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AND LANGUAGE CATEGORIES IN SLAVIC LANGUAGES

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## CONTENTS:

### NEW PERSPECTIVES ON LANGUAGE PROCESSES AND LANGUAGE CATEGORIES IN SLAVIC LANGUAGES

Jadranka Gvozdanović

New Perspectives on Language Processes and Language  
Categories in Slavic Languages. Introduction • 5

Gabriela Múcsková

Dynamics of Linguistic Prescriptivism and Purism in Slovakia  
in the Context of Political and Scientific Development • 11

Božena Bednaříková

The Role of Word-Formation in Signalling Expressivity in News  
Reporting (A Case Study) • 35

Igor Dreer

On the Encoder's Perception of Occurrences: A Parallel Corpus-  
based Study of Transposed Tense Usage in *Kolymskie rasskazy*  
by Varlam Šalamov and *Šumchi* by Amos Oz and Their Hebrew  
and Russian Translations • 55

Olena Pchelintseva

*Zatłuczenie się kota*: Aspectual Range of Polish Verbal  
Nouns • 79

Yehor Duma, Yoshiki Mori

(In)definiteness-driven Agreement Patterns in Ukrainian  
Numeral Phrases • 97

## ARTICLES

Antoni J. Żyndul

“Written by a Man” – A Compliment or an Insult? A Stylometric Analysis of Female Character Complexity in Male- and Female-Authored Fiction • 121

Mirosław Jankowiak

Polish Spoken Language in Varėna District in Lithuania • 137

Aigerim M. Kakimova, Manatkul Sh. Mussatayeva

Отражение государственной идентичности в текстах казахстанской прессы и сознании молодого поколения • 155

## THUS WORKING PAPERS

Afrina Tasnim

Impacts of Stereotypical Gender Role Expectations on Married Female Students: Evidence from the University of Dhaka • 177

Daria Zobova, Mariia Moiseienko, Grzegorz Konecniak (corresponding author)

Postcolonial Perspectives on the War in Ukraine: A Cross-Referential Study of General and Literary Approaches • 205

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## **New Perspectives on Language Processes and Language Categories in Slavic Languages. Papers Originating from the 21st International Congress of Linguists**

The 21st International Congress of Linguists, held in Poznań in September 2024, aimed at presenting the full scope of current linguistics and focused on integrating languages, communities and technologies.<sup>1</sup> The sessions and focus streams at this congress mainly covered language domains and different linguistic approaches, with an exceptional section dedicated to the Slavic language area.

The section on Slavic languages focused on deixis in grammar, pragmatics and discourse. In general terms, it showed that the Slavic languages are firmly embedded in the Indo-European linguistic tradition concerning their grammatical properties, with further developments of aspectual, temporal and modal properties. At the same time, sociolinguistic properties of Slavic languages closely reflect social relations and ideologies. In the sociolinguistic spectrum of Slavic languages, Russian is an exceptionally dominant language, whereas most Slavic languages were in a subordinate position

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<sup>1</sup> The plenary papers, section introductions and focus stream introductions were published by Brill in 2025 under the title of *Contemporary Linguistics Integrating Languages, Communities, and Technologies*, edited by David Bradley, Katarzyna Dziubalska-Kołaczyk, Camiel Hamans, Ik-Hwan Lee, and Frieda Steurs.

throughout most of their histories (and some acquired relative dominance in multiethnic states). The changing sociopolitical situations were reflected in attitudes towards language norms and purism as a defensive mechanism against being overruled by foreign identities. In all instances, the choice of language norm was a complex and ideologically loaded matter. The presented papers in this section of the congress showed that language choice is fundamentally connected with societal discourses and power relations, and even objective news reports are presented with an additional layer of evaluation and expressivity, expressed by lexical, grammatical and even phonetic means. Attitude and perspective are pervasive underlying mechanisms affecting both interpersonal and representational levels of language. This becomes obvious in the choice of aspect and tense on the representational level, and even variant forms of quantified phrases are governed by specificity or definiteness, depending on the language. In this way, deictic embedding and perspective determine a large array of grammatical and pragmatic variation.

Based on the invitation by professor Michał Głuszowski to publish in *Theoria et Historia Scientiarum* a selection of the papers presented in this section, a blind-review process was carried through for papers submitted to this journal. I am happy to present to you the papers that were clearly positively evaluated by recognized experts in the field. These papers cover several of the mentioned important areas.

First of all, the paper by Gabriela Múcsková “Dynamics of Linguistic Prescriptivism and Purism in Slovakia in the Context of Political and Scientific Development” shows how Slovak purism and prescriptivism (a larger notion than purism, aimed at also regulating grammatical, phonological and pragmatic conventions) closely followed the political situation of this country. Slovak purism was mainly directed against Czech lexemes, adopted in Slovak due to long-lasting Czech influence before and during the common state. Following up on the movement to recognize Slovak as a language independent of Czech, that culminated in the *Law on the Slovak language* (1968), there followed a golden age of Slovak purism in the 1970s and 1980s, that significantly contributed not only to the formation of the Slovak language norm, but also to the formation of the national awareness.

Interestingly, a parallel development occurred in Croatia within the Yugoslav state, in which the Croatian language was dominated by Serbian in the Serbo-Croatian standard language. Croatia also saw increasing language awareness in the early 1960s that culminated in the Declaration on the name

and position of the Croatian literary language published in 1967. This was followed by strong communist oppression countered by a struggle for language autonomy, that finally led to the dissolution of the Yugoslav state unity. In both discussed cases, language was a pillar of identity, and purism was a shield to defend this identity whenever threatened.

The paper by Božena Bednaříková titled “The Role of Word-formation in Signalling Expressivity in News Reporting (A Case Study)” discusses expressive word-formations occurring in main news reporting on TV, where a-priori no expressivity, but only so-called objectivity would be expected. Comparing data from 2018 and 2025, the author shows that expressivity in news reporting is generally increasing, and so is the connection with evaluative contexts on the main news-reporting channels (but not so in commercial news). This is an important finding about evaluative (and potentially manipulative) linguistic means of presenting the main news to the public. According to the author, “expressivity is due to a disruption of the systematic correlation between form and meaning within the internal structure of a word, particularly in the relationship between the word-formation base and the formant”. However, if we look into “disruption” in more detail, it becomes obvious that it is in fact an overlaying of neutral meaning with an evaluative, mostly negative (e.g., *Němčour* ‘a German, pejorative’), or positive component (the latter, e.g., expressed by means of a diminutive ending). Lexical means may thereby intersect with grammatical means (e.g., expression of proximity by the possessive dative). Interestingly, the largest overall increase of expressivity across all public media was observed with the use of intensifying prefixes, where expressivity and evaluation in fact arose from connection with evaluative contexts as a matter of implicature.

The paper by Igor Dreer “On the Encoder’s Perception of Occurrences: A Parallel Corpus-based Study of Transposed Tense Usage in *Kolymskie rasskazy* by Varlam Šalamov and *Sumchi* by Amos Oz and Their Hebrew and Russian Translations” discusses the use of tense in a comparative Hebrew – Russian perspective, based on translations. His analysis of relatively parallel text corpora, also by means of mathematical modelling, shows significant similarities in conceptualizing the present and past tense as *experienced* and the future tense as *not-experienced*, interlocked with *proximate*, characteristic of the present, and *remote*, characteristic of the past and future tenses (in line with the Columbia School of Linguistics). In addition to similarities, the author ascribes differences between Russian and Hebrew to different com-

municative strategies. These may in fact also be influenced by verb-aspectual differences between Russian (with deictic binding of the outcome of perfective aspect, in contrast to imperfective aspect) and Hebrew (which lacks this distinction). The analyses also show that *proximity* vs. *remoteness*, a spatiotemporal and existential property of sentence-level, by way of *remoteness* transgresses into the conditional domain in Russian, accounting for the different use of the future tense in Russian vs. Hebrew.

Verbal aspect is a phenomenon on the predicate level. When predicates are nominalized, this may affect aspect semantics. This topic was extensively investigated by Olena Pchelintseva's paper "*Zatłuczenie się kota: Aspectual Range of Polish Verbal Nouns*" based on Polish verbal nouns derived from inchoative/ingressive and delimitative verbs, compared to such Russian and Ukrainian verbal nouns. Comparing dictionary entries with corpus data and questionnaire-based informant reactions, the author reaches the conclusion that inchoative and delimitative verbs in a significant majority of instances lose the semantics of outer boundaries in the formation of verbal nouns, and focus on the event in its entirety, as a total indivisible whole. This effect occurs increasingly from Russian to Ukrainian to Polish, in parallel with increased capacity to form verbal nouns. The author insightfully remarks that "the weakening of the quantitative-temporal limitation of the action" may be related to (differences in) the semantic structure of the perfective verbs themselves. Indeed, this reminds us of Bondarko's (1971, etc.)<sup>2</sup> analysis of the Russian perfective aspect as based on the features of Totality (*celostnost'*) and Boundary Delimitation (*ograničenie dejstvija predelom*). Apparently, only the first feature remains in verbal nouns, as an effect of semantic bleaching, that may allow for additional contextually indicated inferences (such as resultative, attenuative, distributive or multiplicative readings).

The paper by Yoshiki Mori and Yehor Duma titled "(In)definiteness-driven Agreement Patterns in Ukrainian Numeral Phrases" discusses so-called optional verbal agreement with quantified numeral phrases. The authors carefully distinguish between syntactic agreement and semantic agreement (the latter is largely acceptable in East Slavic) with numeral phrases in Subject function; semantic agreement refers to plural predicate forms with Subject numeral phrases, although the numeral form is grammatically singular and would motivate a singular (neuter) predicate form. For Ukrainian and

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<sup>2</sup> Bondarko, A.V. (1971) *Vid i vremja russkogo glagola*. Moskva: Prosveščenie.

Russian, the authors show that semantic agreement is conditioned by definiteness of the Subject numeral phrase; it is ungrammatical if the Subject noun phrase denotes an approximative quantity (expressed in East Slavic by the noun-numeral order), which is by definition indefinite; on the other hand, plural agreement is required with reflexive and reciprocal predicates. The authors define definiteness as ‘previously known’, i.e., previously mentioned in the context. At this point, we may add that experience with at least Russian shows that semantic agreement can also occur if the numeral phrase has not been previously mentioned in the context, but pertains to some general knowledge, or knowledge by the speaker not yet present in the addressee’s frame of reference; the latter is usually referred to as specificity. In this sense, it may be a topic for future research to investigate to which extent semantic agreement may also be conditioned by specificity. In addition, there is a crucial role of animacy as a potential task for future research.

This selection of papers provides new perspectives on language processes and different kinds of perspective underlying or affecting linguistic categories.



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## Dynamics of Linguistic Prescriptivism and Purism in Slovakia in the Context of Political and Scientific Development

**Abstract.** The article presents the phenomenon of prescriptivism as the belief that some language items can be assessed as correct or incorrect according to defined rules. This belief, usually connected with purism, arises as a result of extralinguistic circumstances. The pendulum course of its development in the Slovak linguistic situation in the 20<sup>th</sup> century has some specific features: it is determined by the long-term Czech-Slovak language relations and the politically motivated alternation of convergent and divergent efforts, as well as the socially motivated alternation of top-down and bottom-up perspectives of the rise of prescriptivism and purism. Despite the decline of prescriptivist ideology in contemporary linguistics, it survives in protective language policy and in various forms of folk prescriptivist activities. The aim is to explain the historical motivations behind the maintenance of the popularity of prescriptivism and purism among non-linguists in the context of the more liberal approach to language regulation currently favored by linguists.

**Keywords:** Slovak language; language policy; purism; linguistic prescriptivism; language critique; folk linguistics.

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## 1. Introduction: Prescriptivism and Purism

Linguistic prescriptivism is based on the belief that there are correct and incorrect words or forms, resp. that language contains items – albeit naturally functioning ones – that can be considered “incorrect” for some reason. In contrast to descriptivism, prescriptivist linguists construct language as they would like it to be, or as they think it should be, rather than as it really is – “the descriptivist aims to record language, while the prescriptivist aims to shape language” (Nelson, 2006, p. 459). Therefore, prescriptive linguistics creates its own rules or criteria by which decisions on the incorrectness of certain items are argued. At the same time, it tries to enforce these rules in linguistic practice and to remove inappropriate forms from the language, which practically means to persuade or even (e.g., by law or sanctions) force the language community to remove these units from its linguistic repertoire. This requires that rules and criteria of linguistic correctness be prescribed as mandatory (or at least recommended), so that members of the language community can be required to accept, learn and respect them in official communication. However, the acquisition of such rules encounters a contradiction when the prescription is based on a conception of language as a regular system of structural elements, which is in fact a product of linguistic constructioning and therefore not naturally realised by common users. The “incorrectness” of the elements lies then only in the inconsistency with the desired regularity of language norm, and the user is expected to behave not according to his experience with the language of his vicinity and his own perception, but on the contrary, according to paradigmatically constructed patterns.

The following example from the Slovak prescriptive context shows that the “incorrect” use of a word-form is a consequence of the “immaturity” of the users to understand the structural rules of the language:

In this respect, our common and non-common people have accustomed to *zemiakové hranolky*,<sup>1</sup> because they have not yet reached the level of a user of

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<sup>1</sup> Expression “*zemiakové hranolky*” [potato chips] is broadly used in fem. gender *hranolka*, but according to prescription it should have masc. gender *hranolček*, in pl. *hranolčeky*, because it is morphologically a regularly formed diminutive.

the standard language at which they would think more strictly grammatically<sup>2</sup> (Kočíš, 1995, p. 212).

Therefore, another goal of prescriptive linguistics is to educate the language user or to motivate him to take consciously the responsibility for the correct use of the language (Horecký, 1997, p. 64).

In concrete conditions of social and political circumstances, prescriptive linguistics can acquire an important position within language policy and linguistic scientific “infrastructure”, but also within society itself. This motivates it to develop its own conception of standard language and language planning,<sup>3</sup> and also to believe that it fulfils an important role for the language cultivation, its scientific investigation, and also for society as a whole.

And it is the members of the language community (and paradoxically not others, e.g., descriptive linguists or sociolinguists) who decide on the relevance and prestige of the prescriptive approach. If they adopt the belief that language can be corrected, that the rules are consciously planned and prescribed, there logically arises the social notion that the actors of correction and rule-making are linguists, who are not only competent but also entitled, or even obliged, to prescribe language, and that these linguistic authorities or elites are to be respected by the community. However, it is clear that common language users – despite the general acceptance of the role of linguists and the need to follow the prescriptive rules – are not able to fully acquire all the rules derived from the system of language and apply them “correctly” in their speech behaviour. As a consequence, they do not perceive the prescribed rules as a problem, but on the contrary, they get convinced that the problem is on their side, that they do not know how to use their mother lan-

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<sup>2</sup> *V tomto zmysle si naša pospolitosť i nepospolitosť privykla aj na zemiakové hranolky, lebo ešte nedospela na úroveň takého používateľa spisovného jazyka, na ktorej by uvažovala dôslednejšie gramaticky.*

<sup>3</sup> As Malory points out, prescriptivism cannot be identified with language planning, since, according to him, “prescriptivism is considered to be the attempted enforcement or imposition of language rules, as distinct from the outlining of how something could be done, which language planning entails” (Malory, 2023, p. 265). In our article, we conceive of language planning as a broader concept, namely as any effort to regulate the structure of language, its parts or individual items. It includes the process of standardization, the creation of orthography, as well as creation of grammatical and lexicographical descriptions of the standard language and their application in language acquisition and education.

guage “correctly” and “purely”, and they make mistakes in it.<sup>4</sup> As Buzássyová pointed out, by promoting prescriptive rules without regard to the natural differentiation of language communication and the dynamics of language, “a large part of the Slovak population (including prestigious users of Slovak, who work with the whole richness of the language) is in fact denied that they can speak Slovak” (1995, p. 95). Such an impression leads to a conviction of the imperfection of one’s own language competence and, consequently, to lowered language self-consciousness of the users (Dolník, 2010a, pp. 197–208; 2010b, p. 69) and to the belief that language “how it is used” is bad and incorrect. Moreover, it creates (unfortunately, also with the contribution of some prescriptive linguists) a myth of its permanent decay.<sup>5</sup>

Prescriptivism is sometimes associated with **purism** because, in addition to seeking regularity in language, it can also be associated with the idea of national identity and the purity of language, or its threat due to contact with another language. However, the terms purism and prescriptivism are not perceived as identical. Prescriptivism is a broader term and refers to a larger range of phenomena (e.g., orthography, codification, stylistic and pragmatic conventions, etc.). Only some of these prescriptive regulations are directed at units perceived as foreign.<sup>6</sup> Nevertheless, prescriptivism and purism often accompany and mutually condition each other, which means that they

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<sup>4</sup> It is symptomatic that the most frequent question asked by journalists in interviews with linguists is “What are the most frequent mistakes made by Slovaks in the language?”. This question is often conditioned by older strategies of prescriptive linguistics, in which – in order to remove “incorrect” units from language usage – there were papers summarizing the most frequent mistakes in some type of public sphere of communication, e.g. media, political speeches etc. (for many we can mention at least Považaj, 1993, 1994; Mislovičová, 1995; Hegerová, 1995, 1997).

<sup>5</sup> Language development and change – if we are aware of them and experience them – is often perceived as the mistake and decline of language (for many works pointing out this contradiction, let us mention the very inspiring work of Aitchison, 2001). Statements about the “bad”, “unsatisfactory” or “catastrophic” state of language culture, about the “decline of the language” or even its “threat”, as well as criticisms of these statements, are a part of the Slovak linguistic discourse focusing on the state and use of the standard language for a long time. Such discourse has already become stereotyped, creating “a spiritual climate in which it is required to speak negatively about standard language and to deduce from observing it that language culture is in decay” (Dolník, 2010b, p. 69).

<sup>6</sup> The closeness or remoteness of the two concepts also depends on the understanding of purism. If it is not narrowed to the deliberate protection of the language against foreign words but defined more broadly as any effort to remote undesirable elements (loanwords, slang, dialect, archaisms, neologisms, etc.) from the language (Thomas, 1991, pp. 10–12), then they could be considered as closer.

undergo their emergence, rise or retreat together in the social and political context. Like language, also prescriptivism undergoes its own “linguistic” development and changes. In the history of some languages, the prescriptivist approach was widespread in the 17<sup>th</sup> to 19<sup>th</sup> centuries, or even in the first half of the 20<sup>th</sup> century (e.g., Nelson, 2006; Straaijer, 2016, p. 235ff; Malory, 2023; Crystal, 2007, p. 451ff; and others), but later it gradually disappeared or became the object of criticism, condemnation or even ridicule as an unscientific approach to language.<sup>7</sup>

However, it is not the case of Slovak linguistics and also other linguistics, in which language regulation and prescription – often accompanied with purism and linguistic criticism – still have a strong position and a relatively high prestige. In the next chapters, we will explain the social and political background of the emergence and further development of purism and prescriptivism in Slovakia during the 20<sup>th</sup> century, the reasons why the terms purism and prescriptivism are negatively perceived but still present, and the parallels between historical periods and the current situation.

## **2. Dynamics of Linguistic Prescriptivism and Purism in Slovakia**

### **2.1. Origin and Character of the Slovak Linguistic Prescriptivism and Purism**

The beginnings of linguistic prescriptivism in Slovakia are associated with the emergence of purism, which can be characterized (applying the typology of Thomas, 1991, pp. 62–83) as protective and nationalistic (corresponding with the ethnolinguistic aspect of language; this type is based on perceiving language as a sign of national identity); specifically, it is targeted at loanwords and contact phenomena mainly from the Czech language; therefore, it is sometimes called anti-Czech purism (cf. Múcsková, 2017a, p. 45ff). It is predominantly focused on lexicon, partially also on morphology, with efforts to prevent the penetration of these contact phenomena and remove “undesirable” language variation.

Both purism and prescriptivism are motivated extralinguistically, and they are under-conditioned and kept going by affairs in the social and po-

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<sup>7</sup> Straaijer points out discussions about the role of prescriptive and descriptive approaches and also attitudes towards prescriptivism as unscientific and unimportant for linguistics (2016, p. 235ff). The exclusion of prescriptivism from the interest of scientific linguistics is also critically viewed by Cameron (1995, p. x).

litical context. Therefore, their viability swings between intense purism and prescriptivism and a more tolerant attitude, or even anti-purism. This trimming (i.e., arising or intensifying in periods when community feels to be endangered) and oscillatory (repeatedly swinging) purism – or in fact trimming and oscillatory protective attitudes towards Czech and its impact to the standardization process – corresponds to the metaphor of pendulum (Thomas, 1991, pp. 158–160; see also Jarošová, 2012). Accordingly, the metaphor of pendulum can be also applied on attitudes to the concept or ideology of purism and prescriptivism, which throughout history oscillated between the pole of high prestige and social appreciation and the pole of its rejection or even political persecution. However, we approach the interpretation of purism and prescriptivism as historical and cultural phenomena without evaluating them negatively or positively. The aim is to explain their specific nature and viability determined by the extralinguistic factors.

## 2.2. Golden Age of Slovak Purism – 30s and 40s of the 20th Century

The historical context in which Slovak became a real standard and official language was the period of the first Czechoslovak Republic established after the First World War in 1918. It brought a radical change for Slovaks in their political status – they became a state-forming nation, and Slovak became an official language together with Czech in the common state. For Slovak, however, this meant that it had to function in the fields of public communication, administration, law, business, science, culture and education, i.e., areas in which it had never functioned to such an extent before,<sup>8</sup> and, therefore, was not sufficiently developed for these tasks. In the new conditions, it was developing under the influence of Slovak-Czech bilingualism, in which Czech dominated, and many Czech elements penetrated into Slovak texts.<sup>9</sup> Language norm gradually diverged from the older standard,<sup>10</sup> which was perceived negatively among scholars and the intelligentsia. The increased dynamics of the language norm

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<sup>8</sup> Older codifications (e.g., of A. Bernolák from the end of the 18<sup>th</sup> c. or of L. Štúr from the middle of the 19<sup>th</sup> c.) never became the teaching and official languages and were not accepted by the whole society (on the development of the Slovak standard language, cf. Pauliny, 1983; Krajčovič & Žigo, 2002; and others).

<sup>9</sup> Slovak-Czech linguistic contacts are the subject of interest for a long time, among many works we can mention at least Buzássyová, 1994, 1995; Dolník, 2010a, pp. 71–84; Nábělková, 2014, 2017; Lipowski, 2005; Newerkla, 2009, 2011.

<sup>10</sup> The older standard, perceived as correct and “pure”, was codified in Czambel’s handbook (1902) and based on the variety of the northern central Slovakia.

was also caused by the lack of knowledge of the Slovak standard language, because people in productive age attended Hungarian schools in the pre-war period and used local dialects in private communication. With insufficient knowledge of the codification, they were more open to the unconscious adoption of Czech forms. Increased demands on communicative functions, language contact and intensive enrichment with Czech lexical items led naturally and spontaneously to the convergence of Slovak with Czech.

This tendency was intensified by the presence of Czechs in Slovakia in various areas of economy, education and culture (Rychlík, 1998), as well as by the official ideology of one “Czechoslovak” language and the convergence language policy aimed at the gradual assimilation. A concrete step of this policy was the approval of the *Pravidlá slovenského pravopisu* [Rules of Slovak Orthography] (1931) prepared in Matica slovenská, which legitimized and supported the penetration of bohemisms with the authority of a codification work. The bohemizing Rules met with harsh criticism and were finally rejected (Krajčovič & Žigo, 2002, p. 216ff). This act meant the onset of Slovak anti-Czech protective purism, and to support it, the journal *Slovenská reč* [Slovak Language] was founded in 1932 to contribute to the development of scientific research of Slovak. In its first years it devoted a large space to contributions pointing out “incorrect” items used in language practice, thus trying to prevent the undesirable penetration of bohemisms or archaisms into Slovak (Krajčovič & Žigo, 2002, p. 220). These efforts resulted in a conscious and often extreme purification of vocabulary from foreign loanwords, which often lacked scientific argumentation. Contributions in sections such as *Miscellanea*, *Is it good in Slovak?*, *Wrong words and phrases that should be avoided*, etc. had the form of orders and proscriptions and their explanation was, on the one hand, the scientifically vague but pragmatically very effective concept of “pure Slovak”, and on the other hand, expressive negative assessments of the state of language, which – if they came from the expert – had a considerable persuasive effect:

Such wildness prevails in our everyday spoken language. Let us strive to eliminate it as soon as possible. Let’s all people of good will in Slovakia join together, roll up our sleeves and get to work with the slogan: for our pure Slovak<sup>11</sup> (Mihál, 1938–1939, p. 218).

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<sup>11</sup> *Taká zdivočenosť panuje v našom hovorovom spisovnom jazyku. Usilujme sa čím skôr ju odstrániť. Spriahnime sa všetci ľudia dobrej slovenskej vôle, vysúkajme rukávy a do roboty s heslom: za tú našu čistú slovenčinu.*

In its beginnings, the journal had a strongly prescriptive character and most of its contributions were focused on linguistic correctness. In various articles, it provided lists of prescriptive regulations or criticisms of “incorrect” language use in the form of pairs of words, one of which was identified as incorrect. For these linguistic practices, the journal’s founder H. Bartek used the term “practical linguistics”, and this term included prescriptive linguistics, linguistic criticism and language consulting (cf. Kralčák, 2022, p. 446).<sup>12</sup> The aim was “not to have useless pairs of words, from which, if we want to write well in Slovak, we must choose one and use it consciously” (Jánošík, 1932, p. 217). The structure of such contributions was very simple. The title contained variants occurred in real usage, from which one was regarded as bad. It was followed by example of a bad use (from literature, journal, etc.) and its frequency (e.g., “3 times”, “very often”, etc.). This was followed by comment like “archaism”, “useless loanword”, “Slovak doesn’t know the word...” or even “Not like this!”, “Never!”, and finally the author gives the correct form, which should be used instead.

Prescriptivism and purism had high authority at the time, so that similar prescriptions did not even need scientific argumentation or explanation. It was enough that a linguist wrote it in this journal, or that the expression was labelled as a bohemism. The situation in real usage was irrelevant. If, for example, an “incorrect” word had a high frequency, it meant that more prescriptive work is needed to be done to remove it (instead of adopting it into the codification). In one interview, the chief editor of the journal, H. Bartek, said about the authority of the journal: “If I had written in *Slovenská reč* that this is not a cigarette, but that it is called in Slovak *výfučka*, everybody would be calling it *výfučka* from tomorrow” (according to Pauliny, 1979, p. 47). In the situation, where the codifier has boundless authority, the argumentation “is only an ‘ornament’ of codification decisions, so that the scientific discussion about argumentation and codification acts are autonomous phenomena” (Dolník, 2000, p. 220).

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<sup>12</sup> In addition to the journal, *Matica slovenská* started to provide a language-counseling service, and later short programmes for Czechoslovak Radio *Hovoríte správne?* [Can you speak correctly?] (cf. Encyclopaedia Beliana, <https://beliana.sav.sk/heslo/jazykovedny-odbor-matice-slovenskej>).

**ukradnúť-ukrást:** ukrásť z neho ten najkrajší a najdrahší kus I, 44. Tvar ukrásť (v Pravidlách ukrast) je archaizmus, preto lepšie by bolo neupotrebiť ho. Veď hovoríme napospol len *kradne*, *ukradne*, teda neurčitok musí byť *kradnúť*, *ukradnúť*.

**pýtať sa-tázať sa:** vraj „táže sa“ I, 31, 35, 46, 81, 83, 95 a veľmi často. No v spisovnej reči máme: *pýtať sa*, *opytovať sa*, *dovedať sa* a pod. Sloveso tázať sa pokladáme za zbytočné a nezvyčajné.

**divý-divoký:** divoké blesky I, 53; divoko skáču I, 124. Vari nie tak. Veď v spisovnej reči môžeš čítať len *divý*, *divo*, slovo divoký nepoznajú ani Pravidlá.

**smäd-žižeň:** aby ukojil svoju žižeň I, 68. Slovo žižeň dostalo sa k nám z biblickej češtiny. No ťažko pochopiť, prečo autor ho má radšej ako pôvodné slovenské *smäd*. Básnik môže napísať žižeň, no prozaik má sa pridržať pôvodných slovenských slov.

**hľadiet-zierať:** Bartolomej Zima ziera na slúžku... I, 70; Zieral na bránu I, 101. Ba ešte čo! Či takto niekto hovorí? V slovenčine poznáme slovesá pozeráť, nazeráť ap., ale nie jednoduché zierať, a ani v Pravidlách ho niet. — Načo robiť násilnosti slovenskému slovníku, načo vymýšľať tvar *zierať*?!

**vemeno-vämeno:** Tvar vämeno (tri razy na str. 76) nijako neobstojí, veď *ä* nie je tu za praslovanskú nosovú hlásku. Keď nepíšeme *väža*, ale *veža*, tak nesmieme písať ani vämeno, ale *vemeno*.

**bojazlivý-bázlivý:** vraj „bázlivo milý“ I, 32. Nikdy! Spišovne je len bojazlivý, teda aj bojazlivo.

Picture 1: A critique of literary language by Bartek (1933–1934, p. 188)

The high prestige of the purists and the respect for prescriptive “regulations” in this period also resulted from the fact that they were a reaction to the government’s policy of convergence of the two languages, so that they had the flavor of a defiance of official political power and a struggle for national self-identity (Pauliny, 1947, p. 2). The positive perception of purist activities – often associated in the discourse with the lexemes of struggle (“to fight for the purity of Slovak”, “defenders of Slovak”, “struggle for Slovak”, etc.) – was also supported by rising nationalism and a general resistance to Czech centralism. In 1940, when the *Slovenská reč* was endangered, Jánsky highly evaluated the results of the purists, and in his statistical analysis he indicated which authors and to what extent criticized “barbarisms” (Jánsky, 1940), and this was also an argument for the preservation of the journal.

Interestingly, Jánsky in the introduction stresses that he uses the term purism “without any pejorative attribute”, but in the next lines he says: “However, one should have in mind a linguistic purism that is healthy, uncolored by any side, unscientific tendencies, i.e., a purism that is only helpful to the standard language” (Jánsky, 1940, p. 5). This indicates that criticism of

purism already existed in this period. The emerging ambivalence was, however, only a transitory state in the movement of the pendulum to the opposite – anti-purist – side.

### 2.3. Prescriptivism and Purism as a Forbidden Ideology (1<sup>st</sup> Half of the 1960s)

A sharp reverse occurred after the Second World War, when everything associated with the interwar Republic was politically condemned, and interwar purism was associated with the fascist and separatist movement of the Slovak State (1938–1945). Purism was perceived as negative and harmful, and in the political context of the 1950s, it was labelled as a manifestation of bourgeois nationalism and chauvinism (Peciar, 1949–1950; Horecký, 1990, p. 259; Múcsková, 2017b), which was also politically sanctioned. Thus, purism ceased to be part of a linguistics and became part of a political ideology. The politically determined critique influenced perceptions of purism to such an extent that even later protectionist language regulation deliberately avoided the term. This symptomatic understanding of purism can also be seen in the definition of purism in the Slovak *Encyclopaedia of Linguistics* (Mistrík et al., 1993):

**Purism** – a movement for the purification of the stand. language from elements of foreign origin; it mainly affects vocabulary and phraseology. In the development of languages, purism appears especially in socio-political conditions when a nation feels threatened in its self-existence [...]. Such a situation arose during the first Czechoslovak Republic. The struggle for the purity and preservation of the peculiarity of Slovak was escalated in the discussions on the first *Rules of Slovak Orthography*, which, in the spirit of the false concept of a unified Czechoslovak nation and language, promoted elements and variants identical to Czech. Slovak linguistic purism was mainly targeted against the Czech borrowings [...]. Some traces of purism could be observed to a small extent even later.<sup>13</sup>

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<sup>13</sup> **purizmus** — hnutie za očistu spisovného jazyka od prvkov cudzieho pôvodu; zasahuje hl. slovník a frazeológiu. Vo vývine jazykov sa p. prejavuje najmä v takých spoločensko-politických pomeroch, v kt. sa niektorý národ cíti ohrozený vo svojej samobytnosti [...]. Takáto situácia vznikla aj v podmienkach prvej ČSR. Boje za čistotu a zachovanie svojráznosti spis. slovenčiny sa vyostřili v diskusiách o prvých Pravidlách slovenského pravopisu (1931), v kt. sa v duchu falošnej koncepcie jednotného čs. národa i jazyka podporovali prvky a varianty zhodné s češtinou. Slovenský jazykový p. bol namierený hl. proti preberaniu slov z češtiny [...]. Pravdaže, isté stopy po p. bolo možné sledovať v malej miere aj neskôr.

The rejection of purism brought a new period of conscious and politically controlled convergence of Slovak with Czech and, consequently, a prescription supporting the convergence under the conditions of a common state and social bilingualism, which “rejected the rejection” of bohemisms. As in the interwar period, the convergence of Slovak and Czech was declared to be necessary, especially in the field of new vocabulary and terminology, but also beneficial for smooth communication in a common state (Bělič, 1962, p. 388). These “efforts” developed to political pressure after the adoption of the Constitution in 1960 (cf. Múcsková, 2013). In the cultivation of the standard language “for years it was not allowed to say that a certain expression was not Slovak but Czech” (Buzássyová, 1994, p. 328), any delimiting statement could be considered a “remnant” of interwar purism, which could result in the accusation of bourgeois nationalism. As V. Mihálik wrote: “the fear of purism tied the hands of linguists and linguistics gave up its normative role” (1964, p. 9).

The social situation was in many aspects similar to the interwar years – the presence of Czechs in Slovakia, social bilingualism, but also the prestigious position of the Czech language and generally also of Bohemia in the political and economic sphere. Along with the demand for equal status of Czechs and Slovaks in the federation, negative anti-Czech attitudes and nationalistic views began to emerge (Lipták, 2003, p. 311). The tendency of Slovak and Czech convergence began to be perceived negatively among the intelligentsia. The work that was marked by the contemporary ideology of convergence was this time the *Slovník slovenského jazyka* [Dictionary of Slovak Language], which includes Czech innovations to the dictionary entries, but mostly with some pragmalinguistic qualifier (like *literary* or *archaic*) (Jarošová, 2012, p. 258; 2015, pp. 69–73).

#### 2.4. Revitalization of Purism from the Bottom – Discussion about Language and Linguistics in 1964

In the context of social liberalization and release, as well as pro-reform and decentralization efforts of the 2<sup>nd</sup> half of the 1960s, open criticism of the language usage in the media and administration appeared in the weekly popular journal *Kultúrny život* in 1964.

A well-known translator and editor J. Ferencík published an article “Na obranu starých materií” [“In defence of grandmothers”] (1964) – where he

criticized a “bad language culture”<sup>14</sup> in official and public communication, bad standard language competence of the intelligentsia, and excessive borrowing of Czech expressions and phrases. Critique was also addressed to the authors of the *Slovník slovenského jazyka* and also to linguists for passively accepting these bohemizing innovations. For today’s reader, the article might seem to be not very much different from other articles focused on language criticism, but historically, it was the first manifestation of these opinions that appeared after “years of silence”. This was probably one of the reasons why the article motivated a wide public discussion about language cultivation and prescription as well as about the role of linguistics in language regulation.<sup>15</sup>

An interesting feature of the discussion was that critics were not linguists, but intellectuals from the literary circles, editors, translators, teachers and also ordinary people. A majority of linguists vindicated the high variability and plenty of bohemisms and slang expressions in public texts. They explained it by natural and spontaneous consequences of the dynamic development of the society in the new conditions and the convergence policy. They defined their role just to register, describe the development of language, but not to intervene in it – under the slogan “unhindered development of the language” (Peciar, 1964). On the other hand, these were non-linguists who criticized the state of standard Slovak in the public sphere, which they evaluated as bad and endangering the identity of the Slovak language. They also criticized linguists for accepting this state and ceasing to regulate the language and protect its “purity”. The linguists were accused of “fear of purism”. Non-linguists stressed the necessity of linguistics regulation and purification of the language and demanded a new theory of language cultivation and prescriptive linguistics, or even “new – moderate – purism” (e.g., Mihálik, 1964). Moreover, the majority of proponents of purism claimed (also with regard to the political context of the 1960s) that the protection of lan-

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<sup>14</sup> The term “language culture” has several meanings in Slovak linguistics; it competes or is identified with the term “culture of language”, which usually refers to the result of language cultivation. In the context of prescriptive linguistics, the term “language culture” refers to the state or level of language use, usually in terms of conformity with the codified form of the language (for the terminology, cf. Král, 1988).

<sup>15</sup> During the discussion – in May–October 1964 – there were more than 30 published articles and according to the editor more than 40 stayed unpublished. The whole discussion has been republished in a separate book entitled „*Pri zelenom stole: Naša reč*” [“At a green table: Our language”] (Múcsková & Vrábľová, 2014).

guage and language prescription is not purism. That is why we characterize the demand of new prescriptivism as “hidden” or “moderate” purism (see Múcsková, 2015).

## 2.5. Golden Age of Slovak Prescriptivism – 70s and 80s of the 20th Century

In the 2<sup>nd</sup> half of the 1960s, a new theory of standard language was built and presented in the so called *Tézy o slovenčine* [*Theses about Slovak*] (Ružička, 1967a), which stressed the independence of the Slovak language and its development, and stated “criteria of standard correctness” (Ružička, 1967a; 1967b) as objective rules for assessing language items as “correct” or “incorrect” from the official codification point of view. Its author, Ružička, also prepared and published the first proposal of *Language law* (1968) focused on protection of Slovak as an independent language. This turn in language policy reinforced the authority of prescriptive linguistics and revived the purist, mainly anti-Czech, approaches to the language regulation. In the 1970s and 1980s, prescriptive linguistics was a significant and prestigious field in linguistics. Since 1967, a journal *Kultúra slova* [*Culture of Word*] – a journal for language culture and terminology – started to be published, bringing prescriptive articles (or descriptive but aimed at prescriptive recommendation). It had and still has sections like *Miscellanea*, *Language Counselling*, *You were asking*, *New expressions*, etc. In 1971, in the Ludovít Štúr Institute of Linguistics, the department of Language Culture and Terminology was established, which provided a language consultation service for the public, regular educational radio programmes and articles in newspapers and journals called *Jazykové okienko* [language window = ‘note about language’].<sup>16</sup> Very popular were publications that presented lists of incorrect and correct words, with a symptomatic titles: *A thousand advices from the standard Slovak*, *Dictionary of incorrect and correct words*, *Language consultation centre answers*, and others. The media – television, radio, newspapers – had language correctors and also instructors providing regular courses on the correct use of language and correct pronunciation.

Overall, there was a predominance of structural descriptive linguistics. This became not only a basis for knowing the real state and the language structure, but its role was also seen in serving as a base for prescriptive deci-

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<sup>16</sup> It is still quite a popular genre in which authors point to a particular example of “frequent mistakes” made by people when using Slovak.

sions and codification. Variants or new items were assessed according to their correspondence with the described structure. The criterion of frequency or productivity was only secondary. If an expression considered “incorrect” was used frequently, there were equally frequent instructions about its incorrectness. Rather than reconsidering its negative evaluation, linguistic prescriptivism introduced the term *návratné chyby* [recurrent mistakes].

These prescriptive activities were accepted and highly valued by the public; moreover, even the linguistic community considered this field prestigious. In contrast to foreign definitions of prescriptivism, the definition in the Slovak *Encyclopedia of Linguistics* (1993) defines prescriptive linguistics as a branch of linguistics; control of compliance with prescriptive rules, including linguistic criticism, is not only part of, but also the task of linguists:

**prescriptive linguistics** – branch of linguistics that seeks to develop guidelines, regulations for the use of language in social communication, to produce normative and codification manuals. The basis of p. l. is the theory of standard language, which is grounded on such basic concepts as system, norm and usage, as well as on the sociological knowledge of language use. [...] Prescriptive manuals and guides are prepared and published by certain teams, usually within a scientific institution of a national character, which controls their compliance. [...] <sup>17</sup> (Mistrík, 1993).

## 2.6. The Decline of Prestige in the New Conditions at the Turn of the Centuries

A characteristic feature of purism and prescriptivism is that they persist for a longer time even after the specific circumstances that conditioned their emergence and blossoming into a “golden age” have passed. They remain – as historical tradition – part of the culture of a society and its linguistic ideologies. For this reason, the remnants of anti-Czech purism and language regulation in Slovakia are also encountered in contemporary approaches to language and in the reflection of language dynamics both in linguistics and in society (Múcsková, 2017a, p. 44).

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<sup>17</sup> **preskriptívna lingvistika** – odvetvie jazykovedy usilujúce sa vypracúvať smernice, predpisy na používanie jazyka v spoločenskej komunikácii, spracúvať normatívne a kodifikačné príručky. Základom p. j. je teória spisovného jazyka opretá o také základné pojmy, ako je systém, norma a úzus, ako aj o sociologické poznatky o používaní jazyka. [...] Preskriptívne nástroje, pomôcky vypracúvajú a vydávajú, resp. aj kontrolujú ich dodržiavanie isté kolektívy, obyč. v rámci vedeckej inštitúcie národného charakteru. [...].

However, a more significant decline in the prestige of prescriptivism can be observed in the late 20<sup>th</sup> and early 21<sup>st</sup> centuries. Under the influence of the developing sociolinguistics and pragmalinguistics, the perception of language variation and dynamics is changing: they are no longer viewed as disruptive phenomena that need to be regulated or eliminated. On the contrary, they are accepted as a natural part of language modernization, and a functional and frequency perspective is preferred in their assessment. A significant factor in the preference of the criteria of functioning and frequency was the emergence of corpora and corpus databases, which became a source for research of real, natural language use.

The change of paradigm in linguistics and the focus on communication and parole was again accompanied by discussions and polemics about the adequacy of traditional linguistic prescription and the need for a new more liberal codification (or even about its total “needlessness”). As Ondrejovič wrote, “the differences of opinions on language and its research are evidenced in every volume on standard language and language cultivation that has been published in this country so far” (2008, p. 213).<sup>18</sup> In Slovak linguistics, there have gradually profiled groups of linguists with a “sociolinguistic” or “normativistic” approach to language cultivation (Ondrejovič, 2008, p. 214), and alongside the ever-present prescriptive regulatory efforts and the authority of official codification, there appears more and more intensively the “critique of linguistic criticism” (Dolník, 1997).

Due to changes in linguistic attitudes, but also to the emergence of interdisciplinary researches, linguistic prescription has lost its prestigious status. However, this did not mean the end of prescriptivism, but only its liberalization – i.e., the change of the discourse of language regulation from strict commands and prohibitions to recommendations, advices and explanations. However, there is still a Department of Language Culture and Language Counselling Centre, which is contacted daily by language users with

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<sup>18</sup> The most well-known and recent are the conference collections *Spisovná slovenčina a jazyková kultúra* [Standard Slovak and language culture] (ed. Považaj, 1995), *Slovenčina na konci 20. storočia, jej normy a perspektívy* [Slovak at the end of the 20<sup>th</sup> century, its norms and perspectives] (ed. Ondrejovič, 1997) or *Jazyková kultúra na začiatku 3. tisícročia* [Language culture at the beginning of the 3<sup>rd</sup> millennium] (ed. Považaj, 2009). However, these represent only a part of the discussion also taking place in the journal papers and monographs; overall, it can be said that – also due to certain political circumstances and specificities – discussions or polemics have accompanied the development of standard Slovak since its beginnings.

questions about the language correctness. This is documented by the statistics in the table below:

Number of telephone calls and letters answered (some of them rounded) and the total number of contributions to web language counselling

| Language counselling | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Total  |
|----------------------|-------|-------|-------|-------|-------|-------|--------|
| Phone                | 6,000 | 5,000 | 5,000 | 4,000 | 2,500 | 1,400 | 23,900 |
| Email                | 650   | 453   | 638   | 663   | 1,050 | 1,500 | 4,954  |
| Web                  | 5,500 | 5,957 | 6,237 | 6,453 | 6,514 | 6,832 |        |

Picture 2: Summary of the main activities of a research institute (Ludovít Štúr Institute of Linguistics) of the Slovak Academy of Sciences. Period: January 1, 2016–December 31, 2021 ([https://www.juls.savba.sk/attachments/akreditacne\\_dotazniky/dotaznik\\_2016-2021.pdf](https://www.juls.savba.sk/attachments/akreditacne_dotazniky/dotaznik_2016-2021.pdf))

The above statistics show that in society there is still a myth about the necessity of regulating the language and regulatory activities are required by the public or state institutions. Very popular are the regular (daily) radio and TV programs *Slovenčina na slovíčko* [*Let's talk about Slovak*], the popular book *Slovenčina na každý deň* [*Slovak for every day*] published in 2020 became one of the best-sellers on the book market. The prescriptive approach persists in editorial practice, but also in schools. The viability of prescriptivism is also supported by the widespread myth that language is declining, in a bad state, decaying, or losing its purity.

## 2.7. Maintaining Linguistic Prescriptivism Outside Linguistics

As mentioned above, despite the changes in the linguistic approach to language regulation, the belief that there are correct and incorrect language items that need to be eliminated if we want to speak correct standard Slovak still persists in editorial practice and in school education. In these areas, its persistence is supported by the official language policy, which is undertaken within the Ministry of Culture of the Slovak Republic and its Department of the State Language. Its scope also includes the *Act on the State Language* (Act No 270/1995 Coll., adopted in 1995),<sup>19</sup> which has a strongly protective character, strictly requires compliance with the codification and does not allow elements that distort the prescribed norm:

<sup>19</sup> English version is available at: [https://www.culture.gov.sk/wp-content/uploads/2020/02/zakon\\_o\\_sj\\_v\\_anj.pdf](https://www.culture.gov.sk/wp-content/uploads/2020/02/zakon_o_sj_v_anj.pdf)

## 2 State Language and Its Protection

### (1) The State:

- a) shall create appropriate conditions in the educational, scientific and information systems to enable every citizen of the Slovak Republic to master and use the state language in oral and written communications;
  - b) shall create appropriate conditions for scientific research of the state language, research of its historical development, research of its local and social dialects, shall take care of the codification of the state language, and enhancement of the language culture;
- (2) The codified form of the state language shall be approved and published on the basis of proposal of specialised slovakistic linguistic institutes and specialists in the area of the state language by the Ministry of Culture of the Slovak Republic (hereinafter “Ministry of Culture”) on its website.
- (3) Any interference with the codified form of the state language that is contrary to the regularities shall be inadmissible.

Picture 3: Act of the National Council of the Slovak Republic on the State Language of the Slovak Republic ([https://www.culture.gov.sk/wp-content/uploads/2020/02/zakon\\_o\\_sj\\_v\\_anj.pdf](https://www.culture.gov.sk/wp-content/uploads/2020/02/zakon_o_sj_v_anj.pdf))

The *Act* has been criticized by linguists precisely because of its prescriptive nature and inconsistency with the linguistic approach to language and with the “normal cultivation of the standard language” (Dolník, 2009, p. 8). In section 3 of paragraph 2, the authority of codification is strengthened on the level of the law, i.e., that “a political instrument (the law) directly intervenes into the cultivation of the standard language” (Dolník, 2009.; cf. also Dolník, 2004).

As part of its care for the state language, the Ministry controls the observance of the language law, prepares a *Report on the state of use of the state language* every second year,<sup>20</sup> publishes its own regulatory manuals – e.g., a guide *Ako nehréšiť proti slovenčine* [*How not to sin against Slovak*] (Števčková, 1995) containing about 2500 incorrect expressions (mostly long-rejected bohemisms),<sup>21</sup> or *Slovenčina v našom živote* [*Slovak in our life*]

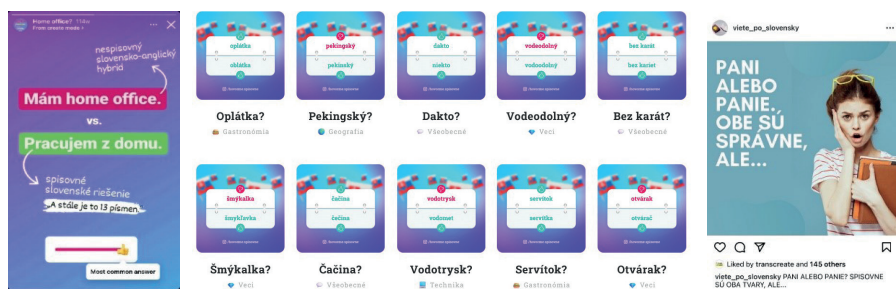
<sup>20</sup> <https://www.culture.gov.sk/posobnost-ministerstva/statny-jazyk-narodnostne-mensiny-a-zahranicni-slovaci/statny-jazyk/spravy-o-stave-pouzivania-statneho-jazyka-na-uzemi-sr/>

<sup>21</sup> The publication was an anachronism at the time of its publication, even in the context of the language prescription of the time. In content and form (it is a list of incorrect expressions and their correct, “pure” variants) reminded the strategies of the purists from

(2020) – and creates its own highly prescriptive database of instructions on standard Slovak.

The second domain in which the ideology of standardism and purism is maintained is the environment of social networks, where discussions about language on various topics are carried out – language correctness, dynamic language phenomena, borrowing from other languages, or bilingual education of children. Thus, an alternative and rather complex “folk linguistics” is being developed, based on the assumption that “[...] it is conceivable that a folk linguistic lens can be applied to any linguistic topic the folk might talk about” (Niedzielski & Preston, 2009, p. 149; according to Albury, 2014, p. 94; about the folk language planning in Slovak context see Múcsková, 2022).

On social networks, there are discussion blogs that focus on language issues or lay language counselling (Cimermanová, 2023; Rusinková, 2020), which resemble those short articles from the interwar period – they do not need argumentation and contains only lists of incorrect expressions mechanically taken from older or more recent linguistic works. Their prescriptive character is also indicated by their titles: *Jazyková poradňa ASAP* [Language counselling ASAP], *Hovorme spisovne* [Let speak correctly], *Máme radi slovenčinu* [We love Slovak], *Viete po slovensky?* [Do you know Slovak?], *Puristický slovník slovenčiny* [Purist dictionary of the Slovak language], etc.



Picture 4: Online prescriptive portals *Hovorme spisovne* <https://www.instagram.com/p/CcaD-TkKG0l/>, and *Viete po slovensky?* <https://www.instagram.com/p/CjV9BQZroUs/>. (according to Cimermanová, 2023, pp. 69–70).

the interwar period. However, due to its distinctly anti-Czech purist character, it has also attracted attention in foreign linguistics – in his contributions, Newerkla points to the unreality of adherence to the prescribed regulations and to the aforementioned persistence of purist approaches to productive units rejected as incorrect by prescriptive linguistics; this contradiction is, from his point of view, also reflected in the teaching of Slovak as a foreign language (2009, 2011).

Folk linguists often replicate the ideologies of standardism and protective purism that have been formed in scientific linguistics before and survive today thanks to widespread myths about the language decline its endangered status. As Ondrejovič states, among the laymen today we meet with a much more pronounced degree of purism than in scientific linguistics: “Purism has lost its position in linguistics in many respects [...], but this does not mean that it has lost this position among the language users” (Ondrejovič, 2020, p. 246). Even Nils Langer and Winifried Davies see it as one of the most significant examples of so-called folk linguistics (2005, p. 1; cit. after Ondrejovič, 2020).

The public acceptance and apprehension of prescriptivism and language regulation – as we have seen it in historical periods of the development of standard Slovak – survives up to the present day. As we have stated above, the prescriptivism undergoes its own “linguistic” development and changes, but this in fact refers only to changes in the linguistic approach to language. However, its current character and approach have not yet penetrated the wider public and cultural consciousness.

### **3. Conclusion**

The development of a language is accompanied by a large complex of factors based on the development of the language community – its political background, culture, thoughts and values. These are often the reasons why the natural dynamics of language is not accepted as an empirical fact but is the subject of evaluation and conscious regulation reflecting the interests and attitudes of language policy and political power. Language ideologies, then, are the tools by which interventions in language are explained as necessary and correct, and which seem to rationalise the promoted principles of language correctness and incorrectness, regardless of whether they are rationally asserted or merely they reflect some desirable fiction.

From the perspective of scientific knowledge of the processuality and complexity of language change, it is clear that “pure” or “natural” language is a construct, as well as the division into “correct” or “incorrect” utterances, words, or forms. The importance of studying the phenomenon of prescriptivism, purism, and anti-purism is therefore not in revealing their (il)legitimacy, usefulness, or harmfulness. They should be accepted as part of the development of language, which accommodates itself not only to communi-

cative needs but also to contradictory cultural and political circumstances, and in its later form carries traces of earlier conflicts and interventions that are subsequently identified as motivations of language changes.

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## The Role of Word-Formation in Signalling Expressivity in News Reporting (A Case Study)\*

**Abstract.** The study examines the effectiveness of word-formation devices in signalling expressivity in television news reporting. The research aims to analyse how expressivity disrupts the objectivity and neutrality of news reporting and what impact it potentially has on recipients. The study is based on Westerståhl's concept of information quality. The research focuses on lexical morphology and examines various types of expressivity, such as the combination of a neutral base with an expressive suffix, diminutives, intensifying prefixation, and conversion of an expressive base. The analysis of television news from 2018 and 2025 revealed that expressivity in television news reporting is generally increasing, but for commercial stations, contextual links to evaluation are decreasing or remaining the same. In contrast, the public television station ČT recorded an increase in both expressivity and contextual links to evaluation. The results suggest that expressive word-formation means are a significant tool that can influence the perception and interpretation of news. The research contributes to a deeper understanding of linguistic mechanisms and their potential for manipulation in media.

**Keywords:** expressivity; word formation; information quality; neutrality; evaluation; television news; prefixation; suffixation; conversion; diminutives.

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## 1. Motivation

The motivation for the case study on the effectiveness of word-formation devices in the media field of television news broadcasting stems from a long-term interest in the devices that have the potential to affect the impartiality of news reporting. The basic aim of the previous research examining linguistic devices in television news broadcasting was the effort to uncover how the informational value of news reports can be disrupted. In the field of media communication, emphasis is placed on objectivity and neutrality, and any deviations from these principles can potentially have a manipulative impact on recipients.

Several projects, which this motivation stems from, have studied different aspects of this problem:

The first project (cf. Jílek & Bednaříková, 2015) focuses on violations of the principles of information quality in television news broadcasting. It is based on Jörgen Westerstähl's concept of information quality, which defines criteria for objective news reporting. The project analyzes which linguistic devices are used to violate these principles and identifies the stylistically marked devices of individual linguistic levels. The goal is to create an analytical tool for evaluating news production and to compare the extent of violations of the principles of information quality among different television stations.

The second project (cf. Jílek, Bednaříková & Svobodová, 2016) analyzes the language of Czech television news anchors, focusing on its compliance with the norms of standard Czech and the principles of objective and neutral news reporting. The study employs functional stylistics and normative media theory to create a taxonomy of linguistic and extralinguistic means that could violate these norms. The analysis relies on phonetic transcriptions and quantitative data from the spoken performances of four anchors. The results reveal specific linguistic habits of individual news anchors and their potential influence on the perception of news. The conclusion summarizes findings on compliance (or non-compliance) with norms and their implications for media communication.

The third project (Jílek, Bednaříková, Horáková, Kopečková, Pitnerová & Zimmerová, 2020) deals with expressivity as a significant means of disrupting objectivity. Media often present themselves as objective, but in reality they use expressive devices to evoke emotions and thus to influence recipients. Expressivity, especially when combined with evaluation, violates

the principle of neutrality and can lead to manipulation. The project examines expressivity at various linguistic levels (phonetic, morphological, lexical, syntactic) and analyzes its occurrence in major news programs. The aim is to create a taxonomy of expressive devices and assess the level of tabloidization of individual television stations.

Building on these ideas, the following motivation examples appear illustrative. Syntactic example: The sentence *Vykradli mu obchod* ('They robbed his shop') shows how the dative *mu* makes it possible to include the content of the statement in the sphere of interest of the person to whom the pronoun refers, thus potentially influencing the interpretation of the event. (on the notion of the so-called loose dative cf. Bednaříková, 1997). Word-formation example: *Majitelé škodovek poškozených v aféře Dieseldate dosud nebyli odškodněni* ('The owners of Škodas damaged in the Dieseldate affair have not yet been compensated'). The use of the words *majitelé škodovek* instead of *majitelé vozů Škoda* illustrates a word-formation device that, while leading to a linguistic economy, is on the other hand a substandard and colloquial device, potentially expressing a personal relationship to the given car brand.

Having this in mind, the current research aims to focus on word-formation devices and their potential to disrupt the objectivity and neutrality of news reporting. Examining these devices is important for understanding how the media can influence public opinion and how to protect the informational value of news reporting.

## 2. Theoretical Base of the Research

### 2.1. The Role of the News Reporting

News reporting is considered by media organizations to be a product of their own activity. It is regarded as one of the main types of media content, and media organizations aim to achieve the highest possible viewership or readership with their news broadcasts (cf. Jílek & Bednaříková, 2015).

The significance attributed to news broadcasting is evident in the following:

- a) The frequency of television and radio news programs.
- b) The placement of news programs in prime-time slots.
- c) There are specialized news channels (e.g., ČT24, CNN Prima News, etc.).

- d) There are web portals of audio and audiovisual media organizations (e.g., [www.ceskatelevize.cz/ct24](http://www.ceskatelevize.cz/ct24), [www.rozhlas.cz/zpravy/portal](http://www.rozhlas.cz/zpravy/portal), [www.tn.nova.cz](http://www.tn.nova.cz)).

Media organizations present news broadcasting as a reflection of current reality and, in their self-presentation, attribute positive values to it, such as truthfulness, objectivity, and balance. News production is also clearly separated from journalism and narrative production.

## 2.2. Concept of Information Quality

Jörgen Westerståhl's concept of information quality (cf. Westerståhl, 1983) deals with the objectivity of news reporting and defines it using two basic factors: factuality and impartiality. These factors are further divided into sub-aspects.

Factuality is conditioned by three aspects:

- a) Veracity: The report should be accurate and complete, and there should be no comments, evaluations of the event, or drawing of conclusions by the author. It is important to state facts, not to evaluate them.
- b) Relevance: This aspect is twofold: internal, which relates to working with information within the message, and external, which relates to working with information within the entire medium.
- c) Informativeness: The processing of the message should be such that the recipient can easily grasp, understand, and comprehend it. This refers to the clarity of the news message.

Impartiality is conditioned by two aspects:

- a) Balance: If there are conflicting opinions on a given reality, they should be presented in the form of quotations or paraphrases. These opinions should be presented at the same time, ratio, space, and form.
- b) Neutrality: This means choosing expressionally neutral means without expressivity, emotional evaluation, or appeal signs. Any subjective evaluation of reality or drawing of conclusions is a violation of neutrality.

Westerståhl's concept focuses on the process of creating news messages, assumes the conscious realization of intentions on the part of the originator, and is not primarily concerned with the effects the message will have on the recipient. The principles of information quality concern not only lin-

guistic representation but also the type of information, sources, and their use, the organization in the periodical, and proportionality. The approach aligns with Czech functional stylistics (cf. Čechová, Krčmová & Minářová, 2008; Minářová, 2011), which also emphasizes the conscious choice of linguistic means.

It is important to note that these principles apply to the author's sections of text, not to quotations, and that not all aspects directly relate to language. For example, relevance only touches on language marginally in the area of text composition. A violation of neutrality is understood as the use of linguistic means that contain expressive, stylistic, or appeal connotations. Individual linguistic means may violate multiple aspects of information quality.

The study focuses specifically on the linguistic choices made in news production (word-formation), which is why Westerståhl's model is well-suited for this purpose. His concept of information quality provides a clear and structured framework for defining and analyzing objectivity in news reporting. The division of objectivity into factuality and impartiality, with further sub-aspects such as veracity, balance, and neutrality, provides concrete criteria for identifying deviations from objective reporting. This is crucial for the study, as it is examining how expressivity, a potential violation of neutrality, disrupts this objectivity. The concept focuses on the *process* of creating news messages and the intentions of the originator. This aligns well with the analysis of word-formation devices, as these are choices made by the news producers. Nevertheless, we are aware of certain limitations in Westerståhl's theory. News reporting has evolved significantly since then, with the rise of the internet, social media, and 24-hour news cycles. There is also a limited focus on reception: Westerståhl's concept primarily focuses on the production side and pays less attention to how audiences perceive and interpret news. While this aligns with our focus on word-formation, it may be a limitation to acknowledge. Modern media studies often emphasize the active role of the audience. These limits and the broader perspective are then discussed in more detail in the Discussion section (see 5.) of this article.

### **3. Objectives and Methods of the Research**

The research focuses on expressivity in the main news broadcasts of nationwide television stations and builds on previous research that focused on the analysis of public television news and a comparison with the news broadcasts

of commercial television stations. The aim of previous research was also to identify linguistic means of breaching the news reporting norm and to determine the frequency of these breaches (cf. Jílek & Bednaříková, 2015).

The current research aims to:

- a) theoretically elaborate on the issue of expressivity, both evaluating and non-evaluating;
- b) update the taxonomy of the most relevant word-formation devices;
- c) monitor pragmatic connections in the use of expressive means in TV news and evaluate their potential ability to influence viewers;
- d) investigate the potential effects resulting from the interaction of expressivity and evaluation, either in direct connection or when using expressivity as a supportive means of evaluation in the immediate context;
- e) compare the data already obtained with completely up-to-date data from the beginning of 2025.

### 3.1. Concept of Expressivity in Lexical Morphology

Expressivity in lexical morphology (word-formation morphology) is defined as the disruption of the systematic correlation between form and meaning within the internal structure of a word (cf. Bednaříková, 2017; Jílek, Bednaříková, Horáková, Kopečková, Pitnerová & Zimmerová, 2020). This disruption is mainly manifested in the relationship between the word-formation base and the word-formation formant. The basic idea is that a neutral combination of a word-formation base and a word-formation formant creates a neutral word, whereas an expressive combination (e.g., an expressive formant with a neutral base or vice versa) creates an expressive word.

Expressivity arises when there is a deviation from the neutral relationship between the base and the formant, leading to the creation of a semantic tension.

This deviation can be caused by:

- a) neutral base + expressive formant: For example, the word *Němčour* ('German' – pejorative), where the neutral base *Němec* ('German') is combined with the expressive formant *-our*.
- b) expressive base + neutral formant: For example, the word *třískot* ('bang'), where the expressive base *třísk* is combined with the neutral formant *-ot*.

- c) expressive base + expressive formant: For example, the word *chlastoun* ('drunkard') where the expressive base *chlast* is combined with the expressive formant *-oun*.
- d) Conversion that can also contribute to expressivity if it involves a transition from an expressive word to another word class. This typically involves nouns and adjectives formed by conversion from expressive verbs, e.g., *nacpané*, *vybydlená* ('stuffed', 'crammed'). Even if the formant itself (i.e., change of inflection) is neutral, it creates a whole with an expressive charge when combined with an expressive base.

### 3.2. Research Questions

The research focused on the following questions:

#### I. Which Means of Word-formation Expressivity Appear to be Relevant?

This question is key because it identifies specific mechanisms by which expressivity is created in language at the level of word formation. The previous research shows that expressivity arises not only at the lexical level but also in the processes of word formation (cf. Jílek, Bednaříková, Horáková, Kopečková, Pitnerová & Zimmerová, 2020). The justification emphasizes that expressivity is due to a disruption of the systematic correlation between form and meaning within the internal structure of a word, particularly in the relationship between the word-formation base and the formant. Therefore, it is important to investigate which specific combinations of bases and formants are most relevant for expressing expressivity. Furthermore, it is crucial to determine which word-formation means are most frequently used in contemporary language and what their stylistic and pragmatic functions are. For example, how often do diminutives appear in contemporary news reporting. Answers to this question can contribute to a deeper understanding of the mechanisms by which language expresses itself and how expressivity changes within it.

#### II. Are Expressive Word-formation Means Combined with Evaluative Ones?

This question explores the interrelationship between expressivity and evaluation in language. Expressive means often carry an evaluative element, either directly or indirectly through context. The combination of expressivity and

evaluation has a strong conative potential, which can influence the attitudes and behaviour of the recipient. Therefore, it is important to examine how these mechanisms are applied in this type of discourse, namely media news reporting: for example, whether expressivity and evaluation are intentionally combined in media texts to achieve persuasive or manipulative goals. Thus, from the perspective of information quality, the connection of expressivity with evaluation in the reporting style is problematic. Answers to this question will help us better understand the influence of language on people's thinking and actions and uncover potential manipulative techniques.

### 3.3. Research Sample

The research sample for the analysis of expressivity in news reporting consists of video recordings of the main television news from four nationwide television stations: ČT (public service), Nova, Prima, and BARRANDOV (commercial). The first ten-minute segments of the news broadcasts were analyzed. A total of 28 main news broadcasts were recorded, i.e., seven video recordings for each station.

The original 2018 sample of TV news broadcasts was reprocessed and confronted with a new, absolutely up-to-date sample of TV news broadcasts from January 2025. The same principles (number of days, number of minutes, etc.) as in the original sample were used for this newly created and processed sample.

General characteristics of the sample: The news broadcasts in ČT (public TV station) are the longest, with detailed supplementary information, including statistical data and commentaries. In NOVA, the speaking time of anchors and reporters made up to two-thirds of the total length of the broadcast. There were minimal live reports, with more of a focus on visuals with commentary. Also in PRIMA, the speaking time of anchors and reporters reached two-thirds of the total length. In BARRANDOV, the broadcasts were the shortest, and their length varied. There were no live reports, all the reports were prepared.

The selection of the first ten minutes reflects the assumption that media institutions rank topics by importance, from the most important to the least important. As far as the saturation of news reports is concerned, the first ten minutes should contain the most important information and supplementary data. It is assumed that the importance of events correlates with the pre-

ferred method of selecting and framing individual topics, and thus the selection of linguistic means.

This approach was used to supplement the most current data from January 2025 for comparison with a previously analysed period. This ensures the relevance and currency of the research findings.

## **4. Analysis of the Collected Data**

### **4.1. Selection of Relevant Word-formation Devices**

The analytical part of this article focuses on the identification and analysis of expressive linguistic means in the area of lexical morphology (word-formation). For the purposes of this research, a taxonomy was compiled that takes into account the different ways in which expressivity manifests itself in the structure of a word. This taxonomy includes the following categories:

- Neutral word-formation base + expressive suffix;
- Expressive word-formation base + neutral suffix;
- Hybrid derivation / hybrid composition;
- Diminutives;
- Augmentatives;
- Intensifying prefixation;
- Expressive word-formation base + (neutral) change in morphological characteristics (conversion).

Although the taxonomy offers a broad view of the potential sources of expressivity in lexical morphology, for a deeper analysis in this article, I focused on the four most relevant items:

- 1) Neutral word-formation base + expressive suffix: This category is crucial because expressive suffixes are one of the main means of expressing expressivity in word-formation. As the sources state, Czech has an extensive set of expressive suffixes that have the ability to modify the meaning of a word and add an emotional or evaluative charge to it. Examples of such suffixes are *-och*, *-ouch*, *-oš*, *-ouš*, *-áš*, *-ejš*, *-as*, *-ou*, *-out*, *-our*, *-oun*, *-oň*, *-áč*, *-ák*, *-izn(a)*, *-ajzn(a)*, *-isk(o)*, etc. (Zima, 1961; Grepl, 1967; Mališová, 2005; Hradilová, 2015). Analysis of this category allows us to observe how neutral words acquire expressive meaning through the addition of an expressive suffix.

- 2) Diminutives: This category is relevant because diminutives are traditionally considered a means of inherent expressivity. Diminutives often express the speaker's emotional attitude, such as tenderness, kindness, or familiarity. In the context of news reporting, diminutives can be used to mitigate the seriousness of some topics or to create a closer relationship with the audience. It should be noted that in addition to expressing smallness, diminutives can also express the intensity of evaluation (on diminutives in Czech, see Rušínová, 2001).
- 3) Intensifying prefixation: Prefixation is a very common word-formation means, especially with verbal bases. Some of the prefixes can have, in addition to spatial meanings, a modal or evaluative meaning. Thus, the action of the given verb is strongly intensified. In the context of news reporting, intensifying prefixation can thus become a means of highlighting the meaning and impact of certain events.
- 4) Conversion of an expressive word-formation base: Conversion is a word-formation process in which the morphological characteristics of a word change, i.e., the inflection changes and usually also the part of speech (for the concept of conversion, cf. Štekauer & Lieber, 2006; Bednaříková, 2009; Manova, 2011). In this case, the research focuses on cases where the word-formation base is expressive and a new word is created by conversion. Although this is not a fully established word-formation process in Czech linguistics, it is very interesting in the context of expressivity. Thus, the analysis of conversion can reveal new ways in which expressivity appears in language.

The selection of these four items is motivated by their importance for the expression of expressivity in Czech and their frequency of occurrence in news texts. The other categories, while theoretically relevant, appeared less frequently in the analysed material, and therefore the research does not focus primarily on them in this article. The analysis of these four selected categories thus provides a comprehensive and representative view of expressivity in the area of lexical morphology in the context of television news reporting.

#### 4.2. Processing of the Data

The processing of the acquired data focused on the quantification and analysis of the occurrence of expressive means in television news, with an emphasis on total occurrence, average occurrence per minute, and contextual

relation to evaluative means. For clarity, the results were presented in graphs and the final comparative table.

The data processing can be summarized in the following points:

- a) Total occurrence of the means: For each observed expressive means, the total number of occurrences in the analysed sample was recorded, which was 70 minutes for each television station. This data provides a basic overview of the frequency of occurrence of a given means in the entire analysed sample.
- b) Average occurrence of a means per one minute: To compare the frequency of occurrence between different television stations and to account for the different lengths of the analysed segments, the average occurrence of each observed means per one minute was calculated. This data was obtained by dividing the total number of occurrences of a given means by the total length of the analysed sample.
- c) Contextual relation to the evaluative means: For each occurrence of an expressive means, it was monitored whether it was in context with any evaluative linguistic means within the utterance. If so, this occurrence was recorded separately. In this way, it was determined how often expressive means appear near evaluative expressions, which may indicate deliberate influencing and manipulation of the given information. These data were also summarized and recalculated to average occurrence per minute.
- d) For the evaluation of the frequency of occurrence, three bands of average occurrence of units per minute of news broadcast were used:
  - Units with a high frequency of occurrence (average occurrence of 1.00 and higher);
  - Units with a lower frequency of occurrence (average occurrence in the range of 0.11–0.99);
  - Units not used or used exceptionally (average occurrence in the range of 0.00–0.10).

This method of data processing made it possible to compare the frequency of occurrence of expressive means on different television stations, identify the types of expressive means that are most frequent in news, and determine how often expressive means appear in context with evaluative expressions, which may indicate violations of the principles of information quality. In addition, this method allowed to compare two different time periods, namely mid-2018 and early 2025, which provided completely fresh data.

### 4.3. Results and Findings

The following analysis of the relevant means is captured in the charts and in the subsequent comments, each located below the respective chart. The charts are numbered according to the taxonomy of the most important expressive devices in the lexical-morphological plan (word formation) presented above.

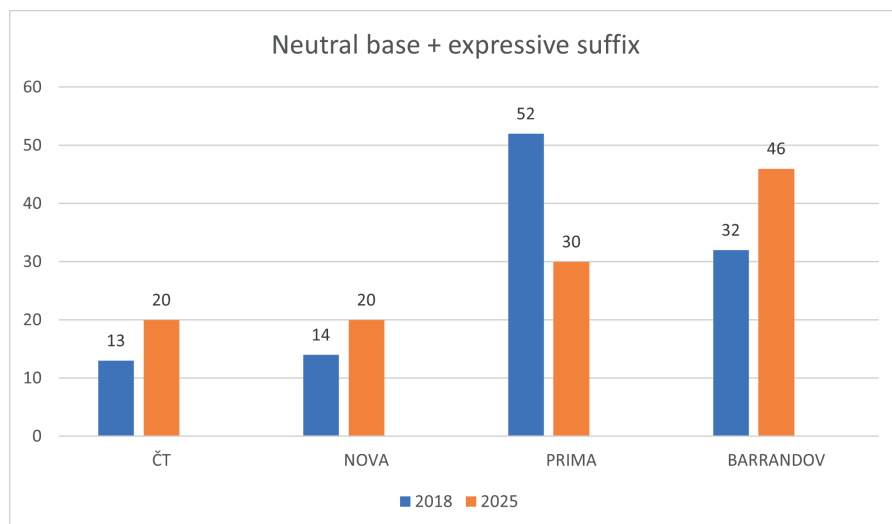


Figure 1. Neutral base + expressive suffix

The first section of the taxonomy focused on the combination of the neutral word base and the main word-formant, which is the expressive suffix. Alternation as one of the word-forming co-formants also plays a role here.

As seen in Figure 1, in 2018 the TV stations ČT and NOVA used far fewer expressives resulting from this word-formation process than PRIMA and BARRANDOV. PRIMA had the highest number of such expressions, both in absolute number and (as seen below) in terms of occurrences per minute of the session. The most frequent expressive suffix was the word-formation suffix *-ák*. This suffix has a dual role: on the one hand, it denotes the agent of the action, such as a *strašák* ('scarecrow'), or *zabiják* ('killer'), on the other hand, it functions as a suffix in univerbizations such as *řidičák* ('driver's license'), *věžák* ('high-rise building'), where a certain degree of expressivity is due to the substandard or colloquial nature of the univerbized expression.

On the other hand, the most recent data showed an increased number of cases of this type of expressivity at all TV stations, except for PRIMA, where the number of uses of possessive suffixes decreased significantly. In addition to the inherently expressive suffix *-ák*, e.g., *parták* ('buddy'), *sedmák* ('seventh-grader'), the univerbization suffix *-k(a)* was often used, e.g., *matikářka* ('female math teacher') or *sociálka* ('social security office').

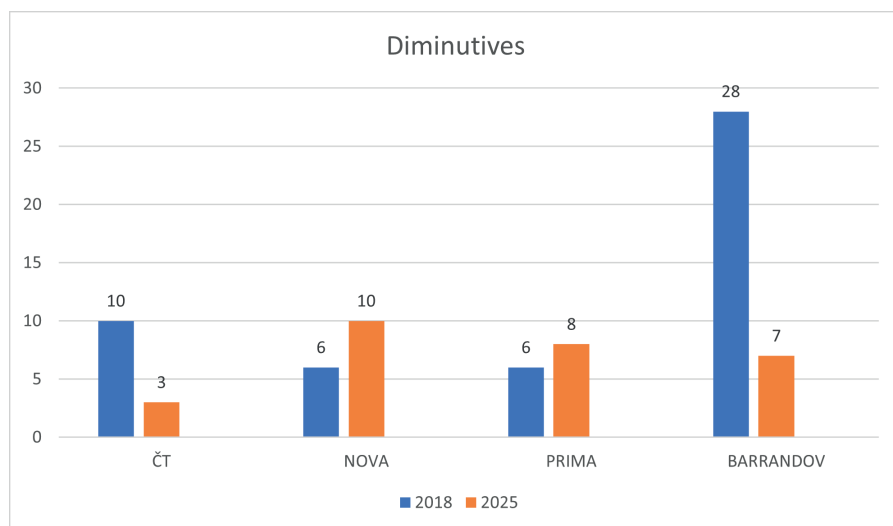


Figure 2. Diminutives

Diminutives, which are usually evaluated in dictionaries as expressive, either by denoting quantity (smaller size) or an emotional relationship to the object, were not particularly used. As seen in Figure 2, a greater number was recorded only at TV BARRANDOV. Mostly there, the participants of an event (*holčička*, *Kamilka*, *dcerka*, 'little girl', diminutive form of *Kamila*, 'little daughter') or things (*kyblík*, *vlaječka*, 'little bucket', 'little flag') were marked with a diminutive. The marking of persons was always about engaging an emotional relationship or simulating one (and thus arousing interest in the event), whereas the things were usually of a really minor dimension.

The most recent data shows a noticeable decline in the use of diminutives, the exception being the PRIMA station.

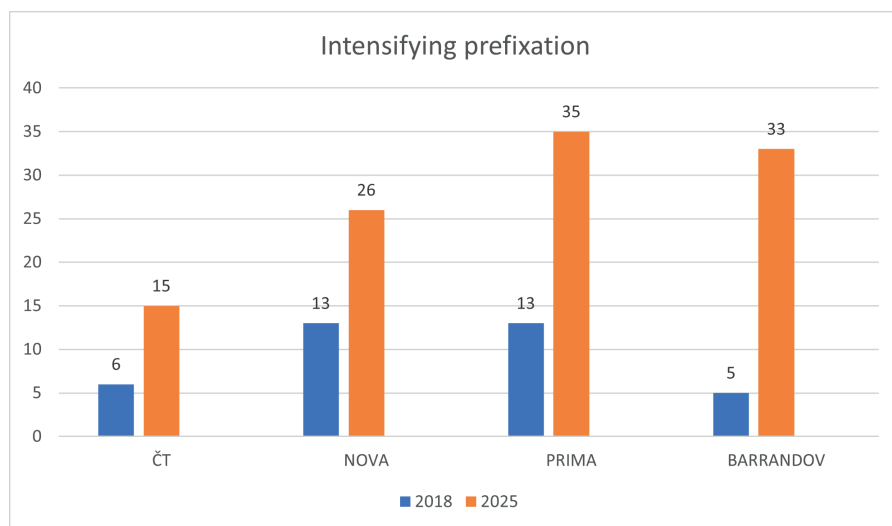


Figure 3. Intensifying prefixation

The strategy in the use of intensifying prefixes has undergone a very interesting development during the period under review. Prefixation is a very frequent word-formation device, especially for verb bases. Some of the prefixes can have a spatial meaning, a manner meaning, or even an evaluative function. Thus, the action of the verb is strongly intensified.

In 2018, there were not many cases, e.g., the modal connotation by *zabydlet se*, *nahánět*, *pochytat* ('to settle down', 'to chase', 'to catch') or evaluative meaning of *zapršet* ('to rain heavily'). Some of these verbs with intensifying prefixes appeared in the context of evaluative adjectives or phraseologisms, thus increasing their evaluative expressiveness in the context.

In contrast, in the current year 2025, the number of cases in which this intensification tool was used increased quite significantly, and this is the case for all television stations, even very clearly for public television (e.g., *oči je zažalují*, 'their eyes will denounce them' – ČT1, *doběhla ho nervozita*, 'nervousness overtook him' – NOVA, *vrhnout se po hlavě a zabojet*, – 'to throw oneself headlong and fight' – PRIMA, *dopřávat si zaslouženého klidu*, 'to enjoy well-deserved peace' – BARRANDOV).

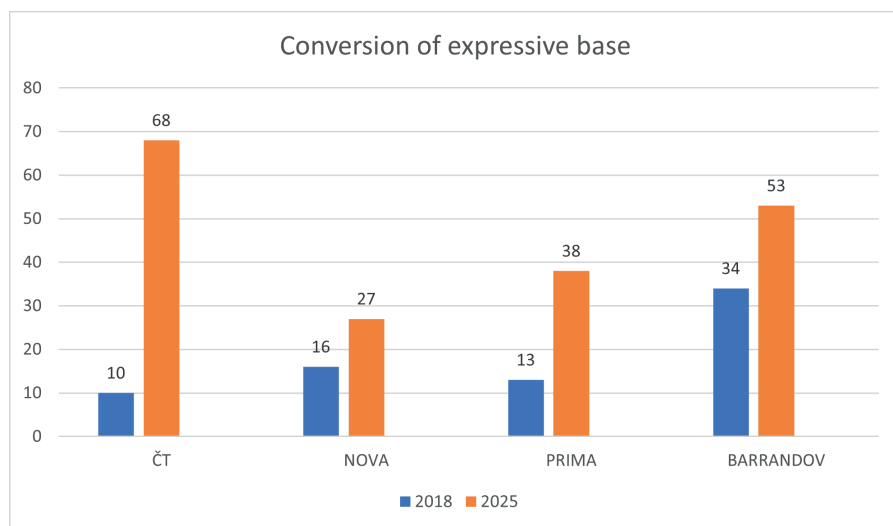


Figure 4. Conversion of expressive base

This type of expressivity is not often mentioned. The point is that the word-formation base is expressive, but the main word-formation formant, which is a change in morphological characteristics, i.e., a change in inflection and usually a change in word class, cannot itself be expressive. Thus, the main word-formant is neutral, the co-formant could be an alternation, but it is not relevant here.

Analysis of the data collected in 2018 shows that television stations generally avoid using explicitly expressive word-formation bases, even in the case of conversion, where the creation of new expressive words would be obvious. Expressivity in words generated by conversion was rather low across all news broadcasts. Cases of conversion combined with expressivity and evaluation appear more frequently only on TV BARRANDOV. Here, converted words with an evaluative aspect are often found near another evaluative means. Examples include words like *nacpané*, *vybydlená*, and *rýpnutí* ('stuffed', 'un-inhabited', 'jab').

However, new data from the year 2025 show a significant increase in the use of expressive word-formation bases for conversion into other parts of speech. This process preserves the original meaning and especially the expressivity. The increase is significant even in public television ČT, where the

number of cases increased from the original 10 to 68. Overall, it seems that even though in the past television tended to avoid expressive word-formation bases in conversion, new data suggests that this trend is changing and conversion with expressive bases is starting to be used more often, even in public broadcasting (e.g., *oči žalující*, ‘eyes accusing’ – ČT1, *hajlování*, ‘hailing’ – NOVA, *pošilhávání*, ‘snooping’ – BARRANDOV).

It is important to realize, however, that conversion as a word-formation process is still debated in Slavic linguistic environments and is not always recognized as a full-fledged word-formation process (cf. Bednaříková, 2009).

| TV station<br>blue: 2018<br>orange: 2025                                                                        | ČT           | NOVA         | PRIMA        | BARRANDOV    |
|-----------------------------------------------------------------------------------------------------------------|--------------|--------------|--------------|--------------|
| Average occurrence of word-formation expressive means per one minute                                            | 0,41<br>1,51 | 0,70<br>1,19 | 1,20<br>1,59 | 1,41<br>1,99 |
| Average occurrence of word-formation expressive means contextually bound to the evaluative means per one minute | 0,16<br>0,31 | 0,49<br>0,53 | 0,66<br>0,51 | 0,83<br>0,56 |

Figure 5. Average occurrence of word-formations in TV stations under analysis

Data from 2018 and 2025 in Figure 5 regarding expressive word-formation means in television news show significant differences:

According to the data from 2018 (blue numbers), the average occurrence of word-formation expressive means per minute of news broadcast increased in the following order: ČT, NOVA, PRIMA, and BARRANDOV. The same trend was observed for the average occurrence of all expressive means contextually bound to evaluative means per minute of news broadcast: BARRANDOV showed a relatively high contextual binding to evaluation, while ČT and NOVA had low binding to the immediate environment.

Data from 2025 in Figure 5 (orange numbers) document that all TV stations saw an increase in the average number of expressive word-formation means per minute. This suggests an overall trend towards greater expressivity in television news.

The contextual binding of expressive means to evaluative means per one minute of news broadcast either remained the same or even decreased at

commercial television stations. This means that even though more expressive means are being used, they may not necessarily be linked to explicit evaluation.

A significant difference was noted at the public television station (ČT): the contextual binding to evaluative means (mostly evaluative adjectives and phraseologisms with evaluative potential), on the contrary, increased. This increase may be related to the public television station's effort to gain more viewers in the competitive environment of television stations (see phraseologisms as *jako třešnička na dortu*, *jako na houpačce*, *to je ve hvězdách*, *jede na plné obrátky*, *roztrhl se pytel*, 'like a cherry on top', 'like on a swing', 'it's in the stars', 'it's running at full speed', 'the floodgates opened').

#### 4.4. Summary of Comparative Observations

While in 2018 it was true that with the increase in expressiveness, the contextual binding to evaluation also increased, in 2025 this relationship changed. The increase in expressivity in 2025 is a general trend across all stations, but at commercial television stations, it is not accompanied by a corresponding increase in contextual binding, or this binding even decreased.

The public television station stands out in 2025 because not only did expressivity increase, but also the contextual binding to evaluation, suggesting a possible change in the strategy for presenting the news.

In conclusion, the data from 2025 show a significant shift in the use of expressive word-formation means in television news. While in 2018 it seemed that higher expressivity was associated with more explicit evaluation, in 2025, expressivity is generally increasing, but contextual binding to evaluation at commercial stations, on the other hand, is decreasing or staying the same, while the public television station is also increasing contextual binding, which may be a result of the effort to gain a larger number of viewers and attract their attention.

### 5. Discussion

Beyond Westerståhl's focus on objective reporting, framing theory (e.g., Entman, 1993) emphasizes how news outlets select and present information, highlighting certain aspects while downplaying others, which can significantly influence audience perception. The use of expressive word-formation

devices can be seen as a framing technique. For instance, the choice to use diminutives like *holčička* ('little girl') might frame a news story to evoke sympathy and highlight a child's vulnerability, shaping how the audience perceives the event.

Critical media studies emphasize the role of ideology in shaping news content. Ideology refers to the underlying beliefs and values that influence how news is produced and interpreted. Expressive language can be a powerful tool for conveying ideological perspectives. The differing trends between public and commercial television stations in our study might reflect different ideological orientations. For example, the greater increase in expressivity and evaluative language at the public station ČT could be interpreted in light of changing public service broadcasting philosophies or the need to compete in the media market.

The current media landscape is often characterized by increased political and social polarization. Expressive language can contribute to this polarization by reinforcing in-group/out-group distinctions and appealing to emotions rather than reason. The use of expressive suffixes to create "us vs. them" language could be analyzed in the context of political debates covered by the news. For instance, the suffix *-ák* used in words referring to opposing political groups can contribute to a polarized discourse.

As far as social media amplification is concerned, news is increasingly consumed and shared through social media platforms. This has led to the amplification of expressive language, as emotional and evaluative content tends to be more engaging and shareable. The expressive word-formation devices can be easily extracted from news reports and shared out of context on social media, potentially distorting the original message and intensifying its emotional impact. For example, a short, expressive phrase containing a pejorative suffix can quickly spread and generate strong reactions.

The rise of citizen journalism and user-generated content has blurred the lines between traditional news and personal expression. Expressive language, common in everyday communication, is increasingly finding its way into news-like content. While our study focuses on professional news broadcasts, it is worth noting that the trends we identify might be even more pronounced in user-generated content. Diminutives and intensifying prefixes, for example, are common in informal communication and might be prevalent in citizen videos or social media posts about news events.

## 6. Conclusions

The research questions appeared to be relevant for contemporary research because they focused on a dynamic and complex aspect of language that significantly influences communication, interaction, and the construction of meaning. Research on expressivity and evaluation at the level of word-formation contributes to broader linguistic knowledge and develops theories about language mechanisms. Knowledge of these mechanisms has practical applications in the field of media analysis, political communication, advertising, and education.

In short, this research proved to be relevant because it focused on the basic building blocks of expressivity in language, at the level of word-formation and its relationship to context bound evaluation. By examining these processes, we can better understand how language expresses emotional and evaluative attitudes, and how these expressions influence communication and the perception of the world.

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**On the Encoder's Perception of Occurrences:  
A Parallel Corpus-based Study of Transposed Tense Usage  
in *Kolymskie rasskazy* by Varlam Šalamov and *Sumchi*  
by Amos Oz and Their Hebrew and Russian Translations**

**Abstract.** This study focuses on the comparative analysis of verb tense meanings in Russian and Modern Hebrew. Despite belonging to different language families, both languages feature the past, present, and future tenses of the indicative mood,<sup>1</sup> which may indicate a corresponding similarity in meanings. While these forms often objectively reflect real-time relationships, systematic discrepancies are observed between the meanings of verb tenses and their actual uses in each language. To address this, we propose invariant meanings for each tense that will underlie all its uses, including transposed ones. Based on the Columbia School sign-oriented linguistic framework (see Diver, 1981; 1995; García, 1975; Tobin, 1990a, 1995), we focus on verb tense usage in *Kolyma Tales* (*Kolymskie rasskazy*) by Varlam Šalamov (2013) and *Sumchi* by Amos Oz (1978), along with their literary translations into Hebrew (2005) and Russian (2015), respectively. On the one hand, we postulate that the tense systems of both languages share a common semantic content, which relates to the speaker's or writer's perception of actions, states, or events at the moment of speaking or writing. This explains the similarity in tense usage between original texts and their translations. On the other hand, differences in

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<sup>1</sup> While Russian has forms, traditionally categorized as perfective and imperfective verbs, and Hebrew possesses a so-called compound past tense expressing hypothetical or habitual actions in the past, these facts are beyond the scope of this paper.

tense usage are more likely attributed to language-specific communicative strategies – standardized ways of combining invariant meanings to convey particular messages, as described within Columbia School theory.

**Keywords:** invariant meanings; tense; Columbia School; Russian/Hebrew and Hebrew/Russian translations.

## 1. Introduction

There is a significant interest in dealing with translation corpora as empirical semantic data to describe differences and similarities between languages. In literary translation, the objective is generally to communicate the literary message of an original or source text (hereafter ST) using a target language (hereafter TL), producing what is referred to as the target text (hereafter TT). When aligned, ST in one language and its corresponding translation (TT) form a parallel corpus (see Altenberg & Granger, 2002; pp. 7–8; Malmkjær, 1998, p. 539).

The writer's literary intention is reflected by his/her choice of grammatical forms (not necessarily conscious, of course), based on their meanings in a source language (hereafter SL) and the contextual messages that these meanings convey. Setting aside individual stylistic choices, in substance, the translator's task is to match two systems by deciding in favor of one or the other way of expressing the writer's message, based on the inventory of the grammatical forms with their meanings and contextual messages in TL. This leads us to the fundamental question: why does the writer use certain grammatical forms, and why does a translator render them this way?

To explain the use of linguistic forms both in ST and TT, we must determine the basic units of analysis. Contrary to common assumptions, in literary translation, extensive texts – such as books, chapters, paragraphs – and even individual sentences do not constitute primary linguistic data. Columbia School theory (hereafter CS), adopted in this study, considers Saussurean signs and their invariant meanings (Saussure, 1983, p. 67) as basic analytical units, distinguishing them from individual words and sentences. Given its universal or cross-cultural nature, this sign-oriented approach can be applied to any translation analysis (see Sangster 2013, p. 9). Having said this, we must make a reservation that we are not suggesting the existence of language universals, nor are we asserting that languages differ in their formal

structures, merely using different forms to convey the same meaning. On the contrary, we believe that each language reflects a distinct worldview, and therefore, should be studied in its own right. Even so, the fact remains that languages can be compared to establish their similarities and differences.

In our research, we start from Jakobson's premise that "on the level of interlingual translation, there is ordinarily no full equivalence between code-units, while messages may serve as adequate interpretations of alien code-units or messages" (Jakobson, 1959, p. 233). Jakobson introduces the idea of "equivalence in difference" (Jakobson, 1959, p. 233), implying that "translation involves two equivalent messages in two different codes" (Jakobson, 1959, p. 233). In other words, though languages are universally made up of signs, organized into various grammatical systems, we assume that the structure of these systems differs from language to language. Therefore, translation from one language into another is always approximate and consists of communicating equivalent messages by using the signs of individual languages. Then our task will be defining "what unifies and what differentiates the two languages in their selection and delimitation of grammatical concepts" (Jakobson, 1959, p. 234).

This study compares how the category of tense is used in a Russian-Hebrew parallel corpus. For convenience, we use the term 'tense' throughout this paper. However, we claim that neither Russian nor Hebrew verb forms do not inherently express tense in the traditional sense. Rather, we show that what is conventionally referred to as "tense" reflects the speaker's or writer's (hereafter *encoder's*) perception of actions, states, or events (hereafter *occurrences*) at the moment of speaking or writing, regardless of whether these occurrences have actually happened or are yet to happen.

Specifically, our study aims to investigate how shifts (transpositions) in temporal perception of occurrences in ST are conveyed in TT. To do so, we conduct qualitative and quantitative analyses based on a Russian-Hebrew parallel corpus, composed of two STs – Varlam Šalamov's *Kolymskie rasskazy* (*Kolyma Tales*, 2013) in Russian and Amos Oz's story *Sumchi* (1978) in Hebrew – along with their respective literary translations – *Sypurey Kolyma* (2005) in Hebrew, and *Sumxi* (2015) in Russian. English translations are provided for clarity.

The use of parallel corpora is justified by the fact that they contain texts intended to convey equivalent messages. This allows us to establish correspondences of form uses across languages. Based on these correspondences,

we can identify how particular meaningful distinctions are encoded in both Russian and Hebrew.

One might question the representativeness of a corpus composed of only two literary works and their translations. However, it is essential to note that the tense choices analyzed here – made by the authors and translators – encompass a wide range of tense uses that exist in both languages. Therefore, while the corpus is relatively limited in size, it is nonetheless sufficiently representative for addressing the linguistic issues under consideration.

## 2. Russian and Hebrew Tense Systems: Hypotheses

Instead of creating a catalog of temporal functions, we will apply the CS view on language to propose an alternative, sign-oriented analysis of tense uses in Russian and Hebrew. Both languages feature formal distinctions traditionally referred to as past, present, and future tenses of the indicative mood.<sup>2</sup> This similarity in the inventory of tenses may imply a corresponding similarity in their meanings. Based on invariant meanings postulated for each form in the two languages, this cross-linguistic analysis will highlight the similarities and differences in their usage between STs and TTs.

Following Tobin's analyses of Hebrew (1988; 1989; 1990b), we claim that Russian and Hebrew verb tenses represent a semantic interlock of two systems, related to the encoder's "spatio-temporal-existential and sensory-experiential perception of [occurrences] at the 'here-and-now' point of speaking and/or writing" (Tobin, 1990b, p. 464). The meaning or semantic substance of the first system deals with "*whether 'an [occurrence] has been experienced or is/was accessible for manifest' [...] to the senses of the encoder at the point of speaking or writing, i.e., the 'here and now' of the speech act*" (Tobin, 1990b, p. 467, emphasis added). Tobin (1989; 1990b) refers to this deictic system as

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<sup>2</sup> Russian and Hebrew are considered aspect-oriented languages. Therefore, in Russian linguistics, the category of tense is often analyzed in conjunction with the category of aspect, serving as a contextual framework or a prism through which the meaning of the aspect is manifested. For more details, see Forsyth (1970), Knjazev (2007), Maslov (2004), Padučeva (1996), Zolotova (1975, 2002), and Zolotova, Onipenko, and Sidorova (2004). Hebrew features a periphrastic (compound) past tense, formed by combining the past tense of the copula *lyhyot* ('to be') as an auxiliary along with the inflected present tense of the respective verb. Due to space constraints, we will not delve into these subjects in detail unless they are essential for understanding tense usage in ST and TT.

the System of Experience. We hypothesize that in both Russian and Hebrew, the System of Experience has two invariant meanings:

- (a) *Experienced*, meaning that the occurrence has been perceived or experienced;
- (b) *Not-Experienced*, meaning that the occurrence has not been perceived or experienced.

Thus, the meaning *Experienced* will be invariably related to the morphological forms traditionally associated with the present and past tenses in Russian and Hebrew. The meaning *Not-Experienced* will be invariably related to the morphological forms traditionally associated with the future tense in both Russian and Hebrew. The meaning *Experienced* encompasses occurrences directly related to the moment of speech, as well as those that happen regularly or irregularly, including general truths that extend beyond the moment of speech. When the context describes an occurrence unrelated to the moment of speech, the encoder refers to prior experience, emphasizing its relevance to the time of speaking or writing, either because the occurrence is habitual or generally applicable, or because the encoder presents it as already completed, “rather than past time per se” (Sangster, 2013, p. 38), regardless of whether it has actually happened.

When Jakobson (1984, p. 6) writes about the Russian preterite (as he calls the past), he states that “this form expresses, in fact, no particular time, but solely a break in the direct connection between the subject and the action”. Bondarko (1962, p. 31), commenting on Isachenko’s work (Isachenko, 1960, pp. 444–445), argues that both the past and future tenses emphasize a break from the moment of speech, whereas the present tense signifies a direct connection between the subject and the action (Bondarko, 1990, p. 24). We assume that by referring to present occurrences, the encoder does not signal any perceptual distance between these occurrences and the moment of speech or writing. In other words, such references imply that the occurrences are in spatial, temporal, or existential proximity to the encoder. Considering this, we postulate a second system that constitutes an interlock with the System of Experience and distinguishes present occurrences from past and future occurrences in Russian and Hebrew. Following Tobin (1989; 1990b), we call this system the Space-Time-Existence System, whose semantic substance deals with *the placing of an occurrence in relation to its perception by the encoder at the point of speaking or writing* (see Tobin, 1990b, p. 466). In

both Russian and Hebrew, the Space-Tense-Existence Systems have two invariant meanings:

- (a) *Proximate*, meaning that an occurrence is in spatio-temporal-existential proximity to the encoder and invariably related to the morphological forms traditionally associated with the present tense in Russian and Hebrew; and
- (b) *Remote*, meaning that an occurrence is in spatio-temporal-existential distance from the encoder and invariably related to the morphological forms traditionally associated with the past and future tenses in Russian and Hebrew.

Thus, based on the proposed hypothesis, the Russian and Hebrew interlocked systems can be represented as follows:

- (a) references to present occurrences simultaneously signal the meanings *Experienced, Proximate*;
- (b) references to past occurrences simultaneously signal the meanings *Experienced, Remote*;
- (c) references to future occurrences simultaneously signal the meanings *Not-Experienced, Remote*.

It follows from the above that in both languages, the use of tense morphology is determined primarily by the encoder's perception of occurrences at the point of speaking or writing, rather than by their actual real-time realization (though tense uses often reflect it).

### 3. Similarity in Communicative Strategies of Tense Usage between ST and TT

The postulated meaningful contrast is employed in both STs and TTs for various communicative purposes, which are commonly referred to as communicative strategies in CS theory (see Diver, 1995; García, 1975; Reid, 1991). We mean a regular, standardized, or idiomatic combination of a specific meaning with other meanings to convey particular messages. The postulation of communicative strategies represents a tendency towards conformity and the systematic use of linguistic signs. This results from the "pressure"

that a social group exerts “on its own members in the direction of a standardized usage” (Diver, 1995, p. 78), ultimately enhancing communication. The most common communicative strategy involves using verb tenses to reflect objective real-time relationships in both STs and TTs. In this analysis, we will examine examples of the use of tense morphology in both STs and TTs to illustrate additional communicative strategies, all of which are consistently motivated by the postulated invariant meanings.

Moreover, we will statistically evaluate the hypotheses formulated above. Given the postulated similarity of the invariant meanings in both Russian and Hebrew, we expect that the quantitative distribution of forms in STs and their corresponding TTs will *not* show statistically significant differences across communicative strategies.

### 3.1. The ‘Historical’ Usage of the Present Tense

Examples (1)–(2) demonstrate a so-called stylistic or metaphoric use of the present tense to describe past occurrences “as if they *were* being witnessed at the ‘moment of speaking’” (Forsyth 1970, p. 150).

- (1) *V tridcat' sed'mom v Ulan-Batore idëm my po ulice s tovariščem. Vremja obedat'. Na uglu - kitajskaja stolovaja. Zaxodim. Smotrju menju: kitajskie pel'meni.* (Šalamov, 2013, p. 145)

*by-shnat shloshym u-sheva, be-ulan-bator, 'any holekh 'ym haver be-rehov. 'aruhat tsohoraym. ba-pyna – mys'ada synyt. nykhnasym. 'any bodeq 'et ha-tafryt: kysanym synnym.* (Shalamov, 2005, p. 150)

In thirty-seven, in Ulan Bator, I **am walking** with a friend down the street. Lunchtime. On the corner – a Chinese restaurant. We **are entering**. I **am checking** the menu: Chinese dumplings.

- (2) *lyf'amym halamty ba-layla she'esty matsby'a alay pyt'om ba-rehov ve-tso'eget “ganav!” “ganav!” ve-'any nyvhal ve-mathyl lyvroah ve-hy rodefet ve-kulam rodfym, [...] ve-ha-redyfa nymshekhet al-pney mygrashym ve-hatserot, al-pney gderot ve-gruta'ot, hurbot ve-symta'ot, ve-kol ha-rod-fym myt'ayfym ve-le'at-le'at hem mathylym levater ve-lefager me-'ahor, ve-raq 'esty ratsa aharay bly leharfot u-va-sof shneynu levadenu ratsym ve-megyym kym'at yahad le-eyze maqom nydah...* (Oz, 1978, p. 12)

*Inogda po nočam mne snilos', čto, stolknuvšis' so mnoj na ulice, Èsti vdrug ukazyvaet na menja pal'cem i kričit: "Vor! Vor!" Ja v ispuge puskajus' bežat', a ona gonitsja za mnoj, vse ostal'nye brosjutsja v pogonju... – vse begut za mnoj. My peresekaem pustyri i dvory, minuja zabory i svalku, nesěmsja pereulkami, no vot presledovateli potixon'ku otstajut, i tol'ko Èsti bez ustali gonitsja za mnoj, i togda nakonec my bežim tol'ko vdvoëm i počti odnovenno okazyvaemsja v kakom-to tainstvennom meste...* (Oz, 2015, p. 13)

At night sometimes, I dreamed that Esti suddenly **points** at me in the street and **shouts**: "Thief!" "Thief!" And I **am frightened** and **begin** to run away and she **pursues** me and everyone **pursues**, [...] and the pursuit **continues** across lots and backyards, over fences and junkyards, ruins and alleyways, and all the pursuers **get tired** and gradually **start** to give up and lag behind, and only Esti **runs** after me without leaving me alone and in the end both of us **run** and **arrive** almost together to some remote spot...

In example (1), the narrator, who is staying in a Kolyma labor camp, recalls an episode from his earlier life in Ulan Bator, the capital of Mongolia. The memory of Chinese dumplings on the menu forms a sharp contrast with the constant starvation he experiences in the camp. In example (2), the narrator recounts a recurring nighttime dream that reflects his fears, desires, and mainly his infatuation with a girl named Esti.

In both ST and TT, the present tense, meaning *Experienced*, *Proximate*, is used for occurrences that are the most stirring and emotional to the encoder, producing the effect of a live experience.

To assess whether the observed distribution of forms differs significantly between STs and TTs in both translation directions, and given the relatively small sample size, we evaluate the frequency with which the 'historical' present is retained or translated into the past by applying Fisher's exact test.

This test is especially appropriate for 2X2 contingency tables when one or more values are below 10. It determines whether the observed distribution of form usage is likely to have occurred by chance. In our case, a *p*-value lower than 0.05 would indicate that the choice to maintain or shift the 'historical' present is statistically significant and, therefore, it is not randomly distributed.

Table 1 presents the frequency distribution of the ‘historical’ present across STs and TTs in Russian and Hebrew. It shows the number of instances where the ‘historical’ present is preserved between STs and TTs (“Coinciding Use”), and those where different forms are used (“Non-Coinciding Use”).

**Table 1.** Frequency Distribution of the ‘Historical’ Present Across Russian and Hebrew ST-TT Pairs

| Source-Target Pair             | Coinciding Use<br>(‘Historical’ Present) | Non-Coinciding Use<br>(‘Historical’ Present vs. Past) | Total |
|--------------------------------|------------------------------------------|-------------------------------------------------------|-------|
| Russian ST → Hebrew TT         | 71                                       | 7                                                     | 78    |
| Hebrew ST → Russian TT         | 15                                       | 3                                                     | 18    |
| <i>p</i> (Fisher’s Exact Test) | 0.391                                    |                                                       |       |

As shown in Table 1, the *p*-value calculated using Fisher’s exact test is 0.391, suggesting no statistically significant difference in the use of the ‘historical’ present between STs and TTs. This result supports our hypothesis that the distribution of forms is not statistically different across STs-TTs pairs.

### 3.2. The Use of the Present Tense for Future Occurrences

In examples (3)–(4), found in both Russian and Hebrew, the present tense, meaning *Experienced*, *Proximate*, is used to describe planned future occurrences, as if they were already happening “relevant and most salient to the speaker’s point-of-view at the ‘here and now’ point of speaking” (Tobin, 1989, p. 67).

- (3) *Čto ty igraeš’?* - *procedil skvoz’ zuby Sevočka s beskonečnym prezreniem: èto tože sčitalos’ xorošim tonom načala igry.* (Šalamov, 2013, p. 50)

*‘al ma ‘ata mesaheq?* – *synen sevočka beyn shynav be-buz eynsofy: gam ze nehshav ke-gynunym nekhonim le-ftyhat myshaq.* (Shalamov, 2005, p. 51)

“What **are** you **playing**?” – muttered Sevochka through his teeth with endless contempt: this was also considered proper manners in a game-opening.

- (4) ‘any **nykhneset** ‘*akhshav* la-myta ve-**mystovevet** la-qyr, she-tukhal lehystader beyntaym. (Oz, 1978, p. 75)

*Ja sejčas ložus' i povoračivajus' k stenke, čtoby ty smog ustroit'sja na noč'.*  
(Oz, 2015, p. 54)

I **am getting** into bed now and **turning** to the wall so you can bed down in the meantime.

Example (3) depicts a scene of interaction between inmates, mostly professional criminals and repeat offenders, within the world of the Soviet forced labor camps, just as a game of cards begins. Sevochka, a cardsharp of the criminal elite, asks another thief what he is putting up to wager. By using the form, meaning *Experienced*, *Proximate*, Sevochka creates a sense of immediacy, suggesting that “playing” is not a plan, but an already initiated negotiation.

A similar effect is illustrated in example (4) in both ST and TT, where Esti, the girl whom the narrator loves, and at whose home he is staying, tells him that she is getting into bed and turning toward the wall so he can also lie down and make himself comfortable. By using the form with the meaning *Experienced*, *Proximate*, Esti likewise conveys immediacy, presenting the action as ongoing rather than planned.

Table 2 presents the distribution of the present tense when used to express future occurrences in Russian and Hebrew STs and TTs. It compares instances where the present tense is preserved in translation (“Coinciding Use”) with those in which it is replaced by a future form (“Non-Coinciding Use”).

**Table 2.** Frequency Distribution of the Present for Future Occurrences Across Russian and Hebrew ST-TT Pairs

| Source-Target Pair             | Coinciding Use | Non-Coinciding Use | Total |
|--------------------------------|----------------|--------------------|-------|
| Russian ST → Hebrew TT         | 17             | 9                  | 26    |
| Hebrew ST → Russian TT         | 14             | 13                 | 27    |
| <i>p</i> (Fisher’s Exact Test) | 0.2772         |                    |       |

As shown in Table 2, the use of the present tense to refer to future occurrences yields a *p*-value of 0.2772, which is well above the conventional significance threshold of 0.05. This indicates that there is no statistically signifi-

cant difference between translation direction and the likelihood of using the present for future occurrences. These results suggest that translators tend to treat this communicative strategy similarly in both directions, supporting our hypothesis that the distribution of form usage in STs and their corresponding TTs remains statistically stable across communicative strategies.

### 3.3. The Use of the Future Tense for Present Occurrences

The future tense, in combination with negation and non-referential subjects, can be used to express the (im)possibility to perform an action at the moment of speech rather than its occurrence in the future, as illustrated by examples (5)–(6).

- (5) *My eli v polnoj temnote – baračnye benzinki osveščali kartočnoe pole, no, po točnym nabljudenijam tjuremnyx starožilov, ložki mimo rta ne pronesëš'*. (Šalamov, 2013, p. 51) [= **ne možeš' pronesti**]

*'akhalnu be-ḥashekha muḥeletet, be-'od menorot ha-benzyn meyrat 'et sade myšḥaq ha-qlafym, 'akh al-smakh nesyonam ha-meḏuyaq shel vatykey-kele – ha-kaf lo taḥty 'et ha-pe*. (Shalamov, 2005, p. 15) [= **lo yek-hola lehaḥty**]

We ate in total darkness, while the gasoline lamps illuminated the card playing field, but based on the precise experience of prison old-timers – the spoon **will not miss** the mouth.

- (6) *shum koaḥ she-ba-'olam, shum mykhshol, lo yukhal la'atsor adam kaze be-tseto legalot aratsot lo-noda'ot*. (Oz, 1978, p. 25) [= **lo yakhol/mesugal la'atsor**]

*Nikakaja sila v mire, nikakie prepjatstvija ne ostanovjat takogo čeloveka na puti k novym, eščë ne otkrytym zemljam*. (Oz, 2015, p. 21) [= **ne moguť/sposobny ostanovit'**]

No power in the world, no obstacle, **can** stop such a man from going to discover unknown lands.

Example (5) describes the conditions under which Soviet Gulag prisoners eat their meals in the barracks. Despite the lack of light, the outcome is con-

sistently the same: nobody ever misses their mouth with the spoon. While in both ST and TT, the forms used are morphologically associated with the future tense, they do not refer to a specific future occurrence. Instead, they express an expected outcome, suggesting that under known conditions, a particular result is likely to follow. This aligns with the postulated invariant meaning of the future tense as *Not-Experienced, Remote*.

A similar effect is observed in example (6) in both ST and TT. It describes a fantasy in which the young narrator imagines himself a bold explorer whom nothing – no force or barrier – can deter from discovering unknown lands. In both Russian and Hebrew, forms morphologically associated with the future tense are used to express the encoder's conviction that a particular outcome is expected, rather than to signal a chronological future. This corresponds to the postulated invariant meaning of these forms as *Not-Experienced, Remote*.

Table 3 presents the frequency distribution of the future tense used for present occurrences in both Russian and Hebrew STs and their corresponding translations (TTs).

**Table 3.** Frequency Distribution of the Use of the Future for Present Occurrences Across Russian and Hebrew ST-TT Pairs

| Source-Target Pair             | Coinciding Use | Non-Coinciding Use | Total |
|--------------------------------|----------------|--------------------|-------|
| Russian ST → Hebrew TT         | 8              | 6                  | 14    |
| Hebrew ST → Russian TT         | 2              | 1                  | 3     |
| <b>p (Fisher's Exact Test)</b> | <b>1</b>       |                    |       |

As shown in Table 3, the *p*-value calculated using Fisher's exact test is 1.0 (the maximum possible value from Fisher's exact test), indicating no statistically significant difference in the distribution of Coinciding and Non-Coinciding Uses of the future to signal present occurrences across translation directions. This result supports the hypothesis that the distribution of forms remains stable between STs and TTs across communicative strategies.

### 3.4. The Use of the Future Tense for Imperative Messages

In Russian and, especially, Hebrew, the future tense morphology can be used to convey requests, wishes, and desires instead of the imperative morphol-

ogy. The imperative is employed to prompt action, which is relevant for actions that have not yet been performed. In this regard, it shares semantic similarity with the future tense, meaning *Not-Experienced*, *Remote*. However, within this imperative strategy, the future tense does not have the same degree of prompting force as the imperative. The future tense is preferred over the imperative when “an immediate or precise fulfilling of the implied request, order or demand is not necessarily of primary importance” (Tobin, 1990b, p. 476), as in example (7).

- (7) *Posle **zajdēs'**, - skazal Ivan Petrovič. - **Napraviš'**. A teper' vot kolun... I potom **složiš'**, tol'ko ne v koridore, a prjamo v kvartiru tašči*. (Šalamov 2013, 147)

*“aḥar-kakh **tykanēs**”, amar yvan petrovyč, “ve-teyasher et ha-masor. beyntaym qah garzen... kshe-tesayem, **terakez** et ha-’etsym le-’arema, ‘aval lo ba-mysdaron – qah otam yashar la-dyra”*. (Shalamov, 2005, p. 153)

“Then **come in**”, said Ivan Petrovich, “and **straighten** the saw. In the meantime, take an axe... When you are done, **gather** the wood into a pile but not in the hallway – take it straight to the apartment”.

In example (7), Ivan Petrovich, presumably a higher-ranking individual or even a camp functionary, gives instructions to a young prisoner named Vas'ka on the labor he is to perform. By using the future tense rather than the imperative, he softens his requests and distances himself from issuing explicit commands. This is especially evident in the use of sequential connectors – “Then, you'll do this. When you are done, do that” – which aligns perfectly with the postulated invariant meaning of these forms as *Not-Experienced*, *Remote*.

In Hebrew, these forms are favored when used to express prohibitions, which are introduced by the word *‘al*, meaning “do not” or “don't”, as in examples (8)–(9). In Russian literature, a similar usage is considered more colloquial (see Švedova, 1980, pp. 619–620, 634), as illustrated by example (8), with the imperative remaining the preferred option, as in example (9).

- (8) *la-rehov ge'ula 'al **tered**, ky sham mytrotsetsym nehagym brytym my-maḥane shneler*. (Oz, 1978, p. 22)

*Na ulicu Geula ty ne **poedeš'**, tam vseгда nosjatsja britanskije šofëry iz lagerja "Šneler" (Oz, 2015, p. 19)*

You **will not go down** to Geula Street, because it is too full of the comings and goings of the British drivers from the Schneller Barracks.

(9) ***tokhal, tokhal** le-te'avon. 'al **tahshosh**.* (Oz, 1978, p. 68)

*Eš', eš' na zdorov'e. **Ne stesnajsja**.* (Oz, 2015, p. 50)

**Eat, eat** to your heart's content. **Don't be** afraid.

In example (8), the narrator's father gives him a bicycle but immediately sets strict rules for its use, emphasizing the need to avoid dangerous zones, specifically Geula Street, due to the presence of reckless British military drivers. In example (9), the father of the girl, whom the narrator loves, warmly offers him a piece of a sweet treat, encouraging him to enjoy it without hesitation.

When used in negative imperative constructions, these forms are not interpreted as predictions about future occurrences, but rather as expressions of a desire to prevent those remote possibilities from becoming reality. In such contexts, the encoder has "the least amount of control over the realization of their request or command" (Tobin, 1990b, p. 479), a characteristic that is consistent with the postulated invariant meaning of the future tense as *Not-Experienced*, *Remote*.

Table 4 presents the frequency with which the future tense is used to convey imperative messages in STs and TTs in Russian and Hebrew.

**Table 4.** Frequency Distribution of the Use of the Future for Imperative Messages Across Russian and Hebrew ST-TT Pairs

| Source-Target Pair             | Coinciding Use | Non-Coinciding Use | Total |
|--------------------------------|----------------|--------------------|-------|
| Russian ST → Hebrew TT         | 13             | 60                 | 73    |
| Hebrew ST → Russian TT         | 5              | 36                 | 41    |
| <b>p (Fisher's Exact Test)</b> | <b>0.594</b>   |                    |       |

As shown in Table 4, while the majority of instances involve a shift between the forms with future reference and the imperative, Fisher's exact test

( $p = 0.594$ ) confirms that these shifts are not statistically significant, indicating directional symmetry. The prevalence of non-coinciding uses reflects a preference in Hebrew, where the future commonly functions as the default form for prompting action. These findings support our hypothesis: despite a high number of form shifts, there is no evidence that they are more likely to occur in one TT than the other.

#### 4. Differences in Communicative Strategies of Forms' Usage between STs and TTs

It would be erroneous to claim that the tenses of STs are consistently preserved in TTs throughout the texts. The discrepancy in the use of verb tenses between STs and TTs results from differences in communicative strategies for using one tense over another between SLs and TLs. While SL as a system favors certain communicative strategies, TL may prioritize others and omit those favored by SL. These distinctions are illustrated by examples (10)–(17) below.

##### 4.1. Descriptive Present Tense in Past Context in Hebrew ST vs Past Tense, Adverbial and Present Participles in Russian TT

The present tense, meaning *Experienced*, *Proximate*, allows encoders in Hebrew to describe ongoing occurrences that happen simultaneously with other occurrences, even if those occurrences refer to the past. In Russian, however, the past tense or non-predicative forms are used instead, as shown in examples (10)–(11).

- (10) “*akhshav sheva shloshym ve-shesh*”, tsyyen ‘aba, **hosem** be-gufo ‘et petah ha-bayt u-**menyya** rosho kama pe’amym my-lemala lemata, ke-**magyya** lydey masqana metsa’eret akh bylty-nymna’at. (Oz, 1978, pp. 55–56)

*Sejčas sem' tridcat' šest', — soobščil otec, zagorodiv telom dvernoj proëm i pokazyvaja vsem svoim vidom, čto on prišël k pečal'nomu, no absoljutno neizbežnomu vyvodu.* (Oz, 2015, p. 42)

“Now, it is seven thirty-six”, Dad pointed out, **blocking** the doorway of the house with his body and **nodding** his head up and down many times as if he **reached** a sad but inevitable conclusion.

- (11) [...] *Potašnikov dobralsya do mesta raboty, edva **volocha** nogi.* (Šalamov 2013, p. 58)

[...] *higi'a potashnikov le-mekom ha-'avoda, **gorer** be-koshi et raglav.*  
(Shalamov 2005, p. 27)

[...] Potašnikov made it to his workplace, barely **dragging** his feet.

In example (10), the narrator, a young boy, plans to run away from home after losing everything (a development that gives the chapter its title, “Everything is Lost”): his bicycle, the toy railway for which he traded the bicycle, and the dog for which he traded the railway. However, his father unexpectedly blocks the door, wordlessly displaying his disappointment.

Example (11) depicts a typical morning in a Kolyma camp, emphasizing the monotony and physical exhaustion endured by the prisoner Potašnikov as he reaches his work site for yet another day of forced labor in the region’s freezing climate.

In the Hebrew version of both examples, the occurrences are simultaneous and, by nature, temporally proximate to each other. Besides their vividness to the encoder, this proximity reflects how close something feels, which aligns with the postulated invariant meaning of *Experienced*, *Proximate*. Russian, by contrast, has alternative means to express simultaneity without relying on forms traditionally associated with the present tense. The meaning of these forms lies beyond the scope of the current analysis.

Table 5 presents the distribution of forms used to refer to present occurrences within past-time contexts across STs and TTs in Russian and Hebrew. It contrasts instances where this strategy is retained in the TT with those where such forms are replaced by forms referring to past or other non-predicative expressions.

**Table 5.** Frequency Distribution of the Use of Descriptive Present Occurrences in Past Context Across Russian and Hebrew ST–TT Pairs

| Source-Target Pair             | Coinciding Use | Non-Coinciding Use | Total |
|--------------------------------|----------------|--------------------|-------|
| Russian ST → Hebrew TT         | 1              | 45                 | 46    |
| Hebrew ST → Russian TT         | 3              | 55                 | 58    |
| <i>p</i> (Fisher’s Exact Test) | 0.6279         |                    |       |

As shown in Table 5, forms associated with the present tense within past-time contexts are predominantly translated using alternative means, leading to a high number of Non-Coinciding Uses in both translation directions. Fisher's exact test ( $p = 0.6279$ ) indicates that these distributional shifts are not statistically associated with the direction of translation. The result supports our hypothesis that form distribution remains statistically consistent across communicative strategies, regardless of ST-TT orientation.

#### 4.2. Future Tense in ST vs Past Tense in TT

In Russian, the future tense can also be employed to convey routine past occurrences. This shift in temporal perspectives is achieved by adding elements such as *byvalo*, ("used to be"), as shown in example (12), by expressions like *vsegda* ("always"), *inoj raz* ("sometimes"), *slučalos'* ("there were times when") (see Isačenko, 1960, pp. 428–429, 450–453), or by the broader context, as illustrated by example (13).

- (12) *Byvalo i takoe: razveděš' s utra kostër požarče, čtoby v obed bylo gde sogret' nogi i ruki, založiš' pobol'she drov i uxodiš' na rabotu.* (Šalamov 2013, p. 71)

*'era gam kakh: hev'arta 'al ha-boqer medura ha-guna kedey she-be-'aruḥat ha-tsohoraym tukhal leḥamem 'et ha-yadaym ve-ha-raglaym, henaḥta kama she-yoter 'etsym ve-yatsata la-'avoda.* (Shalamov 2005, p. 49)

Sometimes it would happen this way: you'd **light** a great bonfire in the morning so that you could warm your feet and hands at lunch, you'd **put** in as much firewood as possible, and go to work.

- (13) *My znali, čto v našej vole prekratit' ètu žizn' xot' zavtra, i inogda rešalis' sdelat' èto, i vsjakij raz mešali kakie-nibud' meloči, iz kotoryx состоit žizn'. To segodnja budut vydavat' «larëk» – premial'nyj kilogramm xleba, – prosto glupo bylo končat' samoubijstvom v takoj den'. To dneval'nyj iz sosednego baraka obeščal dat' zakurit' večerom – otdat' davnišnij dolg.* (Šalamov, 2013, p. 76)

*yad'anu ky be-khoḥenu lyqto'a 'et ha-ḥaym ha-'ele afylu maḥar, ve-ly-fraqym haynu maḥlytym la'asot zot, 'akh kol pa'am hefry'u kol myney*

*dvarym shel ma be-khakh, she-me-hem murkavym ha-khaym. o she-be-dyuq be-oto yom **hilku** "lahmanyia" – hatava shel me'a kylogram lehem, ve-haya pashut metupash lehyt'aved be-yom kaze. o she-ha-toran myn ha-tsryf ha-shakhen hyvtyah she-yten lekha le'ashen ba-'erev – ve-yahzyr hov yashan.* (Shalamov, 2005, pp. 55–56)

We knew that it was within our power to interrupt this life even tomorrow, and at times, we would have decided to do so, but each time, all kinds of little things would interfere, things that life is made of. Either on that very day, they **would be handing out** a “bun” – a perk of a kilogram of bread, and it was just stupid to commit suicide on such a day. Or the watchman from the neighboring shack would promise to let you smoke in the evening, to pay back an old debt.

Examples (12)–(13) illustrate the routine cycles of daily survival in the Soviet labor camps. The morphological future forms used here do not refer to actual future occurrences. Rather, they emphasize the repetitive nature of these experiences, portraying them as predictable and potentially recurring beyond the point in the past from which they are recalled (see Potebnja, 1941, p. 106). This usage is consistent with the postulated meaning *Not-Experienced, Remote*. In the Hebrew TT, this strategy is instead rendered using past forms, meaning *Experienced, Remote*.

On the other hand, in Hebrew, forms traditionally labeled as future tense can be used to express either intended occurrences, as seen in examples (14)–(15), or desired ones, as in examples (16)–(17). By contrast, in Russian STs and TTs, these same messages are conveyed using forms typically associated with the past tense, meaning *Experienced, Remote*, and introduced by conjunctions such as *čtoby* (“so that”), as illustrated by examples (14)–(15), or *liš' by* (“if only”, “as long as...”, “provided that...”), as in examples (16)–(17).

- (14) *she 'al kakh hehlyfu 'etslenu be-ydysh, she-lo 'avyn, eyzo lehysha mud'egat u-ve-sofa tasesa tamyd ha-myla “meshygener”, klomar – meshuga.* (Oz, 1978, p. 18)

*O djadinyx pričudax govorili u nas na idiše, čtoby ja ne **mog** ponjat', vse eti reči zaveršališ' trevožnym šepotom, i v samom konce vseгда šipelo slovečko “mešiginer” (“sumašedšij”).* (Oz, 2015, p. 18)

To this, at home, they would exchange some worried whisper in Yiddish so that I **would not understand**, and at the end, the word 'meshigener', meaning – "madman", always came up.

- (15) *Ljudej otpuskali tol'ko togda, kogda rabota byla sdelana, s tem čtoby oni mogli vyspat'sja...* (Šalamov, 2013, p. 130)

*ha-anashym shuh̄reru raq ka'asher hushlema ha-avoda, ve-gam ze haya raq kedey she-yukhlu lyshon...* (Shalamov, 2005, p. 128)

People were only released when the work was done, so that they **could** get some sleep...

- (16) *ve-raq she-lo ye'abed ly ha-meḥaded ha-tov ha-ze...* (Oz, 1978, p. 64)

*Liš' by ne poterjalas' moja čudnaja točilka.* (Oz 2015, p. 47)

And if only this good pencil sharpener **doesn't** get lost.

- (17) *...i daže pjat'sot grammov ržanogo xleba, tri ložki kaši i miska židkogo supa v den' mogli voskrešat' čeloveka. Liš' by on ne rabotal.* (Šalamov, 2013, p. 208)

*...ve-'afyly khamesh-me'ot gram shel lehem shyfon, shalosh kapot daysa u-qe'arat maraq dalyd be-yom hayu yekholym lehakym 'adam le-tehyya. ha-'iqar she-lo ye'alets la'avod.* (Shalamov, 2005, p. 233)

...and even five hundred grams of rye bread, three spoonsful of porridge, and a bowl of watery soup a day could resurrect a man. As long as he **didn't** work.

In example (14), the narrator, a young boy, recalls how adults would whisper anxiously in Yiddish – a language he did not understand – to react to his unrealistic or socially inappropriate dreams or ambitions.

Example (15) comes from Šalamov's recount of the brutal conditions of Soviet camp life, where prisoners were released from forced labor only when the assigned task was completed, simply to keep them physically functional and return them to work again.

In example (16), the narrator, still a boy, wants to keep a pencil sharpener he found by chance after losing several emotionally significant possessions. The sharpener thus becomes something reliable and meaningful.

Example (17) reflects Šalamov's view on life in a Soviet Gulag, particularly on how not working, even while sick and weak, offered the only opportunity for the body to begin recovering.

In Hebrew, these uses imply that the described occurrences have yet to happen and that their realization remains uncertain, which aligns with the postulated meaning *Not-Experienced*, *Remote* of these forms. In Russian, the presence of the particle *by* ("would") in these constructions indicates that the forms, meaning *Experienced*, *Remote*, are used in a non-past context, similar to their use for hypothetical scenarios.

Table 6 presents the distribution of instances where forms with future-time reference are rendered using forms with past-time reference in translation, and vice versa.

**Table 6.** Frequency Distribution of the Use of Future vs Past Across Russian and Hebrew ST-TT Pairs

| Source-Target Pair             | Coinciding Use | Non-Coinciding Use | Total |
|--------------------------------|----------------|--------------------|-------|
| Russian ST → Hebrew TT         | 0              | 23                 | 23    |
| Hebrew ST → Russian TT         | 0              | 12                 | 12    |
| <i>p</i> (Fisher's Exact Test) | 1              |                    |       |

As Table 6 shows, all instances in both translation directions involve a shift in temporal reference – from future-time reference in STs to past-time reference in TTs, or vice versa. However, Fisher's exact test ( $p = 1.0$ , the highest possible value) confirms that this tendency is not statistically associated with translation direction. These findings support the hypothesis that form choice is motivated by language-specific considerations rather than systematic asymmetry between Russian and Hebrew ST-TT pairs.

## 5. Conclusion

To summarize, this study has shown that analyzing mutual correspondences between source texts (STs) and target texts (TTs) provides valuable insights into the languages being compared. It allows us to uncover both similarities and differences, even between typologically distant languages such as Russian and Hebrew.

We have demonstrated that the analysis of verb tense morphology using the Columbia School (CS) notion of invariant meanings within interlocked systems – rather than relying on diverse meanings based on real-time temporal relationships – offers a more consistent explanation of how tenses function in both STs and TTs.

In doing so, we have also illustrated the cross-linguistic applicability of the adopted CS sign-oriented approach, contributing to a deeper understanding of both language-internal and cross-linguistic functions (see Serpollet, 2008, p. 190).

One limitation of this analysis lies in the still unresolved question of why Russian and Hebrew, despite sharing invariant meanings associated with corresponding tenses, exhibit differences in their usage. Simply attributing these differences to communicative strategies alone is, strictly speaking, not a sufficient explanation. Traditional grammatical aspect – while not the focus of this study – may underlie some of these asymmetries. For instance, Bondarko (1971, p. 172) observed that the transpositional potential of Russian perfective forms in the future, and especially in the past, is considerably higher than that of imperfective forms, which are rarely transposed. This observation may help explain some of the asymmetries we see in the data and could serve as a starting point for further investigation.

Future research might also explore how the use of forms in translated texts differs from their use in original texts written in the same language. This is because the use of forms in the target language (TL), affected by the source language (SL), may differ from their use in the native language (see Xiao & Hu, 2015, p. 20).

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### *Zatłuczenie się kota:*

## Aspectual Range of Polish Verbal Nouns

**Abstract.** This article analyzes Polish categorical verbal nouns, *substantivum ver-bale*, which refer to the same types of situations as the corresponding verbs – actions, processes, or states. The material of the study is continuous sampling of Polish verbal nouns, derived from the delimitative, and inchoative verbs. These units have been analyzed for presence / frequency in corpora, taking into account their realized spectrum of aspectual functions. Based on dictionary and corpus data, as well as the results of a linguistic survey of native Polish speakers, it is shown that the verbal aspectual meaning of the external quantitative-temporal limit of an action is weakened or, in some cases, disappears in verbal nouns. We assume that the nominal form of the verb to one degree or another prevents the explicit presentation of the aspectual meaning of the external quantitative or temporal limit of an action. The study also takes into account data on Russian and Ukrainian verbal nouns.

**Keywords:** verbal noun; verb; aspectuality; aspectual meaning; quantitative-temporal limit.

### 1. Introduction. Status of Verbal Nouns in Polish Dictionaries and Grammars

The focus of study is on Verbal Nouns (hereafter referred to as VN(s)) that denote the same types of situation (actions, processes, or states) as the cor-

responding verbs, such as *zbadanie* ‘research’ ← *zbadać*<sub>PFV</sub>, *badanie* ‘research’ ← *badac*<sub>IPFV</sub>. According to the definition in *Encyclopedia of General Linguistics* (by S. Karolyak), this class of words “is most often the result of the so-called operation of transposition, carried out in relation to linguistic units that do not belong to the category of nouns, which represent conceptual content in abstraction from substantial meanings”<sup>1</sup> (Karolak, 2003, p. 507). However, there is probably no other grammatical form whose status varies so strikingly both in grammatical descriptions of different Slavic languages and in monolingual studies. For instance, the *Grammatical Dictionary of Polish* (Saloni, 2012) considers Polish VN as a form of the verb with no exceptions. The author claims that the verbal noun with *-nie* / *-cie* (“*odśłownik*”) is specified for every verb, and even in cases where there is no such formation in the language: “we describe with full conviction all forms of the modern lexicon contained in the system, including hypothetical ones” (Saloni, 2012, p. 14). The authors consistently implement this principle in their work, including hypothetical formations such as *pachnienie\** ‘smelling’, *mienie\** ‘possession’ in this dictionary. Nevertheless, we did not find, for example, VN *mienie\** in any of the Polish-language dictionaries, except for the electronic *Grammar Dictionary* compiled by Z. Saloni himself<sup>2</sup>. A similar, though not so radical, point of view on verbal nouns can be found in *Dictionary of Conjugation Forms of Polish Verbs* (Mędak, 2004). The author applies a term *rzeczownik odśłowny* to this category of words and includes them in the verb paradigm. However, out of 142 typical verb paradigms (obtained based on an analysis of 17,000 Polish verbs), the VNs is absent in 10 paradigms (Mędak, 2004).

On the other hand, the *Academic Grammar of Polish* (Grzegorzczukowa, 1998) does not include VN in the verb paradigm, but is dealt with in the “Word Formation” section. We read in the *Academic Grammar of Polish*: “[...] it is not always possible to distinguish unambiguously between inflectional and word-formation oppositions [...] there are a number of classes of grammatical forms characterized by very high functional and structural regularity and constituting a kind of border zone between form-forma-

<sup>1</sup> Here and further, the translation of quotes and examples from Polish, Ukrainian, and Russian into English is ours – *author’s*.

<sup>2</sup> Note that the authoritative works by J. Puzynina and K. Marzniakowa separately point out that in Modern Polish no deverbatives are formed from the verbs *pachnieć*, *boleć*, *mieć*, *musieć*, *wiedzieć*, and some others (Puzynina, 1969, p. 30; Marzniakowa, 1993, p. 77).

tion and word-formation” (Grzegorzczkowska, 1998, p. 81). In the section “Word Formation” of the Academic Grammar of Polish (Grzegorzczkowska, 1998) and in the monograph by J. Puzynina (Puzynina, 1969), the system of nouns motivated by verbs are classified primarily into two types: categorical (*substantivum verbale*) and non-categorical (*substantivum deverbale*). The first type includes verbal nouns with the suffixes *-(e)ni(e)*, *-ci(e)*, which are formed systematically from verbal stems. The remaining types of verbal nouns (about 80 formants are used for their formation) are defined as semantically and formally non-categorical, irregular, and their existence can only be verified with the help of a dictionary. There is a significant difference between these two types, which is particularly noted in modern generative studies when investigating the argument structure of Polish deverbatives: “[...] in Polish there are two types of nominal [...]: aspectually ambiguous derived nominals whose properties are like those of English derived nominals and verbal nouns which have grammatical aspect and form aspectual pairs like the related verbs” (Rozwadowska, 2000, p. 239). A. Nagórko shares the same idea: “Their grammatical status is equally controversial... forms starting with *-nie*, and less frequently with *-cie*, as in *bicie*, are treated either as full-fledged nouns or – due to the considerable degree of grammaticalization of the rule that creates them – as ‘nounified’ verbs”<sup>3</sup> (Nagórko, 1998, pp. 112–113). A similar point of view is also found in the works of Korytkowska and Małdzińska (2002), Jędrzejko (1993), Vetulani (2000), and others.

If we turn to academic dictionaries of the Polish language, we will also find differences in views on the status of VNs. In the *Academic Dictionary of the Polish Language* (Doroszewski, 1958–1968; 2000), verbal nouns were defined as *forma rzeczownikowa czasownika* (‘noun form of the verb’); however, they were not presented with the verb (not in verb entries), but in separate dictionary entries.

In the *Universal Dictionary of the Polish Language* edited by S. Dubisz (2004), the authors take a different approach: most of the VNs are specified directly in the dictionary entries of the corresponding verbs, for example:

zakolegować się *pot.* «nawiązać koleżeńskie stosunki z kimś»: Zakolegowali się ze sobą jeszcze w liceum. *dk* • IV, ~guję się, ~gujesz się, ~guj się, ~ał się; *recz.* zakolegowanie się *n I*.

<sup>3</sup> In the original text “*urzeczownikowione czasowniki*”.

It is important that not all verbs in this dictionary contain indications of the nominal form in their entries. Those VNs which have acquired additional substantival meanings are described in separate entries, but the first position in their definition is usually formulated “*rzecz. od...*” (‘noun from...’), indicating the specific verb from which the noun is derived.

The most modern dictionary of the Polish language – *Wielki słownik języka polskiego PAN*<sup>4</sup> (Żmigrodzki, 2024) – also contains indications of the nominal form in verb entries. The authors define this form as a *gerundium*. The difference is that, according to our observations, the nominal form is indicated for a larger number of verbs than in Dubisz’s dictionary. For example, we found an indication of the nominal form for the verbs *pachnieć* ‘to smell’ (“*pachnienie*”), *zechcieć* ‘start wanting’ (“*zechcenie*”), *pojechać* ‘start driving’ (“*pojechanie*”), etc. We found such forms only in the dictionary of Z. Saloni, mentioned above. At the same time, in the entries for several modal verbs (*musieć* ‘have to’, *móc* ‘be able to’, etc.), there is an indication “*gerundium nieużywane*” ‘gerund not used’.

So, taking into account the data from Polish grammars, as well as the ways in which VNs are represented in Polish dictionaries, it is safe to say that Polish VN in general has a very high degree of regularity. However, the grammatical status of the Polish verbal nouns (both its regular and irregular forms) remains controversial: there is no sure agreement in polonistics as to whether the VN is a verb form or a separate word, whether it is formed from all verbs or not, and to what extent it retains verb meanings.

## 2. Polish Verbal Nouns Against the Background of Russian and Ukrainian

Sometimes you need to look at a subject from the outside: what we know for sure about verbal nouns in other Slavic languages? Slavic verbal nouns have a common ancient origin and similar morphological structure. They are inherited from the Proto-Slavic language and have suffixal elements of Indo-European (\*-jo, \*-bha, \*-ta) (Мельничук, 1986, p. 57). Despite this, Slavic VNs differ significantly in comparative terms in such parameters as preservation or loss of actionality features and the range of aspect functions. See a typical example: one Russian VN, which relates to verbs of either aspect (e.g., VN *повторение* ‘repetition’ ← V *повторить*<sub>PFV</sub> / *повторять*<sub>IPFV</sub>)

<sup>4</sup> See also: Żmigrodzki, 2022.

corresponds to two Ukrainian VNs (*повторення* ← *повторити* <sub>PFV</sub> // *повторювання* ← *повторювати* <sub>IPFV</sub>), to two or four Polish VNs (*powtarzanie* ← *powtarzać* <sub>IPFV</sub> // *powtórzenie* ← *powtórzyć* <sub>PFV</sub> (+/- reflexive marker *się*). It is known that there is an evident statistically significant increase in the number of verbal nouns from East to West (Dickey, 2000). In the Russian material, they turned out to be almost exactly half as many as in Polish. Ukrainian, in quantitative terms, is almost in the middle but slightly closer to Polish.

Also, if we look at the corpus of verbal nouns from the perspective of formal preservation of aspectual pairedness, we see that moving from East to West, the number of aspectual pairs of nouns increases. Russian VNs practically lose aspectual formal characteristics, and are semantically unpredictable. In Russian, there are formally only 15% “aspectual” pairs, in Ukrainian – around 40%<sup>5</sup> (Pchelintseva, 2022). In Polish, all VNs with *-nie* / *-cie* have aspectual pairs, as long as the corresponding verb also has a pair. That is very interesting, and there are other interesting dependencies there; however, that fact alone does not explain anything. What are the reasons for this state of affairs?

If we focus on why this happens in Russian and Ukrainian, several reasons become obvious at once – pragmatic, historical, and morphonological. Each of these reasons works to a different degree, and one of them is obviously semantic. It turns out that some perfective verbs cannot form verbal nouns. They cannot at all or that process is severely hindered. These are verbs with the meaning of quantitative or temporal limit of action. This semantics is most vividly manifested in delimitatives and perduratives. See examples of different groups of verbs – we cannot form an VNs from such verbs:

*попеть* (два часа) ‘sing (for two hours)’ → \**попение*?  
*попрыгать* (немного) ‘jump around a little bit’ → \**попрыгание*?  
*подумать* (5 минут) ‘think for 5 minutes’ → \**подумание*?  
*прождать* (3 месяца) ‘wait three months’ → \**прождевание*?  
*пролежать* (целый день) ‘lie in bed all day’ → \**пролежание*?  
*нагруститься* ‘brood for too long’ → \**нагрустение*?  
*запрыгать* ‘to start jumping’ → \**запрыгание*?

<sup>5</sup> There is an obvious but important remark to be made here: of course, not every verb in Russian, Ukrainian, and Polish has an aspectual pair. For example, we have quantitative data for Ukrainian: according to a dissertation (Skukharyna, 2003), only 53% of the entire verb corpus is composed of aspectual pairs.

*дотанцеваться* '≈ dance the hell out of' → \**дотанцевание*?  
*переломать (все стулья)* '≈ to break all the chairs' → \**переломание*?

This regularity has a systemic character; it is confirmed by quantitative data. According to the results of our analysis of dictionaries (Gorbachevich, 2004; Chernyshev, 1948–1965; Rogozhnikova, 1991), in the Russian language there are about 530 delimitative verbs (e.g., *покипеть* [15 минут] 'to boil [15 minutes]') and about 300 perdurative verbs (e.g., *протанцевать* 'to dance [all night]'). None of them form a VN.<sup>6</sup> From the huge number of verbs with this or similar semantics (we analyzed more than 3000 verbs of other terminative Aktionsart), we cannot obtain VNs. And this is not directly related to perfectivity or formal presence of certain morphemes – we easily form VN from verbs with other perfective meanings. See examples below:

*погасить*<sub>PFV</sub> 'to extinguish' → *погашение* 'extinguishment'  
*прочитать*<sub>PFV</sub> 'to read' → *прочтение* 'reading'  
*завоевать*<sub>PFV</sub> 'to conquer' → *завоевание* 'conquest'  
*отомстить*<sub>PFV</sub> 'avenge' → *отмщение* 'vengeance'.

In the Ukrainian language, there are slightly fewer delimitative verbs than in Russian: there are 515 units in the (Bilodid, 1970–1980). According to our data, 10 VNs are formed from them, but none of them retains the delimitative meaning (for example, *посидіти* 'to sit (a little, 5 minutes)' → *посиденьки* 'get-together, hangout' (the name of the whole situation, not a delimitative meaning)).

If we analyze the quantitative ratio of inchoative verbs and VNs in Russian and Ukrainian, we will also find a certain tendency. The number of inchoative verbs with the prefix ZA- in Russian (e.g., *запрыгать* 'to start jumping'), in our continuous sample from Chernyshev (1948–1965), is about 900, and with the prefix ПО- (e.g., *поскакать* 'to start galloping') – 95. From them, 23 and 11 VNs are formed, respectively; the shade of the moment of the beginning of the action is preserved only in 16 (as in *зацветание* 'beginning of flowering', *загорание* 'beginning of burning').

<sup>6</sup> If a verb is polysemantic, then its lexical-semantic variants with other meanings form VNs, for example: qualitative evaluative (*пропаривать* – *пропаривание* 'to steam (qualitatively) – steaming'), general resultative (*построить* – *построение* 'build – building'), etc.

In the Ukrainian language, according to our data, the number of inchoative verbs is slightly lower: with 3A- – 849, with ПІО- – 64 (Bilodid, 1970–1980). From them, 42 and 4 VNs are formed, respectively. The meaning of inchoativeness is preserved only in a few VNs (like *зацарювання* – ‘beginning of a reign’). Thus, we observe in the Ukrainian language, compared to Russian, a decrease in the number of inchoative and delimitative verbs, and, at the same time, an insignificant increase in the number of VNs formed from them. The semantics of limiting an action by an external limit in VNs is expressed much weaker than in a motivating verb, or is lost completely.

### 3. Aspectual Semantic Constraints in the System of Polish Verbal Nouns

After all, in this context (in Russian and Ukrainian, there is a strict semantic restriction), the assertion that Polish VNs are formed from any verb looks very suspicious. We decided to check how things are in the Polish language. Firstly, we have checked every verb in *Uniwersalny słownik języka polskiego* (Dubisz, 2004) to see if it had a correlative VN. So, what did we find? First, we found about 50 imperfective prefix-less verbs whose dictionary entries do not indicate that they have a nominal form: *dnieć* ‘to shine’, *ładnieć* ‘to be pretty’, *pachnieć* ‘to smell’, *móc* ‘to be able to’, *musieć* ‘to have to’, etc. The reasons for the absence of a nominal form, in our opinion, can be determined as follows:

- rarity of the verb (like *frapować* ‘to intrigue’);
- activity of parallel cognate or synonymous forms (*boleć* ‘to be ill’ – there is no nominal form ending in *-nie*, but there are nouns formed according to a different model: *choroba*, *bolesność*, *obolałość*, *boleści*);
- derivative nature of the verb itself (the verb is motivated by a noun or adjective (*pięknieć* from *piękny* ‘beautiful’);
- relational (*mieć* ‘to have’, *braknąć* ‘to lack’) and modal (*móc* ‘to be able’) semantics.

Secondly, about 150 prefixal verbs, according to dictionaries, have no correlative VNs. Among these verbs, several semantic groups are obviously distinguished: quantum-limitating – 21 (*zadudnić* ‘to rumble’), delimitative – 7 (*poszumieć* ‘to rustle’), inceptive / ingressive phase-beginning – 10 (*zaboleć* ‘start to get sick’), cumulative – 16 (*nahłasować* ‘make much noise’), and sative – 7 (*wychłostać* ‘to whip’).

This is interesting, but their number – compared to the entire corpus of Polish verbs – is too small. Therefore, the next stage of the study was the

analysis of verbs and the corresponding verbal nouns of certain semantic groups that contain the semantic feature of quantitative-temporal limit of action. We obtained a continuous sample of delimitative and inceptive/ingressive verbs, and determined whether they have correlative nouns. As a result, we received 228 “delimitative” VNs and 74 “inceptive/ingressive” VNs (Dubisz, 2004). These units have been analyzed for presence/frequency in *Narodowy Korpus Języka Polskiego (NKJP)* taking into account their realized spectrum of aspectual functions.

Let us start with the group with inceptive or ingressive meaning – that is, the point at which an action or process begins. The results of our quantitative analysis of the representation of verbs of this group and corresponding VNs according to the data of dictionaries and corpora are as follows: in our sample, there are 85 inceptive/ingressive verbs with ZA-/PO- and 74 corresponding VNs (*pociec* → *pocieczenie*, *zapalać* → *zapalanie*). A continuous analysis of corpus data showed that 23 VNs have no occurrences. The remaining 51 VNs were found in the corpus. The difficulty of the analysis is that Polish verbs and, accordingly, VNs with ZA- and PO-, rarely have only one (single) aspectual meaning of inception (unlike, for example, Russian verbs like *zatanecvat* ‘to start dancing’, *zaprygat* ‘to start jumping’). Usually, they combine other meanings with inchoativeness, in particular, resultative, distributive, durative, etc. We checked the detected usages to see if they corresponded to the meaning of “the point of beginning of an action or process”: only one VN, *zagadywanie*, has retained the verb initial meaning to some extent. Here are the “bad” examples, which falsify our hypothesis:

(1) *Chodzi o nieustanne mówienie, **zagadywanie**<sup>7</sup> do ludzi, więc ważne jest, aby nie być nieśmiałym* (A. Papierzyńska, Manko 2010-01-05). ‘It is about talking all the time, **to start talking to people** (1.1) / **talking to people** (1.2), so it’s important not to be shy’.

(2) *Magda nie odpowiadała na **zagadywania** i nie głaskała otyłych jamników* (E. Nowacka). ‘Magda did not answer when people **started talking to her** (2.1) / **respond to conversations** (2.2), nor did she pet the fat dachshunds’.

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<sup>7</sup> Here and further on in the examples, the **bold font** is ours – *author’s*.

The VNs in these examples do indeed have a shade of meaning of the beginning of an action, which, however, may (1.1, 2.1) or may not (1.2, 2.2) be reflected in different translations. In other cases, we found that when the corpus contains VNs, it implements the following resultative, distributive, and other aspectual meanings. Below are typical examples. In (3), the meaning of the duration of an action, a process that continues for some time is realized; in (4), the meaning of repeated actions is actualized (distributive type, since the actants are different):

(3) *Ich prawdziwym nałogiem jest bowiem samo **zakochiwanie się**, ów etap związku dwojga ludzi między poznawaniem się, a dokładnym poznaniem* (Mazowieckie To i Owo, 2005-05-02). ‘Their real addiction is the very process of “**falling in love**”, that **stage** of a two-person relationship between getting to know each other and fully knowing what kind of person is next to you’.

(4) *agatkaa35: Co myśli Pani o ciągłym “**zakochiwaniu się**” w coraz to nowych facetach? Czy to nie wołanie “*pokochaj mnie*”? (Onet.pl Rozmowy, 2003-06-05). ‘What do you think about **constantly** “**falling in love**” with new guys every time? Isn’t that a call to “love me”?’*

Let us give another example based on dictionary data about the meaning of the verb. A verb *zatłuc* has two dictionary meanings: starting point of an action (that is, the variant of quantitative-temporal limit of action or process) and resultative:

**Zatłuc** 1. o sercu, tętnie: zacząć bić, zacząć pulsować 2. pot. tłukąc, bijąc, uderzając mocno, zapamiętale, zabić kogoś, coś; utłuc (Dubizs, 2004). ‘1. about the heart, pulse: to begin to beat, to begin to throb 2. colloq. to beat, to strike, to hit hard, furiously, to kill someone, something; to smash’.

The NKJP contains 50 occurrences of VN *zatłuczenie* (date of access 25.07.2025), but all have a resultative meaning, no case of start point meaning. We give a typical example below:

(5) *Jest on oskarżony o **zatłuczenie** metalową rurką swojego kolegi z klasy. Powodem miał być alkohol oraz inwektywy pod adresem jego żony* (Życie Warszawy no. 15/01, 2002). ‘He is accused of **bludgeoning** his classmate **to death** with a metal pipe, allegedly due to alcohol and insults directed at his wife’.

Let us consider the situation with delimitative verbs and correlative VNs. We have found 236 delimitative verbs with the prefix PO- in the dictionaries. To accurately identify the meaning, we relied on the presence of the element “*przez jakiś czas*” or “*na krótką chwilę*” in the dictionary entry. 228 dictionary entries of these verbs contain an indication of their nominal form – VNs. Of these VNs, 139 are missing in the NKJP (date of access 25.07.2025). Among them, for example, are the following VNs:

*pokoszenie* (from *pokosić* ‘mow for a while’)  
*pobadanie* (from *pobadać* ‘research for a while’)  
*pograbienie* (from *pograbić* ‘rob for a while’)  
*podrzemanie* (from *podrzemać* ‘doze for a while’)

However, 89 VNs have at least one occurrence in the NKJP. We analyzed all the cases, and it turns out there are three options. Let us consider these cases.

**Option 1:** semantic narrowing (reduction of verb delimitative meanings). For instance, the verb *popalić* has two dictionary meanings: delimitative (II) and distributive (I) meaning:

I *popalić* 1. *spalić wiele, jedno po drugim, spalić coś w wielu miejscach*, 2. *pot. «sparzyć wiele czegoś, sparzyć coś w wielu miejscach»* ‘I to burn 1. to burn many, one by one, to burn something in many places. 2. col. to burn a lot of something, to burn something in many places’;

II *popalić* «*spędzić chwilę na paleniu*» – ‘spend some time smoking’.

If the dictionary (Dubisz, 2004) is to be believed, the VN can also realize them. However, the corpus tells us otherwise: *popalenie* has only distributive or resultative meaning. We found 9 occurrences of this VN in the NKJP, and all of them implement only the distributive or resultative meaning, as in the typical examples (6), (7):

(6) *Bo szkodliwa dla włosów, powoduje ich wysuszenie, a nierzadko nawet **popalenie*** (Dziennik Zachodni 2007-06-27). ‘Since (dye. – author) is harmful to the hair, causes dryness and can even **burn** it’.

(7) *Oddychali. Chodzili ze strasznej niecierpliwości. Bo się nie dało usiedzieć. Z tego **popalenia się** żywcem i życia dalej - ale właśnie życia żywcem. To byli podobno ci lotnicy. Z tego samolotu* (Białoszewski, 1984). ‘They were breathing. They were pacing with terrible impatience. Because it was impossible to sit still. From **burning** alive and then living on – but living alive. Apparently, these were the pilots. From that plane’.

Let us provide another example: the verb *ponosić*, according to the dictionary (Dubisz, 2004), has 7 meanings, of which 5 are resultative and 2 are delimitative. The VN *ponoszenie*, correlative to it, has a high frequency – we found 1391 occurrences (date of access 25.01.2025). Manual analysis of all occurrences showed that these VN implement only resultative variants of meanings, here is a typical example:

(8) *Tylko najsilniejsi i najsprawniejsi mogą sobie pozwolić na **ponoszenie** dużego kosztu. Jednak im większe koszty i ryzyko ponoszone przez osobnika, tym większa jego wartość...* (Przepis na człowieka, Ryszkiewicz, 1996). ‘Only the strongest and most capable can afford **to pay** the high cost. However, the greater the cost and risk incurred by an individual, the greater his value’.

Another example of this type: *pokarmienie* (from *pokarmić* ‘feed for a while’), 3 occurrences in NKJP (date of access 20.07.2025), implements the meaning of a result, but not of an action limited by external time frames:

(9) *Jeśli miałbym rybę w akwarium której nie znam, i **pokarmieniu** jej pokarmem X miała regularne wzdęcia, pływałaby osowiała, dawała oznaki choroby, to również uznałbym, że pokarm X jest niewłaściwy dla tego gatunku ryby* (Usenet 2005-01-20). ‘If I had a fish in an aquarium that I didn’t know, and **after feeding** it food X, it would bloat regularly, swim lethargically, and show signs of illness, I would also consider food X to be inappropriate for this species of fish’.

The following example with a VN *pobieganie* ‘jogging’ shows the usual meaning:

(10) *Sport w wydaniu lekkiego **pobiegania** lub ćwiczeń zwanych gimnastyką, to nadal zdrowie* (Winogrodzki, 2006). ‘Sport, such as light jogging or exercises called gymnastics, is still healthy’.

About 50 similar nouns with PO- (e.g., *pobrzmiwanie* ‘(short) vocalization’, *potrącanie* ‘(short) touching’, *powalczenie* ‘overcoming (for a while)’, *podenerwowanie* ‘irritation, nervousness (for a while)’), which combine a delimitative meaning with some other, behave in speech in the same way. They realize various aspectual meanings (resultative, attenuative, distributive, multiplicative, etc.), but not delimitative ones.

**Option 2:** semantic drift towards substantivity. This occurs as a result of the loss of living word-formation-semantic links of deverbatives with a motivating delimitative verb. In Dubisz (2004), such lexemes are always presented not only in verb articles, but also in separate dictionary entries as nouns. They can indicate stable states such as *pomyślenie* ‘thinking’, *pochodzenie* ‘origin’, *poruszenie* ‘inspiration, emotional upsurge’, name entire situations such as *posiedzenie* ‘meeting’, *posłuchanie* ‘audience’, *pogadanie* ‘conversation’, or acquire subject meanings *poszycie* ‘covering, cladding’. A good example in this regard is the legal term *pożycie* (more than 1,100 occurrences in NKJP, date of access 20.01.2025). Word-formationally, it is related to the verb *pożyć*, which has three dictionary meanings:

- Pożyć* 1. «przeżyć pewien czas» ‘to live for a certain period of time’ 2. «spędzić pewien czas, żyjąc w jakiś sposób» ‘to live for some time in a certain way’ 3. «przeżyć z kimś jakiś czas» ‘to live with someone for some time’.

The NKJP widely represents the terminologized lexeme *pożycie* (legal term), which is recorded in dictionaries as an independent noun in a separate dictionary entry with the meaning “*wspólne życie z kimś [...], obcowanie fizyczne dwojga ludzi, zwłaszcza w małżeństwie*” ‘living together with someone [...], physical cohabitation of two people, most often in marriage’:

- (11) [...] *i nagrody, nagrody. Nie tylko dla górników, ale i matek za wychowanie kilku synów dla górnictwa, dla żon za wieloletnie **pożycie**, a największe – dla kadry za wykonanie planu* (Szczepański, Górniki polski 2005). ‘[...] and rewards, rewards. Not only for the miners, but also for the mothers for raising sons for the mining industry, for the wives for many years of **life together**’.

Both variants described above were predictable. However, we continued to look for usages that would falsify our hypothesis. And we can say that we found them, but in the variant of the language play presented below.

**Option 3.** Sometimes there are lexical indicators of the short duration of the named situation or process. In this case, the meaning of the verbal noun is perceived as close to the delimitative one. However, the delimitative meaning focuses attention on the external boundaries of the action, while here we see an indication of a brief holistic situation. Thus, there is a shift in focus from external time frames to a brief holistic action. For example, such are the usages of the VN *potrzymanie* ‘holding on for a while’ (formed from the verb *potrzymać* 1. “trzymać kogoś, coś, zwykle w rękach, przez jakiś czas; przytrzymać” ‘to hold someone, something, usually in the hands, for some time, to hold’):

(12) *Krótkie **potrzymanie** rąk nad talerzem daje jednak gwarancję, że podany na stół posiłek będzie wartościowy* (Rozumowski). ‘Holding one’s hands over a plate for a short time, however, gives a guarantee that the food served on the table will be healthy’.

(13) *Proszę pana sekretarza o zapisanie nazwisk, widzę las rąk. Proszę o **potrzymanie** tych rąk chwilę w górze. A pana senatora proszę o zadanie pytania. Czy ja mam minutę na zadanie pytania czy więcej?* (Senat RP). ‘I’m asking the Secretary to write down the names. I see a sea of hands. Please hold those hands up **for a moment**. And I’m asking the Senator to ask a question. Do I have one minute to ask a question, or more?’

**Option 4:** Language plays (an occasional usage to create a certain stylistic effect). In our material, we found several occurrences of occasional usage of VNs in a meaning close to the delimitative one, where we are talking about short-term processes or states. These are the VNs *pociskanie* ‘tossing, throwing for a while’ (7 occurrences), *pobujanie się* ‘rocking for a while’, *poskakanie* ‘bouncing / jumping for a while’, *potanieczenie* ‘dancing for a while’.

It is symptomatic that in half of the recorded similar uses, the VN is put in quotation marks, which emphasizes its unusualness, its usage for the purpose of a language play:

(14) *W trakcie pikniku firma ze Śląska prezentowała bardzo atrakcyjne Eurobangy, które to urządzenie pozwala na wykonywanie skoków na znaczną wysokość. Pięć minut takiego “**poskakania**” kosztowało 10 złotych* (Gazeta Krakowska, 2003-10-06). ‘During the picnic, a company from Silesia presented a very attractive Eurobangy, which is a device that allows you to jump to a considerable height. Five minutes of such “**jumping**” cost 10 zlotys’.

(15) *Ostatnio na sprzedaż w domu aukcyjnym w Teksasie został wystawiony fotel bujany, kiedyś należący do Kennedy’ego. [...] Chociaż za “**pobujanie się**” na nim trzeba zapłacić ponad 100 tys. dolarów, chętnych do jego kupna nie brakuje* (Super Express, 2006). ‘A rocking chair that once belonged to Kennedy was put up for auction. [...] Although more than 100,000 dollars had to be paid for “**rocking**” on it, there was no shortage of people willing to buy it’.

Thus, if such VNs are present in the corpus, 4 scenarios could be possible:

- 1) reduction of the aspectual spectrum of the verbal noun, which realizes in speech the resultative, distributive, usual, and other components of aspectual semantics, but is not found in delimitative or inchoative meanings;
- 2) semantic drift towards substantivity/abstractness;
- 3) the usage of such verbal nouns in a meaning similar to the verbal one; in this case, there is a weakening of the verbal meanings of the external time frames of the action, a shift in the focus of attention to a short, holistic action;
- 4) language play.

#### 4. Some Results of the Linguistic Survey

Even the best corpus cannot provide exhaustive information about the state of the language. Therefore, we conducted a small survey of native speakers of Polish (35 persons). Our respondents were Polish students from different Polish universities, native speakers of Polish. Given the limited space of this article, we present below only the most interesting results of this survey.

In the first type of tasks, respondents had to decide whether it was possible to form a nominal form from certain verbs and, if so, to write these forms (as *ponosić* → *ponoszenie*). The verbs were proposed at random, and among them were those that 1) have a dictionary nominal form (*posiadać* → *posiadanie* ‘possession’,<sup>8</sup> *pożyc* → *pożycie* ‘residence’, 2) do not have a dictionary nominal form (like *pobyć* ‘stay’, 3) have a dictionary VN, but it is absent from the corpora (as *pobadać* ‘to explore’, *zadudnić* ‘to blow’, *poweseleć* ‘to have fun’).

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<sup>8</sup> Of course, we did not offer students interpretations of these verbs.

We received mixed responses. Firstly, not a single questionnaire had all the positions filled in, each respondent had some verbs without VNs. Only the VNs from the above-mentioned verb *posiadać* did not raise any doubts; in other cases, VNs were missing from some of the answers. Secondly, a relationship was found between the presence of a verb meaning other than the delimitative one and the number of positive responses to the VNs. If a verb has only a delimitative meaning or combines it with a distributive one, then, according to the survey results, its chances of being nominalized are very small. Thus, only 3, 5, and 6 respondents out of 35, respectively, considered it possible to form VNs from the verbs *pobadać* 'to explore', *pobyć* 'to be', and *poszaleć* 'to go crazy'. At the same time, the verbs *poszumieć* 'to make noise', *poweseleć* 'to have fun', *pochorować* 'to get sick', and *popalić* 'to burn' express well not only the delimitative but also the resultative meaning, and here 14, 16, 18, and 26 positive responses were received. It should also be noted that the presence or absence of the corresponding VN in the dictionary (which the respondents, of course, were not informed about) in this case does not affect the result. It is the semantics that matters: the VNs *popalenie*, *pożycie*, and *pobadanie* are in Dubisz's dictionary, but the number of positive responses for them varies significantly: 26, 16, and 3, respectively.

The results for the verb *pokropić* 'to drip a little (about rain)' look very symptomatic. There is no corresponding VN in the dictionary (Dubisz, 2004), and we found this suspicious, since there seem to be no obvious semantic or other reasons for the prohibition of its formation. The query in the NKJP showed 23 uses of the VN *pokropienie*. The results of the survey confirmed the viability of this VN: 29 out of 35 respondents indicated that this noun could be formed from this verb.

The next type of task involved making sentences with VNs (*zatłuczenie*, *potoczenie się*, *zagadywanie*, *pobujanie się*). These VNs are formed from polysemous verbs, one of the meanings of which is quantitative-temporal – inceptive/ingressive or delimitative. We were interested in which of the meanings of the motivator verb these VNs would be used, whether there would be a delimitative one among them. In 15% of cases, respondents were unable to come up with such sentences at all. In 30% of cases, the task was not completed quite correctly: a third of the sentences received did not contain the VN, as the conditions indicated, but a verb (in total, in all questionnaires – 47 sentences). Apparently, the use of these VNs causes some difficulties for native speakers, and is not a completely familiar speech act, since a longer path is chosen (two stages instead of one: first form a verb back from the

noun, and only then build a sentence with it). An analysis of those sentences in which respondents did include VNs (76 results, about 50% of all responses) showed that the VNs were used predominantly in procedural or resultative meanings, without emphasizing any time boundaries of the action; see typical examples from the questionnaires below:

(16) *Wszystko zależy od **potoczenia się** wydarzeń w przyszłości* ‘It all depends on how things **will develop** in the future’,

(17) *Nauczyciela denerwowało ciągle **zagadywanie**, które przeciągało trwanie lekcji* ‘The teacher was irritated by the inappropriate **conversations** that interfered with the continuation of the lesson’,

(18) *Policja przybyła na miejsce i ustaliła że **zatluczenie** było przyczyną zgonu* ‘Police arrived at the scene and determined that bludgeoning was the cause of death’.

Only in one usage did we find a clear hint of ingressiveness (the starting point of the process):

(19) ***Zatluczenie** tego serca nie było możliwe* ‘It was impossible to make this heart **beat again**’

But “the cherry on the cake” is the funny result of trying to fulfill the task of the test “perfectly” – that is, to use a VN with a “się”. At the same time, there is still no starting point meaning, it is of course resultative meaning:

(20) *Babcia spowodowała **zatluczenie się** na śmierć swojego kota* ‘Grandmother caused her cat to the point where he **beat himself to death**’.

## 5. Conclusions

The quantitative ratio of Russian, Ukrainian, and Polish verbs with the meanings of external time limitation (inchoative and delimitative) indicates an obvious decrease in their number from east to west. At the same time, their ability to nominalize increases. Nevertheless, the Polish categorical verbal nouns of these groups do not fully correspond to the verb in their

functional and semantic properties and are somewhat shifted towards the noun. Despite the possibility of forming action nouns from delimitative and inchoative verbs, their contextual analysis shows that they express a short, holistic action rather than focusing on its external quantitative and temporal boundaries. In addition, the very number of uses of action nouns in this meaning, in comparison with resultative, distributive, general factual, and others, is noticeably less. It is possible to make a cautious assumption that one of the reasons for the increase in the number of verbal nouns “from the east to the west” (Russian → Ukrainian → Polish) is the weakening of the quantitative-temporal limitation of the action in the semantic structure of the perfective verbs themselves. This is manifested both in the number of corresponding verbs and in the shift of the semantic emphasis from the external boundaries to the meaning of the integrity of the action. This idea, however, requires further verification.

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## **(In)definiteness-driven Agreement Patterns in Ukrainian Numeral Phrases**

**Abstract.** Slavic numeral phrases (numerically quantified expressions) have been a constant target of inquiry because of tangled agreement relations of a twofold nature. First, the agreement of the cardinal with the complement noun varies for paucal cardinals and higher cardinals – *five* and above. Second, higher numerals exhibit ‘optional’ agreement with the verb, which may appear in singular neuter or plural form. We show that the ‘optional’ agreement varies upon the definiteness and determinacy of the referent of the numeral phrase. In showing that, we present data from the distribution of reciprocal and reflexive pronouns, approximative inversion, and collective nouns with numerals. Our analysis is typologically compatible with research on definiteness and plurality in Western Armenian (Sigler, 1997), plurality and animacy in Turkish (Alexiadou, 2019), and languages marking verbs for definiteness (Ortmann, 2000), contributing to the study of morphological economy and pragmatic effects on agreement (Danon, 2010; Corbett, 2023).

**Keywords:** numerals; Slavic agreement; semantic agreement; definiteness; plurality.

## 1. Introduction

Slavic numeral phrases (numerically quantified expressions) have been a constant target of inquiry because of the tangled agreement relations of a twofold nature. First, the agreement of the cardinal with the complement noun varies for paucal cardinals (for example, taking plural nominative in Ukrainian or singular genitive in Russian for cardinal *two* in nominative environment) and higher cardinals – *five* and above. Second, numeral phrases with non-paucal cardinals exhibit ‘optional’ agreement with the verb which can appear in singular neuter or plural form. The latter is attested cross-linguistically: the verb may only ‘optionally’ agree in number with the cardinal-noun construction.

- (1) a. Pjat studentiv      bačy{-ly/-lo}      veselku.  
          five students.pl.gen   saw.{past.3p/past.3s.neut}   rainbow.acc

‘Five students saw the rainbow.’ [Ukrainian]

- b. xamstaššar      šanta      waʔʕ-et/waʔaʕ-uu.  
          fifteen      bag-ø      fell-F-ø/fall-pl

‘Fifteen bags fell.’ [Lebanese Arabic; Ouwayda, 2017]

- c. vec hyur      yega{-v/-n}      partiin  
          six guest-ø      came{-3s/3p}      party.dat

‘Six guests came to the party.’ [Western Armenian; adapted from Sigler, 1997, p. 181]

We argue that East Slavic verb morphology agreeing with numeral phrases can be used for definiteness marking in a broad sense in which referential determinacy is also included. We further claim that in cases where the agreement is forced (such as approximative inversion, the presence of reflexives and reciprocals) and not optional, it is due to the syntactic or semantic processing of the definiteness setting. When syntax does not force a certain agreement pattern, the definiteness setting is processed by semantics or discourse. In other words, if the agreement is not required by syntax, contexts in total provide one or another way to resolve verb morphology in languages that permit optional agreement of the numeral phrase with the verb, but a given context does so only one obvious way.

We argue that one type of Ukrainian numerals (which we call collective diminutive numerals, or CDNs) is only fully felicitous in the case their discourse referent, a small animate social group, has been introduced in the preexisting context as a group, and constitutes a case of semantic agreement with the main verb:

- (2) Četvirko studentiv                      bačy{-ly/ʔ-lo}                      veselku.  
       four.CDN students.pl.gen        saw.{past.3p/past.3s.neut}        rainbow.acc  
       ‘Four students saw the rainbow.’

In Section 2, we start with a discussion of the relationship between agreement and definiteness and come to an intermediate conclusion that definiteness influences numeral-verb agreement across languages. In Section 3, we introduce aspects of Slavic numeral phrase agreement and motivate our choice of Ukrainian as the object of this study. We proceed to claim that the definiteness setting influences the morphology of the main verb: plural marking corresponds to definite numeral phrases, and singular neuter marking corresponds to indefinites. Section 4 provides evidence for this claim in exploring the cases when the numeral-verb agreement is forced, and not optional. We find that the cases of forced agreement plausibly correlate with the (in)definiteness and (in)determinacy of the numeral phrase. Section 5 focuses on collective diminutive numerals in Ukrainian. Here we claim that semantic definiteness effects influence verb morphology when it is not forced by syntax. Section 6 concludes with some prospects. By highlighting definiteness effects present in Slavic numeral morphosyntax and providing novel data, we contribute to the discussion of the interaction between definiteness, plurality, and animacy.

## 2. Agreement and Definiteness

The puzzle of ‘optional’ agreement with Ukrainian numeral phrases motivates an investigation into the link between agreement and definiteness. We propose that this variation is not optional, but is instead governed by the definiteness interpretation of the numeral phrase in question. This hypothesis is strengthened by data from languages such as Western Armenian and Russian, where a functional correlation between agreement morphology and

definiteness is overtly realized. Precise understanding of this correlation requires a definition of (in)definiteness, which we understand in the sense of Heim (1982) as difference in familiarity between unfamiliar (new) and familiar (known). Definites, then, are connected to their discourse referents which have been introduced earlier. The relationship between definiteness of number phrases and plurality is documented cross-linguistically. For example, Sigler (1997, pp. 167–168) discusses data from Western Armenian. Indefinite subjects in Western Armenian appear with verbs in third-person singular, and definite ones with verbs in plural:

- (3) a. *kəsan*            *usanoʁ kənuten-ə-mə*            *caxoʁe-c-av*  
          twenty           student- ɔ                            exam-abl-indef fail-aor.3sg  
          ‘Twenty students failed an exam.’
- b. *kəsan usanoʁ-\*(ner)-ə*            *kənuten-ə-mə*            *caxoʁe-c-an / \*-v*  
          twenty student-\*(pl)-def            exam-abl-indef            fail-aor-3pl / \*-sg  
          ‘The twenty students failed an exam.’ [Western Armenian]

Sigler claims that verb morphology is strictly plural when the relevant numeral-noun complex has been introduced into the discourse before the utterance in question takes place. That is to say, the five soldiers in the following sentence have been introduced into the discourse before the sentence is uttered, and the speaker is concerned about their death:

- (4) *ayt baderazm-i-n meč hink zinvor-\*(ner)-(ə) əsbann-ve-c-an/\*-ab*  
          that battle-GEN-dt in 5 soldier-\*(pl)-(dt) kill-pass-aor-3p/\*-sg  
          ‘In that battle the five soldiers were killed.’

If the context is not clear about their definiteness, “soldier” does not require a definite article or plural marker after the numeral. But if the context sets the soldiers as a salient group, both the complement noun and the verb must become overtly plural. The definite article can be sometimes omitted, though.

Pesetsky (1982, pp. 83–84), reviewing earlier traditional grammar works, shows that in Russian, non-agreeing subjects “exclude the group reading” and must be indefinite:

- (5) a. *šest' matematikov*                      *razlučilis' na mostu*  
       six mathematicians.pl.gen            parted.3p on bridge  
       'Six mathematicians parted company on the bridge.'
- b. *#šest' matematikov*                      *razlučilos' na mostu*  
       six mathematicians.pl.gen            parted.3s.neut on bridge  
       'Six mathematicians parted company on the bridge.'

However, with enough context, (5b) above becomes felicitous in Russian. For example, there is a fad in mathematical community to part (or end a relationship) on one of the Königsberg bridges to signify that there can be no solution to the relationship. The craze faded but some six of the community did perform the ritual. To simplify somehow, (5b) has a reading that it holds for a specific group of six mathematicians that each small group of them partitioning (or covering) the whole group one way or another can be predicated of with part-on-the-bridge (some sort of cumulative reading). In each small group, there is at least one member of the group of the six mathematicians. In an extreme case, the predication with part-on-the-bridge comes down to each individual of the group of six mathematicians (parting from unmentioned persons; some sort of distributive reading). Wider context, such as knowledge of the world, routinely influences agreement (see Danon, 2010 for examples from Hebrew).

The link between agreement and definiteness, observed in Western Armenian and Russian, provides a framework for analyzing more complex phenomena. Accordingly, the next section turns to 'optional' agreement patterns found with numeral phrases in Slavic. We will begin by surveying the key parametric variations across the Slavic family to contextualize the issue and motivate our focus on Ukrainian. The Ukrainian data will then serve as the basis for our central claim: that this agreement variation is not optional, but is determined by the (in)definiteness and (in)determinacy of the phrase.

### 3. Slavic Numeral Phrases and 'Optional' Agreement

The morphosyntax of Slavic numeral phrases is notoriously convoluted, with significant variation across Slavic languages. In this section, we briefly

introduce the chief riddles of Slavic numeral morphosyntax and justify our choice of Ukrainian as the object of this study.

What all Slavic languages without articles share is ‘genitive of quantification’. Cardinals *five* and above assign plural genitive to the complement noun:

- |             |                                         |
|-------------|-----------------------------------------|
| (6) a. Sedm | lékařů                                  |
| seven       | doctors.pl.gen [Czech, West Slavic]     |
| b. Sedam    | liječnika                               |
| seven       | doctors.pl.gen [Croatian, South Slavic] |
| c. Sem'     | vračej                                  |
| seven       | doctors.pl.gen [Russian, East Slavic]   |

However, in East and West Slavic, for higher cardinals (but not for other types of numerals, such as collective or diminutive numerals) which are in inherent or lexical (assigned in connection with  $\theta$ -marking or lexically selected) case positions (7a), we observe ‘genitive override’ (Bailyn, 2004). It means that genitive plural on the complement noun is ‘overridden’ and receives case from the verb that assigns an indirect case to both words in the numeral phrase. This is a property of constructions with cardinals *two* and above, but not for full-fledged nouny cardinals, such as numeral bases of *thousand* and above. If a Ukrainian verb such as *keruvaty* (‘to govern, to operate’) or *pyšatysa* (‘to be proud of’) that always assigns instrumental case requires an object that is a numeral phrase, both the cardinal and the complement noun receive instrumental, and the genitive of quantification on the complement noun is overridden. Despite the surface similarity, the three traditionally assumed branches of Slavic languages diverge in oblique case positions: we observe ‘genitive override’ in East and West Slavic, but not in BCS. Genitive override happens exclusively with the numeral phrases with cardinals in inherent or lexical case positions as other constructions that feature genitive (like possessive and partitive, see (7b)), and other types of numerals (like (7c)) are never overridden:

- |                 |               |                     |               |                      |
|-----------------|---------------|---------------------|---------------|----------------------|
| (7) a. Profesor | mehaniky      | pyšajetsa           | <b>simoma</b> | <b>studentamy</b>    |
| professor       | mechanics.gen | prides.3s.pres.refl | seven.inst    | student.masc.pl.inst |

‘The mechanics professor prides himself in (his) seven students.’

- b. Profesor mehaniky pyšajetsa **avtomobilamy** **studentiv**  
 professor mechanics.gen prides.3s.pres.refl car.masc.pl.inst student.  
 masc.pl.gen

‘The mechanics professor prides himself in his students’ cars’  
 (...that they had reconditioned)

- c. Profesor mehaniky pyšajetsa **dvijkom** **studentiv**  
 professor mechanics.gen prides.3s.pres.refl two.CDN.inst student.  
 masc.pl.gen

‘The mechanics professor prides himself in (his) two students.’

Finally, crucially relevant to this paper is ‘optional’ agreement, only present in East Slavic languages. It has received ample attention in literature, most notably in Franks (1994). His contribution was to show that previous analyses failed to account for the diversity within Slavic languages. In Polish and BCS only non-agreeing option is accepted within the standard norm:

- (8) a. Pięć czarownic przyjecha{-lo/\*-ły}  
 five witch.gen.pl arrived{neut.sing/3pl}

‘Five witches arrived.’ [Polish; adapted from Lyskawa (2020, pp. 10–11)]

- b. Devetnaest aviona {je prešlo / \*su prešli} granicu  
 nineteen plane.gen.pl {is flown-across.sg/areflown-across.3pl} border.acc

‘Nineteen planes crossed the border.’ [BCS; adapted from Bošković (2013, p. 70)]

- c. Pjat studentiv bačy{-ly/-lo} veselku.  
 five students.pl.gen saw.{past.3p/past.3s.neut} rainbow.acc

‘Five students saw the rainbow.’ [Ukrainian]

Even within East Slavic, Ukrainian seems to have the most diverse paradigm of patterns of agreement because of several types of numerals derived from nouns: diminutive numerals (DNs: *dvijka*, *trijka*), collective numerals (CNs: *dvoje*, *troje*) and collective diminutive numerals (CDNs: *dvijko*, *trijko*):<sup>1</sup>

<sup>1</sup> Emmerick (1992) notes that in forms such as *dvaká-* and *triká-* in Old Indian, the suffix *-k-* functions as diminutive. Nevertheless, Comrie (1992) observes, Modern Bulgarian



**Table 1.** Agreement properties of Slavic numeral phrases

|             | Genitive of quantification | Genitive override | Optional agreement |
|-------------|----------------------------|-------------------|--------------------|
| BCS         | Yes                        | No                | No <sup>2</sup>    |
| West Slavic | Yes                        | Yes               | No                 |
| East Slavic | Yes                        | Yes               | Yes                |

Several analyses have been proposed to account for ‘optional’ agreement to show that agreement is never really optional in these cases. Recall the Lebanese Arabic data from the introduction, repeated below:

- (10) xamstaʃshar shanta      waʔʃ-et/waʔaf-uu.  
       fifteen                      bag-ø fell-F-ø/fall-pl  
       ‘Fifteen bags fell.’ [Lebanese Arabic; Ouwayda, 2017]

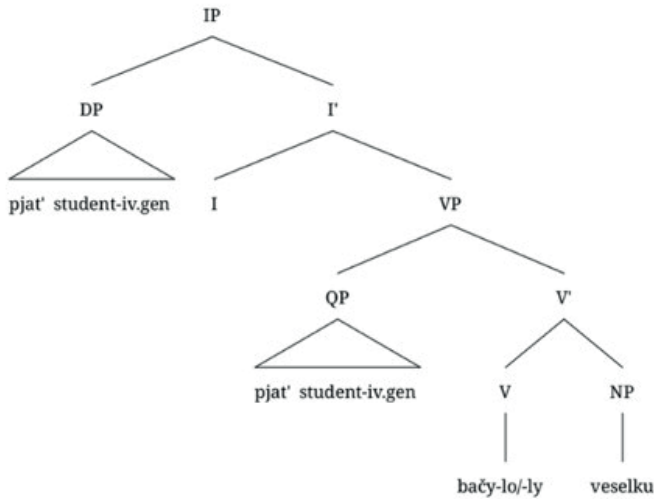
Notice absence of number marking on the complement noun of the numeral phrase. When the complement noun is marked, the form of the verb will always correspond to it, as Ouwayda (2017, p. 267) states: we “[...] can rule out the possibility that plural agreement is simply optional [...], since it is obligatory whenever the noun is overtly plural-marked”.

Ouwayda’s proposal is the “optional pluralizing projection #P” to tie plural agreement with collectivity. The numeral can be in Spec#P to require plural agreement, and in SpecQP for singular agreement (from Ouwayda 2017), with the collective reading available only for cardinals in Spec#P.

A similar proposal has been made by Franks (1994) for explaining optional agreement by movement, with the difference that the whole phrase moves:

- (11) Pjat studentiv    bačy{-ly/-lo}      veselku.  
       five                students.pl.gen    saw.{past.3p/past.3s.neut}    rainbow.acc  
       ‘Five students saw the rainbow.’ [Ukrainian]

<sup>2</sup> We thank an anonymous reviewer for pointing out that the categorical classification here requires nuance. While optional agreement in BCS is largely considered ungrammatical or is highly dispreferred, it is not entirely unacceptable for all speakers. This marginal acceptability is often analyzed as an instance of semantic agreement. For detailed discussion, see Franks (1994) and Bošković (2006, 2024). Another reviewer observes that, in sentences like (8b), optional agreement may occur in colloquial usage when the complement noun is animate; however, elicitation with our informants yielded inconclusive results.



There are problems with such approaches: Ouwayda's account of optional agreement is contingent on the complement noun unmarked for number (described as having a [-pl] feature) as well as a pluralizing projection. Franks' account of optional agreement crucially hinges on different categorial status and height for numeral phrases. Differently from them, Bošković only assumes categorial difference. Bošković (2024) criticizes Franks' approach of different structural heights because the elements in SpecVP can bind subject-oriented anaphors. Instead, Bošković accounts for the optionality by analyzing numeral phrases as quirky subjects: full verbal agreement is triggered when the phrase is a Nominative-cased DP, whereas default (non-agreeing) morphology appears when it is a caseless QP.<sup>3</sup>

Our main claim is that (in)definiteness setting correlates with the number marking on V: plural for definites (and referential determinacy), and default (3s.neut) for indefinites (and referential indeterminacy). We will present as evidence cases where a specific agreement pattern with the verb is required. Our approach does not contradict Bošković's, as it is known that there is a connection between QP/DP distinction and the (in)definiteness setting (Xiong & Huang, 2020). We will further present evidence that, giv-

<sup>3</sup> For an alternative analysis of East Slavic numeral phrase structure – especially in relation to paucal numerals and the resulting case and number mismatches – see Pesetsky (2013), who argues for the presence of a **Quant** projection.

en a context, there is usually one preferred way of resolving the agreement. We infer that when syntactic agreement is underdetermined, semantic factors such as presupposition and collectivity/distributivity distinction on the nominal reference can license verb morphology, in line with the Agreement Marking Principle (Wechsler, 2011).

#### 4. Forced Agreement and (In)definiteness

Slavic languages are known for ‘free’ word order, with the basic word order being SVO (see (12a)): there, the object stays in situ, and the subject is raised to specTP. The next most common word orders are OSV and OVS (as in (12b)), usually derived by Topicalization (A-bar movement), where a fronted object highlights an alternative:

- (12) a. Sim studentiv bačy{-lo/-ly} veselku  
 seven students.pl.gen saw{neut.3s/3pl} rainbow.acc  
 ‘Seven students saw the rainbow.’
- b. Veselku bačy{-lo/-ly} sim studentiv  
 rainbow.acc saw{neut.3s/3pl} seven students.pl.gen  
 ‘As for the rainbow, it was seen by seven students.’

Word order variation of this kind does not influence agreement in most Slavic sentences. For example, genitive override persists, and optional agreement is also preserved, even when the word order is scrambled. However, in one case, word order inside the numeral phrase leads to only one grammatical option, namely, in the case of approximative inversion construction (AIC). This is the first case in this section of placing semantic restrictions on word order and agreement, discussed below in 4.1. Other cases of forced agreement will concern the presence of demonstrative, presence of reflexive *self* and reciprocal *each other*, and semantically motivated forced agreement with collective diminutive numerals. We will show that agreement in all of these cases has to do with the (in)definiteness of (in)determinacy of the referent. The aim then is to generalize the effect of definiteness to optional agreement.

#### 4.1. Indefinites are Singular: Approximative Inversion

When the cardinal and the noun appear in reversed order, they are said to have an ‘approximative reading’ (13). The cardinal receives the role of range approximation, or uncertainty operator (Zaroukian, 2010). Nothing else in East Slavic can be inverted with the approximative effect:

- (13) Studentiv            sim bačy{-lo/\*-ly}            veselku.  
       students.pl.gen    seven saw{neut.sing/3pl}    rainbow.acc  
       ‘Around seven students saw the rainbow’ [Ukrainian]

If adjacency of the cardinal and the complement noun is violated, approximative interpretation is not possible (14a, b). As a result of internal merge, no head can intervene between the inverted words (14c), an observation made by Billings & Yadroff (1996). More precisely, if a head intervenes between the numeral and the common noun in the base positions (14b), internal merge from inside of this phrase is not possible to build an approximative inversion (14c):

- (14) a. Studentiv            ja            bačyv            sim  
       students.pl.gen    I            saw.past.1s    seven  
       ‘As for the students, I saw seven (of them)’  
       #‘I saw around seven students.’ [Ukrainian]
- b. sorok            veselyx            student-ov  
       forty            happy.pl.gen    students.pl.gen  
       ‘Forty happy students’ [Russian]
- c. (\*veselyx) student-ov (\*veselyx) sorok (\*veselyx)

The consistent link between this inversion and an indefinite, approximative reading suggests a syntactic basis for the effect. If we posit that the numeral phrase exists within a larger DP projection, we are able to propose that this construction is headed by a functional element encoding indefiniteness (e.g., a [-definite] feature). The noun-cardinal inversion can then be analyzed as the syntactic mechanism that satisfies, or ‘checks’, this feature. This framework provides a principled explanation for the restriction on the ap-

proximative inversion that it goes together with the verbal agreement of the third person singular neuter (see the above example (13)). As a conjecture, we can predict that, since the structure is syntactically marked as indefinite, no element that requires or imposes definiteness (such as a demonstrative discussed below) can precede the inverted noun-cardinal complex, as this would result in an ungrammatical feature conflict (see the next section).

In certain contexts, the numeral phrase can be accompanied by a classifier-like general noun, sometimes referred to as a pleonastic or measure noun. In Russian, for example, the noun *čelovek* (lit. ‘person’) can be used as a sort of classifier after a number, taking a complement common noun (15b). If the approximative inversion is built up from this construction, it is the classifier-like general noun *čelovek* (15a), not the complement common noun (15c), nor both together (15d), that undergoes inversion with the cardinal.

- (15) a. *Čelovek*      *sem’*      *studentov*      *vide{-lo/\*-li}*      *radugu*  
           people.pl.gen    seven      students.pl.gen    saw{neut.sing/3pl}    rainbow.acc  
           ‘Around seven students saw the rainbow.’ [Russian]  
           [DP [D *čelovek*<sub>i</sub> [-def]]][CLP [Num *sem*][CI’ [CI  $\emptyset$ <sub>i</sub>] [NP *student-ov*]] ...  
           (CI = Classifier)

- |                      |                  |                  |
|----------------------|------------------|------------------|
| b. <i>sem’</i>       | <i>čelovek</i>   | <i>studentov</i> |
| seven                | people           | students         |
| c. <i>*studentov</i> | <i>sem’</i>      | <i>čelovek</i>   |
| students             | seven            | people           |
| d. <i>*čelovek</i>   | <i>studentov</i> | <i>sem’</i>      |
| people               | students         | seven            |

By analyzing the classifier-like general noun *čelovek* as the head of the entire nominal expression in (15a), we immediately capture why it controls external verbal agreement, triggering the default singular neuter form. Locating the [-def] feature responsible for the approximative semantics in the same D head formalizes the mechanism of inversion as a feature-checking operation between the D head and its QP complement.

This analysis is aligned with the broader observations on the nature of indefiniteness. Billings & Yadroff connect approximative cardinality with

“some” indefinites, such as “Some men were in the garden”. For us, approximation and indeterminacy that arises from this construction points to the fact that even if a group of the students can be identified, individual students cannot. Indeterminacy about the number easily transfers to anonymity of individuals and indeterminacy of reference because of its fluent demarcation. However, further research is necessary to fully understand AIC.

Noun-numeral inversion is linked to indefiniteness cross-linguistically. It has been shown that in Shupamem (Cameroon),  $N > \text{Num}$  order only has definite interpretation, and  $\text{Num} > N$  is exclusively indefinite, which is the opposite of approximative inversion construction in East Slavic (Vázquez-Rojas et al., 2011). Similar effects are reported by Dryer (2008) for Nias (Austronesian). If the “default” singular neuter agreement is correlated with indefiniteness, one expects to find it in conflict with contexts requiring definite interpretation, which is discussed in the next section.

#### 4.2. Definites are Plural: Demonstratives, Reciprocals, Reflexives

In this section, we will go one step further and show that pronouns occupying the D position above the numeral uniformly determine agreement with the verb depending on the pronoun’s morphological form. First, demonstratives must be referential and lead to a definite interpretation. We therefore predict that the verb agreement with third person singular neuter is not acceptable. The prediction holds:

- (16) Ci / \*ce      pjat      studentiv      vyrišy{\*lo/-ly}      rozlučytys’  
          these/(*this*)   five      students.pl.gen   decided.past.{3s.neut/3pl}   to-disband

‘These five students decided to disband.’

We see that approximative inversion construction (AIC) and demonstrative pronoun force different agreements on the verb. AIC has an indefinite interpretation, and demonstrative pronouns force a definite interpretation. The pronoun also carries a presupposition of existence and uniqueness. If only one element can occupy the D position, the prediction arises that approximative inversion cannot appear with demonstratives (in fact, nothing can precede AIC, as shown above):

- (17) a. #Ci                      studentiv                      sim                      bačy{-ly/-lo}                      veselku  
                                          these.pl.nom                      students.pl.gen                      seven                      saw{neut.sing/3pl}                      rainbow.acc  
                                          #‘These around seven students saw the rainbow.’

b. The (\*around) seven students saw the rainbow [English]

The ungrammaticality of these examples stems from a direct feature conflict within the DP. Under our analysis, the head of the DP is specified for a [def] feature. Overt lexical items like the demonstrative *ci* inherently carry and assign a [+definite] value. In contrast, the AIC is the syntactic realization of a [-def] value, licensed by AIC. The two are therefore in competition to set the feature of the same head. The constructions in (17) are ungrammatical because they attempt to value D as both [+def] and [-def] simultaneously, resulting in a failed derivation.

Secondly, reciprocals are words like ‘each other’. They naturally require a plural subject, otherwise the sentence is ungrammatical (Heim et al. 1991). Agreement data from the distribution of Ukrainian numeral phrases seems to support it. In East Slavic higher numeral phrases, the presence of reciprocal ‘each other’ forces a plural agreement to the verb.

- (18) Sim                      studentiv                      zna{\* -lo/-ly}                      odyn                      odnogo  
                                          seven                      students.pl.gen                      knew{neut.sing/3pl}                      one                      one.gen  
                                          ‘The seven students knew each other.’

If our claim is correct, the subject as the antecedent of reciprocals is interpreted as definite or determined. At this moment, recall the Königsberg-bridge example above (5). There, the singular neuter morphology was possible if, applied to the group reference, the distributive reading down to an intermediate (i-sum) level and further down to individuals was allowed. In the case of thorough distributive reading, some covert reference to outside of the group was considered if the verbal predicate was collective. In the case of reciprocals here, the commonality is the distribution down to an intermediate (i-sum) level, but the distributive reading down to the individuals in the group and the accompanying covert reference to outside of the group are ex-

cluded. Conditions for the referential indeterminacy are still incomplete.<sup>4</sup> It is predicted, then, that similarly to the case involving a demonstrative pronoun, reciprocals are semantically unlikely to cooccur with approximative inversion (19a), but they do cooccur with plural demonstrative pronouns (19b), because no agreement conflict arises. The predictions seem to hold:

- (19) a. #Studentiv      sim      zna{-lo/-ly}      odyn      odnogo  
          students.pl.gen      seven      knew{neut.sing/3pl}      one      one.gen

‘(Some) seven students knew each other.’

- b. Ci      sim      studentiv      zna{\* -lo/-ly}      odyn      odnogo  
      these      seven      students.pl.gen      knew{3s.neut/3pl}      one      one.gen

‘These seven students knew each other.’

Finally, the same extends to reflexives<sup>5</sup> as well:

- (20) Sim      studentiv      bačy{\* -lo/-ly}      sebe  
      seven      students.pl.gen      saw{neut.sing/3pl}      self

‘Seven students saw themselves.’

- (21) a. #Studentiv      sim      bačy{-lo/-ly}      sebe  
          students.pl.gen      seven      saw{neut.sing/3pl}      self

‘(Some) seven students saw themselves.’

<sup>4</sup> If we follow the judgment of Pesetsky on (5), the reasoning is simpler: predications on the group reference allow for the plural morphology, ones down to an intermediate (i-sum) level allows for the singular neuter. We leave it open which line we should follow for further research.

<sup>5</sup> The relationship between reflexives and reciprocals is not well understood and has a great deal of cross-linguistic variation. Büring (2005, pp. 220–221) observes that “plural reflexive sentences cannot be interpreted as reciprocal; for example, they like themselves cannot mean that they each like the other(s)”. In German and many Slavic languages, however, they allow for reciprocal interpretation:

- (i) a) Sie mögen sich  
      they like self  
      ‘They like each other.’ / ‘They like themselves.’ (German; Büring, 2005, p. 221)  
      b) Oni siebie lubią  
      they self like.pl  
      ‘They like each other.’ / ‘They like themselves.’ [Polish]

|       |       |                 |                    |      |
|-------|-------|-----------------|--------------------|------|
| b. Ci | sim   | studentiv       | bačy{* -lo/ -ly}   | sebe |
| these | seven | students.pl.gen | saw{neut.sing/3pl} | self |

‘These seven students saw themselves.’

Our analysis rests on the assumption that the definiteness and determinacy of a numeral phrase can be formally determined within the syntax. The section has provided strong support for this view by examining three distinct contexts where verbal agreement is unambiguously plural. The unifying factor across these cases is that each construction requires a referentially determined antecedent, which we have modeled with a [+def] feature that syntactically forces plural agreement. These instances stand in contrast to cases where the syntax leaves the [def]-value underspecified, resulting in the agreement optionality that is ultimately resolved at the semantic or discourse level. Thus, we have established a crucial correlation: when the definiteness of a numeral phrase is syntactically fixed, so too is its agreement pattern. In the next section, we look at a special case of strongly preferred agreement in Ukrainian after briefly describing general agreement patterns of Ukrainian numeral phrases.

## 5. Semantic Agreement, Definiteness, and Collective Diminutive Numerals (CDNs)

It is well known in the literature that  $\varphi$ -features of words can be expressed even if syntactic agreement is not possible, as in “donkey anaphora” (Preminger, 2019):

(22) No linguist who has purple pants looks silly in them/\*it

In “donkey sentences”, the plural agreement is present despite absence of c-command. Further, the nominal in question (*purple pants*) is in the relative clause, which means that features are not syntactically interpreted. Donkey anaphora type of agreement is then semantic and is based on semantic  $\varphi$ -matching. Slavic nouns referring to humans (such as *profesor*) have an interpretable gender feature. Although the noun is morphologically masculine, it can be semantically feminine. Syntactic agreement fails here, and we observe semantic agreement:



These nouns, to the best of our knowledge, have never received a proper analysis in the literature, including in traditional grammar. The attention to Ukrainian diminutive collectives was mentioned as a separate phenomenon in 1932 in *Narysy z ukrajins'koji syntaksy* (*Essays on Ukrainian Syntax*) (Smerečynskyj, 1932, p. 99). However, the discussion is quite brief, and the author mentions that “there are diminutive numerals like...četvirko, pjatirko etc. not present in other languages”. The most authoritative dictionary of Ukrainian (Bilodid, 1970) does not describe *dvijko* as diminutive, but rather as an ‘immutable group’ form, and gives the following examples:

- |         |        |       |                |             |              |
|---------|--------|-------|----------------|-------------|--------------|
| (26) a. | Kolo   | stiny | stojat         | dvijko      | divčatok     |
|         | around | wall  | stand.pres.3pl | two.CDN.nom | girls.pl.gen |

‘Two girls are standing near the wall.’ (Vasylchenko, 1954).

- |             |     |             |            |             |                       |
|-------------|-----|-------------|------------|-------------|-----------------------|
| b. Pered    | nym | vidčajdušno | tancuva-ly | dvijko      | cyhančat              |
| in-front-of | him | boldly      | danced.3pl | two.CDN.nom | roma-kids.<br>pl.gen. |

'Two Roma kids boldly danced in front of him.' (Hončar, 1954).

No other types of numerals prefer plural agreement on the verb: diminutive numerals such as *dvijka*, *trijka*, etc. are common feminine nouns and agree in all  $\phi$ -features, collective numerals such as *dvoje*, *troje*, etc. exhibit optional agreement, and cardinals *five* and above exhibit optional agreement. Based on the discussion of syntactically forced agreement driven by definiteness and determinacy, other examples of semantic agreement in East Slavic, and properties of CDNs that characterize them as collective we claim that they introduce a semantic definiteness and determinacy effect on agreement with the verb. Unlike the cases of forced agreement in the previous section, this effect does not stem from a formal syntactic definiteness feature. Rather, the semantic mechanism at play is one of group formation and discourse salience similar to the reaction to the collectivity and distributivity for the Königsberg-bridge example and to the antecedent formation of reciprocals and reflexives. By lexicalizing a small number of individuals as a single, bounded ensemble (e.g., ‘a twosome’), the CDN presents its referent as a uniquely identifiable and cohesive entity within the discourse model, thereby motivating the plural agreement typically associated with definite, specific groups.

## 6. Conclusion and Future Problems

This paper has argued that variable patterns of verbal agreement with numeral phrases in East Slavic are not a matter of optionality, but rather serve as a sensitive diagnostic for the definiteness and referential determinacy of the subject DP. We claimed that the (in)definiteness feature in D correlates with the number marking on V: plural for definiteness and determinacy, and default (3s.neut) for indefiniteness and indeterminacy. Definiteness-driven agreement in this sense is syntactic in cases in Section 4 but semantic with CDNs (and hence can be overridden). Semantic agreement is driven by the context as CDNs cannot be licensed without the discourse referent introduced before. Discussion of definiteness-driven agreement is typologically compatible with research on definiteness and plurality in Western Armenian (Sigler, 1997), plurality and animacy in Turkish (Alexiadou, 2019), and languages marking verbs for definiteness (Ortmann, 2000), such as Hungarian, contributing to the study of morphological economy and pragmatic effects on agreement (Danon, 2010; Corbett, 2023). However, great issues still remain. For example, it is not clear what happens to the definiteness setting when the numeral phrase is in the oblique cases and the genitive on the complement noun is overridden, as the genitive of quantification is the only genitive that can be overridden in East and West Slavic languages. Bošković (2006) claims that the numeral in oblique case is an AP. We end up with a cardinal-noun construction that can be NP/DP, QP or AP depending on the construction in question. Considering semantic  $\phi$ -matching of gender features in Slavic discussed above, plural agreement on verbs in presence of CDNs may also be extraneous, especially because it can, in rare cases, be overridden by a singular demonstrative pronoun. Other remaining issues include the sources of approximative meaning and its connections to indeterminacy, issues in morphology of numerals and roles of suffixes (in particular the apparent polysemy of the suffix *-k-*), and distributivity and collectivity in numeral phrases.

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# ARTICLES

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## **“Written by a Man” – A Compliment or an Insult? A Stylometric Analysis of Female Character Complexity in Male- and Female-Authored Fiction**

**Abstract.** This study investigates whether male and female authors differ in the linguistic complexity they attribute to female characters in contemporary fiction. Drawing on a custom corpus compiled of fragments of dialogue spoken by female characters in one hundred fantasy novels published in the 2010s, the analysis applies stylometric methods to measure two forms of linguistic complexity: lexical complexity and syntactic complexity. Statistical modelling reveals no significant difference between male- and female-authored texts in terms of lexical complexity. However, syntactic complexity differs significantly, in favour of male-authored dialogue. These findings partially contradict expectations grounded in feminist theory, suggesting that women would have the tools and experiences to produce more complex female characters. This paper presents the first, to this date, stylometric analysis of gender effects on character complexity.

**Keywords:** stylometry; male gaze; character complexity; natural language processing; corpus linguistics.

### **1. Introduction**

With each new generation come new trends and in-group jokes, understandable to the select few. A phrase which is now gaining traction in online communities is the idea of a text clearly being “written by a man”, or

“written by a woman”. As explained by Urban Dictionary, a dictionary of online jokes, being “written by a man” is “typically used to describe a female [character] who fits the stereotypical beauty standards that appeal to men. e.g. innocence, natural beauty, etc.” ([www.urbandictionary.com/define.php?term=written%20by%20a%20man](http://www.urbandictionary.com/define.php?term=written%20by%20a%20man), DOA 20.11.2025). As highlighted by the online dictionary, this label is seen as something pejorative, while a text written by a woman has positive connotations. The trend appears to have gained traction on the TikTok platform; however, similar online communities existed prior to its emergence, e.g. Reddit’s *r/MenWritingWomen* community ([www.reddit.com/r/menwritingwomen](http://www.reddit.com/r/menwritingwomen), DOA 20.11.2025). The community members post book fragments about women written by male authors, in which the female characters are often flat, unbelievable, or oversexualised. The analogy between the trendy phrase and the online community is clear; by popular belief, male authors have a tendency of producing unrealistic female characters who lack complexity, and abide by gender norms dictated by the male-dominated society.

This study aims to empirically test whether this notion is backed by any evidence, or is simply a commonly accepted misconception. Specifically, the work aims to determine whether men and women write female characters differently. I hypothesise that there is a difference in the complexity of female characters penned by male authors in comparison to female authors. To test the hypothesis, I use methods from corpus linguistics and stylometry and discuss them in the light of gender and literary studies.

## 2. Idiolect, Sociolect, and Stylometry

Every individual is thought to possess their own distinct style of speaking and writing; this style is known as one’s idiolect (Coulthard, 2004). Daelemans (2013, p. 451) states that a plethora of psychological factors affect idiolect, among which one can find “personality, mental health, and being a native speaker or not; sociological factors include age, gender, education level, and region of language acquisition”. When detailing an individual’s idiolect, an expert may proceed by analysing a variety of texts written by an author in search of common discriminating characteristics. In this study, which focuses on a specific social group, not individuals, the idea of idiolect is extended into sociolect: the idea that if a group of authors shares a similar background, e.g. gender, time period, or social class, texts which they pro-

duce will show more similarities within group than between group (Louwerse, 2004).

Stylometry is a field which largely builds on the ideas of idiolect and sociolect. Stylometric analysis can be defined as the process in which "[t]he stylometrist looks for a unit of counting which translates accurately the 'style' of the text, where we may define 'style' as a set of measurable patterns which may be unique to an author" (Holmes, 1994, p. 87). This definition is broad and leaves substantial leeway, which allows for various interpretations of what a "unit of style" can be. Some typical operationalisations measurements are, among others, sentence length, sentence complexity, word frequency, or recurrent spelling errors (Gomez Adorno et al., 2018). The unit of style is necessary in each of the sub-tasks of stylometry: from authorship attribution which the field is most commonly associated with, to authorship profiling, authorship verification and the more niche sub-field of stylochronometry. One of these subtasks, profiling, is concerned with identifying characteristic traits of an author (e.g. their gender or age), without precisely determining the author's identity (Neal, 2017). With the idea of sociolect in mind, this stylometric approach can be broadened and implemented to characterise groups of similar backgrounds: in this study's case, male authors and female authors.

### 3. Gender

Although it often appears to be a trivial aspect of everyday life, gender permeates both the way in which an individual expresses behaviours and the way in which they interact with stimuli in the external world. This has been carefully highlighted in feminist studies (see de Beauvoir, 1949; Criado-Perez, 2019). Without exception, this is also an aspect present in literature. Mills (1995, p. 65) claims that "the author is seen as someone who is writing within a set of discursive parameters which are not of her own making or of which she is not even necessarily consciously aware. Similarly, the reader is subject to many discursive pressures which lead her to read in particular ways". With relation to sociolect, this notion serves as the backbone of the study; an author may unknowingly express a bias linked to their gender, and the style of a text is inherently influenced by the background of an author.

The gender bias is especially notable in the context of male authors portraying women in literature and mass media. A history of unequal power dy-

namics influences how contemporary men and women view the world; this, in turn, can often lead men to produce skewed representations of women's experiences. Laura Mulvey (1999) linked these ideas to film and proposed the notion of the "male gaze", stating that:

In a world ordered by sexual imbalance, pleasure in looking has been split between active/male and passive/female. The determining male gaze projects its phantasy on to the female figure which is styled accordingly. In their traditional exhibitionist role women are simultaneously looked at and displayed, with their appearance coded for strong visual and erotic impact so that they can be said to connote to-be-looked-at-ness. Women displayed as serial object is the leit-motiff of erotic spectacle [...] (1999, p. 837).

By introducing the male gaze, Mulvey draws attention to the unreliability of female characters presented by men. The voyeuristic nature of the male perspective warps a woman's role in film; the female character is an object of visual sexual gratification, meant to elicit a response from other male viewers. Her role ceases to serve a more meaningful function in terms of plot and narrative drive.

Importantly, Mulvey's theory has since been applied to other arts outside of film, including literature. The camera, film characters, and audience, which stand as the three pillars of the male gaze, are replaced by a narrator, a group of protagonists and a reader (Grate, 2015). While the notion of a "gaze" typically involves the act of seeing, the analogy still stands; an author's role in fiction is to paint a mental image with words, and this is the medium in which the bias is executed. Potentially relevant to this study, the male gaze is also accompanied by an inverse theory, which proposes the existence of a female gaze. By reclaiming the active voice in fiction, women have the possibility to present female characters in a more positive light, while also writing them to serve as driving agents. According to Conaway (2018), the female gaze may be at times equated to a "feminist gaze", as this approach in the arts strives for a sense of equality between the genders.

From the linguistic perspective, the combined impact of language and gender on reality has long been acknowledged; Lakoff notes that women face discrimination both in how they are taught to use language, and in how language is used to talk about them (1973). In terms of the former, as a result of gender roles in society, women are expected to use more hedging statements and indirect language, which, in turn, weakens their sense of presence and

hinders their ability to take on leadership roles. As an example of the latter, it is argued that when speaking about women, euphemisms are often used to diminish authority, like when using the words "girl" or "lady", instead of "woman" (Lakoff, 1973, p. 58). Such aspects may further shape how female characters are presented in media, subconsciously influencing both creators and recipients.

#### **4. Previous Studies on Gender in Creative Writing**

Not much research has been done on the influence of an author's gender on the style of their writing, especially not in terms of analysing complexity. Nonetheless, some background literature on the topic has been published. From the perspective of social sciences, Gardiner (1981) claims that female-authored prose possesses some characteristics which are divergent from the male mainstream. Gardiner's (1981) main argument is that women's fiction is largely based on comparison and paradox, with female authors highlighting their distinctiveness from men, as well as other women, to strengthen a feeling of personal identity. Attention is also drawn to the prevalence of maternity in a woman's life, and the archetype of the mother, both a role model, as well as an individual which the woman wants to distinguish herself from. These notions portray female characters as projections of the author's identity, as they bear the burden of a woman's struggles, dreams, passions, and hopes. One may believe that this is in line with the idea of female-authored heroines being more complex and "life-like".

In terms of studies providing quantitative results, Argamon et al. (2003) analysed the British National Corpus (BNC) in search of differences between texts written by men and those written by women, regardless of genre. The researchers found a notable difference between the genders, both in terms of syntax, and in terms of lexical choices. Female literature was found to use more pronouns, and was classified as "involved", according to Biber's (1995) dimensions of involvement and informativeness. Contrarily, male literature was characterised as more noun-modifier dense, and "informational". Involved literature uses more pronouns, private verbs, verbs related to senses, and discourse markers, whereas informational discourse is characterised by longer words and lexically dense sentences (Xiao, 2009). More recent studies have been done on Swedish literature, finding that male- and female-authored fiction also differs in terms of semantic themes; literature authored

by women was found to contain more references to emotions and mental processes, the home, as well as social relations, whereas literature authored by men contained more references to weapons, violence, and geometry- and direction-related concepts (Dahllöf, 2023).

## 5. The Study

Similar to Argamon et al.'s (2003) research, this study aims to find a link between the linguistic features of a text and an author's gender. The study involved compiling a corpus of male- and female-authored excerpts of text, writing a computer script for analysing linguistic complexity, and carrying out statistical analyses on the obtained results. The code used for analysing linguistic complexity has been made publicly available under the following address: [github.com/antonijordan/MFAuthorsStylometry](https://github.com/antonijordan/MFAuthorsStylometry) (DOA 20.11.2025).

### 5.1. The Corpus

To answer the research question, a custom corpus was constructed. The corpus consisted of 150-word long dialogue excerpts from one-hundred novels. The process of compiling the corpus consisted of three main steps. First, I narrowed down the criteria for selecting texts to include; to avoid any personal bias, I resorted to using a list called “Best Fantasy Books of the 2010s” provided by one of the most popular book-tracking websites: *GoodReads* ([www.goodreads.com/list/show/38633](https://www.goodreads.com/list/show/38633), DOA 23.06.2024). From the list, I chose one hundred books, fifty written by men, and fifty written by women. The condition was that an individual author could only have one entry, meaning that if an author appeared more than once on the *GoodReads* list, any duplicates were skipped in the process. To avoid genre differences influencing the analysis, the choice was narrowed down to fantasy novels. The final criterion for the text was that it should be originally written in English, as English language models are characterised by the best performance.<sup>1</sup> These decisions were made to ensure validity of the corpus to the research task, with all of the entries coming from the same time period and genre, as well as being additionally seen as popular in the literary mainstream.

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<sup>1</sup> Even multilingual models perform better when the text is translated into English – see Etzaniz et al. (2023).

The next step consisted of extracting text fragments from each of the hundred entries, as the study was only concerned with the representation of women. As I wanted to analyse the complexity of heroines, and not the author's world-building abilities, I decided to extract fragments of dialogue spoken by the female characters, to better represent the way in which they expressed themselves. The first one-hundred-and-fifty words of female-spoken dialogue were extracted from each book and entered into the corpus. The length of the fragments was determined by copyright restrictions; more than four-hundred words could not be extracted from each book (Xiao, 2010). While choosing novels in the public domain could have allowed me to overcome this limitation, it was important to the study to choose modern literature, as this is more significant for contemporary times.

The final step of the procedure entailed compiling the corpus. Aside from the text fragments, metadata was collected and catalogued; this included the year of publication, author name, author sex, and the title of the source book. The corpus itself cannot be shared and redistributed due to aforementioned copyright restrictions.

## 5.2. Linguistic Complexity

The aim of the study was to assess the possible correlation between an author's sex and the level of linguistic complexity they use to portray female characters. The concept of linguistic complexity, or language complexity, is widely debated in the scientific community because there is no single widely accepted operationalisation. Different linguistic traditions approach it from their own perspectives. Miestamo et al. (2008) list three main types of complexity: epistemic, ontological, and functional. The epistemic view considers language complex if it takes more time or elements to explain. The ontological perspective examines structural features like constituency and dependency. The functional view focuses on the cognitive effort involved in processing and understanding language. This study takes an ontological approach, assessing complexity based on the statistical properties of language. In this study, I select Moving Average Type-to-Token Ratio (MATTR) and Average Dependency Distance (ADD) as the direct operationalisations of complexity. Both of them characterise different levels at which complexity can be realised, that is the lexical and the syntactic level.

### 5.2.1. Moving Average Type-to-Token Ratio

Moving Average Type-to-token Ratio (MATTR) is an algorithm based on Type-to-Token Ratio (TTR). TTR can be used to measure the lexical complexity of a text by dividing the number of total meaningful units appearing in a sequence (tokens), by the number of unique lemmas (types). However, the algorithm is not without its flaws; as it is used on text fragments with a limited number of tokens, the longer the text, the lower the TTR. MATTR, introduced by Covington and McFall (2010), utilises a moving window technique. As stated by the algorithm's authors (2010, p. 96):

We cut the Gordian knot by computing and averaging the moving average type-token ratio (MATTR). This approach was also advocated by Köhler and Galle (1993). We choose a window length (say 500 words) and then compute the TTR for words 1–500, then for words 2–501, then 3–502, and so on to the end of the text. The mean of all these TTRs is a measure of the lexical diversity of the entire text and is not affected by text length nor by any statistical assumptions. Further, the individual TTRs can be compared in order to detect changes within the text.

As a result, MATTR is insensitive to text length and a more accurate algorithm for calculating the lexical complexity of a text. It is the safer option, even if the text fragments used in this particular corpus were of similar length; the obtained results are more uniform, and, therefore, valid.

### 5.2.2. Average Dependency Distance

To operationalise syntactic complexity, one must first define syntax and parsing. In linguistics, two main syntactic traditions exist: constituency grammar and dependency grammar. Constituency grammar, also known as Context-Free Grammar (Chomsky, 1956), proposes that each sentence can be divided into hierarchical phrases, also known as constituents. In contrast, dependency grammar (Tesnière, 1959) does not look for connections between phrases, but words themselves. Words are thought to be linked by binary dependencies, which “hold between a syntactically subordinate word, called the dependent, and another word on which it depends, called the head” (Kuebler et al., 2009). From this, dependency graphs can be built. Dependency grammar has been well-researched from the perspective of NLP research, with some studies finding that it is more adequate for computing

tasks, due to its higher accuracy (Buchholz & Marsi, 2006; Nivre et al., 2007). I decided to operationalise syntactic complexity on the basis of dependency parsing, by implementing Average Dependency Distance (ADD), proposed by Oya (2011). This is applicable to the study, as the longer the average distance between all dependencies in a sentence, the more complex the sentence is (Gibson, 1998).

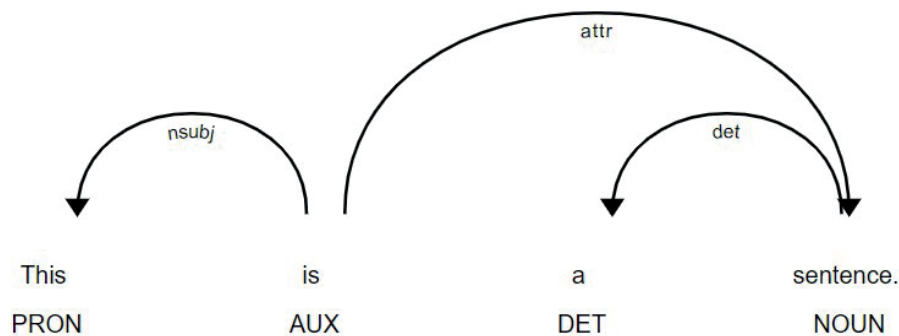


Figure 1. A simple example sentence with relatively short dependencies

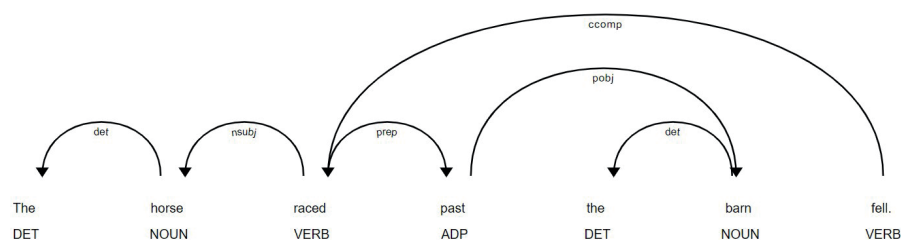


Figure 2. A sentence with more dependencies, one of which is considerably long

To test this hypothesis, Oya compiled a corpus study which compared sentences produced by native English speakers and Japanese natives who had learned English as a foreign language (2011). The study results indicate that native English speakers' sentences exhibited the highest ADD values, which suggests that dependency distance is an indicator of syntactic complexity.

Figure 1 and Figure 2 display sentences and the dependency distances between each of their constituents, displayed by overarching arrows. Sentence 1 possesses an ADD of 1.3, while Sentence 2 only has a slightly higher value of 1.5, despite being significantly longer. As ADD is calculated as an

average, both dependency distance length, as well as the general number of dependencies in total, contribute towards the final result. Moreover, ADD is a normalised measure, meaning that it is insensitive to sentence length.

6. Results

The process of executing the study consisted of three main stages: compiling a custom corpus of female characters’ dialogue fragments from one-hundred fantasy books; writing code to process the contents of the corpus and to implement the MATTR and ADD algorithm; fitting statistical models to the obtained data. In the final step, the independent variable was always the author’s sex, while the dependent variables were the MATTR or ADD values.

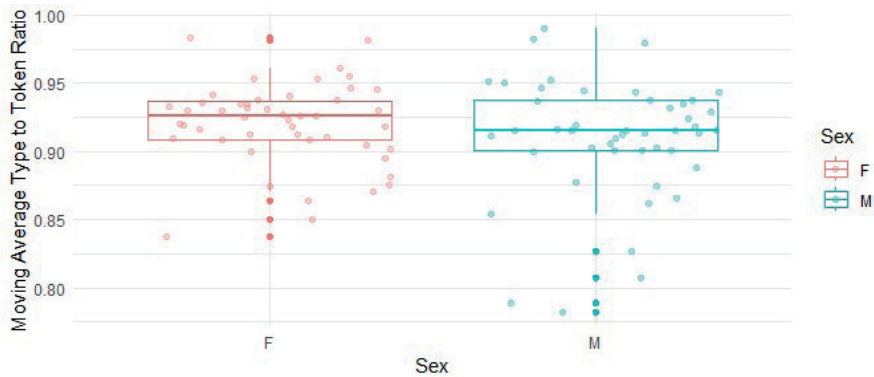


Figure 3. A box plot presenting the model fit to the data which compares MATTR values for each of the sexes

**Table 1.** A regression table showing the relative difference between male and female authors in terms of MATTR. The intercept is the MATTR for the male author

|             | Estimate | Std. Error | <i>t</i> value | <i>p</i> value |
|-------------|----------|------------|----------------|----------------|
| (Intercept) | 0.910    | 0.006      | 165.015        | <0.05          |
| Sex: Female | 0.011    | 0.008      | 1.365          | 0.176          |

The first statistical model treats an author’s sex as a predictor variable, while the MATTR is the outcome variable. As can be seen in the table, fe-

male-authored texts were characterised by a higher MATTR; however, the model did not find the difference to be statistically significant.

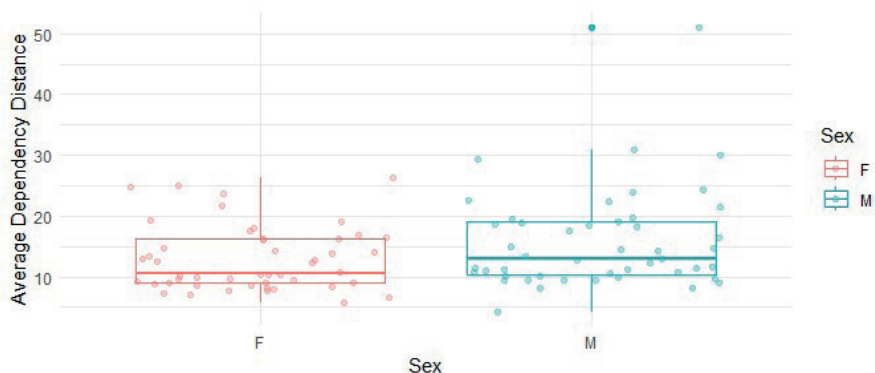


Figure 4. A box plot presenting the model fit to the data which compares ADD values for each of the sexes

**Table 2.** A regression table showing the relative difference between male and female authors in terms of ADD. The intercept is the ADD for the male author

|             | Estimate | Std. Error | <i>t</i> value | <i>p</i> value |
|-------------|----------|------------|----------------|----------------|
| (Intercept) | 15.753   | 0.997      | 15.80          | <0.05          |
| Sex: Female | -2.902   | 1.403      | -2.07          | 0.041          |

In the second model, once again, the predictor variable was an author’s sex, while the outcome was the ADD value of a passage. In this category, the model found the difference to be statistically significant ( $p < 0.05$ ), as the ADD of male-authored texts was noticeably higher (SexM Estimate = 15.753, SexF Estimate = 12.851).

**Table 3.** A regression table representing the interaction between ADD and MATTR values as predictor variables. Sex of the author is the outcome variable

|             | Estimate | Std. Error | <i>z</i> value | <i>p</i> value |
|-------------|----------|------------|----------------|----------------|
| (Intercept) | 7.914    | 14.214     | 0.557          | 0.578          |
| ADD         | -0.338   | 0.649      | -0.520         | 0.603          |
| MATTR       | -7.422   | 15.213     | -0.488         | 0.626          |
| ADD:MATTR   | 0.287    | 0.718      | 0.400          | 0.689          |

The final model served as a classifier, and was fit to both of the predictor variables and their interaction. The model was not able to predict an author's sex on the basis of the interaction between a text's MATTR and ADD values ( $p = 0.689$ ).

## 7. Discussion

As can be seen from the obtained data and results, my hypothesis was partially rejected. I hypothesised that there would be a difference in the way that male and female authors write female characters in fiction; while there is a significant difference in the syntactic complexity of texts, no difference in lexical complexity could be identified. On the one hand, this may be explained by the relatively small size of the corpus, or by the fact that only 150 word-long fragments could legally be extracted from each book; it is possible that in longer text excerpts, authors of both sexes could use a wider array of lexis. On the other hand, it is possible that striking differences in the words that authors of both sexes use only appear when analysing selective evidence. In line with the thought that the exception is not the rule: just because disheartening examples of "shallow" female characters exist, does not mean that – statistically – this is most often the case when men write female characters.

My hypothesis was informed by the gender discourse, feminist theory, anecdotal evidence, and opinions trending in online communities; therefore, I assumed that if a difference was to be found, it would be skewed towards the female authors. I initially hypothesised that since women share the same sex as the characters they create, they would likely reflect aspects of their own identity in them and perhaps offer a deeper understanding of the feminine. Contrary to this, the slight difference which was statistically significant actually went against all of the cited literary sources, and suggested male authors to produce more complex female characters (in terms of ADD). While the study's findings do not directly challenge the notions proposed in feminist literature, they indicate that female writers tend to construct less complex sentences. This could falsify the idea of the existence of male and female gazes. While these differences certainly appear in qualitative analyses, my quantitative results not only fail to back these theories up, but actually contradict them.

The male gaze has, however, become a staple in media commentary and criticism, and I do not aim to contradict this discourse. Theoretical pieces

have argued that if the concept is to be talked about in the contemporary landscape, it should be seen as of an even greater importance than before, due to the rise of social media and online distribution capabilities (Oliver, 2017). Therefore, an alternative interpretation of this study’s results can be that what has been established about the visual format, cannot be translated onto literary texts. Mulvey’s revolutionary thinkpiece on the male gaze clearly marked the voyeuristic capabilities of camera and film (1975). While these concepts have been mapped onto literature prior to this study (see Grate, 2015), it may be so that characters in books and films are made complex using different strategies, nullifying sex differences.

Another possible interpretation of these unexpected results is linked to the notion of complexity in general. A possible criticism concerning the study is the fact that linguistic complexity may not suffice when assessing whether a character is “complex” or not; it could be seen that linguistic complexity is only relevant to the language used by an author, and not the way in which the character is structured. This was controlled through the means of implementing a random intercept model in the data analysis; however, this may not have been sufficiently effective taking into account the sample size. An example of this was found within my corpus. In *The Golem and the Jinni*, written by Helene Wecker (2013), the main heroine is a non-human creature, who starts off at the level of intelligence of a human infant, and acquires language and abilities throughout the novel. While on the basis of lexical and syntactic complexity, the character may appear to be “simple”, her story, personality, and experiences could be incredibly complex. This highlights the importance of a dual approach, where both qualitative and quantitative aspects should always be taken into account.

## 8. Limitations

The drawn conclusions are only interpretations and inferences based on the obtained data. The study is not without certain limitations, related to the compiled corpus and the notions of complexity.

The corpus which I compiled for the purpose of this study was specialised, so as to allow for the conducted research to be targeted and as applicable to the posed research question as possible. However, its relatively small size could be partially responsible for the results. Although the books were published within a specific time frame, the authors’ ages were not consid-

ered, meaning that generational differences might have influenced the results as well. Similarly, while all the authors were anglophone, they may have come from diverse cultural backgrounds, which could have also affected the findings. It is also important to mention that publishing a book is not a one-man endeavour, but instead involves teams of people; apart from an author, an editor can have a significant impact on the final version of a text. In this study, the editor's gender was not included in the analysis. As only one-hundred books were taken into consideration, and additionally only in fragments, not in their entirety, it could be the case that these fifty specific female-authored books were simpler lexically and syntactically. The books were chosen from a list based on popularity; possibly, the common reader chooses books which are more approachable in general, therefore opting for texts written in simple language, with short sentences. Moreover, I cannot determine how the authors' idiolects influenced the data in comparison to social language factors.

## **9. Future Research**

The notion of character complexity based on author sex is one which definitely carries potential for future research. The study would benefit from being replicated on a larger corpus, or on a database containing books from other literary genres, besides fantasy. The study could also be recreated on corpora of books from different time periods, which could then be compared, to display historical changes in approaches towards presenting female characters in fiction.

## **10. Open Data Statement**

All data and code used in this paper is available under the following link: [www.github.com/antonijordan/MFAuthorsStylometry](https://github.com/antonijordan/MFAuthorsStylometry). DOA 20 November, 2025.

### **Acknowledgement**

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## Polish Spoken Language in Varėna District in Lithuania

**Abstract.** This article describes the Polish language in the Varėna district of southern Lithuania. Although the Polish language of the Baltic-Slavic borderland has been thoroughly described in numerous monographs and hundreds of articles, the Varėna district has remained largely unexplored. To date, no publications have addressed this topic. The material basis for the analysis are recordings collected during three dialectological expeditions (2014, 2023, and 2024). This amounts to a total of 45 hours and 16 minutes, of which approximately 13 hours and 20 minutes are devoted to Polish. The publication describes the sociolinguistic situation, family language, bilingualism (multilingualism), and knowledge of the official language. The second part of the article is devoted to the characteristics of selected linguistic features and vocabulary. Attention is also paid to loanwords from Lithuanian, Belarusian, and Russian languages.

**Keywords:** Polish spoken language in Lithuania; Polish-Belarusian linguistic contacts; Polish-Lithuanian linguistic contacts; loanwords.

### 1. Introduction

Research on spoken Polish on the Belarusian-Lithuanian-Polish border has a long and rich tradition. Many monographs and hundreds of articles have been written on this subject. All three areas of the Lithuanian Polish language (Vilnius area, Kaunas area, and Smalvos area) were described in the

late 1930s by Halina Turska (1982) in her extensive publication entitled: *O powstaniu polskich obszarów językowych na Wileńszczyźnie*.<sup>1</sup> After 1945, due to political and ideological reasons, research in this field was limited, and only a few articles were written by linguists from the Byelorussian SSR or the Lithuanian SSR. In the late 1980s, a political thaw occurred, and Polish linguists were given the opportunity to conduct fieldwork in some Soviet republics. Intensive dialectological research, the collection of material, and the description of the Polish language in Belarus, Ukraine, Lithuania, and Latvia began. Hundreds of texts have been published over the past three decades, including monographs (among others: Kurzowa, 1993; Dwilewicz, 1997; Grek-Pabisowa, 2002; Karaś, 2001; 2002; 2017; Morita, 2006; Zielińska, 2002). Separate periodicals and publishing series have also been devoted to the Polish language of this borderland, e.g.: *Studia nad polszczyzną kresową*,<sup>2</sup> and *Język polski dawnych Kresów Wschodnich*.<sup>3</sup>

Linguists have thoroughly researched the Polish language in Lithuania, both historically and contemporarily. However, there remain areas that are very poorly documented, such as the Polish language in the areas around Deveniškės, Eišiškės, and Salčininkai, as well as west of Kalesninkai. The Polish language of the Varėna district has not been the subject of comprehensive research or descriptions of its inhabitants' speech. Some information about the language of the Poles in this region can be obtained from the work of Wandalin Szukiewicz, who conducted ethnographic and archaeological research at the turn of the 19th and 20th centuries (cf. Konczewska, 2024; 2025, pp. 56–59). Among the villages located in the present-day Varėna district, he visited Kalviai, Rudnia, Būdos, Drucminai, Daržininkai, and Prauda. In 1997, a survey expedition was conducted by researchers from the University of Warsaw (Elżbieta Smułkowa, Małgorzata Litwinowicz, Justyna Straczuk) and the University of Vilnius (Halina Karaś, Krystyna Rutkowska). The researchers recorded people from 26 villages, including Dubičiai and Kalviai in the area of interest to us (Smułkowa, 1997, p. 402).

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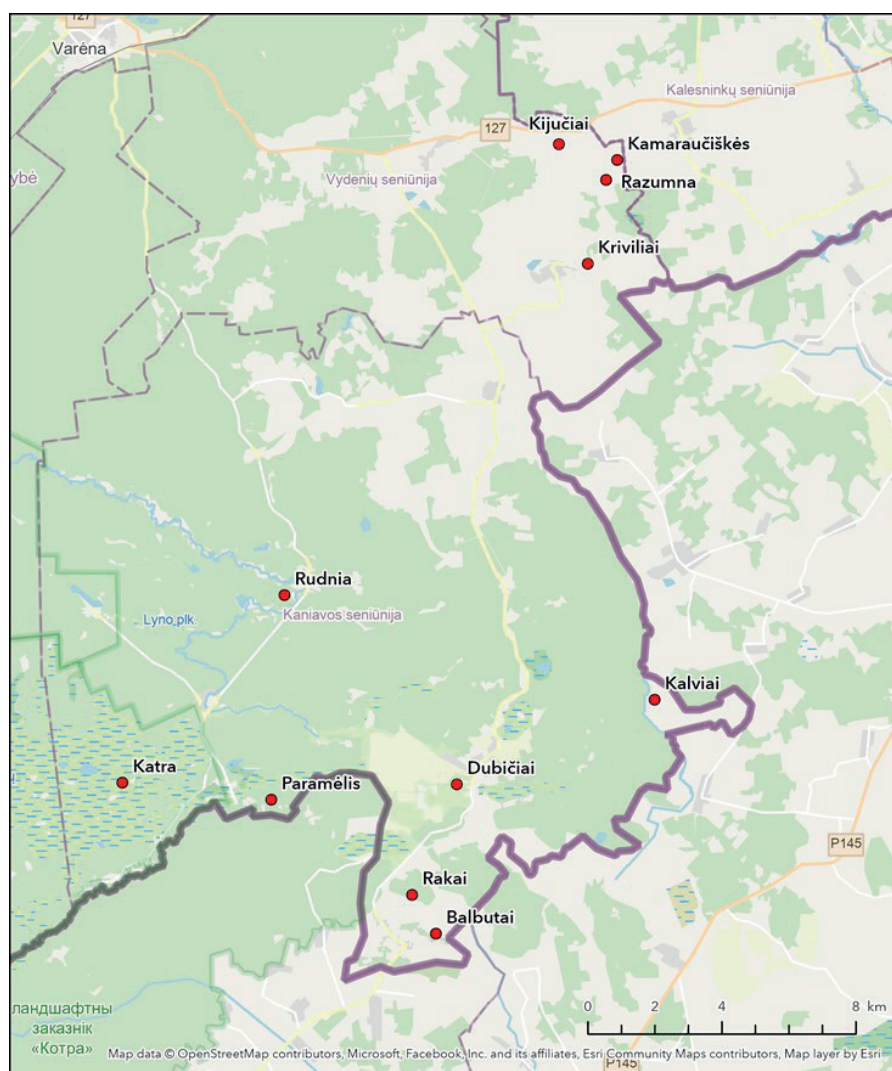
<sup>1</sup> Eng. *On the creation of Polish language areas in the Vilnius region*.

<sup>2</sup> Eng. *Studies on the Polish language of the borderlands*.

<sup>3</sup> Eng. *The Polish language of the former Eastern Borderlands*.

## **2. Material Base**

The material used in this article comes from three expeditions. The first was conducted in the summer of 2014. As part of the TriMCo (Triangulation Approach for Modeling Convergence with a High Zoom-In Factor) project, the author of this article and Helena Stetsko conducted a week-long expedition in the Varėna district, during which the following localities were surveyed: Kalviai, Balbotai, Rakai, Paramėlis, and Katra. We recorded a total of 21 hours and 35 minutes, most of which was in the Belarusian dialect and about a quarter in Polish. In 2023, an expedition was carried out as part of the Institute of the Lithuanian Language, in which the following people participated: Danguolė Mikulėnienė (head), Asta Leskauskaitė and Danutė Valentukevičienė (Lithuanian dialects), Mirosław Jankowiak (Belarusian dialects and Polish language), and Aidas Gudaitis (language of tombstone inscriptions). I then researched the following towns: Dubičiai, Kalviai, Kijučiai, Katra, Kamarauciškės, Kryviliai, Razumna, and Rudnia. I recorded a total of 15 hours and 19 minutes of Belarusian dialect and 4 hours and 22 minutes of Polish. The third expedition, also conducted by the author of this article (as part of a project implemented at the Institute of Lithuanian Language in Vilnius), took place in the summer of 2024. I then recorded Polish-speaking respondents in three villages: Balbutai, Kalviai, and Dubičiai (a total of 3 hours and 58 minutes). The collected material therefore totals approximately 45 hours and 16 minutes, of which approximately 13 hours and 20 minutes of Polish.



Map 1. Localities covered by the author's research in 2014, 2023, and 2024.

### 3. Sociolinguistic Situation

The Varėna district is located in southern Lithuania. Its administrative affiliation has changed over the centuries – it belonged to the Grand Duchy of Lithuania, the Polish-Lithuanian Commonwealth, and the Russian Empire. After World War II, following Lucjan Żeligowski's rebellion, the area

was militarily occupied by Polish troops and became part of the Polish state in 1922. During the interwar period, the official language was Polish, as were education and administration. After World War II, these lands became part of the Lithuanian Soviet Socialist Republic, where two languages were used – Lithuanian and Russian. The situation changed with the collapse of the USSR. In 1990, Lithuania became an independent country, and Lithuanian became the sole official language.

The sociolinguistic situation of the Belarusian-speaking population in the Varėna district was described in detail in a monographic book devoted to Belarusian dialects in Lithuania (Jankowiak, 2023). The area of our interest has been most thoroughly researched from the point of view of the functioning of the Lithuanian language and Lithuanian dialects; these are works by, among others, V. Karaciejūtė, A. Leskauskaitė, D. Mikulėnienė, and N. Tuomienė. The researchers described in detail the structure of the local Lithuanian dialects. In 2025, Danutė Valentukevičienė defended her doctoral thesis at the Institute of Lithuanian Language (Valentukevičienė, 2025).

According to the 2021 census, the Varėna district had a population of 21,137, of whom 19,097 were Lithuanians, 1,349 were Poles, 252 were Russians, 135 were Belarusians, 38 were Ukrainians, 53 were others, and 206 were of unspecified nationality. It should be emphasized, however, that declared national identity does not always correspond to the language spoken. Many people who spoke Belarusian on a daily basis, including Catholics, declared Polish nationality. In turn, all Polish speakers considered themselves Polish:

*Muj monś był z Biełarúsi, Póliak, ja Pól'ka, i tátuś, mamúsia, všýscy býli Póliácy* [W 1943 Balbutai]<sup>4</sup>.

The village of Katra is currently inhabited by 16 people (compared to 19 in 2011). It is a completely Orthodox village, with the oldest generation speaking only the Belarusian dialect (they had no knowledge of Polish). Knowledge of Lithuanian was limited to basic phrases and words. The younger generation also speaks Lithuanian.

The village of Paramėlis had 20 inhabitants in 2011 and 8 in 2021. This is a mixed Catholic-Orthodox village, with a population declaring Polish and Belarusian nationality. The village is Belarusian- and Polish-speaking.

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<sup>4</sup> The abbreviations adjacent to the respondents mean: M/W – man/woman, 1943 – year of birth, Balbutai – current place of residence.

The village of Balbutai was inhabited by 39 people in 2011, and according to the 2021 census – 30. It is a village of mixed religion (Catholics and Orthodox) with Polish language and Belarusian dialect. In the past, the population was predominantly Polish, Catholic, and spoke Polish.

The village of Rakai is inhabited by Orthodox and Catholic Christians; in 2011, there were 114 people, while the 2021 census recorded 81 residents. The Belarusian dialect predominates among the older generation, and many also speak Polish. Lithuanian is primarily spoken by the younger generation.

The village of Dubičiai is the municipality's center. In 2011, it had a population of 291 people, and the 2021 census recorded 216 people. Most families speak Lithuanian, and a dozen or so people speak Polish and the Belarusian dialect. The village has a Catholic church, a school, and a cultural center.

The village of Kalviai was a strongly Polish place, where Polish was spoken and Catholics lived. Currently, Polish is the dominant language, with many people speaking the Belarusian dialect. Lithuanian is spoken by visitors who have purchased houses for summer residences. In 2011, the village had 47 inhabitants; the 2021 census showed 35 people.

The village of Kriviliai is a larger settlement, currently inhabited by 319 people, up from 358 in 2011. The Lithuanian language is dominant there, but there are a few people who speak the Belarusian dialect and Polish. Center with a school, community center, and shops.

The village of Kijučiai currently has a population of 128 (as of 2021), up from 165 in 2011. It is inhabited by Catholics. The dominant language is Lithuanian, with a few people speaking Polish and Belarusian dialect.

In 2011, the village of Kamarauciškės was inhabited by 5 people; in 2023, there was only one Polish-Catholic couple living there, speaking Polish (also knowing the Belarusian dialect). The place was Polish-speaking before.

The village of Razumna is inhabited by Catholics who speak Polish and a Lithuanian dialect. In 2011, 25 people lived there, and the 2021 census recorded 10 inhabitants.

Polish is usually spoken by the oldest generation of interlocutors. They also often know the Belarusian dialect. The middle generation converses daily in Russian and Lithuanian. The local Belarusian-speaking and Polish-speaking population name their language “po prostu”, but it should be noted that from the point of view of the language structure, this name sometimes refers to the Belarusian dialect, and sometimes to the local variant of the Polish language. This is what a resident of Balbutai calls this language:

*No tútaj juš po prostému fšýstko. Cály čas po prostému [...]. Rodzíce to po próstu [M]: Po-prostu means just Belarusian or just Polish? Tak z pól'ska [W 1943 Balbutai].*

Some respondents described the language of their villages as “tutejšy” [Eng. “local”]:

*To jak sie nazýva, po tutejšému, jak sie nazýva, ten táki jénzyk miešány trošéčke [M 1957 Dubičiai].*

Some respondents also emphasized the “mixed” nature of their everyday language, usually defining it as a mixture of Belarusian and Polish, sometimes with some Russian elements:

*Najviénczej rozmávia sie u nas všéńdzie, dzie tu rozmaviájo, to nie na čýstym pól'skim, a takim miešánym, jak to sie nazýva, Žýdzi nazyvájo my tutéjsi, i ten jénzyk táki miešány, táki podobny, bielarúski, pól'skie słowa [M 1957 Dubičiai].*

Many of the oldest respondents did not know Lithuanian in the past. They only know basic words and phrases. This is especially true in the villages of Katra, Paramėlis, Rakai, Balbutai and Kalviai, Kamarauciškės and Razumna. Knowledge of the Lithuanian language is improving slowly but steadily:

*Litfíni kážuť po litéfsku, a my ni bum-bum, áni ja, áni on nie umiémy po litéfsku ni gráma. Téras to juš tróške rozumiémy [W 1944 Kamarauciškės].*

The middle generation and young people usually speak Lithuanian fluently, a language that is indispensable in the workplace and state institutions.

Many people talk to their animals in the local Belarusian dialect. However, one respondent emphasized that she talks to her dog in Lithuanian because he was adopted from Lithuanians:

*To Lítvin, ja do niégo múvie po litéfsku, to cúrka pšyviézla tam, na rabóci páni dála, to on po litéfsku rozmáviaľ, to i ja juš po litéfsku. S sabáčkam dahavarúsia pa litéfsku [W 1943 Balbutai].*

The Orthodox population, who declared Belarusian origin and spoke the Belarusian dialect, attended Orthodox churches in Pervamaisk or Matyli. After the collapse of the USSR and the emergence of the border, they moved to Druskininkai. The Polish-speaking population declares Polish nationality and is of Catholic faith. For many years after World War II, the Polish language played a significant role in the Catholic Church. After 1990, when Lithuania regained independence, the linguistic situation in the church changed. For example, in Dubičiai, the main language of worship is Lithuanian, although the Polish- and Belarusian-speaking population often prays in Polish at home and confesses in Polish. They also have Polish prayer books. Currently, people from villages Katra, Paramėlis, Balbotai, Rakai, and Dubičiai, go to church in Dubičiai (Lithuanian-speaking parish). In turn, believers from villages Kriviliai, Kijučiai, Kamarauciškės, and Razumna currently attend church in Kalesninkai, where the Polish language dominates the liturgy. The inhabitants of the village of Rudnia have their own church, where a priest of Lithuanian origin celebrates mass in Lithuanian.

In places with Slavic populations, such as Rakai, the cemetery is dominated by tombstones in Polish (among the Catholic population), with a significant number in Russian (among the Orthodox population). The number of tombstone inscriptions in Lithuanian increases each year. The choice of language on the tombstone depends mainly on the decision of the family of the deceased:

[MJ: Who chooses the language of the tombstone?] *Jak kto chce, jakí jest, jak kto chce* [W 1943 Balbutai].

In many places, gravestones in Lithuanian already predominate; for example, in the cemetery in Dubičiai the number of gravestones by language is as follows: in Lithuanian – 82,6%, in Polish – 16,8%, in Russian – 0,3% and unspecified – 0,3%. For comparison, in the village of Rakai – in Russian – 43,4%, in Lithuanian – 31,6%, in Polish – 19,7, unspecified – 2,6%, mixed – 1,6%, and other – 1,3%. In Kriviliai – 95,9% in Lithuanian and 4,1% in Polish.

Slavic-speaking villages, except for the eastern part of the region, are not compact. They are isolated villages located mainly near the border with Belarus, and they are surrounded by Lithuanian-speaking populations. The situation is slightly different in the villages located in the eastern part of the region where the heavily polonized area begins and continues eastward, through Eišiškės, Butrymonys, to Šalčininkai and Turgeliai.

Attitudes toward the Polish language are generally positive. It is considered beautiful, cultured, and the language of liturgy in the Catholic Church. Many people have family members living in Poland. However, respondents emphasize that their Polish differs significantly from that in Poland. Russian served as the official language during the Russian Empire and in the Lithuanian SSR after World War II. The middle generation typically speaks it fluently in everyday life. After 1990, when Lithuania regained its independence, the role of Lithuanian as the sole state language has steadily increased. The Belarusian dialect has the least prestige and is limited to family and neighborly contacts.

**Table 1.** Languages and dialects in the researched villages. Pluses indicate the prevalence of the language/dialect, i.e., +++ – commonness, predominance, + – functioning to a small extent.

|               | Lithuanian | Polish | Belarusian |
|---------------|------------|--------|------------|
| Katra         | +          | -      | +++        |
| Paramėlis     | +          | ++     | ++         |
| Rudnia        | +++        | +      | +          |
| Rakai         | +          | ++     | ++         |
| Balbutai      | +          | ++     | ++         |
| Dubičiai      | +++        | +      | +          |
| Kalviai       | +          | +      | +++        |
| Kriviliai     | +++        | +      | +          |
| Kijučiai      | ++         | ++     | +          |
| Kamarauciškės | -          | +++    | +          |
| Razumna       | +          | +++    | +          |

#### 4. Characteristics of Selected Phonetical-Grammatical Features

Selected characteristics of the pronunciation of the local Polish-speaking population are presented below. It should be emphasized, however, that there is considerable idiolectal variation, dependent on many factors, such as the respondent's origin, education, etc. Some features have a wide area of occurrence, others – only a limited one.

The structure of the Polish language in Lithuania has been described many times, including publications [Kurzowa, 1993, pp. 221–310; Dwile-

wicz, 1997; Grek-Pabisowa, Maryniakowa, 1999, pp. 19–48; Karaś, 2001, pp. 82–222; Grek-Pabisowa, 2002; Zielińska, 2002, pp. 80–129; Karaś, 2017, pp. 145–334; and other].

#### 4.1. Phonetics

- Akanye (inconsistently), like: *pravastáŭny, addála, chadzili*. A feature typical of the Belarusian language and most of its dialects, as well as the Russian literary language. Examples founded in interviews:

*Tútaj radzílusia, tútaj, vo, vyrósla, a monš muj byl z Bielarúsi* [W 1943 Balbutai], *V kalchózie, mílieńki, v kalchózie pracováli* [W 1937 Kalviai], *Býla v tym Danbásie* [M 1957 Dubičiai], *Viéncej táta tarfiána ziémia* [M 1957 Dubičiai], *Aparácja robili na péncheš* [W 1944 Kamarauciškės].

- Asynchronous or non-nasalized pronunciation of nasal vowels /ą/ and /ę/:

*Miénsa nie było, tyl'ko na sviénta* [W 1943 Balbutai], *On pšýjdzie i jému tam zapláco* [W 1943 Balbutai]; *I rukámi réža. Kiédys tšéba było džéva cióngac na sánačkach* [W 1943 Balbutai], *Zbirájo (się) i spievájo* [W 1937 Kalviai], *Za nóga pšyvióńžeš švínia* [M 1957 Dubičiai].

- Semi-palatal pronunciation /s'/, /z'/, /c'/, /dz'/:

*Dz'íádek dom budóvať* [M 1957 Dubicze].

- Anterior lingual dental /l/ (consistently):

*Tútaj juž Bolbóty* [W 1943 Balbutai]

- Soft /l'/: *tyl'ko, kol'onía, niev'él'ki*

*Nie dúža, tam tyl'ko żył moj dziádzia jéden. Jak przyjecháli, to kol'éjka stajála* [W 1943 Balbutai], *Al'e téras juš mašýny. Óna ml'éko odbirála ot kruf. Dl'a l'údziej najmováli* [W 1937 Kalviai]; *Óna býla u škól'e tam* [M 1957 Dubičiai].

- Pronunciation of non-syllabic /ŭ/:

*Jézdzi cúrka, jákich kilomiétrau dziésieńc. No, był chlieŭ* [K 1943 Balbutai], *A cukiérkaŭ a piaćenia, a rúžne búlki tam* [W 1937 Kalviai].

- Realization of old /ě/ at the end of a word as /i/:

*Býla u **cháci*** [W 1943 Balbutai], *Pracavála u **kalchózi**. Na tej **lapáci** piékla* [W 1937 Kalviai].

- Pronunciation of /s/ as /š/:

*To ja jěšče chliep másłam **pašmarúje*** [M 1937 Kalviai].

- Narrowing (reduction) of /o/ to /u/ in unstressed position, usually before a stressed syllable:

*Jak mója **kulieżánka**. Do **kumúnii** ksionc od rázu* [W 1937 Kalviai].

#### 4.2. Morphology

- Noun endings in the locative singular, typical of the Belarusian language, e.g.:

*My tútaj z **cúrkaj** żyjem* [W 1942 Balbutai], *Pracavála **dajárkaj*** [K 1942 Balbutai].

- The ending -aju in the instrumental case of feminine singular nouns, typical of the Belarusian language, e.g.:

*S **kótačkaju**, máju kótačku, to Katja, a sabáčka Foks* [W 1943 Balbutai].

- The ending of nouns in the nominative plural in -ie/-e and genitive plural (femininum) (typical for Hrodna-Baranavičy subdialects of South-Western dialect of Belarusian language):

*Vnukié pšyjádo do bápci* [W 1957 Dubičiai], *Lápci z tákiej **lazé**. Šełestuné nazýváli* [dzwoneczki wieszane koniom]. *Kumpiačkié na try dzielili* [W 1943 Balbutai].

- Past tense forms of verbs with a standardized ending, as in East Slavic languages, such as: *ja żyła* instead of *ja żyłam*:

*Osiemdziésiont jéden rok, to ja juš **pożyła** tútaj* [W 1943 Balbutai], *Jak býli zdróvy, to jagódy **zbirála**, to jagódy jěšče **spšedavála*** [W 1937 Kalviai], *Sámi **piékli*** [chleb], *a téras **kupújem*** [W 1937 Kalviai].

- The ending -uv in the plural genitive of nouns where -i or Ø is in standard Polish:

Cúrka **golémbiuf** nakupovála [W 1937 Kalviai], Skončýlem dziésienć **kliásuf** [M 1957 Dubicze], Tam dúža býlo **mieškániuf** [M 1941 Kamarauciškės].

- No male-non-male distinction, like *konie byli* instead of *konie były*:  
*Tam pólskie **terény** býli pšet vójno* [M 1957 Dubičiai].
- The ending of the first plural of present tense verbs is -mo:  
*Gdzie my **mieškámo**?* [W 1944 Kamarauciškės].
- Common occurrence of diminutive forms, e.g.: *mílieńki*, *kościúlek*, *panóček*:  
*I kónik **maładziéńki** był, adzín **slabiéńki** był* [W 1943 Balbutai].

#### 4.3. Syntax

- Constructions using the preposition *pšy*, such as: *pšy Soviétach* 'in the Soviet times':  
*Ciéńsko býlo **pšy** kolchózach* [W 1943 Balbutai], ***Pšy** mámie navučýlasie doić króvy* [W 1943 Balbutai].
- Participle ending in -všy:  
*Toj dóktor už dávno **umáršy**, a ja juž dwadziesty siúdmy rok* [z rakiem] [W 1937 Kalviai], *Dóbže, že jéšče nie **vyžucífšy*** [M 1957 Dubičiai], *Ále, vo, **pšyjecháfsy** tútaj do Panóčaj, óni **pšyjecháfsy*** [W 1944 Kamarauciškės].
- Construction of the type: *choróvać čym* (standard Polish: *choróvać na co*) 'to be sick with what +Inst.'  
*Ja dúžo liat chorovála rákam* [W 1937 Kalviai].
- A construction like *u mnie jest* instead of *ja mam* 'I have':  
*U nas býla króva* [W 1937 Kalviai].
- A construction like *rozmaviać na języku* instead of *rozmawiać po*:  
*Jédna grúpa býla **na jénzyku** litéfskim fšýstko, a jédna grúpa býla inżyniéruf, gdzie učýli **na jénzyku** rosýjskim i agronómuf* [M 1957 Dubičiai].

#### 4.4. Pronunciation

The interlocutors' statements usually retain the stress typical of the Polish literary language, but, in some cases, it is consistent with the norms of East Slavic languages (e.g., Belarusian). Deviations from the Polish norm usually refer to words borrowed from Belarusian or Russian. Among the collected material, I found the following examples: *bylá* instead of *býła*, *ja samá* instead of *ja sáma*, *s króvami* instead of *s krovámi*, *patráű* instead of *pótraw*, *kvásili* instead of *kvasíli*, *sonsiád* instead of *sónsiad*, *na sánačkach* instead of *na sanéčkach*, *ja nie\_viem* instead of *nie viem*, *nie chciál* instead of *nie chciál*, *umár* instead of *úmarł*, *prendzėj* instead of *préndzej*, *počekáj* instead of *počekáj*, and many others.

#### 5. Vocabulary of Local Polish Spoken Language

Polish vocabulary includes many regionalisms. These are often words that have a different phonetic form than literary Polish, a different accent, or are identical to Belarusian or Russian, only adapted to Polish pronunciation. Polish vocabulary includes many regionalisms. These are often words that have a different phonetic form than literary Polish, a different accent, or are identical to Belarusian or Russian, only adapted to Polish pronunciation. The collected material included, among others, the following lexemes: *dževniány* 'wooden' (Pol. *drewniany*) [Dubičiai], *litėfka* 'Lithuanian woman' (Pol. *Litwinka*) [Dubičiai], *vasaló* 'merrily' (Pol. *wesoło*) [Balbutai], *pódvuz m* 'forecourt' (Pol. *podwórze n*) [Kalviai], *inákšy* 'another' (Pol. *inny*) [Kalviai], *pšechódni* 'transitional' (Pol. *przejściowy*) [Dubičiai].

The Polish language in Lithuania has been the subject of much research by linguists. These include dictionaries (Rieger et al., 2006 or Grek-Pabisowa et al., 2017). The specificity of the Polish language spoken on this borderland is evidenced primarily by numerous borrowings from Baltic languages and dialects, Belarusian dialects and Russian. Vilnius linguist Krystyna Rutkowska has written a number of articles on Baltisms in Lithuanian Polish (Rutkowska, 2004; 2006; 2008; 2015). I. Grek-Pabisowa and M. Ostrówka wrote about the influence of Belarusian dialects on the Polish language of the northern borderlands (Grek-Pabisowa & Ostrówka, 2018). The vocabulary of Belarusian dialects in Lithuania has been described in detail in the publication by the author of this article (Jankowiak, 2022).

Lithuanisms: Older borrowings from the Lithuanian language and its dialects refer to such thematic areas as: nature and landscape, plants, the animal world, humans (especially negative traits of character and appearance), and traditional agriculture. Younger loanwords are words related primarily to the administrative and public sphere. In the studied area, I noted, among others, the following Baltisms: *brazgùliai* ‘bells hung around the horses’ necks’ < Lith. *brazgùliai* [Balbutai], *délče* ‘the moon when it wanes after the full moon’ < Lith. *delčią* [Rudnia], *eliéktra* ‘electricity’ < Lith. *elektrà* [Kalviai], *genís* ‘woodpecker’ < Lith. *genỹs* [Balbutai], *gúšta* ‘nest’ < Lith. *gūžtà* [Kriviliai], *kalakút* ‘turkey’ < Lith. *kalakùtas* [Balbutai], *kúdra* ‘a small water reservoir’ < Lith. *kūdra* ‘wet place, swamp’, *kundziúk* ‘kindziuk, skilandis’ < Lith. *kindziukas* [Dubičiai], *kumpiák* ‘ham, the hip part of a pork carcass’ < Lith. *kuñpis* [Dubičiai], *paršúk* ‘boar’ < Lith. *paršiukas* [Dubičiai], *svíran* ‘granary’ < Lith. *svirnas* [Balbutai], *kajmínas* ‘neighbour’ < Lith. *kaimýnas* [Balbutai], and many others.

Borrowings from Belarusian: Borrowed vocabulary from Belarusian and its dialect frequently appears in my respondents’ speeches. It primarily refers to the world of plants, animals, traditional farming, and household. Sometimes, these words also appear in both languages, but differ only phonetically, such as Bel. *načóŭka* vs. Pol. *nočúvka* ‘wooden trough’. A high percentage of Belarusianisms is found primarily among Poles, who often speak Belarusian daily with some family members and neighbors in the countryside. During fieldwork, I noted, among others, the following lexemes: *bójka* ‘butter churn’ < Bel. (масла)бойка [Kalviai], *chryščóny* ‘baptized’ < Bel. хрышчоны [Balbutai], *doždž* ‘rain’ < Bel. дождж, *jon* ‘he’ < Bel. ён [Balbutai], *halínka* ‘small twig’ < Bel. галінка, *hrúdka* ‘chicken breast’ < Bel. грудка [Balbutai], *humnó* ‘thresing floor’ < Bel. гумно [Balbutai], *karšún* ‘hawk’ < Bel. каршун [Balbutai], *miasný* ‘meat’ < Bel. мясны, *tut* ‘here’ < Bel. тут [Balbutai], *janá* ‘she’ < Bel. яна, *pógžeb* ‘cellar’ < biel. погрэб [Balbutai], *prodavác* ‘sell’ < Bel. прадаваць [Balbutai], *prymák* ‘a man living in his in-laws’ house’ < Bel. прымак [Balbutai], *sála* ‘backfat’ < Bel. сала [Balbutai], *Siómuchá* ‘Pentecost’ < Bel. Сёмуха [Balbutai], *taksáma* ‘also’ < Bel. таксама [Balbutai], *tá-maka* ‘there’ < Bel. dial. тамака [Kalviai], and many others.

Borrowings from the Russian language. Russian began to exert a more intense influence on the speech of the local population, particularly after World War II, when it served as the second official language in the Lithuanian Soviet So-

cialist Republic. Besides words used in everyday life, these primarily include words related to the administrative and public sphere, socialist vocabulary, and the kolkhoz-sovkhoz economy. In the collected material, Russianisms are much fewer than Polonisms. The following Russianisms were excerpted e.g.: *baliéžnia* 'sickness' < Rus. *болезнь* [Kamarauciškės], *bal'nica* 'hospital' < Rus. *больница* [Kamarauciškės], *chvácit* 'to be enough' < Rus. *хватит* [Balbutai], *cietrádž* 'notebook' < Rus. *тетрадь* [Balbutai], *dáže* 'if' < Rus. *даже* [Dubičiai], *dobáviać* 'to add' < Rus. *добавлять* [Dubičiai], *família* 'surname' < Rus. *фамилия*, *kalchóz* 'collective farm' < Rus. *колхоз* [Balbutai], *miéždu námi* 'between us' < Rus. *между нами* [Kamarauciškės], *niedziélia* 'week' < Rus. *неделя* [Kalviai], *obšćiežysje* 'dormitory' < Rus. *общежитие* [Dubičiai], *prošétšy* 'having passed' < Rus. *прошедши* [Balbutai], *pryjátny* 'pleasant: about man' < Rus. *приятный*, *skóra* 'ambulance' < Rus. *скорая* [Balbutai] *sótka* '1/100 hectare' < Rus *сотка* [Balbutai], *úksus* 'vinegar' < Rus. *уксус*, *vapščé* 'at all, whatever' < Rus. *вообще* [Balbutai], *vlašć* 'authority' < Rus. *власть* [Balbutai], *zakázňnik* 'nature reserve' < Rus. *заказник* [Dubičiai], and many others.

## Conclusions

In modern Lithuania, Polish has been in use for decades. It has several variants: written, spoken, urban, and rural. It occurs widely and compactly, primarily in the Vilnius region and in the present-day Šalčininkai region. It is also present in the Kaunas and Smalvos regions. The Varėna district has remained unexplored in this respect until now. In the area of interest, the Polish language did not occur, and there is no occlusion. The terrain (dense forests and swamps) meant that the Slavic population primarily inhabited villages bordering present-day Belarus. In the past, these villages were socially and economically linked to centers in the south (now within Belarus). From the north, they were surrounded by Lithuanian-speaking people. The exceptions are the towns located in the eastern part of the region – Razumna, Kamarauciškės, and Kijučiai, from which to the east extends the area of dense settlement of the Polish-speaking population.

The Polish language is only spoken currently by a few people, mainly the oldest generation and a few people from the middle generation. The place of the Polish language here is taken primarily by Lithuanian. There are currently no Polish schools in the study area, and Catholic parishes are mostly Lithuanian-speaking. The role of the Polish language will steadily decline.

The Polish language in the study area is relatively diverse, depending on the place of residence, the respondent, and the surrounding linguistic situation. A number of features typical of the vast area of Polish in the northern borderlands can be listed, such as the akanye, the non-syllabic /u/, soft /l'/, and others. Some features have a limited, local scope, such as the first-person plural forms of verbs: *robimo*, *palimo*. In the case of vocabulary, it is worth emphasizing the preservation of old Baltic words (most of which also appear in local Belarusian dialects) and words of Belarusian origin. The number of Russian words is decreasing. On the other hand, there is a growing number of loanwords from Lithuanian, which refer to the public-administrative sphere and technological innovations. As in the case of the Polish language in other regions of Lithuania, the local Polish language was shaped primarily by the old Baltic substrate as well as numerous borrowings from East Slavic languages and dialects (mainly Belarusian, less from Russian).

The article presented here is a preliminary reconnaissance study for a planned, extended study of spoken Polish in the Varėna district. The analyzed Polish dialects require description not only because they have not been studied before, but also because it is important to preserve them and provide information about the disappearing element of the intangible culture of Poles in this area for future generations.

#### LIST OF VILLAGES:

| Official name (Lithuanian) | Polish name     |
|----------------------------|-----------------|
| Balbutai                   | Bołboty         |
| Dubičiai                   | Dubicze         |
| Kalviai                    | Kowalki         |
| Kamarauciškės              | Komarowszczyzna |
| Katra                      | Kotra           |
| Kijučiai                   | Kijucze         |
| Kriviliai                  | Krzywile        |
| Paramėlis                  | Paramok         |
| Rakai                      | Raki            |
| Razumna                    | Rozumna         |
| Rudnia                     | Rudnia          |

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## **Отражение государственной идентичности в текстах казахстанской прессы и сознании молодого поколения**

**Резюме:** В данной статье рассматривается вопрос представления государственной идентичности Казахстана в местных средствах массовой информации и ее проявлений в сознании молодого поколения. Государственная идентичность рассматривается здесь как форма коллективной идентичности, которая, в отличие от национальной принадлежности, охватывает различные этнические группы, при этом гражданство и приверженность государственной символике и ценностям выступают в качестве основных объединяющих элементов. Формирование идентичности в популярных журналах и блогах происходит, среди прочего, посредством использования терминологии, непосредственно описывающей государство (Казахстан, страна, государство), или посредством использования слов, относящихся к отношениям «индивид-правительство-государство» (президент, гражданин) в позитивном контексте, связанном с развитием и поддержкой. Первая часть анализа объясняет эти вопросы на основе количественного SEO-анализа. Вторая часть представляет результаты опросов, проведенных среди учащихся старших классов и студентов вузов, относительно их отношения к государствен-

ной символике и знаний о ней. В случае молодых государственных, таких как Казахстан, существующий независимо с 1991 года, можно наблюдать процесс формирования идентичности *in statu nascendi*, а осведомленность и отношение молодого поколения свидетельствуют об эффективности государственной политики в области идентичности и создании языкового образа государственности как силы, объединяющей многонациональное общество.

**Ключевые слова:** Казахстанская идентичность; государственная символика; дискурс в прессе; этническая принадлежность; студенты, опрос.

### The Reflection of State Identity in the Texts of the Kazakh Press and the Consciousness of the Younger Generation

**Abstract.** This article examines the issue of representing Kazakhstan's state identity in local mass media and its manifestations in the consciousness of the younger generation. State identity is treated here as a form of collective identity, which, unlike national affiliation, encompasses various ethnicities, with citizenship and a commitment to state symbolism and values serving as the primary binding elements. Identity building in high-impact magazines and blogs occurs, among other things, through the use of terminology that directly describes the state (Kazakhstan, country, state) or through the use of words referring to the individual-government-state relationship (president, citizen) in positive contexts related to development and support. The first part of the analysis explains these issues based on quantitative SEO analysis. The second part presents the results of surveys conducted among high school and university students regarding their attitudes toward and knowledge of state symbols. In the case of young statehoods, such as Kazakhstan, which has existed independently since 1991, one can observe the process of identity formation *in statu nascendi*, and the awareness and attitudes of the young generation testify to the effectiveness of the state's identity policy and the creation of a linguistic image of statehood as a force unifying the multinational society.

**Keywords:** Kazakh identity; state symbols; press discourse; ethnicities; students; survey.

Анализируемое в данной статье чувство государственной идентичности имеет наднациональное измерение и может включать группы, которые не являются частью доминирующей нации в данной стране. В любом государстве, даже при его мононациональном составе, проживают представители различных диаспор, испытывающие чувство принадлежности к данному обществу, не только к своей этнической

или национальной общине. Чувство принадлежности и сопричастности ко всему, что происходит в этом обществе позволяет гражданам ощущать себя коллективным субъектом. Совокупность представлений, ценностей, символов и норм формирует самосознание граждан и создают чувство принадлежности к своему государству.

Особую актуальность данная проблема приобретает в многонациональном Казахстане, в котором в результате различных факторов (исторических, общественно-политических, социальных и др.), по данным Бюро национальной статистики от 27.03.2025, проживает 70 этнических групп общей численностью более 200 человек, однако в этот список не включены 42 500 человек, указавших иную национальность, и почти 70 000 человек, не указавших свою этническую принадлежность (QAZSTAT 2025). Трудно переоценить роль государственной идентичности в консолидации общества, укреплении легитимности власти и обеспечении национальной безопасности.

Репрезентация государственной идентичности осуществляется через множество каналов и включает в себя историческую память, национальные традиции, государственную идеологию, официальные символы (герб, флаг, гимн), а также правовые и политические институты. Государственная идентичность формируется через образование, культуру, политику, СМИ и общественные институты. Она может быть как устойчивой, так и изменчивой, особенно в периоды кризисов, реформ или глобализации. И каждый из этих каналов имеет свои особенности.

Соответственно предметом данной статьи является выявление способов и средств репрезентации государственной идентичности казахстанских граждан в языке масс-медиа. В Казахстане активно не только популяризуется, но и находит реальное воплощение трехязычие в соответствии с государственной Культурной программой «О триединстве языков» (Омарбекова, 2019). Безусловно, учитывая разный возраст представителей социума, утверждать, что оно носит массовый характер, не соответствовало бы реальности. Как известно, старшему поколению освоение английского языка представляет определенные трудности, но билингвизм в Казахстане занимает прочные позиции. Соответственно, поскольку в коммуникативном пространстве Казахстана активно функционируют два языка: казахский как государственный и русский как официальный, казахстанская пресса существует в двух основных языках – казахском и русском, что является

свидетельством того, что на государственном уровне учитываются интересы и национальных диаспор, преимущественно говорящих на русском языке.

Таким образом, двуязычие в казахстанской прессе не только отражает реальную языковую ситуацию, но и становится инструментом формирования идентичности на разных уровнях.

В языке казахстанской прессы широко используются официальные концепты, отражающие государственную идеологию и идентичность. Например:

- «Тәуелсіздік» (независимость) – ключевое понятие, используемое в патриотическом контексте, начиная со Дня провозглашения Суверенитета РК (25 октября 1990 года) (Конституция, 1995).
- «Мәңгілік Ел» – национальная идея, концепция вечного государства, символизирующая устойчивость и преемственность, реализуемая в государственной политике «Казахстан-2050» (Назарбаев, 2014).
- «Рухани жаңғыру» – программа духовной модернизации, ориентированная на обновление национального самосознания, реализуемая в казахстанском обществе с 2017 года (Назарбаев, 2017).
- «Ұлы дала елі» (страна Великой степи) – возрожденное понятие, символизирующее исторические корни казахов. национальный бренд (в соответствии с Постановлением Правительства РК №1448 от 31 декабря 2014 года «О подготовке и проведении в 2015 году 550-летнего юбилея Казахского ханства») (Назарбаев, 2018; Правительство, 2014).

Следует оговорить, что понятия, выраженные в терминах «Мәңгілік Ел» (Вечное государство), «Рухани жаңғыру» (Духовное возрождение), «Ұлы дала елі» (страна Великой степи), определяющие векторы развития Казахстана, как эксплицитно, так и имплицитно выражаются в анализируемых текстах. Они отражают государственность, формируют у читателей определенные образы государства, чувство патриотизма, государственной и национальной идентичности, подкрепляя их в массовом сознании посредством масс-медиа. Пресса Казахстана играет активную роль в формировании государственной идентичности социума через выбор тем и ракурс подачи информации.

В формировании государственной идентичности важную роль играют также историческая память и культурное наследие (ср. напр.

Szprociński, 1991; Feldman, 2001). Так, казахстанская пресса регулярно публикует материалы, посвященные истории страны, видным деятелям и ключевым историческим событиям. Особое внимание уделяется:

- Дню Независимости (16 декабря) – главному празднику, связанному с формированием суверенной казахстанской идентичности.
- Наурыз – традиционному празднику весны, который позиционируется как символ национального единства.
- Личностям Абая, аль-Фараби, Каныша Сатпаева, Алии Молдагуловой и других – персоналиям, внесшим большой вклад в историческое наследие Казахстана.

Эти материалы способствуют формированию у аудитории чувства принадлежности к общему историческому прошлому государства.

Немаловажным фактором в формировании государственной идентичности социума Казахстана играет его многовекторность: полиэтничность, полиязычность и поликонфессиональность, в связи с чем в отечественной прессе частотны публикации на такие темы, как:

- «Казахстан – единая семья народов»,
- «Мы все – одна нация»,
- «Единство в многообразии» и др.

В Казахстане активно функционирует Ассамблея народа Казахстана (АНК), которой отводится «важнейшая роль в формировании уникальной модели всеказахстанского единства», а её задачи заключаются в «реализации государственной национальной политики, обеспечении общественно-политической стабильности в Республике Казахстан и повышении эффективности взаимодействия государственных и гражданских институтов общества в сфере межэтнических отношений» (Assembly, 2026). Деятельность АНК регулярно освещается в прессе с целью представления образа Казахстана как толерантного и мирного государства.

Идентичность, в том числе государственная, – это динамическое явление, которое формируется на основе истории, культуры, политических институтов и общественных норм (Tajfel, 1974). В условиях глобализации и цифровой революции государства сталкиваются с новыми вызовами, требующими адаптации и гибкости. Кроме того, в Казахстане важным вопросом является использование этнокультурного потенциала государства и адаптация политики идентичности к многоязычию и мультикультурализму.

Проблема государственной идентичности является объектом научных исследований многих научных дисциплин – политологии, социологии, истории, философии, культурологии и др. Вкратце остановимся на положениях, наиболее существенных для настоящего анализа. Бенедикт Андерсон обращает внимание на сознательный аспект идентичности, которая помогает людям чувствовать себя частью единого «воображаемого» сообщества, даже если они никогда не встречались лично (Anderson, 2006). Государственная идентичность создается и поддерживается через официальные нарративы, в которых важная роль отводится прессе (Anderson, 2006, с. 199–206). В исследованиях Эрика Хобсбаума внимание уделялось процессу, в котором государства создают мифы и ритуалы для укрепления национального самосознания. По его мнению, многие традиции, которые считаются «древними», на самом деле были созданы сравнительно недавно с целью усиления национального единства. В подтверждение своей мысли он отмечает, что многие государственные праздники, официальные символы и исторические нарративы формируются искусственно для поддержки государственной идентичности (Hobsbawm, 1983). На значение символов и мифов обращал внимание также Энтони Смит. Благодаря их влиянию идентичность строится на основе глубоких исторических корней, а не только на современных политических решениях (Smith 1991).

При анализе государственной идентичности Казахстана, помимо общих теоретических предположений о факторах, формирующих коллективную принадлежность, важны также региональные детерминанты. В этом контексте выделяется контраст с Россией и концепция «негативной идентичности», построенной не столько на конкретных ценностях, сколько в противовес идентичностям других наций и групп. Как полагает Лев Гудков, российская идентичность часто строится на идее противостояния «Западу» и опирается на мифы о «великом прошлом» (Гудков, 2004). На значение исторической памяти обращали внимание также Алексей Миллер и Мария Липпман, отмечая, что государственная идентичность – это гибкий конструкт, который формируется и меняется под влиянием политических и социальных факторов, в том числе через историческую память, важные события и ключевые мифы для национального самосознания (Miller & Lippman, 2012).

Труды же казахстанских ученых охватывают вопросы национальной идентичности, этнополитики, государственного строительства

и исторической памяти. Нурболат Масанов критиковал этноцентристские подходы к истории Казахстана и подчеркивал, что казахстанская государственность формировалась в многонациональном и многокультурном контексте. Он считал, что важно рассматривать казахскую идентичность в широком евразийском контексте, а не только через призму национальной истории. Исследователь подчеркивает, что историческая память играет ключевую роль в формировании государственной идентичности, но ее нельзя строить на мифах и идеологизированных интерпретациях прошлого (Масанов, 2004, с. 36).

Айдын Ауесбай, в свою очередь, сосредоточивался на влиянии глобализации на национальную идентичность (Ауесбай, 2015), анализируя результаты влияния современных технологий, миграционных процессов и экономической интеграции на восприятие казахстанцами своей принадлежности к государству. Особое внимание он уделяет тому, как молодежь воспринимает казахстанскую идентичность в условиях цифровой трансформации (Ауесбай, 2017).

В основе нашего исследования лежат темы работ Масанова и Ауесбая, которые изучают нарративы в прессе и чувство идентичности у молодого поколения. Опираясь на новые материалы, это исследование дополняет и обновляет существующие знания, а также представляет собой попытку охарактеризовать меняющуюся идентичность в середине 2020-х годов в разных её воплощениях.

СМИ оказывают огромное воздействие на массовое сознание и отражают умонастроение социума. В настоящей статье попытаемся проанализировать газетные тексты, посвященные проблемам государственной идентичности, проблеме в полиязычном Казахстане.

Процедура извлечения текстов осуществлялась следующим образом: в поисковиках сайтов газет выпуска 2020–2025 года, «Егемен Қазақстан» <https://egemen.kz/>, «Казахстанская правда» <https://kazpravda.kz/>, «Литер» <https://liter.kz/>, «Халық» <https://halyqline.kz/tag/halyq-gazeti/>, «Алматы ақшамы» <https://aqshamnews.kz/>, «Tengrinews» <https://tengrinews.kz/>, «Village.kz» <https://www.the-village-kz.com/> вводилось название тегов и методом сплошной выборки из всех рубрик данных периодических изданий отбирались тексты с ключевыми словами «государство», «государственный», «мемлекет». В итоге было получено 324 текстов, содержащих информацию о государственной идентичности в Казахстане. Из них в казахскоязычной прессе – 114 текстов, в рус-

скоязычной – 210. В таблице 1 представлены данные о количестве текстов в каждой из проанализированных газет.

Таблица 1. Данные по результатам первичного поиска материала.

| Источник             | Количество текстов первичного поиска |
|----------------------|--------------------------------------|
| Егемен Қазақстан     | 40                                   |
| Tengrinews           | 40                                   |
| Village.kz           | 60                                   |
| Казахстанская правда | 60                                   |
| Литер                | 50                                   |
| Халық                | 40                                   |
| Алматы ақшамы        | 34                                   |
| Итого                | 324                                  |

Количество текстов первичного поиска о государственной идентичности обусловлено числом релевантных публикаций в ограниченный временной период (2020–2025). Количественное ограничение текстов было целенаправленным для обеспечения репрезентативности и сопоставимости фактического материала: круглое количество позволяет избежать дисбаланса выборки на результаты анализа. Дело в том, что данная статья является лишь фрагментом полиаспектного исследования, посвященного репрезентации семантики идентичности в языке казахстанской прессы. В целом в рамках проведенного нами комплексного изучения семантики идентичности (языковой, социокультурной, транслингвальной, этнокультурной), изучено свыше 1000 газетных текстов (Мусатаева & Какимова, 2024; Глушковски и др., 2024).

В Таблице 2 в качестве примеров приводятся 2 фрагмента из проанализированных 324 газетных текстов. Из каждой из статей был извлечен лид, а также контекст статьи. С целью выявления семантического ядра анализируемых текстов была использована технология SEO-анализа ([https://miratext.ru/seo\\_analiz\\_text](https://miratext.ru/seo_analiz_text)), по данным которой была получена следующая общая статистика 210 русскоязычных текстов. Как уже отмечалось, из 324 текстов 114 являются казахскоязычными, которые не распознаются этой платформой.

Таблица 2. Примеры материала, подвергнувшегося количественному анализу.

| Название статьи                                                         | Рубрика                                                                                                                                                                                                                           | Дата               | Автор            | Контекст                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Лид                                                                                                                                                                                  |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| «Слушающее и слышащее государство: сенаторы провели встречи в регионах» | Сенат <a href="https://kazpravda.kz/n/slushayushchee-i-slyshashchee-gosudarstvo-senatory-proveli-vstrechi-v-regionah/">https://kazpravda.kz/n/slushayushchee-i-slyshashchee-gosudarstvo-senatory-proveli-vstrechi-v-regionah/</a> | 29 августа 2024 г. | Адия Кенжетулова | Сенаторы Казахстана провели ряд встреч в регионах, подчеркивая важность создания справедливого, правового и социального государства. Депутат Сената Бибигуль Жексенбай встретилась с коллективом Генеральной прокуратуры, где обсуждались идеологии, заданные Президентом на третьем заседании Национального курултая, а также вопросы взаимодействия с обществом и СМИ в рамках концепции «слушающего государства». Сенатор Нурторе Жусип посетил село Жанажол Жамбылского района Северо-Казахстанской области, где обсудил с жителями и местными властями проблемы миграции, состояния дорог и сокращения средств программы «Ауыл аманаты». Сенатор Амангельды Нугманов ознакомился с процессами модернизации пограничных пунктов в Актюбинской области, обсуждая меры по сокращению времени прохождения границы и улучшению условий для граждан. | Сенаторы Казахстана проводят встречи в регионах, акцентируя внимание на создании справедливого и правового государства, обсуждая с гражданами актуальные проблемы и пути их решения. |

| Название статьи                                           | Рубрика                                                                                                                                                                                                                        | Дата       | Автор            | Контекст                                                                                                                                                                                                                                                                                    | Лид                                                                                                                                                                                          |
|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Как государство будет под-держивать студентов в 2025 году | Накопитель-ная система “Келешек”.<br><a href="https://liter.kz/kak-gosudarstvo-budet-podderzhivat-studentov-v-2025-godu-1736851255/">https://liter.kz/kak-gosudarstvo-budet-podderzhivat-studentov-v-2025-godu-1736851255/</a> | 14.01.2025 | Нэля Сулейменова | Данная мера государственной поддержки предназначена детям Казахстана в возрасте от 5 лет для стабильного накопления финансовых средств до достижения ими 18 лет для оплаты образовательных услуг в стране и за рубежом, включая высшее, а также техническое и профессиональное образование. | Министерство науки и высшего образования РК сообщает, что в целях реализации поручения главы государства разработана Единая добровольная накопительная система “Келешек”, передает Liter.kz. |

**Таблица 3.** Общая статистика 210 русскоязычных текстов.

|                                  |        |
|----------------------------------|--------|
| Количество символов с пробелами  | 110657 |
| Количество символов без пробелов | 96214  |
| Количество слов                  | 14444  |
| Количество уникальных слов       | 2871   |
| «Тошнота» текста                 | 21     |
| «Водянистость» текста            | 2%     |

При проведении SEO-анализа было выделено 10 доминантных слов, которые представлены в Таблице 4.

**Таблица 4.** 10 доминантных слов.

| Слово           | Повторений | Плотность, % |
|-----------------|------------|--------------|
| государство     | 231        | 1,6          |
| Казахстан       | 140        | 0,97         |
| год             | 87         | 0,6          |
| развитие        | 87         | 0,6          |
| государственный | 83         | 0,57         |
| страна          | 74         | 0,51         |
| президент       | 74         | 0,51         |
| гражданин       | 68         | 0,47         |
| быть            | 68         | 0,47         |
| также           | 58         | 0,4          |

Кроме лексем «год», «быть» и «также», все остальные доминантные слова связаны с государственностью и формированием коллективной идентичности. Они отражают государственную политику в области идентичности, изложенную во введении и реализуемую посредством нарративов в официальных документах и текстах прессы. С точки зрения нашей дискуссии, передача ценностей от официальных сообщений к общественному сознанию имеет особое значение. Это особенно важно для молодого поколения, члены которого еще формируют свою идентичность и одновременно будут формировать будущее государства. Следовательно, их взгляды будут отражать эффективность казахстанской политики в области идентичности.

С целью выявления особенностей понимания носителями языка значения самого терминосочетания «государственная идентичность» и их отношения к данной проблеме нами был проведен рецептивный эксперимент посредством Yandex-Forms, включавший следующие вопросы:

- 1) На каком основании Вы считаете себя казахстанцем?
- 2) Как Вы понимаете государственную идентичность?
- 3) Знаете ли Вы, что изображено на государственном флаге РК?
- 4) Знаете ли Вы, что изображено на государственном гербе РК?
- 5) Знаете ли Вы гимн РК?
- 6) Какие государственные праздники Вам нравятся?

В опрос также были включены вопросы о самих респондентах: их возрасте, поле, социальном статусе (месте работы или учебы). В исследовании принимал участие 131 респондент: студенты разных вузов и колледж (КазНПУим. Абая, АГПК № 2) и служащие (педагоги, медицинские работники, предприниматели, домохозяйки и др.). Параметры респондентов с учетом гендерного соотношения представлялись следующим образом: 9 – представители мужского пола и 123 – женского<sup>1</sup>; возраст: 15–19 – 108 студенты и школьники (81%), 50 и больше – 10 респондентов (7%), 20–35 – 8 респондентов (6%) и 36–50 – 8 респондентов (6%). В связи с небольшим количеством представителей старших возрастных групп и несоответствием основной цели исследования, их ответы были исключены из анализа результатов, и окончательные результаты представляют точку зрения 109 школьников и студентов как поколения, вступающего во взрослую жизнь.

Наибольшее число респондентов указали свою национальность как казахи (66 участников, или 60,55%), за ними следуют русские (13; 11,93%) и уйгуры (11; 10,09%). Другие национальности были значительно малочисленнее: дунганы (4), немцы (2) и курды (2), а по одному человеку указали свою национальность как другую (индийцы, белорусы,

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<sup>1</sup> Столь значительная разница в половом соотношении стала следствием особенностей учреждений, охваченных исследованием. Это были педагогические вузы и колледж, в которых 90 % учащихся – женщины. Большинство преподавателей и служащих в этих учреждениях тоже женского пола.

корейцы, африканцы, башкиры и удмурты). Четыре человека не ответили на вопрос о своей национальности.

Первые два вопроса были закрытыми, и респонденты могли выбрать более одного ответа. В первом вопросе, касающемся оснований считать себя (или не считать) казахом, распределение ответов было, как показано на Диаграмме 1.

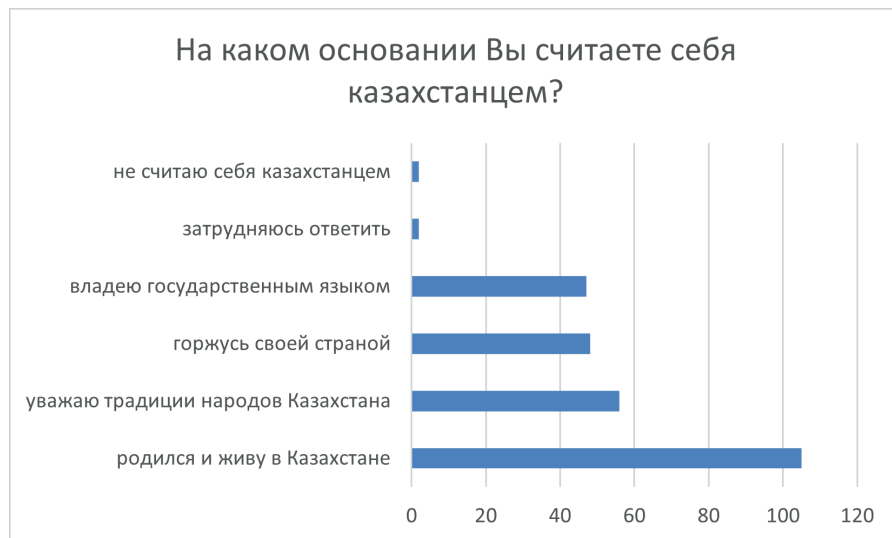


Диаграмма 1. Распределение ответов на вопрос: на каком основании Вы считаете себя казахстанцем?

Кроме вышеуказанных опций, у респондентов была возможность выбрать вариант «принимаю все перечисленные», но эти ответы добавились к общему результату. В современном обществе принадлежность к нации всё чаще определяется не этническими, а гражданскими признаками – где человек родился, живёт, участвует в общественной жизни. Поэтому ответы 105 респондентов (96,33%) «родился и живу в Казахстане» подтверждают распространённость этой точки зрения в опрошенной группе. В своем национальном сознании они опираются на объективные и легко проверяемые критерии: место рождения и текущее проживание. Эти же критерии объединяют людей разных этнических, языковых или культурных групп и позволяют идентифицировать себя с нацией по факту гражданской принадлежности и реальной жизни в стране. Остальные ответы, касающиеся знания казах-

ского языка, уважения для традиций этносов страны, а также общей гордости, давались реже, и каждый из них встречался примерно у половины участников опроса.

Второй закрытый вопрос с несколькими вариантами ответа относился к тому, как респонденты понимают национальную идентичность (см. Диаграмма 2).



Диаграмма 2. Распределение ответов на вопрос: как вы понимаете национальную идентичность?

Похоже первому вопросу, ответ «все перечисленные» добавлялся к результатам отдельных опций. Ответ «осознание общих культурных ценностей, традиций и языка, связанные с государством» оказался наиболее частотным (84 респондента, т.е. 77%). Он отражает значение глубинного и эмоционального восприятия принадлежности к государству, а не только формального или юридического. В многонациональных странах, таких как Казахстан, этническая принадлежность может быть разной, но общая культура, традиции и язык становятся основой для объединения и это помогает преодолеть различия и укрепить целостность государства на основании «государственной», а не «этнической» идентичности. Несколько меньше голосов было получено за ответы, указывающие на важность чувства принадлежности к государству (56; 51,37%) и идеологической общности (41; 37,61%). Де-

сять респондентов не смогли указать, на чем основано их чувство национальной идентичности.

Вопросы 3., 4. и 5., касались знания флага, герба и гимна Казахстана. Ответы были почти повсеместно утвердительными. Двое признались, что не знают национальный гимн, герб и флаг; один человек не был знаком со всеми тремя национальными символами, а двое других – только с одним. Это были общие вопросы о наиболее важных национальных символах, поэтому результаты этой части опроса соответствовали ожиданиям. Распределение ответов на последний вопрос, касающийся любимых национальных праздников, было более разнообразным. Из-за своего открытого характера вопрос требовал от респондентов конкретного ответа.



Диаграмма 3. Распределение ответов на вопрос: какие государственные праздники Вам нравятся?

Как любимый государственный праздник чаще всего выбирался Наурыз (61 ответов, т.е. 61,46%) – отмечаемый тюркскими и иранскими народами праздник прихода весны и нового астрономического года (21–23 марта), символизирующий плодородие, дружбу и любовь. Так как Наурыз отмечается разными народами, живущими в Казахстане, стал интегральной частью общей культурной идентичности страны. Этот праздник несёт в себе глубокие культурные, исторические и эмо-

циональные смыслы, которые близки большому числу граждан, независимо от их этнической принадлежности. Наурыз сближает людей через общие ритуалы – угощение, традиционные игры, концерты и т.д.

Другим самым распространённым ответом (20 респондентов; 18,34%) было выражение в целом позитивного отношения к национальным праздникам без указания конкретных праздников (ответы: да, конечно, много, все).

Среди прочих праздников выбор был весьма разнообразен. Только День Независимости получил больше, чем 5%, но даже в этом случае его было значительно меньше, чем Наурыз (13; 11,92%). Следует также упомянуть День конституции (5; 4,59%) и Международный женский день (4; 3,67%). Другие названия указывались вообще лишь отдельными респондентами (1–2 респондента). Это были: национальный праздник влюбленных Козы Корпеш и Баян-Сулу (от заглавия казахской народной лирико-эпической поэмы), День Победы, День Республики Казахстан, День детей, Новый год, День защитника отечества, День столицы.

Относительно небольшое число людей, которые не ответили или заявили, что им не нравятся никакие государственные праздники (6; 5,5%), свидетельствует о позитивном отношении казахстанцев к этому аспекту их коллективной идентичности и его большом символическом и общинном значении.

Люди склонны воспринимать свою идентичность не через бюрократические категории, а через то, что им близко: язык, праздники, семейные традиции, уважение к общим героям или ценностям. Поэтому этот ответ апеллирует к эмоциям и поэтому воспринимается как более «живой» и искренний. Также во многих странах (в том числе в Казахстане) поддержка культурной идентичности как основы гражданского единства активно продвигается через образование, СМИ и государственные программы

На основании вышеизложенного можно заключить, что в многонациональном, поликультурном и поликонфессиональном Казахстане вопрос о государственной идентичности является актуальным. В отличие от периода тоталитарной системы, когда во всех сферах общественной жизни активно внедрялась русификация, нивелируя все национальное, за время суверенитета у казахстанцев сформировалось новое мышление. Сутью этого нового типа мышления является то, что

большая часть представителей других этносов, проживающих в Казахстане, стали идентифицировать себя со страной своего рождения и проживания, т.е. с Казахстаном, с казахской культурой, необходимостью проявления подлинного уважения к казахскому как к государственному языку. Это проявление обыденного языкового сознания отмечается в большинстве социальных сетей и различных пабликах.

Наш анализ доминантных слов в пресс-текстах и взглядов молодого поколения выявляет процессы формирования национальной идентичности Казахстана в конкретный момент времени, во втором десятилетии XXI века. Поскольку этот процесс продолжается, целесообразно повторить анализ через определенный период, с целью выявления произошедших изменений.

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# THUS WORKING --- PAPERS



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## Impacts of Stereotypical Gender Role Expectations on Married Female Students: Evidence from the University of Dhaka

**Abstract.** The topic of women's involvement in development has emerged as a crucial indicator for the successful execution of developmental endeavors in developing nations such as Bangladesh. The government of Bangladesh is actively advocating for the mitigation of sociocultural attitudes and practices that hinder women's involvement and competitiveness in economic development and higher education. The education sector has witnessed an influx of women, leading to a significant number of them pursuing college degrees. Consequently, many are married and must balance academic pursuits with household and family responsibilities. The primary objective of this research was to investigate the impact of traditional gender role expectations on married female undergraduate students at the University of Dhaka. A mixed research methodology was employed, involving twenty-two female students and two key informant interviews. The study found that rigid labor divisions based on stereotyped gender roles place excessive strain on women, especially in caregiving and domestic duties, limiting their academic engagement. Unless the patriarchal system of unequal gender role expectations is modified, married female students will continue to face challenges, and their contributions to progress in education will remain constrained.

**Keywords:** marriage; female students; gender role; stereotypes; expectations.

## 1. Introduction

The concept of gender can be acquired from early childhood through social interactions involving adults, as well as through the observation of adult behavior and the subsequent reception and reinforcement of particular child behaviors (Massey, 2013). According to MacNaughton (2000), gender is socially constructed,<sup>1</sup> and its formation commences at birth, subsequently progressing and evolving alongside the child. Gender roles encompass a range of behaviors that individuals or collectives adopt in alignment with their biological sex, influenced by the prevailing societal norms and values. According to Whyte (1998), the acquisition of gender role knowledge in young children is a result of active development facilitated by the monitoring of their social environment. This perspective aligns with Bandura's (1977) social learning theory,<sup>2</sup> which underscores the significance of learning through observation and imitation of behavior. Many communities have long maintained the belief that women have inherent biological tendencies towards nurturing behavior and that traditional gender roles often necessitate their engagement in behaviors that foster care. According to Wingrave (2016), gender stereotypes can result in a culture of discrimination, which is a matter of concern for gender equality organizations. These stereotypes have been acknowledged to have an impact on children's opportunities, academic performance, and well-being, as highlighted by Zero Tolerance (2013). Throughout history, there has been a notable correlation between the broader societal norms surrounding gender roles and the specific duties assigned within marriages (Ogletree, 2014).

Throughout much of the 20th century, there existed a prevailing consensus regarding the husband's and wife's respective responsibilities and roles within the family unit. Notably, it was widely acknowledged that husbands were expected to fulfill the roles of provider and protector. In contrast, wives were expected to assume the duties of responsible homemakers and mothers. Working women adhere to an implicit set of guidelines regarding their home responsibilities within their marital role. It is hardly surprising that society also puts conventional gender role expectations on married female college students. The expectations mentioned above create a diverse array of obsta-

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<sup>1</sup> Feminist theorists argue that gender is not biologically fixed but socially constructed through repeated performance, institutional expectations, and cultural reproduction of roles.

<sup>2</sup> Social learning theory, developed by Albert Bandura, explains that individuals learn behaviors, attitudes, and emotional responses through observing others within a social context.

cles in individuals' daily routines, impeding their ability to balance their academic pursuits and personal commitments effectively.

This study aims to assess the veracity of the aforementioned assertion, as well as to identify whether there are any obstacles encountered by married female students enrolled at the University of Dhaka. This study makes three key contributions. First, it centers on married female undergraduates, a population that remains largely invisible in both global and South Asian gender and education scholarship. Existing studies typically focus on unmarried youth, graduate women, or working mothers, leaving a gap in understanding how early marriage intersects with higher education. Second, instead of treating domestic responsibilities, emotional strain, and academic performance as isolated issues, this study examines how these forces operate together to shape students' persistence. This multi-layered approach moves the discussion beyond descriptive accounts of gender inequality. Third, the study shifts attention from family expectations to institutional structures by showing how rigid university policies, such as inflexible attendance requirements and a lack of childcare, can deepen married students' vulnerabilities. By applying Role Congruity Theory to the university context, the study expands the theory's scope and offers a framework for understanding identity conflict among married students in South Asia. Ultimately, the study will provide potential solutions, if applicable, derived from the research findings. Since one of the primary purposes of social research is to find solutions to problems, this study aims to contribute to the literature by shedding light on the significant issue of how traditional gender roles affect married women's educational pursuits and whether they face difficulties in completing their bachelor's degrees.

### 1.1. Background of the Study

Despite the recognition of the value of women's education, many obstacles stand in the way of women obtaining higher education and contributing their full potential to the improvement of society. Such barriers are even more prevalent among married female students. The gender role expectations of Bangladeshi society tend to put women in a situation where they are expected to be the primary caregivers in the family. Thus, when a girl marries, she is expected to take care of her husband and in-laws and do the household chores. Although marriage might be one of life's most rewarding experiences, students marrying during their undergraduate years face numerous challenges. Marriage duties can increase the burden of schedule management and en-

hance stress levels (Mullings, 2011). Married women confront multiple challenges and leave their studies unfinished due to various social and cultural reasons. Rather than attending classes, married women are expected to look after their homes and kids (Goldin, 2004). A significant proportion of married women want to continue their education after getting married. Still, they face challenges such as security and safety, long-distance travel to academic institutions, and balancing the workload of family engagements, child-rearing, studies, and careers (Kuperberg, 2009; Sathar, Lloyd, & Haque, 2000).

Married female students often encounter significant challenges in fulfilling their academic aspirations due to the presence of multiple concurrent responsibilities vying for their attention. The duties associated with their familial obligations deplete their energy reserves and consume a significant portion of their time. The individuals in question seem to experience physical, emotional, and psychological effects as a result of their simultaneous responsibilities, which seem to emanate from academic stress, fear, anger, and a lack of proficiency. This study investigates the influence of social gender role expectations on married undergraduate female students and their experiences in managing the demands of both their academic and marital responsibilities.

This study aims to assess the influence of stereotypical gender role expectations on married female undergraduate students of the University of Dhaka. To explore the general objective, the specific objectives are to explore the gender role expectations faced by married female undergraduate students and to determine the impact of those gender role expectations on married female students. This study addresses the following research questions:

- How do stereotypical gender role expectations impact married undergraduate female students?
- Are there any challenges married female students face due to their gender roles?

## **2. The Intersection of Gender Roles, Societal Expectations, and Academic Life**

Extensive scholarly investigation into gender roles reveals a persistent tension between domestic expectations and personal aspirations. Gender roles, shaped by cultural, historical, and societal norms, significantly affect individuals' experiences, particularly for women, who often face challenges balancing domestic duties with educational aspirations. Historically, women have been expected to manage home maintenance, child-rearing, and family

health. In the context of Bangladesh, as a society scoring high in masculinity, it maintains distinct, rigid expectations: men are conditioned to be assertive providers, while women are socialized into nurturing roles. Marriage is frequently viewed not in individual terms but as a relationship where each partner sacrifices autonomy (McQuillan, 2005). For married female undergraduates, this often means fulfilling academic obligations while also meeting expectations tied to their roles as wives and mothers.

Studies from different contexts describe how marriage intensifies women's responsibilities. Research by Ogletree (2014), Mullings (2011), Bird (1979), and others shows that women tend to keep doing most household work even when they are in school or full-time jobs. This often creates stress, fatigue, and conflicts between personal goals and family demands (McRoy & Fisher, 1982; Pittman et al., 2001). *Lasode and Awote* (2014) described role contagion<sup>3</sup> from juggling employment, school, and family responsibilities. Egan (2004) found that individuals often lack the vitality to meet these expectations, leading to high stress levels. However, most of these studies come from Western contexts or look at older women, graduate students, or working mothers. Only a handful examine married undergraduate students, and even fewer look at them in South Asian settings, which is very different from the Western settings where married women often do not have to stay with their in-laws. This creates a gap because the pressures on young married students, many of whom live with in-laws, are not the same as those faced by older or employed women.

In Bangladesh, research on women in higher education has grown, but it still rarely focuses on married undergraduates. Hofstede's masculinity vs. femininity dimension<sup>4</sup> matters here; Bangladesh's high-masculinity culture<sup>5</sup> prescribes assertiveness for men and nurturing for women, shaping the roles of married female students. Begum Shuvra et al. (2019), Lin (2016), and Jin

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<sup>3</sup> *Role contagion* refers to the psychological spillover where stress, expectations, or emotions from one social role (e.g., employee) bleed into another role (e.g., student or caregiver), intensifying emotional burden and reducing role performance across domains

<sup>4</sup> Hofstede's cultural dimension of masculinity vs. femininity describes the extent to which a society values traditionally masculine traits (like assertiveness and competition) versus feminine traits (like care and cooperation). Bangladesh scores relatively high in masculinity, reflecting more rigid gender role expectations

<sup>5</sup> According to Hofstede's model, "masculine" cultures emphasize competition, achievement, and distinct gender roles, while "feminine" cultures promote care, cooperation, and flexible role expectations

(2023) discuss challenges faced by women in education more broadly, but they do not examine how marriage reshapes a woman's daily routine, mobility, or mental well-being during her bachelor's degree. Coronel et al. (2010) found that most women received minimal domestic support, yet emphasized organizational culture over gender expectations. Potokri (2010) linked women's academic struggles to cultural traditions but did not address challenges post-marriage. Elizalde (2021) noted that female first-generation students<sup>6</sup> face pressures to conform to gender roles, though specific duties or impacts were not discussed. Some studies from Nigeria, Pakistan, and Turkey (Lasode & Awote, 2014; Ali et al., 2011; Sakallı-Uğurlu et al., 2018) describe similar struggles elsewhere, yet the cultural and family structures in those places differ from Bangladesh. For example, the role of in-laws, guest management, and the expectation that a new bride must "adjust" are rarely discussed in international work, even though these are common pressures in Bangladesh.

Studies by Yogev (1981), Bird (1979), and Granello & Navin (1997) revealed that women often take on additional roles without reducing previous ones. However, no studies have examined how these expectations affect married students' academic and psychological well-being. Anderson (2014), Kitsa & Mudra (2019), and Irene et al. (2019) emphasized cultural values that tie women to domestic roles and expect self-sacrifice. Meeussen et al. (2022) showed that women face undervaluation in paid labor alongside high caregiving expectations, yet did not address academic settings.

Another missing area involves emotional and psychological strain. Authors like Dryden (1999) and Meeussen et al. (2022) show how gendered divisions of labor affect women emotionally, but they do not link this directly to academic outcomes. This is important because anxiety, guilt, or exhaustion can directly shape how a student attends class, completes assignments, or stays motivated. In addition, almost no studies evaluate how universities respond to these issues. Some mention family support, but institutional support, such as childcare, flexible policies, or counseling for married students, is almost absent in the literature. This makes it unclear whether the burden married female students carry is only a domestic issue or if universities also contribute by not offering structural support.

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<sup>6</sup> First-generation students are those whose parents did not complete higher education. In many societies, they face unique pressures, including adherence to traditional gender roles, as discussed by Elizalde (2021) and Potokri (2010).

## 2.1. Gender Norms and Educational Access in South Asia

Unlike in Western contexts where role conflict might be viewed through an individual lens, South Asian studies highlight that marriage often functions as a “patriarchal bargain”. Across South Asia, research shows that girls and young women still face pressure to prioritize duties at home over personal goals. Large-scale analyses, such as those by Bussolo et al. (2024), point out how expectations about respectability, obedience, and family roles shape women’s decisions long before they enter the labor force. Similar patterns appear in Pakistan (Firdoos et al., 2023; Gul et al., 2025) and India (Hiremath, 2024), where cultural scripts continue to define what a “proper” woman should do. Firdoos et al. (2023) note that in Pakistan, cultural expectations compel women to prioritize marital adjustment over educational attainment. This echoes older findings by McQuillan (2005) but places them in a modern regional context: women are expected to sacrifice autonomy for family stability. These studies are valuable, but they mostly examine general gender inequality rather than the lived experiences of young married students trying to complete a university degree, which this current research aims to address.

Marriage often becomes the turning point where gender expectations intensify. Some recent South Asian studies are beginning to look at this intersection. Abdullah et al. (2024) show that married female students face academic setbacks when domestic responsibilities suddenly expand. Their participants described a constant tension between university work and home expectations, yet the study did not examine how institutional practices might worsen this conflict.

In Bangladesh, family structures, particularly in-law households, play a unique and often decisive role. Hasan et al. (2025) discuss the influence of family beliefs on girls’ educational access in Pakistan, yet they do not explore how in-laws specifically shape a married student’s daily routine. Many South Asian women live with extended families after marriage, but most research still assumes a nuclear household model. As a result, important forms of pressure, managing guests, maintaining harmony with a mother-in-law, and performing domestic labor to “prove” oneself, remain largely absent from academic discussions.

Several studies explore the emotional side of gendered expectations. Tabkhi et al. (2025) show that many female students associate marriage with anxiety and reduced freedom. Saha (2024) and Tarannum (2024) describe emotional exhaustion among South Asian women abroad, especially first-generation or

married students who feel torn between academic work and family expectations back home. These works are insightful, but they focus on graduate or international students. The emotional burden on married undergraduate students in South Asia, particularly in public universities, remains under documented. Most existing research acknowledges stress but does not connect it clearly to academic motivation, attendance, or long-term persistence.

While the recent surge in literature provides excellent data on the South Asian region generally, focusing heavily on Pakistan and India, there is a scarcity of research specifically addressing the *Bangladeshi* context at premier institutions like the University of Dhaka. Most existing local studies, such as Begum Shuvra et al. (2019), discuss challenges in higher education broadly but do not deeply investigate the specific causal link between traditional gender stereotypes and academic persistence among married students. The focus of most existing papers is on family responsibilities, overlooking how rigid institutional structures and social support can amplify or moderate students' struggles.

Furthermore, student mothers and married women often fall into a policy "blind spot" in Bangladeshi universities, which are largely designed for unmarried students with few family obligations. This study aims to fill that gap. Few, if any, have focused on institutions like the University of Dhaka, which draws students from diverse backgrounds. By focusing specifically on the lived experiences of married undergraduates at the University of Dhaka, it moves beyond general regional trends to analyze how specific local dynamics, such as the lack of campus daycare or rigid attendance policies, interact with traditional gender expectations to constrain women's potential. This current study seeks to fill a gap by examining how married students navigate their academic lives while fulfilling traditional roles as wives, mothers, or daughters-in-law roles which may significantly impact their academic perseverance and mental well-being. Addressing this topic could open further inquiry into how modifying entrenched gender norms may support women's right to higher education.

In sum, while existing literature explains how gender norms shape women's lives generally, it does not capture the everyday balancing act of being married, being a young woman, and being an undergraduate student in Bangladesh. This study makes these hidden tensions visible and demonstrates why they deserve serious academic and policy attention.

### **3. Eagly & Karau's Role Congruity Theory**

The theoretical framework for the research includes the role congruity theory of Eagly & Karau (2002). The Role Congruity Theory<sup>7</sup> explains the societal expectations placed upon women to fulfill certain roles (Eagly & Karau, 2002). It helps clarify the challenges and biases women face when pursuing roles that conflict with stereotypical gender expectations, particularly in leadership. The theory argues that gender stereotypes persist because of a perceived mismatch between the feminine gender role and positions of authority. Cabrera et al. (2009) argue that men and women acquire different skill sets through their socially assigned roles, with women taking on household responsibilities and men engaging in paid employment. These abilities are then culturally validated and reinforced.

Gender roles are deeply rooted in society and consist of both descriptive and prescriptive expectations regarding how women and men should behave (Tabassum & Nayak, 2021). The theory emphasizes that societal assumptions link certain roles, like caregiving or leadership, to specific genders. Role Congruity Theory is therefore useful for understanding how traditional gender expectations shape the experiences of married female students. It highlights how these women may struggle to pursue education while meeting the societal demands of marriage and domestic life. When individuals deviate from prescribed gender roles, they may face resistance or exclusion, making them feel out of place within academic or professional environments.

### **4. Method**

This study employs a qualitatively driven mixed-methods design to examine the impact of stereotypical gender role expectations on married female undergraduate students at the University of Dhaka. The research is primarily explanatory and exploratory, prioritizing the rich, contextual data from in-depth interviews to understand students' lived experiences. This qualitative core is complemented by an exploratory, small-sample survey. Given the study's focus on depth over breadth, the survey was not designed for statis-

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<sup>7</sup> Role congruity theory suggests that prejudice arises when there is a mismatch between gender stereotypes and perceived role expectations, particularly when women occupy roles traditionally associated with men.

tical generalization but to provide descriptive data that illustrates the prevalence of themes within the sample and complements the narrative findings. The use of mixed methods in this manner allowed for both a deep understanding and a structured overview of how married female students navigate traditional roles while pursuing higher education.

#### 4.1. Participants

A purposive non-probability sampling method<sup>8</sup> was adopted. Married and unmarried female undergraduate students were selected from various faculties based on their marital status and accessibility. Eleven married and eleven unmarried students participated. It was challenging to assemble a larger sample at the university selected for the study due to time constraints and technical limitations. The small sample size, however, is consistent with the study's qualitative focus and exploratory nature, where the goal is to gather in-depth information from information-rich cases rather than to create a statistically representative sample. Participants living with parents, in-laws, or in student halls were included to reflect diverse living conditions. While the number of married respondents was limited, their insights provided rich and nuanced perspectives on the dual pressures of academic and domestic life. Data from unmarried students were used primarily for comparison to assess how gender role expectations differ by marital status.

Qualitative data were gathered through two key informant interviews with married students representing different stages of academic and marital life; one with a child and one navigating divorce. The selection of key informants aimed to showcase variation in marital roles, family structures, and academic stages.

#### 4.2. Procedure

Primary data were collected using questionnaires and semi-structured interviews, while secondary data were obtained from academic literature, books, and existing studies. Two separate Google Forms were designed; one for married and one for unmarried female students, containing a combina-

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<sup>8</sup> *Purposive non-probability sampling* is a sampling technique in which participants are selected based on specific characteristics or criteria relevant to the study's objectives. It does not aim to represent the population statistically but to gather in-depth information from "information-rich cases" (Patton, 2015).

tion of open- and closed-ended questions. The married group answered additional questions on social and institutional support. The interviews with key informants were conducted both in person and by phone. Field notes were taken to capture behavioral insights and reflective observations, which contributed to triangulation and thematic development.

### 4.3. Measures

Grounded in Eagly & Karau's (2002) Role Congruity Theory, the framework aims to provide a comprehensive understanding of the impacts of these expectations on their academic persistence and mental well-being.

- **Independent Variable: Gender Role Expectations.** This variable captures the societal and familial expectations imposed on married women. These expectations are categorized into three dimensions: **Household Responsibility (V1)**: Tasks such as cooking, cleaning, and maintaining the household; **Family Time (V2)**: Obligations to spend time with family and fulfill ceremonial or relational duties; and **Child and In-Laws Care (V3)**: Responsibilities related to caregiving for children and extended family members.
- **Dependent Variables: Impacts.** The dependent variables measured were: **Academic Persistence (D1)**: The ability to maintain consistent progress in academic life, including attending classes and completing coursework; and **Mental Well-being (D2)**: Psychological health indicators such as anxiety, emotional exhaustion, and life satisfaction.
- **Mediating Variables. Role Congruity** assesses the extent to which married female students perceive alignment between their gendered roles and their academic responsibilities. A mismatch may result in discomfort, disengagement, or lower self-efficacy, affecting both academic persistence and mental well-being.
- **Moderating Variables. Social Support (M1)**: Refers to emotional, logistical, or moral support received from partners, family, or peers. Social backing can buffer the negative impact of gender role expectations. **Institutional Support (M2)**: Encompasses support mechanisms provided by the University of Dhaka, such as flexible academic policies, counseling, or targeted programs. Effective institutional backing can improve outcomes despite societal expectations.

## 5. Findings & Analysis

### 5.1. Qualitative Inference

Regarding gender roles around household chores, comparing both married and unmarried women, one found that all agreed their role expectations leaned toward household responsibilities. Female students, married or not, are expected to complete domestic tasks before focusing on studies. Spending time with family is not a strong expectation, and caregiving for family members is not heavily demanded either.

This suggests families mostly expect female members to do chores, but ease up in other roles to help them balance study and home life. Though imperfect, this gives students some space to focus on academics. While not severely disrupting education, these expectations still affect academic persistence and future prospects.

Looking at mental well-being, I found that both married and unmarried students were anxious due to household expectations. This anxiety stems from being compelled to do chores. Yet, most do not stress over dividing time between family and studies. Both groups seem less emotionally involved with family, despite being busy with chores and academics.

This might be because they have a convenient environment in their parents' or in-laws' home that reduces their stress. So, while they feel anxious about the imposed roles, they seem to manage mentally, whether married or unmarried.

There were cases where family support was lacking, creating barriers for female students. One participant said: *"Family members weren't supportive enough of me moving to a different city alone"*. An unmarried respondent added, *"I faced discrimination from male classmates... the stigma of boys and girls spending time together without supervision is no good"*. Another said, *"It can be difficult to keep up with studies, take care of family, and handle financial expenses... and still smile at the end of the day"*. These examples show that gender roles impact perseverance and academic integrity; these were just from unmarried students.

Married students also shared barriers. One participant said: *"I sometimes have to manage in-laws' guests and take exams at the same time"*. Another, already a mother, said: *"Managing a baby is tough... I can't get proper time to*

study". Gender roles imposed by society act as a pull factor,<sup>9</sup> assigning work that takes time away from academics.

Some unmarried students reported emotional exhaustion. One participant shared: *"People expect me always to be nice and happy even when I'm exhausted"*. Another said: *"A chaotic environment is being created... I am having non-cooperation from members of the family"*. Another participant added: *"I've to be concerned about my attire, appearance, and etiquette a lot more than males while just going to study"*. Trying to balance family, chores, studies, and financial duties takes a heavy mental toll.

Some married students expressed dissatisfaction but said they were coping with support. One of them said: *"Multitasking is tiring sometimes. I feel insecure if I'm incapable of providing everything they think of me to do"*. Another said, *"The Pressure of taking a baby during my study period was really tiring... Expectations of doing household work and taking care of my in-laws always made me anxious and restless"*. Married and unmarried students have different reasons for mental strain. Marriage adds more roles to play. A married respondent said *getting "me time" is difficult due to managing two full-time responsibilities*. Gender roles clearly impact the mental well-being of both married and unmarried students. Society tries to reduce the burden it creates, but the burden still exists.

When asked about the support they expected, most students mentioned mental support from both family and society. Some also hoped for less familial pressure, more financial support, and a shift in societal mindset that softens strict gender roles.

Married female students suggested that the University of Dhaka implement specific support policies for them, like a separate dormitory for married and pregnant students. Many also asked for an affordable, full-time daycare center. Their responses show that there are no married-student-specific policies or functional daycare facilities for student mothers, which must be addressed.

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<sup>9</sup> In this context, "pull factor" refers to the sociocultural forces, such as traditional gender norms and expectations, that attract or pressure women into prioritizing domestic and caregiving roles over educational or professional goals. This usage is adapted from migration theory, where "push and pull factors" are defined as the forces that either induce people to leave a place of origin or attract them to a destination (Lee, 1966). In this study, the concept is applied to the social forces influencing women's life choices rather than geographic movement.

### Data Obtained from KII

One KII respondent was married before entering university and conceived during her first year. Her marriage was arranged, and she lives separately with her husband and child. The other was married in her final year, conceived the same year, married her partner, and lived with her in-laws until recently, when the couple began divorce proceedings.

For the first respondent, balancing studies and gender role expectations was difficult. Her in-laws expected her to handle chores and childcare. Though she was not forced into motherhood, she felt unprepared. She said she was okay with marital duties since she did similar work in her parents' house, but having a child too early disrupted her future plans. Her baby's needs often made her miss classes. Living in a nuclear family now, she manages the child alone while her husband works. She got temporary access to a teacher's daycare, which closes at 4 p.m., preventing her from attending evening classes. Her studies were constantly disrupted by concerns over who would care for the baby during class hours.

The second respondent took her final exams while eight months pregnant. She divided her post-marriage experience into three phases.

1. **First two years:** Very supportive husband and in-laws. No gender role pressure, good mental health, no academic barriers.
2. **Next six years:** She received a Ph.D. offer from Europe. Her in-laws pressured her not to go, citing childcare issues. After moving houses, she and her husband could not manage the child due to work. She left the child with her parents and went abroad, which strained the marriage.
3. **Last two years:** While abroad, she discovered her husband was cheating with his parents' approval. Despite social pressure and advice from her own parents to "adjust", she eventually filed for divorce.

She reflected that if she had conformed to traditional gender roles, she would not have been able to pursue her Ph.D. The mental toll from fighting societal and familial expectations left her emotionally drained.

### 5.2. Quantitative Inference

Two separate surveys were conducted, one for unmarried (n=11) and one for married (n=11) female students, to compare and contrast gender role expectations.

### Data Obtained from Unmarried Female Students

#### *Characteristics of the Unmarried Student Sample*

The demographic profile of the unmarried respondents was gathered to contextualize their responses. The majority of participants (7 out of 11) were between 24–26 years old, an age range that aligns with the typical marriage age in Bangladesh, making them a relevant group for analyzing pre-marital role expectations. The remaining participants were aged 18–20 (3 students) and 21–23 (1 student).

Regarding their field of study, the students were drawn from two main areas: Social Sciences (6 students) and STEM (Science, Technology, Engineering, and Mathematics) (5 students). This focus was intentional, as respondents living with their parents were prioritized over hall residents, who typically face fewer stereotypical pressures.

I asked several questions on the impacts of gender role stereotypes, like academic persistence and mental well-being, and moved on with them. Let us have a look at the Gender Role Expectations on Academic Persistence first.

#### ► **Role Expectations and Academic Persistence:**

**Household Chores:** A strong majority of unmarried students reported facing stereotypical expectations regarding household chores. When asked if they are expected to do most of the chores despite being a full-time student, 9 out of 11 respondents either agreed or strongly agreed. Only one student disagreed, and one was neutral.

**Family Time:** The pressure to prioritize family time over studying was less pronounced. A significant portion (4 out of 11) disagreed with feeling such pressure, while another 3 were neutral. In contrast, 2 students agreed that they felt pressured, and 2 strongly disagreed.

**Caregiving:** Expectations to care for family members over academic activities were varied. The most common responses were “sometimes” (3 students) and “rarely” (3 students). Furthermore, 2 students reported they were “never” expected to do this. On the other end, 2 students felt this expectation “often” and 1 student felt it “always”.

#### ► **Role Expectations and Mental Well-being:**

**Anxiousness:** When asked about feeling anxious from prioritizing household duties over academic work, the responses were evenly split. Ex-

actly 4 out of 11 students reported feeling anxious “sometimes”, while another 4 students felt so “rarely”. Two students felt this “often”, and only one reported “never” feeling anxious.

**Stress:** The level of stress experienced from the conflict between family and study time was also mixed. The largest group reported feeling this stress “rarely” (4 students). The remaining respondents were distributed across the other categories: 2 students felt it “often”, 2 students “sometimes”, and 2 students “never”. Only one student reported “always” feeling this stress.

**Eagerness and Guilt:** Most unmarried students disagreed with the statement that they feel overly eager or worried about their family’s care while they are busy with their studies. A clear majority of 7 out of 11 students either disagreed or strongly disagreed with this sentiment. Three students remained neutral, and only one agreed. This suggests a minimal mental burden from these specific expectations for the unmarried group.

#### Data Obtained from Married Female Students

##### *Characteristics of the Married Student Sample*

The married student sample also consisted of 11 respondents. The largest age group was 24–26 years old, comprising 5 out of 11 students. The next largest group was 21–23 years old (4 students), with one student from the 18–20 age group and one from the 27–29 age group.

In terms of academic discipline, the students were primarily from Social Sciences (5 students) and STEM fields (4 students), with one student each from Business studies and Liberal Arts/Humanities.

A crucial variable for this group was their living situation after marriage. Of the 9 students who responded to this question, a majority of 6 lived with their in-laws, a factor likely to increase exposure to traditional gender role expectations. The remaining 3 students lived with their own parents.

Let us have a look at the academic persistence of these married female students.

#### ► **Impacts on Academic Persistence:**

**Household Chores:** This emerged as a significant factor affecting academic life. Over half of the respondents, 6 out of 11, either agreed or strongly agreed that they faced stereotypical expectations to perform most household

chores. In contrast, 4 students disagreed or strongly disagreed with this, and one was neutral.

**Family Time:** Unlike the pressure of chores, most married students did not feel significant pressure from family to prioritize family time over their studies. A large majority of 8 out of 11 students either disagreed or strongly disagreed that they experienced such pressure.

**Caregiving:** Similarly, a majority of respondents indicated that the responsibility of caring for children or in-laws was not solely theirs. When asked if they had to provide care while their partner contributed little, 7 out of 11 students disagreed or strongly disagreed, suggesting a degree of shared responsibility or support. However, 3 students did agree with the statement, indicating this burden still exists for a notable minority.

According to the study's analysis, the expectation to perform household chores had the strongest negative impact on academic persistence among the married students.

#### ► **Impacts on Mental Well-being**

**Anxiousness:** Balancing studies and household chores was a clear source of anxiety. A majority of 6 out of 11 students either agreed or strongly agreed with the statement: *"Being a student, I am always anxious to balance my studies and the household chores"*. This suggests a direct link between the dual roles and mental strain.

**Stress:** However, when asked if they felt stressed and depressed for not making enough time for family, the responses were different. The largest group, 5 out of 11 students, disagreed or strongly disagreed, suggesting that any stress experienced was more related to managing tasks than to guilt over family time.

**Eagerness and Guilt:** This finding was further supported by responses to a statement about feeling eager or worried about family care while studying. A clear majority of 8 out of 11 students disagreed or strongly disagreed, indicating a degree of mental stability and support from their families in this specific area.

#### ► **Analysis of Support Systems**

**Social and Family Support:** An overwhelming majority of married students, 9 out of 11, reported receiving support or accommodations from their

family or society to help manage their roles. The remaining two students responded with “Maybe”. This indicates that while gender roles are imposed, there is also a corresponding system of social support in place.

**Institutional Support:** In stark contrast, institutional support was perceived as almost non-existent. A large majority, 8 out of 11 respondents, stated they received no support from the university. Only two students reported receiving any support, and one answered “Maybe”.

### ► Perceived Effects of Support on Academic and Mental Well-being

The survey further explored how societal and institutional factors influenced academic persistence and mental well-being:

**Societal Pressure:** Most students felt that society or family did not compel them to prioritize domestic life over education. Nine out of 11 respondents disagreed with the statement that society or family affects their ability to prioritize their studies.

**Societal Effect on Academics:** When asked about the overall effect of society on their academic persistence, the results were inconclusive. The largest group (6 out of 11) felt the effect was neutral. However, 3 students perceived a positive effect, while 2 perceived a negative one.

**Institutional Effect on Academics:** The perception of the university’s impact was overwhelmingly neutral. A full 11 out of 11 respondents answered “Neutral” when asked how the institution affected the relationship between expectations and their academic persistence, suggesting the university is seen as absent rather than helpful or harmful in this dynamic.

**Support for Mental Well-being:** Both societal and institutional support for mental well-being were rated poorly. The majority of respondents disagreed that society (6 out of 11) or the institution (8 out of 11, combining “Disagree” and “Strongly Disagree”) takes a supportive role. This highlights a significant gap, particularly from the university.

The findings show a stark contrast. An overwhelming number of students (9 out of 11) felt they received support from family or society. This suggests that while society imposes gender roles, it also provides some mechanisms to help women manage them. Conversely, institutional support was perceived as almost entirely absent, with 8 out of 11 students reporting they received no support from the university.

### Relationships Between Support and Student Perceptions

Finally, a cross-analysis was conducted to explore the relationship between the perceived support and its effect on students' academic and mental well-being.

**Table 1.** Cross-tabulation of Perceived Societal Effect on Academic Persistence and Perceived Societal Support for Mental Well-being

|                                                        | "Society takes a supportive role in your mental well-being..." |               |                |
|--------------------------------------------------------|----------------------------------------------------------------|---------------|----------------|
| How has society affected... your academic persistence? | Agree (N=1)                                                    | Neutral (N=5) | Disagree (N=5) |
| Positively                                             | 1                                                              | 3             | 0              |
| Neutral                                                | 0                                                              | 2             | 3              |
| Negatively                                             | 0                                                              | 0             | 2              |

The analysis indicates a link between support for mental health and perceptions of academic impact. As shown in Table 1, among the **5 students who disagreed** that society supports their mental well-being, none felt society had a positive impact on their academics. This suggests that when students feel their mental health is not supported by society, they are more likely to view society's overall influence on their education as either neutral or negative.

**Table 2.** Cross-tabulation of Perceived Institutional Effect on Mental Well-being and Perceived Institutional Support for Mental Well-being

|                                                             | "The institution takes a supportive role in your mental well-being..." |               |                |
|-------------------------------------------------------------|------------------------------------------------------------------------|---------------|----------------|
| How has the institution affected... your mental well-being? | Agree (N=2)                                                            | Neutral (N=6) | Disagree (N=3) |
| Positively                                                  | 0                                                                      | 0             | 1              |
| Neutral                                                     | 2                                                                      | 5             | 2              |
| Negatively                                                  | 0                                                                      | 1             | 0              |

The institutional data reinforces the theme of neglect. Most responses fall under “Neutral”, indicating that students see the university as absent rather than actively helpful or harmful. Table 2 shows that **3 of the 11 respondents** found the institution had a negative effect on the relationship between role expectations and their well-being, while only 2 found the effect to be positive, with most remaining neutral.

Thus, it can be concluded from the quantitative analysis that the respondents faced stereotypical expectations of doing most of the household chores, which impeded their academic persistence, as well as them being anxious about whether or not they would be able to balance the activities within the household and their studies, affected their mental well-being. Even in the case of the unmarried female students, the results were pretty much the same. I could not get any groundbreaking evidence as to how the married and the unmarried had different role impacts, except for the ones with children. Having an extra role to play might just create negative impacts of Stereotypical Gender Role Expectations on Married Female Students on their academic persistence and mental well-being.

It can also be concluded that although society is the one that stereotyped these gender roles, and they are the ones extending the hands of support. For this reason, the respondents are positive about the attitude of society, but institutional attention and support are badly needed for the respondents to make their lives way easier than they are right now.

## 6. Discussion

The general objective of the research conducted was to assess the influence of stereotypical gender role expectations on married female undergraduate students of the University of Dhaka. I was able to assess the influence with the limited time and data they could gather.

The study explored the gender role expectations faced by married female undergraduate students and found that doing household chores was the main expectation from their in-laws. Other responsibilities also existed, but this was the most notable among the sample population. The impact of this expectation was evident; respondents faced a blow to their academic persistence and, more importantly, their mental well-being.

Among all respondents, those who had a child during their studies faced the greatest challenges. These ‘young mothers’ reported that caring for their

children during university disrupted their routines and studies. Managing their child's safety and care during classes was a key issue.

When I began the study, the assumption was that society strongly pressures married students with stereotypical expectations. However, after conducting the survey and KIIs, it became clear that these pressures were not always explicitly enforced. Rather, students internalized these expectations through observation, growing up in households where mothers did domestic work while fathers earned an income. For many, these expectations felt natural or vague. Despite this, the impacts were clear: negative effects on academic persistence and well-being, especially for those with children. Stereotypical gender roles also constrained married female students' ability to pursue higher education.

Regarding academic persistence, the findings suggest that married undergraduate female students struggle to maintain academic progress because of traditional gender role expectations demanding multiple responsibilities. This aligns with studies by Jin (2023) and Lin (2016), which highlight the adverse effects of gender stereotypes on academic performance. However, those studies focused on female students in general, not specifically married students.

This study found that most married female students did not feel that society or family undervalued their education. This contrasts with Elizalde (2021), whose participants felt societal expectations compelled them to conform to gender roles, devaluing their academic efforts. Elizalde's study, however, focused on female first-generation students, which might explain the difference.

In terms of mental well-being, the study emphasized that married students, more than unmarried ones, bore the emotional consequences of fulfilling traditional domestic roles. Many participants reported increased anxiety due to their perceived inability to manage both academic and household duties. This supports findings by McRoy and Fisher (1982) and Pittman et al. (2001), who noted that an unbalanced division of labor can lead to exhaustion and frustration. Jin (2023) also emphasized that gender stereotypes negatively impact girls' psychological development.

Respondents often felt anxious when their responsibilities clashed with academic deadlines. Dryden (1999) similarly found that women blamed themselves for household disorganization, leading to guilt and anxiety. Married respondents expressed that multitasking was exhausting and that meeting expectations made them restless. Those with children reported feeling insecure about not fulfilling every demand placed on them.

A significant portion of the study centered on the level of support students received. Most married students reported receiving support from family and society to balance their roles. This finding aligns with Coronel et al. (2010), who observed that many women rely on outside help for domestic duties. However, Coronel et al. also found only 39.5% of women were satisfied with the support they received, whereas this study found higher levels of satisfaction among respondents.

The role of institutional support, however, was notably lacking. Most students reported that their university did not offer sufficient accommodation. Requests for married-student-friendly dormitories and full-time daycare facilities were common. These findings indicate that despite receiving some social support, institutional neglect remains a barrier. The lack of support from the University of Dhaka significantly impacts both academic persistence and mental well-being.

This issue was particularly apparent among student mothers. One KII respondent, who had a child in her first year, said she could not attend evening classes due to the limited daycare hours. Another student had to take her final exams while eight months pregnant. Despite initial family support, societal and marital pressures resurfaced when she received an international Ph.D. offer. She eventually left her child with her parents, which led to emotional strain and ultimately a divorce. Her story illustrates how adherence to traditional gender roles can restrict educational and career growth.

This study's unique value lies in its focus on married female students at the University of Dhaka. It addresses a gap in the literature by analyzing how academic persistence and mental well-being are impacted by traditional gender roles. Eagly and Karau's Role Congruity Theory helps explain these experiences. The theory emphasizes that societal beliefs about gendered behavior create obstacles for women who pursue roles misaligned with those expectations. This was evident in both the survey data and key informant interviews. One respondent's experience of resistance from her in-laws when she attempted to study abroad is a direct example of role incongruity.

The research findings provide practical insights. Institutions should implement policies to support married students, such as daycare centers, more flexible academic rules, and psychological counseling. Respondents themselves suggested these solutions.

While the study has some limitations, such as a small sample size and time constraints, the findings are still significant. The respondents came

from various regions of Bangladesh, giving the data contextual depth. The survey used SPSS for reliability, and interviews provided nuanced narratives.

In conclusion, the study confirms that stereotypical gender role expectations adversely affect married female students' academic and emotional lives. The findings advocate for better institutional support, greater social awareness, and further research to help married female students overcome these challenges.

## **7. Conclusion & Recommendations**

### **7.1. Conclusion**

Married female undergraduate students often face the challenge of balancing their academic pursuits with household responsibilities and caregiving obligations. Many are overburdened by the duties of managing family life alongside academic demands. This struggle leads to stress and emotional exhaustion as they try to meet both sets of expectations. These issues are deeply shaped by societal gender norms, which impose direct and indirect pressures.

Students who received support from spouses or extended family members faced fewer difficulties and were better able to manage their studies. However, many still rely heavily on their families and society for help, indicating that the burden of gender role expectations has not been lifted completely. The research reveals that stereotypical roles continue to restrict women's educational progress, especially for those with children. The nation has yet to overcome these deeply embedded cultural preconceptions. This result indicates that marriage is not merely a personal or cultural factor, but a key influence on women's academic persistence. Pressures like in-law expectations, managing guests, and domestic responsibilities, often overlooked in research, shape how young women navigate higher education. The findings also highlight the role of universities themselves: rigid attendance rules, absence of childcare, and a curriculum designed around unmarried students can unintentionally reproduce gender inequality. By documenting these interconnected pressures through the framework of Role Congruity Theory, the study extends existing theoretical discussions and offers a model that can be applied to other South Asian contexts where early marriage intersects with higher education. Overall, this study moves beyond filling a local gap. It

reframes the discussion by showing how marriage, gender norms, and university structures intersect to shape women's educational opportunities, offering insights that are relevant for both theory and policy across South Asia.

## 7.2. Recommendations

Based on the findings of this research, the following recommendations are proposed to address the challenges faced by married female undergraduate students:

1. **Childcare Facilities:** Establish affordable, high-quality daycare centers within universities. This would help student mothers focus on academics without worrying about their children's care during class hours.
2. **Gender Awareness Programs:** Universities should introduce programs to raise awareness about domestic gender roles and their impacts on education. Special emphasis should be placed on sensitizing men about shared household responsibilities.
3. **Further Research:** More studies with larger and more diverse samples across multiple universities in Bangladesh should be conducted to understand the broader impact of gender roles on education. The research can serve as a case study and can be expanded to include a comparative analysis of different contexts in the future.
4. **Ministry-Level Counseling Support:** A counseling division under the Ministry of Education should be established to assist married students. This can help them manage marital stress, academic attendance issues, and the mental burden of dual roles.
5. **Encouraging Spousal Participation:** Husbands should actively share household tasks and child-rearing responsibilities to relieve the pressure on their wives.
6. **Promoting Shared Domestic Duties:** Family members, including in-laws, should be encouraged to participate in household chores and foster a culture of shared responsibility.
7. **Training in Prioritization & Delegation:** Married female students should be supported in developing time management skills. They should also learn to delegate responsibilities, assigning tasks such as childcare to other trusted family members when needed.
8. **Coping Strategies:** Encourage healthy coping mechanisms, such as disconnecting from responsibilities during rest (e.g., turning off phones) and setting boundaries to manage stress.

**9. Policy Reforms for Inclusion:** Educational institutions and policymakers must work together to create an inclusive academic environment where married female students can thrive without being hindered by societal expectations.

In order to progress, it is crucial to persistently question and dismantle the stereotypical gender role expectations that limit the potential of married female students and, by extension, all women. Educational institutions, policymakers, and society at large must work together to create a more inclusive and equitable environment to enable married female students to actively pursue their academic and professional goals while simultaneously addressing and alleviating societal pressures that may impede their progress.

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## Postcolonial Perspectives on the War in Ukraine: A Cross-Referential Study of General and Literary Approaches

**Abstract.** This essay critically examines both mainstream postcolonial scholarship, especially revised and reedited publications, and emerging Ukrainian-authored approaches to regionalized postcoloniality, in the context of Russia's ongoing war against Ukraine (for a similar treatment of the Irish context, see Konecniak, 2009). It argues, first, that Ukrainian postcoloniality has already developed into a distinct discourse, and second, that recent literary and theoretical works should be included in the development of a broader postcolonial paradigm internationally. While its primary aim is to contest claims that Ukrainian postcoloniality remains underdeveloped, the essay also serves as a preliminary survey for researchers interested in approaching post-invasion Ukrainian literary and cultural works from a postcolonial perspective.

**Keywords:** postcoloniality; war in Ukraine; literary theory; literary criticism; meta-theory.

## 1. Introduction: Postcolonizing the War in Ukraine

To account for the consequences of the Russian-Ukrainian war, a group of Ukrainian researchers, led by Vasyl Krotiuk, have contributed the monograph *Світоглядний сенс сучасної війни: соціогуманітарні аспекти* (*The Worldview Sense of Modern War: Socio-Humanitarian Aspects*). Mykhailo Chuhuienko presents there details of the context of the war through the lens of postcolonial theory yet, at the same, he notices its spatial limitations: “postcolonial criticism focuses exclusively on the imperialist ideologies and practices of Western states, essentially leaving non-Western forms of imperialism, in particular, Russian, Chinese, Iranian, and Turkish imperialism, without adequate critical examination” (Chuhuienko, 2024, pp. 51–52). He specifically identifies the omission in existing postcolonial approaches to the war in Ukraine and, referring also to the observations of Tamara Hundorova, he comments on the ambiguous status of Ukrainian postcoloniality:

On the one hand, for quite some time now, since roughly the mid-1990s, articles [...] devoted to postcolonialism have appeared in Ukrainian periodicals, academic conferences on this topic have been held, [...] and Ukrainian researchers have recognized the relevance and creative potential of postcolonial studies in the Ukrainian context, as well as the possibility and necessity of applying their insights to understanding Ukrainian-Russian relations. On the other hand, throughout the years of Ukraine’s independence, not a single in-depth monographic study on the history and philosophy of postcolonial critical theory has been published. (Chuhuienko, 2024, p. 52; all translations by the authors)

Chuhuienko’s comment shows the ambiguous condition of Ukrainian postcoloniality, the presence and absence of scholarly interest at the same time. He continues that “in terms of content, those few scholarly articles by Ukrainian authors do not demonstrate a deep grasp of the sophisticated conceptual apparatus of postcolonial studies” (Chuhuienko, 2024, p. 52). He discusses selected attempts made to situate Ukraine in a colonial and postcolonial context, namely those based on “internal colonialism” found in discourses about Ireland, Wales or Scotland, or rooted in Ewa Thompson’s thought (see Chuhuienko, 2024, pp. 54–55).

He also considers ways to apply Western versions of postcolonialism, namely the thought of Edward Said (Chuhuienko, 2024, pp. 61–64), and sim-

ilarly finds ambiguity there (Chuhuienko, 2024, p. 63). Chuhuienko points to both the spatial adaptability of Said's concept and the contextual threats that its adaptation may lead to. He raises questions about the postcolonial aspects of the "hybrid war" (p. 55) and about the future of Ukrainian-Russian postcolonial dichotomy from a global perspective: "Whether we can even speak in this context of the 'globalization of Ukraine' and the 'provincialization of Russia' will be determined by the course of events in eastern and southern Ukraine" (Chuhuienko, 2024, p. 65). He sees two crucial theoretical forces for basing postcolonial research, namely anthropology (pp. 66–67) and philosophy: "The need for postcolonial studies of war in its philosophical and anthropological dimensions has become notably relevant in light of attempts to revive the imperial idea, particularly in the context of Russia's large-scale military aggression against Ukraine and the Kremlin's genocidal practices aimed at the 'recolonization' of the neighboring state" (Chuhuienko, 2024, p. 71). He treats the development of Ukrainian postcolonial criticism as serving the impact of the 2022 invasion and the war itself.

The first aim of this essay is to analyze a selection of contemporary Ukrainian scholarship to demonstrate that the existing body of this research direction in the context of the Russian invasion of Ukraine has helped Ukrainian postcoloniality develop into an already distinct and well-defined discourse (for a discussion moving from foundational postcolonial texts to Ireland-specific analyses, see Koneczniak, 2009), quite contrary to what Chuhuienko claims. We further aim to re-evaluate the presence of postcolonial studies in Ukraine-based literary research on the current situation following Russia's invasion by analyzing their cross-referential networks of postcolonial Ukrainian approaches (for a cross-referential study in a different context, cf. Koneczniak, Yağızyılmaz & Abu Hanieh, 2024), to reassess Chuhuienko's skeptical view that it is developing in divergent directions. Finally, we seek to find evidence against considering the 2022 invasion a defining point that impacted Ukrainian postcolonial critique, which is slightly against the argument that Chuhuienko put forward.

As a survey and preliminary discussion aimed at providing scholars with a comprehensive cross-referential tool to study contemporary literary works in the framework of Ukrainian postcoloniality, the essay builds on existing perspectives, including not only the already addressed contribution by Chuhuienko but also, notably, the essay "Explanatory Potential of the Postcolonial Approach for Understanding the Russian-Ukrainian War"

by Olena Khylyk and Maksym Khylyk (2024). In their attempt to theorize Ukraine's and Russia's current status in international relations, the authors trace Ukrainian-Russian conflict through the colonizers-colonized dichotomy. They also treat the 2022 invasion as crucial in the context of the development of Ukrainian postcoloniality and view the present-day opposition as an example of a process of decolonization. They acknowledge that Ukraine escapes simple categorization as a colony, given the absence of racial hierarchies and geographical distance. At the same time, they focus, instead, on the colonial formation of power relations, the colonizer's assertion of cultural superiority, and Ukraine's pro-European orientation as a form of expressing counter-discourse.

Drawing on such crucial postcolonial theorists and philosophers as Edward Said (Orientalism), Jean-Paul Sartre (neocolonialism), Gayatri Chakravorty Spivak (subalternity), and Homi K. Bhabha (othering), they provide a metatheoretical basis for including the treatment of the war in Ukraine in the postcolonial paradigm (or at least for not excluding it). Khylyk and Khylyk published their text in English and engaged extensively with canonical theorists. As such, their work has achieved a broader international readership. Notwithstanding this, it does not relate to Chuhuienko's essay, which can be justified with their concurrent publication or belonging to different fields of knowledge, no matter how similar their approaches to the potentiality of postcolonialism for a discursive description of the war in Ukraine are.

When demonstrating lack of sufficient interest in appropriately postcolonizing the war in Ukraine, Chuhuienko refers to the thought of the historians Valerii Smolii and Oleksii Yas. He refers to them in the context renewed attempts at postcolonizing the Ukrainian-Russian relations following the invasion of 2022: "The topic of postcolonial war has become even more relevant, and consequently, interest in postcolonial themes among Ukrainian scholars has grown in connection with the Russian Federation's full-scale invasion of Ukraine on February 24, 2022" (Chuhuienko, 2024, p. 56). He considers Smolii & Yas as the pioneering scholars who noted the possibility of applying a postcolonial framework in the context of the war in Ukraine (see 2024, p. 56) and, who, in their article titled "Сучасна російсько-українська війна у світлі постколоніалізму" ("The Contemporary Russian-Ukrainian War in the Light of Postcolonialism"), characterize Russian aggression as a policy of "repeated colonization" (Smolii & Yas, 2022, p. 13; cited in Chuhuienko, 2024, p. 56). They contend that "the contemporary Russian-

Ukrainian war is not only a war with Putin's Russia, but it also stands as a war whose aftermath would be the final break with the Soviet and imperial legacy. It is the war that must ultimately offer a genuine postcolonial solution to the problems and contradictions of the post-Soviet space" (cited in Chuhuienko, 2024, p. 56).

Chuhuienko follows the thought of Smolii and Yas in considering the Russian invasion of Ukraine a defining period in the expected development of the regionalized postcolonial criticism. As a matter of fact, read first-hand, Smolii and Yas's article does stress the postcolonial nature of the war manifested in several interrelated factors and leading to the development of Ukrainian postcoloniality: "conceptual proposals and research strategies from the scope of postcolonial studies and imperial history" (Smolii & Yas, 2022, p. 6). As to the long-lasting causes of the invasion, these comprise the denial of Ukrainian statehood, driven by Russia's ambition to restore its colonial empire and reinforced across its information policy; the manipulation of historical and cultural narratives which aim at erasing Ukrainian identity and distorting perceptions of Ukrainians as a distinct people; and the Putin regime's military aggression serving to reclaim Russia's former imperial status (Smolii & Yas, 2022, pp. 3–6). They argue that "The nature of the modern Russian-Ukrainian war is hidden in the Soviet and old imperial past, since it is from there that the neo-imperial priorities of Putin's Russia originate, which determine the essence of its political, economic, social, cultural decisions, strategies, actions, and even the very justification for the current aggression" (Smolii & Yas, 2022, p. 12). The article does not offer a literary perspective on Ukrainian postcoloniality; however, it affirms the possibilities of postcolonial thinking. In this respect, it is similar to the orientation adopted by Khyenko and Khyenko (2024), even though the latter does not mention Smolii and Yas, which might indicate that their observations might have been formulated independently. Still, both articles confirm the relevance and validity of postcolonial paradigms in discussing the war in Ukraine and its broader context.

The ideas proposed by Khyenko and Khyenko, Chuhuienko, as well as Smolii and Yas, also echo "The Postcolonial Moment in Russia's War Against Ukraine" (2023) by Maria Mäklsoo. Yet, this article is directly addressed only by Khyenko and Khyenko (and not by Chuhuienko), who take note of Mäklsoo's observation that "Ukraine is also among the most flagrantly neglected cases of Soviet colonialism due to the allegedly insufficient applicability of the

label ‘postcolonial’ to the former Soviet/Russian imperial space” (as cited in Khylyk & Khylyk, 2024, p. 21) and who consider it as a representation of “a significant shift in academic discourse” (Khylyk & Khylyk, 2024, p. 21). Mälksoo’s essay problematizes the discussion by differentiating Ukraine’s case from global postcolonial studies, which typically emphasize racial categorization. The features found in the postcoloniality of former Russian imperial subjects, which include post-communist societies from former Soviet republics, remain contested and they involve the necessity for redefining the very concept of a postcolony (2023, p. 473).

Mälksoo attributes this omission to the epistemic differences found in Eastern and Western frameworks which have been developed for managing historical and cultural knowledge about imperial relationships. Again, postcolonial criticism, rooted in Western traditions, has not been inclusive enough to incorporate Eastern experiences. She argues that decolonizing international relations requires consideration of the memory politics behind their categories of subjectivity and agency. Russia’s war against Ukraine, as she believes, has exposed the principles as who has historically been, and who has not, able to speak for themselves in the discourse of international politics (2023, p. 479). Although “[t]he reactions to Russia’s current war against Ukraine, general support to Ukraine notwithstanding, have also revealed some long and deeply rooted legacies of Russian imperialism in the mindsets of many in Western thinkers when it comes to the difficulty of seeing and acknowledging a distinct Ukrainian subjectivity that is not defined by another power laying a historical claim to Ukrainians as ‘Little Russians’” (p. 474). This has not significantly impacted global postcolonial thought.

Khylyk and Khylyk (2024), who, in contrast to Chuhuienko, omit Smolii and Yas’s significant Ukrainian contribution, offering a similar approach, from their English-language essay, argue that Ukraine has been subject to postcolonizing attempts by Western scholars unfamiliar with its context. In contrast, as already mentioned, Mälksoo (2023) highlights Ukraine’s marginalization in postcolonial scholarship. Khylyk and Khylyk as well as Chuhuienko also advocate for the development of domestic Ukrainian approaches to postcolonial theory, while Mälksoo frames the invasion as “the postcolonial moment”, necessitating cultural decolonization: “The war is already proving to be a decolonizing moment of sorts: indeed, a game changer for the Central and East European (CEE) states more generally in their vocal countering of Russia’s attempted denial of Ukraine’s (and by extension Rus-

sia's former imperial subjugates') sovereign political agency" (2023, p. 472). A year before publication of the contributions of Khylyk and Khylyk, as well as Chuhuienko, Mälksöo makes it clear that the question is not whether or how postcolonial thought applies to Ukraine, but rather which aspects of Ukrainian postcoloniality already define this field of study.

Alongside this first aim, our second objective is to identify and critically assess emerging Ukrainian-authored postcolonial scholarship in the aftermath of Russia's full-scale invasion. Rather than applying established postcolonial frameworks to Ukrainian literature, this essay investigates whether Ukrainian scholars themselves are already generating a distinct decolonizing discourse rather than focusing solely on its potential. The assumed "nuanced" discourse reflects local cultural, historical, and geopolitical realities. By analyzing recent academic publications, we seek to understand how postcolonial theory is being reimagined from within Ukraine, and how this domestic discourse challenges, complements, or sets itself in opposition to global postcolonial paradigms.

The following questions will be addressed (cf. Chuhuienko, 2024, pp. 56–57):

1. How has the war affected the circulation and recognition of Ukrainian postcolonial scholarship and Ukrainian postcoloniality in global postcolonial academic discourse (cf. Koneczniak, 2009)?
2. To what extent are Ukrainian scholars developing original postcolonial frameworks in response to Russia's invasion?
3. Which theoretical approaches are emerging from Ukrainian-authored studies, and how do they interact with established postcolonial paradigms?

Developed from the presentation of Ukrainian approaches towards the potentiality and applicability of postcolonial studies to the description of the Russian aggression and the war in Ukraine, the discussion will consist of three further sections. The next examines the current state of "mainstream" postcolonial research, focusing on recent developments (2025). It includes a discussion of new publications and revisions of established works (cf. Koneczniak, 2009). Limiting the temporal scope to the post-invasion period, we examine revisions and re-editions of key postcolonial studies to identify Ukrainian-Russian issues within them. Then, the following section discusses Ukrainian scholarly approaches to postcolonialism prior to the 2022 invasion, particularly since the Euromaidan events of 2013. It highlights the presence of postcolonial research at Ukrainian universities, both in teaching and scholarship,

and assesses their presence in or omission from the discussion of the potentiality of postcolonial approaches discussed in the introductory section. Finally, the essay offers an analysis of selected research publications that draw on postcolonial theory to the post-2022 Ukrainian context. In this respect, it reassesses their theoretical underpinnings and potential application.

## 2. Ukraine and Mainstream Postcolonialism at Present (2025)

Postcolonial criticism remains one of the most adaptable theoretical frameworks of the twentieth and twenty-first century. It continues to shape descriptions of contemporary literary and cultural discourses globally. Its adaptability is both its strength and weakness. As postcolonial literary and cultural theorists and practitioners representing minority communities commonly agree, it enables analysis of increasingly complex social relations rooted in inequality, but it can also lead to superficial interpretations when inequality is not easily defined. Such key-foundation publications as *The Empire Writes Back* and *Orientalism* are still widely referred to because of their relevance; however, the third decade of the twenty-first century has seen the emergence of new original approaches and revised perspectives (cf. Koneczniak, 2009, p. 97). For example, in 2025 alone, Routledge released a revised edition of *Postcolonial Studies: The Key Concepts*, alongside several new postcolonial companions and comprehensive studies that reflect the field's development. As shown in the previous section, Ukrainian scholars often adopt and adapt mainstream postcolonial theories. This raises the reverse question: to what extent do mainstream postcolonial studies engage with Ukraine (cf. Koneczniak, 2009)?

Despite this proliferation of scholarship, the Ukrainian context remains conspicuously absent from revised foundational texts. This contrasts, for example, with Irish studies, which have been well integrated into mainstream postcolonial criticism (see Koneczniak, 2009). Maria Mäklsoo noted this omission in 2023, and it persists in the 2025 publications. For instance, the fourth edition of *Postcolonial Studies: The Key Concepts* (2025) by Ashcroft, Griffiths, and Tiffin makes no reference to Ukraine, although it does mention Russia in discussions of contemporary imperialism. Similarly, recent works such as *Navigating Boundaries: A Comprehensive Study of Postcolonial Theory and Literature* by Shuchi Agrawa, which offers a broad and versatile scope of societies subject to postcolonial analysis, fail to address Ukraine's war-inflicted situa-

tion. Neither Soviet nor Russian imperial histories, nor their present-day aftermaths, are included. In *Reading Postcolonial Literature: From Professional to Non-Professional Practices* by Hayley G. Toth, one can speak of a similar omission, as the war in Ukraine does not feature there (cf. Koneczniak, 2009).

These examples suggest that, despite postcolonialism's theoretical apparent inclusivity, its geographical scope still remains narrowly defined, confirming earlier observations by the Ukrainian scholars. Mainstream postcolonial scholars appear largely uninterested in contemporary societal and political relationships, such as those in Ukraine, that could be meaningfully interpreted through the colonizer–colonized dichotomy. Even in publications on postcolonialism whose thematic scope reaches beyond literature and culture and concerns legal and political issues, the Ukrainian context is not explored. For example, Shuk Ying Chan's *Postcolonial Global Justice* (2025) does not refer to Ukraine at all. This and similar gaps suggest that mainstream postcolonial scholarship continues to overlook the Ukrainian context, even though it is highly relevant. They also indicate the necessity for developing postcolonial frameworks that could take into account the postcolonial specificity of Ukraine. Chuhuienko argues that Ukrainian scholars are yet to draw on postcolonial critics to describe their spatial and geopolitical specificity of postcoloniality: "Contemporary postcolonialism, as a branch of social philosophy, has achieved significant scholarly accomplishments thanks to long-term interdisciplinary research into historically diverse colonial conditions and situations, as well as the theories and practices of both imperialism and anti-imperial resistance" (Chuhuienko, 2024, p. 71). However, we would contend that Western postcolonialism itself can lend itself to revisioning and reevaluating in the context of the complexity of the Ukrainian postcolonial status. By way of illustration, it could refer to the cultural and historical theories of Russian-Ukrainian imperial contexts addressed by Smolii & Yas (2022, pp. 8–9).

### 3. Postcolonial Theories in Ukraine Prior to the War

Ukrainian literary criticism has evolved significantly since the political, cultural, and social transformations that marked the beginning of the twenty-first century. In common cultural (postcolonial) perspectives, these changes signaled Ukraine's growing affinity with Western Europe and its gradual distancing from Soviet heritage. Such a process as a matter of fact has been

contested by Russian policy aimed at reintegrating former Soviet states. In response, as one counter-discursive strategy, Ukrainian scholars at major universities began actively engaging with literary texts and cultural artefacts through the lens of postcolonial studies, particularly in relation to post-socialist and post-totalitarian realities. Such works have since been considered in the context of the escalating Russian-Ukrainian conflict.

Tamara Hundorova is widely recognized as a leading scholar of Ukrainian postcoloniality. She is referred to by Chuhuienko (who quotes two of the many publications she has contributed), but her approaches are included in neither Khyenko and Khyenko's nor Mälksoo's texts, even though she has been the major advocate for the establishment of Ukrainian postcolonial frameworks of thought. In one of her texts, an introduction to the volume she co-edited with Agnieszka Matusiak, not referred to by Chuhuienko, Hundorova argues that the development of postcolonial studies, and its impact on Ukrainian scholarship, at some point coincided with the fall of the Soviet world, the process that entered postcolonial discourse: "after the collapse of the Soviet Union, which functioned as an imperial structure, postcolonial studies migrated to the post-Soviet space. In this regard, the experience of Ukraine, which has been in a situation of semi-colonial dependence since the 17th century and which has experienced the difficult experience of totalitarian colonization in the 20th century, is particularly conducive to the application of postcolonial methodology" (Hundorova, 2014a, pp. 8–9). The development of postcolonial criticism in Ukraine can be divided into two phases: the first involved familiarization with the principles and methods of postcolonial criticism in the 1990s; the second, emerging in the early twenty-first century, concerned the availability of important texts in the Ukrainian language, for example the translation of Said's *Orientalism*, which caused Ukraine-specific theoretical and critical adaptations to emerge (Hundorova, 2014a, pp. 8–9). Hundorova has already established a body of postcolonial criticism to account for the specificity of the Ukrainian context and thus deserves a comprehensive treatment, not just essential single mentions (as commonly happens), in scholarship specializing in Ukrainian postcoloniality.

As Serhiy Trojan discusses, and as can be confirmed in an analysis of almost all of the texts addressed here so far, Ukrainian postcolonial scholarship is deeply rooted in Said's *Orientalism* (1978), which remains a foundational theoretical text in the field. Said's ideas entered cultural discourses in Ukraine in the 1990s, particularly as a critical tool for examining the after-

math of imperial domination. Trojan refers to Vitalii Chernetskyi's description of Ukrainian postcolonialism as a 'postmodernism of resistance'. Yet his scholarly contributions are not included in recent discussions by Mälksoo, Chuhuienko, and Khyenko and Khyenko. As he notes, the development he describes is visible in Ukrainian literature in such features as carnivalism, polyphony, and a conscious break with the colonial past (Trojan, 2014, p. 63). Trojan also draws on Marko Pavlyshyn, who supports a postcolonial reading of Ukrainian culture. Pavlyshyn emphasizes that postcolonialism can offer a less reactionary and more generative approach, and that the colonial experience can be used not only to reject it but also to construct a unique cultural identity in Ukraine (in Trojan, 2014, p. 69).

Trojan identifies the BU-BA-BU literary group, consisting of Yuriy Andrukhovych, Oleksandr Irvanets, and Viktor Neborak, as embodying a "carnival-like destruction of worn-out totalitarian rituals" (2014, p. 70). Citing Chernetskyi, Trojan highlights that Andrukhovych's essays reflect "the trajectories of self-identification of the postcolonial Ukrainian intellectual in today's multipolar world" (in Trojan, 2014, p. 70). Trojan argues that in his work *Postcolonial Syndrome*, Mykola Riabchuk addresses Ukraine's sociopolitical evolution as a gradual process of emerging from imperial influence. He stresses the difficulty not only of breaking from external domination but also of overcoming internalized complexes, and this process resonates with Said's notion of lasting cultural hegemony beyond 'official' colonial rule (Trojan, 2014, p. 70). Trojan concludes that Ukrainian postcolonial discourses vary. Even though they are generally based on Said's theoretical framework, they are also appropriated to account for the specific conditions of the post-Soviet context (Trojan, 2014, p. 71). Given Trojan's engagement with a range of Ukrainian postcolonial theorists, his exclusion from recent efforts to apply postcolonial approaches to the war in Ukraine is indeed pronounced.

Olena Yurchuk, like Hundorova, is a major critical and scholarly voice supporting the development of Ukrainian postcolonialism. However, she is mentioned in only one of the articles from the first section of this article. Namely Khyenko & Khyenko refer to her article "Some comments concerning Ukrainian postcolonial studies", when juxtaposing the colonial policy of the tsarist and the Soviet periods, both aiming at annihilation of Ukrainian culture: "While in the Tsarist Russia the prohibition model of identity moulding prevailed, in the Soviet era it was a substitution model under which Ukrainian national symbols were gradually replaced by imperial ones

through renaming and infusing them with imperial fundamentals or markers (Khylo & Khylo, 2024, p. 27). Yurchuk argues that the development of Ukrainian postcolonial studies should account for a more nuanced understanding of postcolonial theory itself. This might be achieved by means of a detailed and thorough exploration of imperial and colonial discourses as well as their mutual influences. She suggests that such an approach can question the still present marginality of colonized cultures and reformulate the relationship between center and periphery in the Russian-Ukrainian context. She questions the interpretation of Ukrainian history as an “eternal colony”, the status stemming from successive imperial centers it was positioned against (Mongol-Tatar, Polish, Russian). This status is responsible for the misconception that Ukrainian culture cannot exist outside its imperial framework (Yurchuk, 2015, p. 257).

Yurchuk explores how Russian cultural expansion sought to absorb Ukrainian cultural space to reinforce Russia’s self-presentation as part of the European tradition. In this account, Russia did not frame Ukraine as inferior. Instead, it appropriated Ukrainian culture to reinforce its own imperial prestige. According to Yurchuk, this appropriation helped Russia shed its Orientalist image and reestablish itself as a European power. The cultural paradigm rests here on two key myths. First, it is based on the idea of Kyivan Rus seen as the cradle of three fraternal peoples, granting Russia historical continuity with Europe, despite the fact that during Kyivan Rus’s zenith, the territory of modern Russia lacked developed centers and remained peripheral. Second, it consists in the myth of Russia as the “older brother” of all Slavs, asserting cultural superiority over the region (Yurchuk, 2015, p. 258). In applying postcolonial theory to the Ukrainian context, it is essential to analyze texts through the prism of the author’s ideological position: colonial, anti-colonial, or postcolonial. Such an approach would open the way for dismantling imperial narratives, re-examining colonial trauma, and re-engaging with pre-colonial experience. These could serve as the foundation for national identity in postcolonial Ukraine (Yurchuk, 2015, p. 261).

Vira Burko, whose contributions do not feature as part of the cross-referential network in the three articles discussed in the first section, adds a crucial point to the Ukrainian postcolonial discourse. She emphasizes the role of trauma and its expression in postcolonial literature. Writers use postcolonial strategies to expose mechanisms of subjugation, such as the construc-

tion of the “Other” and the legitimization of colonial violence, thus assuming a dual role: “the destroyer of the dominant tradition and the creator of a new one” (Burko, 2012, p. 38). Verbalization becomes an act of resistance and recovery, a means of entering cultural dialogue: “only if there is a powerful and effective postcolonial voice it is possible to destroy the imperial system as such” (Burko, 2012, p. 38).

Olha Nikolaïenko, similarly blatantly omitted in the texts discussed in the first section, in her article “Постколоніальний процес і Україна: у пошуках ідентичності” (“The Postcolonial Process and Ukraine: In Search of Identity”), builds on Hundorova’s ideas and also contributes to what appears to be a developing Ukrainian school of domestic postcolonial criticism. She highlights that, for the colonized, the struggle for the right to exist and speak is historically and geographically embedded (Nikolaïenko, 2015, pp. 130, 132–133). Her thought also borrows a lot from mainstream postcolonial theorists, such as Said, Bhabha, and Spivak. Nikolaïenko stresses the importance of regaining one’s agency and voice in Ukrainian postcolonial culture. Postcolonial texts often reject Western ideas of universal truth and logic. Instead, they support a multiplicity of experiences and (their) interpretations. Language plays a central role in this process: its decolonization involves both a return to the “language of the colonies” and a revision of the privileged status of the “language of the center”. She identifies two key strategies in postcolonial writing: the denial of the center’s linguistic dominance and the appropriation or reconstruction of its language (Nikolaïenko, 2015, p. 128).

The motif of silence in Ukrainian postcolonial fiction is explored by Tetiana Ostapchuk through Mariia Matios’s novel *Солодка Даруся* (*Sweet Darusia*). The novel depicts the tension between personal memory and imposed historical discourse. It highlights the consequences of trauma, loss, inferiority, and fractured cultural identity (Ostapchuk, 2014, pp. 79–80). Ostapchuk’s analysis takes into account the specificity of Ukrainian postcoloniality in literary criticism. However, her voice is largely absent from recent attempts aiming to postcolonize the war in Ukraine in philosophy and international relations, which reveals the broader marginalization of literary research in Ukrainian postcolonial studies.

Many Ukrainian postcolonial texts engage with Gayatri Chakravorty Spivak’s theoretical work, particularly her concept of the subaltern. Spivak writes: “If, in the context of colonial production, the subaltern has no history and cannot speak, the subaltern as female is even more deeply in the shad-

ows" (Spivak, 1994, pp. 82–83; also cited in Nikolaienko, 2015, p. 133). According to Nikolaienko, Ukraine has often been feminized in Eastern European contexts and cast as passive, nostalgic, or mystical (Nikolaienko, 2015, p. 133). Such gendered representations contribute another dimension to the Ukrainian postcolonial condition. It reinforces the need for developing a multidimensional approach to identity, agency, and resistance. This can serve as the argument for including Nikolaienko's literary perspective on Ukrainian postcoloniality in broader multidisciplinary contexts.

Shortly before the full-scale invasion of Russians and war in Ukraine, Oksana Pukhonska (2021) noted that contemporary literary works had already begun to document the traumatic experiences of victims and depict the deep wounds inflicted by the war in Donbas. Those events led to a rebirth of scholarly interest in applying postcolonial frameworks to Ukrainian literature and culture. They resulted in efforts to develop new theoretical approaches and methodological tools. In Pukhonska's words, "War always causes the deconstruction of the world that humans have built on the foundations of security and certainty about the future. It is not even death that causes military trauma, but rather the constant fear of the destruction of one's familiar environment, and consequently the fear of death, which takes center stage in the physical space of combat operations" (Pukhonska, 2021, p. 168). She concludes that "contemporary literary texts bear witness to the depth of the trauma experienced as a result of the war, which has a destructive impact on both the individual and society seen as a whole". She adds that "in this case, literature takes on functions that have not been previously characteristic of it: those of cultural psychotherapy through the identification and detailed articulation of the injustices endured" (Pukhonska, 2021, p. 174). Hence, one may argue that Ukrainian war literature provides a specific and unique source of Ukrainian postcoloniality.

#### **4. War in Ukraine Through Postcolonialism in Literature**

At the outset of this section, it can be argued that, paradoxically, and somehow questioning what most of the scholars previously referred to have argued for, the Russian invasion of Ukraine in February 2022 was not viewed as a paradigm shift within postcolonial thought but rather as a continuation of existing theoretical and critical approaches, a representation of the gradu-

al evolution of national memory. According to Serhii Tsypanov, memory in postcolonial society does not change instantly: old and new paradigms coexist in their hybrid form. Colonial narratives remain present but are gradually being replaced by postcolonial ones: “Hybridization often occurs as a response to trauma, so revisiting hybrid identity and memory can be no less traumatic” (Tsypanov, 2024, p. 140). Tsypanov draws primarily on mainstream postcolonial theorists such as Franz Fanon and Homi Bhabha (as Chuhuienko also does; see 2024. P. 51) but largely neglects the Ukrainian approaches to postcoloniality that had already been developed. As regards cross-referentiality, one should be aware that due to their temporal simultaneity, the texts to be discussed here cannot have featured in those discussed in the first section.

In her discussion of the Ukrainian postcolonial condition amid the full-scale war, Valentyna Kulenko emphasises the intensification of historical trauma and the pressing need to confront colonial legacies. The author describes Russia’s colonial ambitions and observes that colonial oppression and the threat of continuing colonial influences may lead to historical misrepresentation, cultural assimilation, and the rise of Ukrainian inferiority. Kulenko argues for the restoration of suppressed Ukrainian cultural activity and for the reintroduction of works by minority Ukrainian authors into the country’s cultural and educational spheres (Kulenko, 2023, p. 185).

Analyzed by Roksalana Mohylna, Haska Shiyan’s novel *Behind the Back* (*За спиною*), written in the context of Russia’s aggression in Crimea and Donbas, offers a notable case study. Published in 2019, the novel received several major prizes and quickly attracted a scholarly and critical interest. Mohylna (2025) interprets the work from a postcolonial perspective. She highlights themes of center and periphery. She treats the protagonist, Marta, as emotionally distant and unwilling to become involved in the war. For Mohylna, as also argued by other scholars, the war itself represents a kind of colonial return: Russia’s attempt to reclaim a former colony. The opposition between center and periphery, West and East, becomes central to the novel’s postcolonial framing (Mohylna, 2019, pp. 278–281).

Shortly before this essay was completed, Tamara Hundorova reiterated in a 14 July interview that Ukrainian postcolonial studies do exist. She argued that the 2022 invasion should not be seen as a pivotal moment that reopens questions about whether postcolonial approaches can contextualize the war. Instead, she focuses on continuity and earlier beginnings, recollecting the dawn of the Soviet empire: “[...] at Harvard at that time Ukrainian studies

were flourishing: I first met [Mark] Pavlyshyn, [Omelyan] Pritsak, Maksym Tarnavskyi, and Viktor Ostapchuk. They founded a scholarship for Ukrainian scholars in Australia. That's how I ended up in Australia in 1991, where I encountered Ukrainian independence" (Hundorova, 2025). The scholars she enumerated would become Ukrainian postcolonial thinkers, whose contributions have also been discussed here. The first mentioned gave rise to postcolonial thoughts in and on Ukraine: "Pavlyshyn and his graduate student Petro Savchak wrote about [Mykola] Gogol, which sparked an interest in postcolonial studies. This was important for Ukraine with its relations with Russia. Pavlyshyn's idea was that postcolonialism and postmodernism are interconnected, they come out of poststructuralism and feed each other" (Hundorova, 2025).

For Hundorova, Ukrainian postcolonial criticism is a fact, and there is no need to return to Said's ideas frequently. Instead, developing its specificity and avoiding utilitarian perspectives is required, particularly when the latter may appear in the context of the current war: "We need to understand how certain ideas are used for political purposes. I am concerned that in Ukraine decolonization is reduced to topography. This is important, but we need to do it in moderation and be aware that there are other resources, such as language. We need to offer our own concepts" (Hundorova, 2025). She stresses that equally important is the need for ensuring specificity in postcolonialism as it develops in the former Soviet-dependent states. Even theories such as those advanced by Ewa Thompson should be approached cautiously, as "[h]ers is clearly decolonial, aggressive. Among other things, it is Polish optics. And Poland has complicated relations with Russia, history is the same" (Hundorova, 2025). Hundorova's stance might be a crucial warning against appropriating theories within Ukrainian postcoloniality: apparently similar and corresponding, they may turn out to be misleading. And in fact they were for some of the Ukrainian scholars whose texts were described specifically in the first section and contained plenty of references to contextually different postcolonial theorists.

## 5. Conclusion

Ukraine today faces not only political and economic challenges but also a pivotal stage in shaping its cultural identity. This identity should serve as a reason to continue developing Ukrainian postcolonial research, rather

than as a justification for its relevance after February 2022. Russia's ongoing aggression, rooted in imperial and totalitarian narratives, presents unprecedented challenges that demand responses shaped by Ukraine's own historical and cultural context. Postcolonial criticism has been present in Ukrainian scholarly discourse since the restoration of independence in 1991, and it remains heterogeneous as a theoretical and methodological framework, which can benefit specifically from Ukrainian postcolonial literary practice and theory. Much existing research remains at the level of thematic analysis. There is a need for conceptual and interdisciplinary integration of scholarship capable of confirming a stable paradigm for postcolonial discussion in the Ukrainian context.

This essay has examined three key dimensions of Ukraine's postcolonial discourse. It discussed Ukraine's absence from mainstream postcolonial criticism, notably in recent reeditions of major postcolonial studies. It thus reaffirms Mäklsoo's observation that Ukraine remains omitted in Western-led postcolonial thought. The essay also traced the development of Ukrainian postcolonial theory prior to the war and stressed the contributions of such scholars as Hundorova, Trojan, Yurchuk, and Nikolaienko. They have adapted canonical theories to Ukraine's post-Soviet and post-socialist realities. The three texts discussed in Section 1 argue for the applicability of postcolonial studies to the discursive context of the Russian invasion of Ukraine. While their arguments are valid, it is important to note that this question of applicability was already examined a decade earlier, as shown in Section 3. Both critical approaches conclude with the necessity of establishing a nuanced version of Ukrainian postcoloniality, and we have sought to demonstrate that such a version is already present in the most recent literary criticism and will continue to emerge in contemporary literary activity, which has definitely been hindered since 2022.

We acknowledge that this essay relies heavily on other scholars' approaches, which have already demonstrated the potential of Ukrainian postcoloniality for analyzing the war-inflicted realities of Ukrainian society, culture, and literature. For example, back in 2024, Chuhuienko's chapter also addressed the problems concerning postcolonial approaches to the war in Ukraine. A recent lecture by D. Uffermann (2026) has likewise addressed decolonization and strategic essentialism in the Ukrainian context. Nevertheless, our intention was to provide scholars seeking to interpret Ukrainian works within postcolonial frameworks with comprehensive referential

foundations to anchor their studies in the theoretical and critical descriptions and assessments of the uniqueness of Ukrainian postcolonial thought and history.

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