadrul controverselor. În acest sens, exprimările hristologice ale lui Origen, ale Sfântului Atanasie, ale Capadocienilor și ale Sfântului Chiril al Ierusalimului sunt evaluate în paralel cu prezentarea exprimărilor oponentilor acestora: Pavel de Samosata, Apolinarie, Arie, Eunomie și Nestorie. Într-o astfel de expunere devine evident *de ce* refuză Biserica interpretările ereziarhilor. Abordarea facilitează cunoașterea textuală și concretă a problematicii hristologice.

Următoarele capitole: *Hotărârile Sinoadelor Ecumenice de la Efes și Calcedon privitoare la definirea dogmei hristologice și Hristologia împăratului Iustinian și a Sinodului al V-lea Ecumenic*, trec de la teologhisirea Părinților la proclamarea sinodală a învățăturii despre Iisus Hristos. Autorul reușește și aici o analiză subtilă a învățăturii celor trei Sinoade Ecumenice, comparabilă cu expunerile realizate de Pierre Thomas Camelot (*Istoria Sinoadelor Ecumenice II: Efes și Calcedon*) și de Martin Jugie (*Nestorie și controversa nestoriană*). În capitolul al patrulea sunt dezbătute învățătura nestoriană, definiția de la Calcedon, *Tomosul* lui Leon și apariția monofizitismului, pentru ca în capitolul al cincilea să fie abordată politica lui Iustinian, învățătura lui Leonțiu și a lui Ibas de Edesa, respectiv dezbaterea sinodală privind unirea ipostatică. Aceste capitole completează viziunea dogmatică axată pe gândirea Părinților și oferă posibilitate unei evaluări în profunzime a impactului teologhisirii lor.

Capitolul șase, *Învățătura hristologică a Părinților după Sinodul V Ecumenic*, revine la o prezentare contextualizată a hristologiei, arătând principalele contribuții teologice ale Sfinților Sofronie al Ierusalimului, Maxim Mărturisitorul, Ioan Damaschinul și Teodor Studitul. Pasaje ample sunt dedicate raportului dintre hristologie și soteriologie, iar problema medierii în gândirea Sfântului Maxim este tratată *in extenso* (378-412). Poate părea surprinzător că Înaltpreasfinția Sa nu dedică un capitol separat analizei Sinoadelor VI și VII Ecumenice, dar trebuie observat că structura lucrării are o simetrie perfectă. Este o succesiune – de la Scriptură, la Părinți, la Sinod și înapoi la Părinți – care oferă prioritate paternității duhovnicești și care îndeamnă la deslușirea hristologiei printr-o asumare ipostatică a adevărului mărturisit comunitar.

*Iisus Hristos este Același, ieri și azi și în veac* nu epuizează expunerea învățăturii hristologice, dar oferă suportul discuțiilor dezvoltate în volumele ulterioare. Miza textului este descriptivă. Cartea prezintă realitățile scripturistice, momentelor istorice și monumentelor teologhisirii patristice. Într-un cuvânt, ea este menită să înfățișeze coordonatele care definesc învățătura Bisericii despre Persoana și lucrarea Mântuitorului. Este o introducere în gândirea hristologică a *ekklesiei*, o sinteză duhovnicească și dogmatică a Tradiției vii. Într-un stil caracteristic, Înaltpreasfințitul Părinte Irieneu realizează această expunere, care presupune o



simbioză între surse de factură diferită – istorice, biblice, liturgice și dogmatice –, fără ostentație. Este o scriere coerentă, omogenă și profundă care invită cititorul să participe la cunoaștere, să învețe de la Scriptură, de la Părinți și de la întreaga sinaxă.

**Lucian Zenoviu BOT**

Ilsa J. Bick, *Sin Eater's Confession*, Wisconsin, Carlorhoda Lab, 2014, 296 p.

Adolescence is known as the period of transition between childhood and adulthood. Also, it is a special period of identity affirmation and self-discovery.



There are moments when, as a teenager, you can be completely lost because of the difficulty of finding yourself or, sometimes, because you are too afraid to accept what you really are. "*Sin Eater's Confession*" is a book about affirmation and responsibility for being yourself. It is mostly internal dialogue, following the story of Ben, apparently a normal teenager.

The book brings pain, shadows and fear. From the beginning Ben said that "Ben" is wicked and repentant and the person that everybody admires is only a mask, e.g., "*the face in the mirror is the mask*" (p. 1). We can find that Ben is just a supposition, he doesn't know who he actually is and he doesn't have a stable personality. But does that makes Ben a usual adolescent?

First of all, the book is written from Ben's point of view, but it is a Ben from the future who remembers a past event and writes in the present. It causes ambiguity because we are not sure about the credibility of the events. Ben reports about his life as a teenager like he wants to confess some mistakes because "*sometimes writing things out helps you see your path*" (p. 3) and he continues "*because-trust me-I need all the help I can get*" (p. 4). After the confession from the beginning we discover the true Ben who has a friend Jimmy and is almost sure that he killed his friend. We ~~can~~ find that Jimmy is an innocent boy, passionate for photography and attracted to Ben because Jimmy is homosexual. The book is composed of Ben's thoughts and believes.

Second, we should know the difference between a diary and a memory. A diary is "*a book in which one keeps a daily record of events and experiences*" and a memory is "*something remembered from the past*" (according to Oxford dictionary). Ben wrote a memory of the events happening between October, 27th-28th, only two days. But,

after some years, he had time to overthink and reflect about events. He can change or add some details. He wrote much more about the moment when Jimmy disappeared, a moment about 2-3 minutes. Jimmy went with a stranger, may be a man or a woman, Ben wasn't sure about what he saw. After years he had time to think about his feelings when Jimmy went. Maybe he felt angry because Jimmy was gone, or he could be jealous because of a possible relationship between Jimmy and the driver of the car. How we can say that everything was true, when Ben lost his glasses? How it is possible that a near-sighted person can see clear without glasses?

We can say that Ben is the camera who is capturing only what he remembers, while Jimmy is the owner of the camera, a camera that captures the truth. For that, Ben is important for Jimmy's life or death, he is responsible for him and in a certain moment Jimmy depends on Ben. Everything changed when Jimmy showed to everybody some pictures with Ben. In that moment Ben started to be different because he felt in danger, his reputation was coming to grief.

After all, Ben behaves like a murderer, like he was the person who killed Jimmy. From the beginning he wants to confess something because he has night visions, "*Why I didn't do what I should've?*" (p. 4). After years he wants to relieve his heart of guilt. He said that he wrote for Brooke and Agent Agela, but I think that he wrote only for himself. Those memories were like a letter for him, to relieve his heart and talk about what happens, even if he talks only with him. It is like a conversation between the adult Ben and the teenage Ben, two different persons with different perspectives about the past events.

He needed to talk about his identity, his personality and in the end about his sexual orientation. After Jimmy's death he had a lot of remorse and questions about who he really is. Ben was an interesting character, he had all the time an existential problem. On the surface, he was a normal boy with normal problems about adolescence and life affirmation, but looking deeper, he was totally different. He couldn't find if he likes girls or boys, he never had a relationship and even his relations with other people were hard. We can say that he was a rebel boy, in a continuous fight with himself.

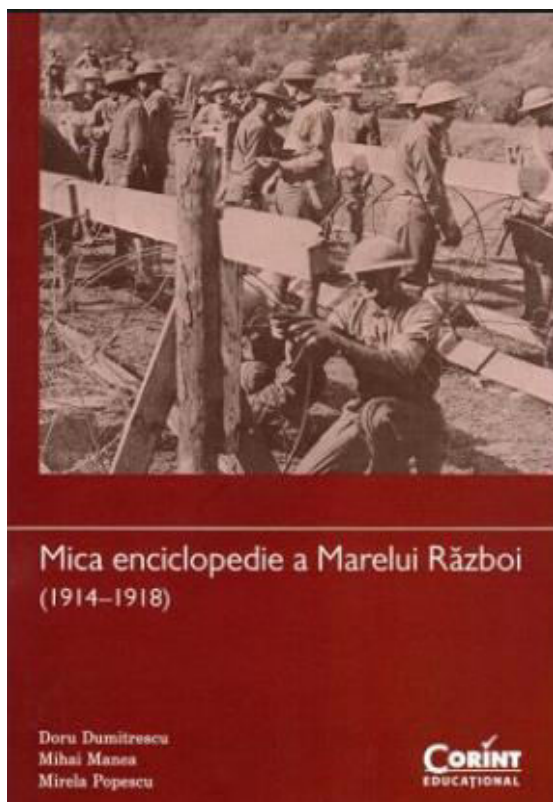
According with the title "*Sin Eater's Confession*" there is a problem about who is the final Sin Eater? A sin eater is "*a person formerly hired to assume the sins of a dead person by eating food placed near the corpse*" (<https://www.merriam-webster.com/dictionary/sin-eater>). In tradition, it says that a sin eater takes all the sufferings and pain of the dead person. In Romanian culture, a sin eater could be the priest. The person confesses all the sins to the priest and he prepares the soul of that person to pass to Heaven. In this case, can Ben be the sin eater? Can him forgives the sins of Jimmy? Or maybe he is confessing his mistakes to a sin eater, to the Ben from future. In this case, Ben has two positions, he is a dual being: Ben from the future is the sin eater that listen Ben's confession, his mistakes from adolescence.

In conclusion, Ben is apparently a normal teenager that passes through changes in his adolescence to discover himself, but he had some strange occurrences that follow him all his life, even after many years. He determines to write about his problems in order to relieve his soul, being prepared for everything,

including a death. He had a period, between childhood and adulthood, to discover his identity and the responsibility for being himself and accept what he became after years.

**Anca-Ioana RUS**

Doru Dumitrescu, Mihai Manea, Mirela Popescu, *Mica enciclopedie a Marelui Război (1914-1918)*, București, Editura Corint Educațional, 2014, 204 p.



Anul 2014, prin comemorarea centenarului izbucnirii Primului Război Mondial, a deschis/redeschis un imens șantier istoriografic, cercetători din lumea întreagă aplecându-se asupra studierii și analizării resorturilor care au dus la izbucnirea acestui conflict, asupra desfășurării și consecințelor acestuia, iar mai nou asupra impactului pe care acesta l-a avut asupra societății, în general, și indivizilor, în particular. O serie de publicații periodice, volume colective, dicționare, instrumente de lucru și baze de date au fost lansate în mediul academic românesc rechestionând dosarul Marelui Război. În seria acestor publicații, un loc aparte îl ocupă *Mica enciclopedie a Marelui Război (1914-1918)*, editată de Doru Dumitrescu, Mihai Manea, Mirela

Popescu, toți cadre didactice în București. Gândit și realizat ca un instrument de lucru, acest volum constituie o reală contribuție istoriografică, ce poate fi utilizată atât de istorici, cât și de elevi și profesori în proiectarea lecțiilor de istorie dedicate Marelui Război.

Din punct de vedere structural, *Mica enciclopedie a Marelui Război (1914-1918)* este împărțită în șapte mari secțiuni, dedicate personalităților implicate în conflict, principalelor acte, tratate și bătălii, precum și unor aspecte particulare, mai puțin cercetate în istoriografia românească.

Prima parte a enciclopediei este dedicată combatanților și oamenilor politici implicați în Primul Război Mondial (pp. 7-76). În categoria combatanților au fost incluși generalul Henri Mathias Berthelot (1861-1931), mareșalul Ferdinand Foch (1851-1929), generalul Franchet d'Espèrey (1856-1942), generalul Joseph Joffre (1852-1931), generalul Charles Louis Marie Lanrezac (1852-1925), generalul

Georges Robert Nivelles (1856-1924), generalul Philippe Pétain (1856-1951), generalul Maurice Sarrail (1856-1929), generalul Luigi Cadorna (1850-1923), generalul Armando Vittorio Diaz (1861-1928), generalul Edmund Henry Hynman Allenby (1861-1936), generalul John Denton Pinkstone French (1852-1925), mareșalul Douglas Haig (1861-1928), amiralul John Rushworth Jellicoe (1859-1935), generalul Horation Herbert Kitchener (1850-1916), mareșalul Alexandru Averescu (1859-1938), generalul Ion Dragalina (1860-1916), generalul Eremia Grigorescu (1863-1919), mareșalul Constantin Prezan (1861-1943), generalul Alexei Alexeevici Brusilov (1853-1926), generalul John Joseph Pershing (1860-1948), mareșalul Conrad von Hötendorf (1852-1925), mareșalul Erich von Falkenhayn (1861-1922), generalul Erich von Ludendorff (1865-1937), mareșalul August von Mackensen (1849-1945), amiralul Reinhard Scheer (1863-1928), generalul Alfred von Schlieffen (1833-1913), generalul Ismail Enver Pașa (1881-1922), generalul Mustafa Kemal Atatürk (1881-1938), strategii, comandanți de oști, șefi de stat major, personalități implicate atât în evenimentele din perioada 1914-1918, cât și în viața politică, militară, științifică interbelică. În categoria oamenilor politici au fost incluși Georges Benjamin Clemenceau (1841-1929), Théophile Delcassé (1852-1923), Raymond Poincaré (1860-1934), Vittorio Emanuele Orlando (1860-1952), Vittorio Emanuele al III-lea (1869-1947), Herbert Henry Asquith (1852-1928), Arthur James Balfour (1848-1930), George al V-lea (1865-1936), David Lloyd George (1863-1945), Ionel Brătianu (1864-1927), Ferdinand I (1865-1927), Alexandru Marghiloman (1854-1925), Maria Alexandra Victoria de Edinburgh (1875-1938), Vladimir Ilici Lenin (1870-1924), Nicolae al II-lea (1868-1918), Woodrow Wilson (1856-1924), Franz Ferdinand (1863-1914), Francisc Iosif I (1830-1916), Ferdinand de Saxa-Coburg Gotha (1861-1948), Theobald von Bethmann Hollweg (1856-1921), Matthias Erzberger (1875-1921), Wilhelm al II-lea (1859-1941), Mehmed al V-lea (1844-1918), István Tisza (1861-1918), suverani, prim-miniștrii, șefi de partide politice.

Cea de-a doua parte a enciclopediei cuprinde o serie de acte și documente diplomatice, înțelegeri și tratate (pp. 77-104), care „[...] au pus bazele unor alianțe diplomatice, politice și militare, au împărțit sferile de influență în lumea extraeuropeană, în acord cu interesele marilor puteri, au consfințit intrarea sau, dimpotrivă, ieșirea din război a unor state, au pregătit harta politică a lumii interbelice” (p. 77). Selectiv, în această secțiune au fost incluse tratatele Puterilor Centrale (sau Tripla Alianță), tratatele Antantei (sau Tripla Înțelegere), nota Sazonov, notele diplomatice ale papei Benedict al XV-lea, acordul Sykes-Picot, telegrama Zimmermann, declarația Balfour, Decretul asupra Păcii, cele 14 puncte wilsoniene, tratatele de pace de la Brest-Litovsk, de la București, armistițiile de la Padova, Maudros, Salonic, Compiègne, tratatele de pace de la Versailles, de la Saint-Germain-en-Laye, de la Sèvres, de la Trianon, tratatul de la Washington și tratatul de la Laussane.

A treia parte a enciclopediei trece în revistă marile bătălii ale Primului Război Mondial (pp. 105-129), bătălii care au provocat moartea, dispariția sau mutilarea a milioane de oameni și au lăsat urme vizibile până astăzi. Astfel, sunt pomenite bătăliile de pe Marna pe frontul de vest (1914 și 1918), de la Tannenberg pe frontul din Polonia (1914), de la Coronel în largul coastelor chiliene, în Oceanul

Pacific (1914), de la Ypres pe frontul de vest (1914-1918), de la Gallipoli, supranumită „*bătălia pentru Dardanele*” (1915), de la Skaggerak, supranumită „*bătălia Iutlandei*” (1916), de la Turtucaia pe frontul românesc (1916), de la Verdun pe frontul de vest (1916), de la Somme pe frontul de vest (1916), ofensiva Brusilov pe frontul de est (1916), de la Mărăști, Mărășești și Oituz pe frontul românesc (1917), de la Passchendaele pe frontul de vest (1917), de la Caporetto pe frontul italian (1917), de la Piave pe frontul italian (1917 și 1918) și de la Cambrai pe frontul de vest (1917).

Cea de-a patra parte a enciclopediei este dedicată lumii din spatele fronturilor de luptă (pp. 130-160). Din punct de vedere economic, războiul a dus la închiderea burselor de la Bruxelles, Viena, Londra, Paris și New York, la o scădere a produsului intern brut (PIB), la o depreciere a monedelor naționale, precum și la concentrarea eforturilor înspre susținerea mașinării de război. Toate acestea au generat o radicalizare a societății civile, supusă raționalizării alimentelor și a cărbunelui, militarizării întreprinderilor, transporturilor, cenzurii presei, precum și bătăliilor care de multe ori se desfășurau în proximitatea așezărilor umane. Din punct de vedere politic, toate eforturile au fost concentrate înspre justificarea războiului și efortului depus pentru acesta. Cu toate acestea, paradoxal, războiul a stimulat cercetarea științifică, în acest interval fiind înregistrate o serie de progrese, contribuții istoriografice, artistice, cinematografice etc.

Ultimele două părți ale enciclopediei sunt dedicate strategiilor militare proiectate și implementate de ambele tabere (pp. 162-166) și armamentului utilizat în anii războiului (pp. 167-173).

Toate cele de mai sus, în mod firesc, sunt însoțite de o serie de imagini care întăresc cele prezentate, imagini ce surprind viața în tranșee, diferite ipostaze și portrete, precum și principalele arme folosite pe scară largă în anii războiului.

Celor prezentate mai sus li s-ar mai fi putut adăuga alte elemente privind personalitățile (politice și militare) implicate în conflict, actele și documentele diplomatice, strategiile militare și ciocnirile militare. Un alt minus al lucrării este acela că nu beneficiază de un indice de nume, eventual de localități, care nu face altceva decât să știrbească din valoarea acesteia.

Lucrarea este însoțită de o cronologie a Marelui Război (pp. 175-197), începând cu vara anului 1914 și până în vara anului 1923, când a fost semnat ultimul tratat de pace cu Turcia, precum și de o amplă listă bibliografică (pp. 199-204), cuprinzând titluri din istoriografia românească și europeană. Personal, am fi amplasat cronologia Marelui Război în deschiderea enciclopediei; astfel, datele prezentate în cuprinsul acesteia puteau fi înțelese mult mai bine, mai ales de publicul „nespecialist”.

Constatăm, din cele expuse mai sus, că avem de-a face cu un veritabil instrument de lucru, care respectă normele unei lucrări enciclopedice, parțial complet, care vine să ofere atât comunității științifice, cât și publicului pasionat de istorie, o imagine de ansamblu asupra dimensiunii politice, militare, economice și sociale a Marelui Război. Indubitabil, volumul poate fi folosit de istorici, cercetători, profesori și elevi, în demersuri științifice, proiectarea unor

lecții/seminarii dedicate istoriei Primului Război Mondial, precum și explicării unor episoade ale conflictului.

Conchidem prin a felicita efortul celor trei autori, depus pentru apariția acestui instrument de lucru, extrem de util, care ușurează munca de documentare a istoricului și să stăruim pentru apariția unei ediții revizuite și adăugite cu alte informații legate de istoria Marelui Război, precum și cu un indice de nume.

**Mihai-Octavian GROZA**

Guy Gauthier, *Missy – Regina României*, trad. Andreea Popescu, col. „Casa Regală”, București, Editura Humanitas, 2010, 339 p.

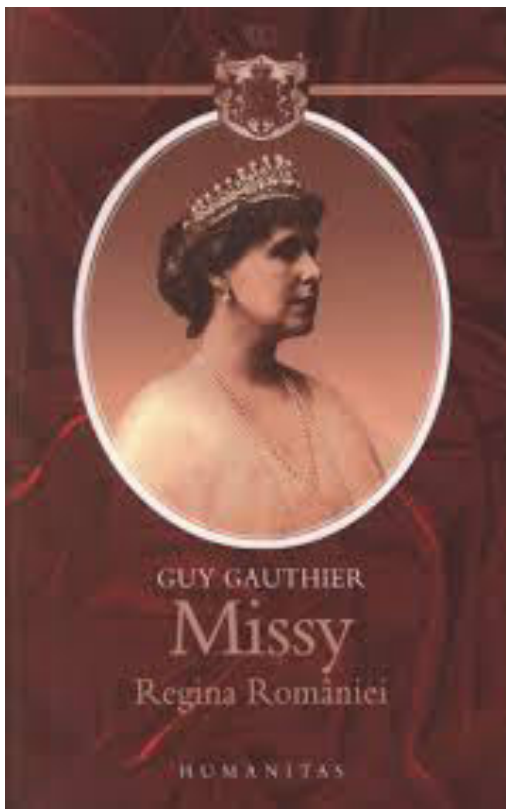
Personalitate importantă a istoriei românilor, regina Maria și-a descris

simțămintele nutrite pentru țara pe care a ajuns să o conducă, cu precădere în cadrul memoriilor și a celorlalte opere ale ei (a se vedea: Regina Maria, *Histoire de ma vie*, vol. 1-2, Paris, Les Editions Plon, 1937-1938; Regina Maria, *Mon pays*, Paris, Editions Georges Cres, 1917; Regina Maria, *Ode à la Roumanie*, Paris, 1922). În plus, despre ea s-a scris destul de mult de-a lungul timpului, în paginile unor lucrări care o evocă cu multă candoare, subliniindu-i meritele.

Între volumele importante care i s-au dedicat de-a lungul timpului, se numără și cel al lui Guy Gauthier, scriitor francez, specializat în istoria contemporană a României. Monografia amplă ce poartă semnătura lui, oferă o biografie complexă, pe alocuri romanțată, a mai-sus pomenitei regine, însoțită de un frumos suport ilustrativ. Autorul realizează un demers complex, ce debutează cu o incursiune genealogică (p. 8, p. 15), care constituie

însă doar pretextul descrierii copilăriei lui Missy (p. 8-18), dublată de prezentarea, frumos realizată, a mediului în care s-a format, și a celui în care, ca tânără prințesă britanică, a ajuns să activeze (p. 30-47).

Posesor al unui fin talent în alegerea titlurilor subunităților tematice, istoricul francez se dovedește de asemenea și un foarte bun cunoscător al complexului univers monarhic european al celei de-a doua jumătăți a secolului al XIX-lea și a primei părți a secolului trecut. Așa se face că, un atu al lucrării sale,



frumos scrisă și bine documentată, îl constituie interconectarea evenimentelor de la mai multe curți europene și realizarea de conexiuni între ele. Fără a-și propune oferirea unui aport informațional supraîncărcat, care să genereze o abundență inutilă a amănuntelor, ce îngreunează lectura, Gauthier reușește să creeze o frumoasă senzație, care-l implică pe cititor în evenimentul cititului dintr-o perspectivă sinestezică și-l face să se simtă atras și angajat în cursul evenimentelor, prin folosirea acestor aspecte. Iată un astfel de exemplu:

*„Pe 13 martie 1881, Alexandru al II-lea, țarul care a desființat iobăgia și care pentru Maria este „bunicul Împărat”, semnează un ucaz ce prevede crearea unei Adunări legislative, inițiativă sugerată de ministrul liberal Loris-Melikov. Dorința țarului este să stăvilească agitația revoluționară. Din nefericire, răul este deja prea adânc. În după-amiaza acestei zile care va fi esențială pentru democrația rusă, Alexandru al II-lea, după ce a trecut trupele în revistă, se duce la una dintre mătușile sale cu trăsura și apoi se întoarce la Palatul de Iarnă din Petersburg. Pe drum, un nihilist aruncă o bombă sub picioarele cailor. Din cauză că explozia a rănit doi cazaci din escortă, Țarul coboară să îi ajute. În acel moment, un alt revoluționar, văzându-l descoperit, aruncă a doua bombă. Țarul, grav rănit, este transportat la Palatul de Iarnă, unde își dă suflul. Astfel dispăruse un suveran care își manifestase în mod constant generozitatea față de poporul rus. Maria, fiind prea mică să ia parte la interminabilele ceremonii ortodoxe, asistă la funerariile bunicului său la una dintre ferestrele Palatului de iarnă, Ducesa de Edinburgh... La vârsta ei, prințesa Maria este departe de aceste probleme. Moartea bunicului ei este în primul rând ocazia să descopere fascinantă țara a mamei sale. Mica englezoaică, o nouă „Alice în țara minunilor” trăiește o adevărată poveste cu zâne” (p. 13-14).*

Interesant este și modul în care, folosindu-se de raportul de cauzalitate dintre mai multe evenimente, autorul reușește să descrie modul în care se ajunsese la anumite stări de fapt în spațiul european, dar și cel în care, prezentând anumite elemente de alcov și folosind un limbaj de-a dreptul hilar, vorbește despre anumite aspecte din biografia viitoarei regine. Un astfel de moment îl prezintă cel în care descrie cum, cu concursul lui Wilhelm al II-lea al Prusiei, dar și al altor capete încoronate, ea ajunge să se căsătorească cu prințul Ferdinand. Atent la detalii, ține să surprindă chiar și fiasco-ul primei întâlniri, evidențiind motivele care au contribuit la acesta:

*„În toamna anului 1891, mașinăria se pune în funcțiune. Pentru a marca sfârșitul manevrelor militare ale armatei germane, la care a participat și Ferdinand de România în calitate sa de ofițer prusac comandând un regiment de infanterie al Gărzii, Împăratul ordonă un mare banchet la castelul Wilhelmsheide, lângă Cassel, castel devenit celebru prin detenția lui Napoleon al III-lea după înfrângerea de la Sedan, din 1870. Cu binecuvântarea lui Wilhelm al II-lea, care le-a dat mână liberă, Charlotte și Maria Alexandrovna pun la cale un plan. Nici o mirare că în seara aceea, la masă, Maria se află lângă prințul Ferdinand...”*

*Din păcate pentru complotatori, seara este un fiasco, o Berezina! Maria se plictisește teribil lângă vecinul ei, care, cu zece ani mai mare și de o timiditate bolnăvicioasă, este incapabil să spună două cuvinte fără a se bâlbâi... După ce s-au stins ultimele candelabre, Maria va îndura supărarea mamei sale, care îi amintește că o prințesă incapabilă să poarte o conversație cu vecinii săi de masă este calamitatea unei cine moderne și teroarea stăpânei casei” (p. 38).*

În ciuda tonului jovial, pe alocuri de șagă, volumul conține serioase descrieri frumoase și bine documentate, ale evenimentelor importante ale cărei actantă a fost



și principesa evocată. Autorul nu uită să surprindă rolul important pe care l-a jucat ea în Primul Război Mondial, contribuția ei la realizarea Unirii, dar și la stabilitatea politicii interne și externe a României din anumite perioade. Sinceritatea, devotamentul și consecvența ei în susținerea armatei române, reflectată în vizitele constante pe care le făcea la spitale, alinând suferințele răniților de pe front, este frumos ilustrată, nu doar prin descrierea unui eveniment, ci și prin prezentarea unor amănunte ce înlătură orice ipoteză cărcotașă:

*„Se întâmplă uneori ca Regina, în ciuda tuturor dispozițiilor sanitare, să întârzie lângă un soldat. Mai ales lângă unul tânăr, care are nevoie mai mult decât ceilalți de această prezență maternă consolatoare. Se agață de mâinile ei, le sărută. Aceasta se întâmplă des. N-ar fi fost nimic dacă Maria ar fi purtat mănuși. Dar nu, ea a renunțat deliberat la mănușile de cauciuc. I se amintesc cu respect cuvintele de ordine. Contaminarea există, amenințătoare. Ea răspunde ironic celor care se neliniștesc: „Nu credeți că le face mai multă plăcere să-mi sărute mâna descoperită?” Cochetărie de fațadă. Ce durere cumplită ascunde acest abandon?” (p. 206).*

Vădit impresionat de calitățile ei diplomatice și de modul în care, folosindu-se de charmul feminin, suverana româncă a reușit să repare greșelile diplomației românești, care puteau transforma negocierile de după război într-o tragedie pentru țara ei, autorul ține să descrie pe larg întâlnirea ei cu Clemenceau (p. 236-246), și să prezinte călătoriile pe care aceasta le întreprinde atunci, cu scopul de a sensibiliza opinia publică internațională și de a o face să susțină cauza românească. Apoi, urmând firul cronologic, descrie relația sa tumultoasă cu fiul Carol (p. 254-259), modul în care a reușit să-și consolideze statutul prin intermediul unor alianțe matrimoniale inspirate (p. 260-265), evenimentul încoronării cu multiplele sale implicații diplomatice (p. 267-272), sau reușita în a-și determina soțul să întreprindă și el călătorii cu scopuri diplomatice (pp. 272-281).

În partea finală, el ține apoi să sublinieze contrastul dintre viața ei dinamică, plină de reușite și dedicată cauzei românești, și finalul trist, pe alocuri, și, într-un fel izolat, determinat de neînțelegerile cu clasa politică sau cu fiul, reîntors în țară și devenit rege. În plus, își permite chiar să avanseze ipoteze cu caracter ironic, cu privire la semnificația anumitor ani în istoria monarhiei românești:

*„Dacă există numere malefice pentru indivizi, atunci există incontestabil ani nefericiți și pentru monarhii. În România, toți anii care se termină în 7 sunt blestemați pentru regalitate. În 1897 a fost febra tifoidă, aproape mortală a prințului moștenitor Ferdinand; în 1907 a izbucnit marea răscoală țărănească ce a fost pe punctul de a arunca țara în revoluție și de a izgoni dinastia de Hohenzollern; în 1917 trădarea rușilor și armistițiul de la Focșani ar fi putut crea consecințe fatale pentru Ferdinand și regina Maria. Va mai exista 1947 și exilul regelui Mihai, preluarea totală a puterii de către comuniști și sfârșitul unei mari aventuri începute în 1866 în saloanele de la Tuilleries. Anul 1927, la care ne referim acum, este de asemenea, nefericit. Într-adevăr, destinul se înverșunează împotriva României Mari și lovește monarhia cu o soartă cumplită, din care nu-și va mai reveni” (p. 295).*

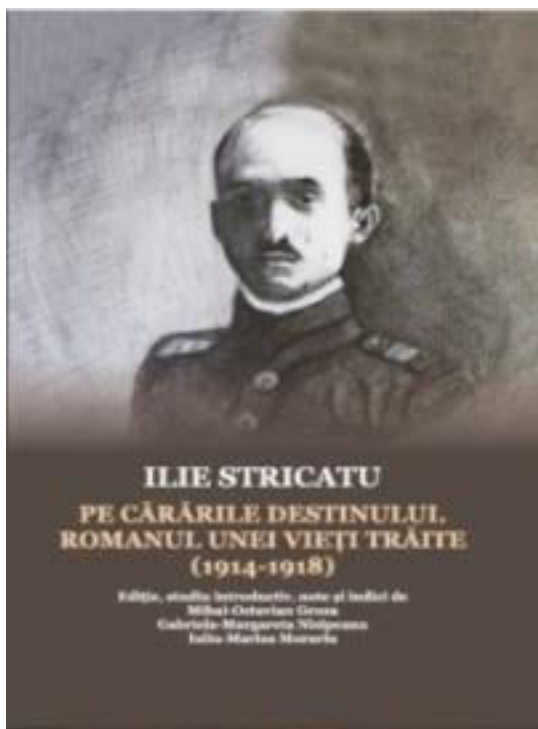
În plus, Gauthier clarifică anumite pasaje din biografia reginei, care nu erau încă suficient de clare, combate anumite încercări de instrumentalizare propagandistică a istoriei, și o readuce în atenție, într-un mod abil, ce se plasează la interferența dintre literatură și istorie, pe regina care a devenit un adevărat simbol al militantismului României Mari în timpul Primului Război Mondial.



De aceea, dar și din pricina altor motive, a căror descoperire o lășăm însă în grija cititorilor, lucrarea lui se constituie într-o frumoasă și valoroasă contribuție, plăcută și interesantă deopotrivă atât pentru cititorul specializat, cât și pentru cel curios să afle mai multe informații cu privire la istoria țării noastre. Faptul de a fi scrisă de un străin care, în ciuda apartenenței la altă națiune, cunoaște realitățile autohtone în profunzime, reușind să le coreleze cu evenimentele petrecute concomitent pe scena internațională, constituie un alt mare plus al ei, și un motiv suplimentar care dovedește cât de importantă este cunoașterea ei, și contribuția pe care scriitorul o aduce prin intermediul publicării volumului citat.

### ***Iuliu-Marius MORARIU***

Ilie Stricatu, *Pe cărările destinului. Romanul unei vieți trăite (1914-1918)*, ediție, studiu introductiv, note și indici de Mihai-Octavian Groza, Gabriela-Margareta Nisipeanu, Iuliu-Marius Morariu, Cluj-Napoca, Editura Argonaut/Mega, 2017, 196 p.



În afluxul istoriografic, prilejuit de împlinirea a peste 100 de ani de la declanșarea Primului Război Mondial, rămas în istorie și sub denumirea de Marele Război, o tânără echipă de istorici, propune atenției noastre editarea unui volum de memorialistică intitulat, Ilie Stricatu, *Pe cărările destinului. Romanul unei vieți trăite (1914-1918)*.

Lucrarea, ce are un titlu sugestiv, prin care ne este adus la cunoștință și memorialistul, personajul principal al cărții, se dorește a fi, și este una de bună calitate, din perspectiva aparatului critic și a bogatului material arhivistic și istoriografic folosit. Astfel, toți cei trei editori, Mihai-Octavian Groza, Gabriela-Margareta Nisipeanu și Iuliu-Marius

Morariu, toți fiind la bază istorici și provenind din școala istoriografică clujeană, aduc spre cunoștința publicului larg, un personaj mai puțin cunoscut, care a trecut prin ororile Primului Război Mondial.

Pe lângă întreaga acțiune, prezentată în lucrare, prin redarea efectivă a memoriei păstrate de către Ilie Stricatu, participant direct la Marele Război, considerăm oportună o primă analiză asupra structurii propuse de editori. Așadar, la o primă vedere analitică, lucrarea însumează 196 de pagini, întregul material fiind structurat pe 24 de capitole, care sunt de fapt și însemnările lui Ilie Stricatu.

În afara structurii lucrării, trebuie remarcate atât studiul introductiv, cât și nota asupra ediției, bine realizate și documentate, prezentate într-un stil liber, ușor de citit și înțeles atât pentru specialiștii în domeniul istoriei, cât și de simplii cititori pasionați de istoria Primului Război Mondial. La o lectură atentă, întregul material este excelent prezentat, prin explicarea în note de subsol, detaliate, a fiecărui cuvânt aflat într-o formă arhaică, sau a localităților care astăzi și-au schimbat denumirea. De asemenea, evenimentele și personajele istorice amintite de către memorialist, ne sunt redată și prezentate pe larg tot în subsolul paginilor.

Pe de altă parte, firul evenimentelor, prezentate în acest volum, păstrează în oarecare măsură stilul cunoscut, al memoriei colective asupra războiului, în care sunt amintite momentul mobilizării pe front, posibilele alianțe și intrarea în focul luptei al națiunilor ce s-au declarat la început neutre.

Ne este evident nouă cititorilor, că fiecare memorialist a păstrat vie pentru el, dar a transmis pe mai departe experiența frontului, povestind într-un mod original și raportându-se personal la firul epic al întregului eveniment ce a marcat la finalul său, întregul mapamond. În esență, autorii acestui volum încearcă să surprindă și acest caracter al acestui gen de scriere, al memoriei, tot mai des cultivat în istoriografia românească.

Totodată, trebuie să remarcăm modul în care ne sunt prezentate, toate faptele și evenimentele de către memorialistul Ilie Stricatu, el ținând acțiunea vie și îndemnându-l pe cititor să lectureze cât mai rapid paginile cărții spre a afla în final deznodământul unei părți mai puțin cunoscute a Primului Război Mondial. Desigur, toată acțiunea trebuie privită de cititor prin spiritul epocii de acum mai bine de o sută de ani, în care naționalismul și patriotismul erau bine cultivate în rândurile soldaților care, la rândul lor, le transmiteau mai departe.

Dacă ar fi să păstrăm același stil de analiză asupra acestei ediții de memorii a lui Ilie Stricatu nu trebuie să ometem a sublinia și interesantul demers al editorilor de a ne pune la dispoziție și o serie de fotografii, care provoacă un puternic impact vizual asupra faptelor prezentate pe parcursul lucrării. În aceeași notă, a studiului introductiv, în finalul ediției, aceasta nu se încheie abrupt, prin ultima însemnare a memorialistului și ne este prezentat câte un scurt rezumat sub forma unui abstract, rezumat prezentat în mai multe limbi de circulație internațională (engleză, franceză, germană, maghiară și italiană). Tot spre încheiere trebuie remarcată și bibliografia organizată atent pe secțiuni, evidențiindu-se atât surse primare, cât și bibliografie generală sau de specialitate.

Nu în ultimul rând, dorim să amintim și indicele de nume, foarte bine și atent redactat de către editori.

Pentru a conchide, nu ne rămâne decât să salutăm cu *laudatio* acest demers al tinerilor cercetători aflați în pragul afirmării și dorindu-le o cât mai bună expunere a acestei ediții de memorii, acum în pragul anului centenar.

***Andrei PĂVĂLEAN***



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