treatises and documents
Journal of Ethnic Studies

razprave in gradivo
Revija za narodnostna vprašanja

June / Junij 2025

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»V tistem trenutku smo začutili, da smo si blizu in da smo porušili mejo«: stiki Osnovne šole Milojke Štrukelj s San Vendemianom v obdobju med šestdesetimi in osemdesetimi leti 20. stoletja

Izvleček

Članek obravnava stike novogoriške Osnovne šole Milojke Štrukelj in nižje srednje šole v San Vendemianu oz. eno od oblik regionalnega sodelovanja med slovenskim in italijanskim prostorom. Šoli sta sodelovanje vzpostavili v šestdesetih letih 20. stoletja, v času blokovskih delitev in nedefinirane državne meje med Italijo in Jugoslavijo, v družbi na obeh straneh pa so še vedno odmevali dogodki, povezani s fašizmom in drugo svetovno vojno. Poudarek bo na dveh oblikah sodelovanja, in sicer na letovanjih in kulturni izmenjavi v letu 1972. Šoli sta s tem, ob podpori lokalnih, regionalnih in državnih političnih institucij, želeli med mladino vzpostaviti čezmejne odnose, ki bi temeljili na spoštovanju in preseganju predsodkov. Šlo je za ambiciozen projekt, ki se je vključeval v kulturno diplomacijo med obema državama. Prispevek bo na podlagi arhivskega in časopisnega gradiva osvetlil glavne vidike in vplive tovrstnih stikov, ki so zaznamovali več generacij slovenskih in italijanskih otrok.

Ključne besede

Osnovna šola Milojke Štrukelj, Nova Gorica, San Vendemiano, kulturna diplomacija, kulturna izmenjava, letovanja.

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1. Uvod

Novogoriška Osnovna šola Milojke Štrukelj (OŠMŠ) je ena od osrednjih izobraževalnih institucij na severnem Primorskem, dodaten pomen in vlogo pa ji daje njena umeščenost v neposredno bližino meje z Republiko Italijo. Šola, ki deluje že več kot šest desetletij, ta vidik uspešno vključuje v gradnjo in krepitev čezmejnih stikov s sorodnimi zamejskimi in italijanskimi ustanovami. V najnovejšem obdobju je bilo v tem okviru pomembno predvsem sodelovanje OŠMŠ pri projektu Krepitev (socialno-)konstruktivističnega pristopa na slovenskih obmejnih območjih k poučevanju in učenju sosedskih jezikov (SJ) v osnovni šoli s soustvarjeno razširitvijo in vrednotenjem modela CoBLaLT oz. Contatti, katerega vodja je bila Irina Moira Cavaion. Namen obsežne raziskave, ki se je izvajala med letoma 2021 in 2024, je bilo povezati različne šole iz slovensko-italijanskega in slovensko-hrvaškega obmejnega prostora. Poudarek je bil na spoznavanju jezika, kulture, zgodovine in književnosti sosednjih držav z namenom izboljšanja družbene inkluzivnosti in pouka sosedskih jezikov. Gre za socialno-konstruktivističen pristop do poučevanja in učenja sosedskih jezikov, pri katerem ima poleg samega jezika pomembno vlogo pri intelektualnem razvoju tudi spoznavanje raznolikih kulturnih prvin. To omogoča izboljšanje kakovosti izobraževanja in bolj odprto družbo, saj spodbuja k boljši družbeni ozaveščenosti in medkulturnemu zavedanju, predvsem v obmejnih in multietničnih okoljih (Cavaion 2022, 81–103). OŠMŠ je v okviru projekta sodelovala z goriško nižjo srednjo šolo Graziadio Isaia Ascoli *(Scuola media Graziadio Isaia Ascoli)*, pri čemer je lahko nadgradila bogato zgodovino stikov z izobraževalnimi ustanovami iz italijanskega prostora.

Prispevek se bo posvetil zgodovini tovrstnega čezmejnega povezovanja izobraževalnih ustanov na primeru vzpostavitve stikov med OŠMŠ in nižjo srednjo šolo *(Scuola media statale)* v kraju San Vendemiano, do katerih je prišlo že v šestdesetih letih 20. stoletja. Šoli sta v okviru povezovanja občin Nova Gorica in San Vendemiano vzpostavili sodelovanje, ki je vodilo k skupnim organizacijam letovanj, srečanjem ter izmenjavi otrok in pedagoškega kadra. Šlo je za obliko, ki je spodbujala preseganje predsodkov, spoznavanje sosedskega jezika in kulture ter ustvarjanje pristnih odnosov oz. prijateljstev. Kar se je sprva začelo kot ideja dveh šol, je kmalu preraslo v večji politični projekt, ki je imel podporo ne le pri občinskih oz. regionalnih oblasteh, ampak tudi med državnimi političnimi odločevalci na obeh straneh meje. V tem okviru bi lahko šolska letovanja in izmenjave umestili na področje kulturne di-

plomacije, s katero države krepijo svoje odnose. Cummings je kulturno diplomacijo definiral kot »izmenjavo idej, informacij, umetnosti in drugih vidikov kulture med državami in njihovim prebivalstvom, s ciljem spodbujanja medsebojnega razumevanja« (2003, 1). Med dejavnosti, ki so sodile v ta kontekst, lahko vključimo različne zvrsti umetnosti (glasba, film, ples), promocije (kulture določene države, jezika, medknjižničnega sodelovanja, literature), športne dogodke, obiske intelektualcev, znanstvenikov, kulturnih skupin in umetnikov, razstave, seminarje, konference, festivale, izobraževalne štipendije ter šolske in študijske izmenjave (Mark 2009, 10; Udovič & Podgornik 2016, 127–129). Prav slednje so se vzpostavile kot pomemben element kulturne diplomacije v času hladne vojne in blokovskih delitev (Bu 1999, 393–415).

Prispevek bo na podlagi referenčne literature ter arhivskega in časopisnega gradiva osvetlil glavne vidike sodelovanja OŠMŠ in nižje srednje šole v San Vendemianu. Gre za tematiko, ki kljub pomenu in ambicioznosti do danes še ni bila deležna znanstvene obravnave. Daljši opis je bil do sedaj predstavljen le v publikaciji ob 15. obletnici pobratenja občin Nova Gorica in San Vendemiano. Pomen projekta je bil še toliko večji zaradi zgodovinskih okoliščin, ki so v 20. stoletju zaznamovale obmejno območje oz. italijansko-jugoslovanske (slovenske) odnose. Šlo je za dinamike, dogodke in procese, ki so jih oblikovali dve svetovni vojni, blokovske delitve, različni politični režimi, nerešeno mejno vprašanje in postopna otoplitev odnosov med državama. Tem vidikom bo namenjeno prvo poglavje, sledila pa bo predstavitev različnih oblik povezovanja obeh šol in širših vplivov, ki ga je projekt imel na čezmejno sodelovanje.

2. Povezovanje Nove Gorice z italijanskim prostorom v času socialistične Jugoslavije

Za razumevanje pomena vzpostavljanja čezmejnih stikov ter obmejnih in čezmejnih dinamik na Goriškem se je treba vrniti v prvo polovico 20. stoletja, ko so območje zaznamovali dve svetovni vojni, prehod iz habsburškega v italijanski državni sistem, fašizem, določitev nove državne meje med Italijo in Jugoslavijo, ki ni bila uradno sprejeta do leta 1975, ter težave, ki jih je po letu 1947 imela slovenska skupnost v Italiji pri uveljavljanju narodnih pravic na vseh področjih (Kacin Wohinz & Troha 2001, 25–65; Kacin Wohinz & Pirjevec 2000). Del Goriške, ki je bil vključen v Jugoslavijo, je z določitvijo meje ostal brez središča, saj je bila Gorica priključena Italiji, meja pa je potekala neposredno na vzhodnem robu mesta. Z novo ureditvijo je mesto izgubilo velik del svoje vloge in

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pomena, saj je kar 92 odstotkov predvojne Goriške pokrajine (Vipavska dolina, del Krasa, severno Posočje), katere sedež je Gorica bila, pripadlo Jugoslaviji (Šušmelj 1997, 9). Izguba središča za severnoprimorski prostor je posledično vodila v izgradnjo Nove Gorice. Mesto se je razvilo na solkanskem polju, neposredno ob novi državni meji in s tem ob Gorici. Gradnja se je pričela ob koncu leta 1947, uradno pa je naselje postalo mesto pet let kasneje. V naslednjih desetletjih je prišlo do njegove hitre širitve in razvoja v upravno, kulturno, izobraževalno in gospodarsko središče severnoprimorske regije (Vuga 2018, 16–27). Tedanja občina Nova Gorica je v sredini sedemdesetih let 20. stoletja štela okoli 54.000 prebivalcev, obsegala pa je dobrih 605 km^2 – poleg neposredne okolice še območja današnjih občin Kanal ob Soči, Brda, Šempeter - Vrtojba, Miren - Kostanjevica in Renče - Vogrsko (Marušič 1977, 5).

Razmere so se poleg tega razvijale v sozvočju z globalnimi dejavniki. Predvsem v prvih letih po drugi svetovni vojni je bila nova državna meja v veliki meri neprepustna in izredno nadzorovana, območje pa eno od žarišč hladne vojne (Pirjevec et al. 2005). Goriški prostor so zaznamovale napetosti, sovražno razpoloženje, grožnja vojaškega spopada med državama in pogoste emigracije, predvsem iz Jugoslavije v Italijo (Šušmelj 1997, 10–11). Napetosti so deloma popustile po sprejetju Londonskega memoranduma leta 1954 in Videmskega sporazuma, ki je sledil leto kasneje. Prvi je ukinil Svobodno tržaško ozemlje ter uredil vprašanje razmejitvene črte med Italijo in Jugoslavijo, pri čemer prva dokumenta ni ratificirala in je tolmačila, da razmejitvena črta ne predstavlja dokončne meje med državama. Memorandum je poleg tega urejal narodne pravice slovenske skupnosti v Italiji in italijanske v Jugoslaviji (Gombač 1992, 322–323). Pravnoformalno ni razrešil mejnega spora, dejansko pa je omogočil postopno normalizacijo odnosov med državama (Troha 2005, 1226). Videmski sporazum, podpisan avgusta 1955, je urejal maloobmejni promet z namenom olajšanja življenja obmejnega prebivalstva. Veljal je za 10-kilometrski obmejni pas, za osebni promet in prenos blaga pa je uvedel prepustnice, ki so v začetku omogočale štiri prehode meje na mesec (Šušmelj 2005, 307–322). Sporazum je sprostil pretok oseb čez mejo, pozitivno vplival na zmanjšanje političnih napetosti ob meji, izboljšal življenjski standard in omogočil lažje povezovanje na različnih ravneh. Lokalno prebivalstvo se je možnosti, ki jih je omogočal prestop meje s prepustnicami, množično posluževalo. Med letoma 1955 in 1962 je znašalo skupno število prehodov meje skoraj 45 milijonov, v obdobju med letoma 1973 in 1976 pa že več kot 76 milijonov (Šušmelj 2004, 13). To je pomembno vplivalo na stike prebivalstva obeh strani meje. Sporazum je pospešil predvsem gospodarsko sodelovanje in krepitev političnih

stikov tako na državni kot tudi lokalni ravni (Troha 2005, 1228). Prihajalo je do intenzivnih trgovskih stikov na obeh straneh meje. Prebivalstvo s slovenske strani je v Italiji nakupovalo predvsem kozmetiko, oblačila, pralna sredstva, gradbeni material, na drugi strani pa je povpraševanje zajelo predvsem avtomobilsko gorivo in prehranske izdelke, v prvi vrsti meso. Zaradi količinskih omejitev in carin je prehode meje zaznamovalo tihotapstvo. V skrivanje nakupov pred cariniki so bili vključeni številni, ne glede na starost in spol (Repe 2018, 680–683). V kasnejših desetletjih je bil Videmski sporazum večkrat obnovljen in razširjen, kar je še povečalo čezmejni promet in pretok oseb (Čepič 2018, 671–674).

Po normalizaciji odnosov med državama so se pričeli vzpostavljati stiki in sodelovanje tudi na regionalni in medkrajevni ravni. Pri približevanju in sodelovanju z italijansko stranjo je imela posebno vlogo ravno Nova Gorica. Ta je v prvi vrsti razvijala odnose z neposredno soseščino, predvsem Gorico. Kljub različnima okoljema in ideološkima sistemoma je postopna otoplitev vplivala tudi na odnose njunih političnih predstavništev in prebivalstva, hkrati pa tudi na razvoj gospodarstva in drugih družbenih dejavnikov (Jan 1997). Stiki so se najprej razvijali v povezavi s skupnimi vprašanji, ki so bila pomembna za normalno delovanje obeh mest (npr. oskrba z vodo, železniška povezava) (Šušmelj 1997, 11–12). Prvo uradno srečanje delegacij obeh mestnih občin je potekalo leta 1965 v Novi Gorici. Namenjeno je bilo predvsem reševanju skupnih, vsakodnevnih težav, vezanih na gospodarska vprašanja, telekomunikacijske in prometne povezave, trgovino ter infrastrukturo. Rezultat tega in številnih nadaljnih srečanj je bila poglobitev sodelovanja na področju kulture (razstave, nastopi pevskih zborov in dramskih skupin) in športa (kolesarsko tekmovanje *Giro d'Italia*, atletski mitingi) (Šušmelj 2024, 92–95). Novo poglavje v povezovanju med državama so predstavljali leta 1975 podpisani Osimski sporazumi, ki so uredili mednarodno priznanje in formalno določitev jugoslovansko-italijanske meje (Pirjevec et al. 2006). Pogajanja so potekala v tajnosti, sporazum pa sta v Osimu pri Anconi podpisala zunanja ministra obeh držav. Med dokumenti sta bili tudi pogodbi o natančnem poteku meje in o pospeševanju gospodarskega sodelovanja med državama. Sporazum je v veljavo stopil marca 1977 in dokončno zaključil mejno vprašanje med Italijo in Jugoslavijo (Šušmelj 2010, 35–36). Šlo je za enega ključnih elementov pri stabilizaciji razmer v obmejnih območjih, omogočil pa je tudi vzpostavitev »najbolj odprte meje v Evropi«, kot so jo številni imenovali (Repe 2018, 683). Po sprejetju osimskih sporazumov se je sodelovanje Nove Gorice z italijanskim prostorom, predvsem Gorico, bistveno razširilo, povečal pa se je tudi čezmejni promet in pretok ljudi (Šušmelj 2024, 165–208).

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Predstavništvi obeh mest sta med drugim ustanovili več skupnih komisij, katerih namen je bilo poglobljeno in samoiniciativno spodbujanje raznovrstnih oblik čezmejnega sodelovanja. Oblikovane so bile komisije za gospodarsko sodelovanje, urbanizem in varstvo okolja, vodno gospodarstvo in plinovod, tisk in informacije ter vsebinsko široko zasnovana komisija za kulturo, izobraževanje ter mladinska in športna vprašanja. Komisije so v naslednjih letih opravile pomembno delo za razvoj in približevanje čezmejnega goriškega prostora. Povezovanje z Gorico je bilo v novogoriškem okolju videno kot pozitivno za razvoj intelektualnega prostora, kulture, nenazadnje pa tudi višjega socialnega standarda (Šušmelj 1997, 26–28).

Že leto po prvem uradnem srečanju med predstavništvoma obeh obmejnih mest je bilo vzpostavljeno še sodelovanje med občinama Nova Gorica in San Vendemiano. San Vendemiano je bil kraj in sedež manjše občine, ki je imela v začetku sedemdesetih let. 20. stoletja okoli 6.000 prebivalcev. Nahaja se neposredno ob mestu Conegliano v Benečiji (Galletti 1999, 10–15). V času vzpostavljanja stikov je šlo še za relativno ruralno območje s pomembno vlogo poljedelstva in vinogradništva. Obenem pa se je predvsem z vse večjo navezavo na bližnji Conegliano pričela razvijati raznovrstna obrt in industrija, predvsem panoge gradbeništva, kovinarstva in mizarstva (Tomassi 1999, 16–20). Šlo je za dve zelo različni občini, saj je bila novogoriška od sanvendemianske precej večja tako po prebivalstvu kot površini. Stike sta v začetku leta 1966 v okviru sodelovanja lovskih družin prva navezala ravnatelj OŠMŠ Aleksander Krševan in predsednik šolskega skrbništva v San Vendemianu Giuseppe Bellotto. Povezava je še istega leta dala podlago bogatemu pedagoškemu sodelovanju, ki bo posebej predstavljeno v naslednjih poglavjih (Maccari & Mušič 1988, 8). Temu uspešnemu projektu so kmalu sledile tudi druge institucije. Do prvega formalnega srečanja obeh občinskih predstavništev je prišlo v juniju 1968 v Novi Gorici, njegov namen pa je bil krepitev zanimanja za medsebojno spoznavanje (Comitato Comunale Scambi 1977, 2). Stiki, izmenjave in sodelovanja, ki so se v drugi polovici šestdesetih let 20. stoletja vzpostavili na gospodarskem, kulturnem, pedagoškem, športnem in političnem področju (Mignozzi 1993), so bili v obeh okoljih pozitivno sprejeti ter so jeseni leta 1973 pripeljali do podpisa Listine o pobratenju med občinama (Delo 1973, 25). Takratna župana obeh občin, Rudi Šimac in Adriano Maccari, sta v skupnem zapisu ob tem poudarila:

> Mir, prijateljstvo in realistični pristop za bodoče odnose so prispevali k rojstvu, razvoju in utrjevanju pobratenja med občinama in njunimi

prebivalci, ki ga v bistvu nista podpisali samo občini, pač pa posredno tudi njuni prebivalci: od družin, šol in društev do strank in podjetnikov, skratka vseh prebivalcev Nove Gorice in San Vendemiana (Mignozzi 1993, 4).

V naslednjih letih sta občini vzpostavili posebne skupne komisije na kulturnem, političnem, izobraževalnem in gospodarskem področju, izvajali različne oblike srečanj in sodelovanj ter tako pomembno prispevali h krepitvi čezmejnih stikov ne samo na regionalnem, ampak tudi višjem, državnem političnem nivoju. Občina San Vendemiano je tudi aktivno podprla slovensko osamosvojitev v letu 1991 (Primorski dnevnik 1991a, 11) in v času osamosvojitvene vojne intervenirala pri italijanski državni oblasti (Primorski dnevnik 1991b, 8). Ob 20. obletnici pobratenja je bilo izpostavljeno, da je šlo za pogumno dejanje, za Novo Gorico in posredno tudi za Slovenijo, ki je nedvomno pomenilo začetek konkretnega spogledovanja z Evropo (Koron 1993, 4). Med vsemi pobudami, ki sta jih v času do slovenske osamosvojitve sprejeli obe občini, so imeli posebno mesto in pomen letovanja in izmenjave šol iz obeh regij, kar je bilo poudarjeno tudi v zborniku, ki je izšel ob 15. obletnici pobratenja občin: »Kljub številnim plodnim pogovorom in srečanjem uradnih delegacij je prav počitniška izmenjava šolskih otrok s srečanji njihovih staršev vred postala in ostala hrbtenica vseh dvaindvajsetih stikov med občinama« (Maccari & Mušič 1988, 8).

3. Osnovna šola Milojke Štrukelj

Novogoriški osnovnošolski sistem se je pričel razvijati hkrati z izgradnjo in širitvijo mesta. Prva osnovna šola v mestu je pričela z delovanjem v šolskem letu 1951/1952, kamor se je preselila iz Šempetra pri Gorici (Skerlovnik-Štrancar 1992, 173). Deset let kasneje je bila zaradi širitve mesta in hitrega povečevanja (šoloobveznega) prebivalstva zgrajena nova, večja zgradba oz. Osnovna šola Milojke Štrukelj. Poimenovana je bila po partizanki in aktivistki narodnoosvobodilnega boja Milojki Štrukelj (1925–1944). Šola se je izoblikovala v eno osrednjih severnoprimorskih pedagoških ustanov z bogatim kulturnim in športnim javnim udejstvovanjem. V sedemdesetih letih 20. stoletja je šlo za eno največjih šol v Sloveniji, saj je vpis presegal tudi 1500 otrok (Skerlovnik-Štrancar 2009, 10–12). Stavba je bila v času svojega delovanja deležna več dograditev prostorov – učilnic, telovadnice, kuhinje, v osemdesetih letih 20. stoletja pa je zaradi pomanjkanja prostorov prišlo do razširitve mestne šolske mreže. Leta 1981 je bila s samoprispevki zgrajena Osnovna šola IX. korpusa – danes Osnovna šola Frana Erjavca, pet let kasneje pa na

enak način tudi podružnična šola Ledine, ki je spadala pod OŠMŠ (Batič 2022, 126–143).

OŠMŠ je v okviru šolskih interesnih dejavnosti krepila sodelovanje z drugimi izobraževalnimi institucijami v regiji in širše v slovenskem prostoru, s postopnim odpiranjem meje in omilitvami pa so se že v šestdesetih letih 20. stoletja postopoma pričeli vzpostavljati, kasneje pa tudi krepiti stiki s šolami v Italiji, Avstriji in na Hrvaškem (PANG 1). Najpomembnejše in najplodnejše sodelovanje je bilo z bližnjim, italijanskim okoljem. Tako kot številne druge novogoriške politične, kulturne in gospodarske institucije se je sodelovanje usmerilo na krepitev stikov s sorodnimi ustanovami oz. slovenskimi in italijanskimi osnovnimi ter nižjimi srednjimi šolami v sosednjih regijah Furlaniji- Julijski krajini in Benečiji. Izobraževalne ustanove oz. šolsko mladino z obeh strani meje so povezovali predvsem kulturni in športni dogodki, prireditve in tekmovanja, pri čemer so bile te aktivnosti pogosto plod osebnih čezmejnih poznanstev. Najvidnejša primera sta bila že omenjeni dolgoletni ravnatelj OŠMŠ Aleksander Kerševan, ki je to funkcijo opravljal med letoma 1964 in 1991, in učitelj telesne vzgoje Janko Prinčič, ki je v obdobju poučevanja na šoli, med letoma 1966 in 1983, vzpostavil pomembno čezmejno sodelovanje na področju košarke, bil pa je tudi med vidnejšimi pobudniki sodelovanja s San Vendemianom (Miška 2016, 24).

4. Vzpostavitev sodelovanja OŠMŠ s San Vendemianom in letovanja

Kot je bilo že na kratko omenjeno, je bilo za vzpostavitev čezmejnih stikov OŠMŠ pomembno sodelovanje ravnatelja Kerševana in predsednika šolskega skrbništva v San Vendemianu Bellotta. Na srečanju, ki je potekalo v začetku leta 1966, naj bi med drugim govorila tudi o vplivu predsodkov in ideologije med šolsko mladino, ki so izhajali iz zgodovinskih okoliščin. Oba pedagoška delavca sta prepoznala možnost preseganja tovrstnih stereotipov in predsodkov v družbi z angažiranjem mlajših generacij. To je vodilo v izvedbo prve izmenjave in letovanja desetih otrok iz OŠMŠ in nižje srednje šole v San Vendemianu, ki sta potekala julija 1966. Glede na zapis iz zbornika, ki je izšel ob 15. obletnici pobratenja občin, naj bi šlo za pionirsko izmenjavo med dvema državama z različnima ideološkima sistema v času blokovskih delitev (Maccari & Mušič 1988, 8). Obe državni in občinski vodstvi sta imeli do pobude sprva previden odnos in projekta uradno nista podprli. Podpora

s te strani je prišla šele kasneje, kot posledica pozitivnega odziva lokalnega okolja, šol ter otrok in njihovih staršev (Maccari & Mušič 1988, 8). Povezovanje je potekalo tudi med pedagoškim kadrom, ki je na srečanjih izmenjaval svoje izkušnje in primerjal delovanje obeh šolskih sistemov (Primorski dnevnik 1968, 1). Oba uspešna dogodka sta vodila k vzpostavitvi dolgoročnega sodelovanja, ki se je kasneje razvilo v več smereh. Po uspehu letovanj sta v letu 1971 občinski upravi prevzeli pokroviteljstvo nad projektom in ga vključili v široko zastavljen program kulturnega, družabnega in rekreativnega sodelovanja, kar je posledično vodilo v nadgradnjo in poglobitev stikov med šolama (Comitato Comunale Scambi 1977, 2).

Letovanja so bila primarno namenjena desetim najuspešnejšim učencem in učenkam obeh šol. Tako je npr. med poletnimi počitnicami leta 1969 slovenska skupina bivala v kraju Caprile v Benečiji, italijanska pa je bila nastanjena Poreču v Istri (PANG 2). Najprej so se letovanja izvajala ločeno, od leta 1975 dalje pa skupno. Ob prvi skupni organizaciji je sanvendemianski župan Adriano Maccari izpostavil pomen tovrstnih srečanj: »Narodi ne obstajajo zgolj zato, ker jih določajo meje in ozemlja, temveč jih označujejo srca njihovih pripadnikov. Prepričani smo, da je pravo prijateljstvo boljši graditelj resničnega in trajnega miru kot diplomacija« (Maccari & Mušič 1988, 38–39). Do leta 1992 je potekalo 17 tovrstnih letovanj, ki se jih je udeležilo 368 otrok z italijanske in 375 s slovenske strani. Poleg OŠMŠ so bili na slovenski strani v kasnejšem obdobju vključeni tudi otroci iz OŠ IX. korpus oz. Fran Erjavec in drugih osnovnih šol iz občine (npr. Solkan, Kanal, Dobrovo), na italijanski strani pa iz Conegliana, Vittorio Veneta in Colle Umberta (Mignozzi 1993, 10–11). Šlo je za aktivno preživljanje počitnic, saj so otroci obiskovali različne kraje, kjer so spoznavali naravne, kulturne in narodne posebnosti sosedskega okolja. Del letovanj so bili tudi skupni dogodki, npr. športne igre in debatni večeri, kjer so se otroci pogovarjali o prostem času, šoli, folklori, veri, športu ter družbenih, političnih in gospodarskih vprašanjih. Slovenski in italijanski otroci so izmenično letovali v enem od jugoslovanskih ali italijanskih gorskih ali obmorskih krajev (npr. Gardsko jezero, Piancavallo, Caorle, Poreč, Umag, Portorož, Baška, Puntižela) (Maccari, Mušič 1988, 40). Leta 1991 je letovanje zaradi vojne za slovensko osamosvojitev odpadlo, a se je že naslednje leto nadaljevalo v Portorožu (Mignozzi 1993, 46). Skupno bivanje na slovenski obali v letu 1992 so slovenske učenke in učenci opisali z besedami:

Hitro so se stkale vezi, ki so se v tednu dni učvrstile in nas kljub oddaljenosti in jezikovni pregradi še povezujejo. [...] Ugotavljamo, da smo od tega

letovanja pridobili zelo veliko: poglobili smo znanje italijanskega jezika, spoznali italijansko kulturo in dobili smo nove prijatelje (Mignozzi 1993, 12).

Učenci tretjega razreda nižje srednje šole v San Vedemianu so jih dopolnili:

Doumeli smo, da se problem razlik v jeziku zlahka premosti in da se z malo truda da izmenjati misli, tudi če ne govoriš istega jezika. Še nečesa smo se naučili, kar bi radi povedali tudi tistim, ki mislijo, da so ljudje iz drugih držav različni. To namreč sploh ni res, saj smo vsi enaki in če smo skupaj, lahko postanemo vsi še boljši (Mignozzi 1993, 16).

5. Kulturna izmenjava otrok v letu 1972

Uspeh in vključitev letovanj v občinske programe je omogočilo finančno in organizacijsko nadgradnjo projekta, ki bi dodatno povezal šolsko mladino. Poleg poletnih gostovanj in druženj za manjše skupine je bila organizirana še t. i. kulturna izmenjava otrok v času šolskega pouka. Do potrditve te ambiciozne ideje je prišlo v začetku januarja 1972 med srečanjem obeh predstavništev v Novi Gorici, ki sta soglasno sprejeli idejo, hitro pa je sledila tudi izvedba (Comitato Comunale Scambi 1977, 3). Dodatno težo in pomen projektu je dala tudi podpora italijanskih ministrstev za zunanje zadeve in šolstvo ter republiškega sekretariata za kulturo in prosveto Socialistične republike Slovenije (PANG 3). Prva tovrstna izmenjava je potekala marca 1972, ko je 60 otrok na slovenski in 60 na italijanski strani, v starosti 12 let, teden dni bivalo v sosednji državi, obiskovalo tamkajšnji pouk, izven šolskega časa pa je spoznavalo kulturo sosedskega naroda. Poleg OŠMŠ sta se v projekt vključili še nižji srednji šoli v San Vendemianu in Colle Umbertu (PANG 4). Organizacijski odbor si je z izmenjavo med drugim zadal doseči naslednje cilje: spozna-vanje učnih sredstev in metod dela na šolah obeh držav; spoznavanje zgodovine, folklore, običajev, noš in kulture obeh narodov; vzbujanje interesa za učenje tujih jezikov; izmenjava izkušenj med učitelji obeh narodnosti in vzbujanje interesa za medsebojno sodelovanje; vzbujanje interesa med družinami iz obeh pokrajin za medsebojno spoznavanje in navezovanje trajnejših stikov ter utrjevanje prijateljstva; odpravljanje predsodkov med ljudmi ter s tem krepitev sodelovanja in odprtosti državnih meja (PANG 2). Prav slednje je bilo videno kot ključno, kar je v posebnem prispevku izpostavila tudi Alenka Puhar:

In če se je šestdesetim italijanskim in šestdesetim slovenskim otrokom, ki so z odprtimi očmi hodili po svetu, odprl pogled na tirnice v življenju

sosedov, potem so bili smotri te izmenjave doseženi. Potem bo morda meja zmeraj manj ločnica in zmeraj bolj takšna meja, kjer je veliko prehodov in veliko nezarjavelih zapornic (Puhar 1972, 21).

Izmenjava ni odmevala samo v italijanskem in slovenskem prostoru, ampak je o njej poročalo tudi tuje časopisje (Comitato Comunale Scambi 1977, 12). Ob izmenjavi je potekalo skupno srečanje na mejnem prehodu v Rožni dolini, ki so se ga poleg pedagoškega kadra, otrok in njihovih družin udeležili tudi jugoslovanski in italijanski politični predstavniki:

> Sobotna svečanost pri prehodu Rdeča hiša je bila nadvse prijetna. Poleg županov obeh občin iz Trevisa so bili prisotni tudi odbornik Moise, novogoriški župan Rudi Šimac ter predsednik republiškega zbora za kulturo Dušan Šinigoj. Govorniki so poudarili globok pomen izmenjave otrok, ki bodo s svojim bivanjem pri družinah ustvarili tesne vezi med obema mestoma (Primorski dnevnik 1972a, 3).

Slovenski otroci so bivali pri starših njihovih italijanskih vrstnikov in obratno, kar se je izkazalo za pozitivno pri spoznavanju sosedskega okolja, kulture in jezika. Dopoldanski čas je bil namenjen pouku in hospitacijam pri različnih predmetih. Otroke so spremljali učitelji in učiteljice iz matične ustanove, ki so izvajali pouk po prilagojenem programu. Popoldanski čas je bil namenjen različnim ogledom lokalnih posebnosti. Slovenski otroci so si v tednu dni ogledali spomenike iz prve svetovne vojne ob reki Piavi, Benetke, Verono, lokalne proizvodne obrate in koncert. Italijanske otroke so slovenski organizatorji peljali na Lokve, v Postojnsko jamo, Kobarid in Brda, kjer so lahko spoznali lokalne kulturne, gospodarske in naravne značilnosti (PANG 2). Preostali čas je bil namenjen druženju doma pri gostiteljskih družinah in neformalni socializaciji v novem okolju.

6. Širši družbeni vplivi stikov šol

Tako letovanja kot kulturna izmenjava so bili v obeh okoljih sprejeti zelo pozitivno, kar je razvidno tako iz medijskega poročanja kot iz izjav političnih predstavnikov, učiteljev oz. učiteljic ter otrok in njihovih staršev. V časopisu Primorski dnevnik so npr. izpostavili, da gre za »koristno izmenjavo otrok« (Primorski dnevnik 1972b, 3). Podobne izjave je najti tudi v italijanskem časopisju:

> *Tutta la gente dei tre comuni (op. p. Nova Gorica, San Vendemiano, Colle Umberto) ne è cosciente, tanto che si sente veramente protagonista di*

una strategia di pace che va ad eliminare le barriere umane che ancora dividono, anche se molto larvatamente, la gente veneta e slovena (Comitato Comunale Scambi 1977, 14).[1]

O dogodkih so poleg časopisja poročale radijske in televizijske postaje (PANG 2). OŠMŠ je po prvi izmenjavi opisu projekta namenila celotno številko šolskega časopisa *Čriček*, kjer so otroci in učiteljice opisali svoje doživetje bivanja v San Vendemianu (Osnovna šola Milojka Štrukelj 1972). Posebno publikacijo *Odprta meja – Confine aperto* je v drugi polovici sedemdesetih let 20. stoletja izdajala tudi Komisija za kulturne izmenjave (*Commissione comunale scambi con Nova Gorica*) pri občini San Vendemiano, v kateri so besedila obravnavala številne vidike skupnih dogodkov na vseh nivojih (Primorski dnevnik 1976a, 4). Obe strani sta stike šol videli kot osrednji element v širšem povezovanju obeh občin.

Vpliv tovrstnih stikov je bil večplasten in je zajemal tako praktične kot tudi simbolne vidike. Obe občinski predstavništvi sta po koncu prve kulturne izmenjave za družine sodelujočih otrok pripravili anketni vprašalnik, ki je zajel več deset vprašanj, nanj pa je na slovenski strani odgovorilo 44 družin, ki so gostile italijanske otroke, na italijanski pa 38 družin, ki so poslale svoje otroke v Novo Gorico, in 27 družin, ki so gostile slovenske otroke. Iz odgovorov, ki so bili tudi javno objavljeni tako na slovenski kot italijanski strani, je razvidno navdušenje oz. pozitiven odziv na izvedbo. Z letovanji in kulturno izmenjavo se je med obema krajema in med številnimi udeleženci vzpostavil stik, ki je presegal izhodiščni okvir projekta. Med slovenskimi družinami je v anketi 95 odstotkov podprlo nadaljevanje sodelovanja, 82 odstotkov pa je izrazilo pripravljenost za ponovno gostovanje otrok. Na italijanski strani je ti ideji podprlo 100 oz. 96 odstotkov družin. Hkrati so vse italijanske družine, ki so poslale otroke v Novo Gorico, izrazile željo, da bi se vzpostavili stiki s slovenskimi družinami, 90 odstotkov pa jih je to do časa izvedbe ankete tudi storilo. Med italijanskimi družinami, ki so gostile slovenske otroke, je bil odstotek nekoliko nižji, a je še vedno velika večina potrdila to pripravljenost (Žorž 1972, 27). Stiki družin so se uresničili tudi v praksi, saj je prišlo do organizacije skupnih srečanj, prvega že junija 1972, ko je Novo Gorico obiskalo 140 staršev in otrok iz Italije. Pet let kasneje je bil ravno tako v Novi Gorici organiziran prvi piknik prijateljstva, ki je privabil okoli 200 ljudi z obeh strani meje in je prerasel v tradicionalni dogodek, ki se je vsako leto izvajal izmenično v obeh mestih (Maccari & Mušič 1988, 44). Po nekaterih podatkih naj bi do konca osemdesetih let 20. stoletja tovrstni stiki vključevali okoli 3,000 oseb iz obeh občin (Maccari & Mušič 1988, 28).

Med praktičnimi vidiki lahko izpostavimo spoznavanje in učenje sosedskega jezika. Otroci, ki so se znašli v novem okolju, so se soočili s tujim jezikom, kulturo in navadami. Anketa je kot izziv izpostavila komunikacijo v tujem jeziku, kjer se je več težav pojavilo na italijanski strani. V anketi je 73 odstotkov slovenskih družin izjavilo, da ni bilo težav s komunikacijo, med italijanskimi družinami pa jih je skoraj enak odstotek izpostavilo, da so imele težave s komunikacijo s slovenskimi otroki (Žorž 1972, 26). Tudi sicer je iz izjav razvidno, da je več slovenskih učencev in učenk znalo italijansko. Ena od učenk je izpostavila: »Z otroki sem se dobro razumela, ker razumem italijansko. Le v začetku je morala gospa prevajati njihovo govorico v čisto italijanščino, kajti oni govorijo svoj dialekt« (Ličen 1972, 5). Tudi na slovenski strani so pri komunikaciji večkrat pomagali starši: »Ker italijanščine ne znam, se je z njim (op. p. italijanskim učencem) pogovarjal oče, jaz pa sem samo poslušal. [...] Kadar se nisva mogla sporazumeti, sva si pomagala z rokami« (Manfreda 1972, 17–18). Da bi vsaj deloma presegli težave s sporazumevanjem, je bil v San Vendemianu kot del priprav na prihod slovenskih otrok med februarjem in junijem 1972 organiziran tečaj slovenskega jezika. 33 otrok v starosti med 11. in 15. letom je poučevala Slovenka iz Trsta Irena Guštin Passerini (Maccari & Mušič 1988, 51). Naslednje leto je to vlogo prevzel šolnik, slovenist in publicist Arduino Cremonesi Pillepich (Matajur 1973, 1). Časopis Primorski dnevnik je leta 1982 ob predstavitvi takratnega letovanja otrok poročal:

> San Vendemiano je kraj, kjer že veliko mladih govori slovensko, saj so se našega jezika naučili s takimi izmenjavami in tudi s tečaji slovenščine, ki so bili na tamkajšnji nižji srednji šoli več let. Poučevala je Slovenka, učiteljica iz Trsta, ki biva v bližnjem Trevisu (Primorski dnevnik 1982, 3).

Podoben tečaj italijanščine je bil v okviru posebnega krožka za učence in učenke organiziran tudi na OŠMŠ (Maccari & Mušič 1988, 52). V okviru tečajev so otroci poleg jezika spoznavali tudi kulturne prvine in značilnosti sosedskega naroda.

Simbolni pomen so imele ekskurzije, na katerih so obiskali različne naravne, kulturne in zgodovinske znamenitosti, predvsem z namenom spoznavanja kulture sosedskega naroda. Med drugim je bil poudarek tudi na obeležjih iz prve svetovne vojne v Posočju in ob reki Piavi, s čimer so želeli opozoriti na vojne grozote in spodbuditi zavzemanje za mir in svobodo (PANG 2).

Kulturna izmenjava je vključevala tudi učitelje in učiteljice, ki so v tem okviru, a tudi ob številnih drugih priložnostih, organizirali skupna srečanja, na katerih so primerjali različne metode poučevanja in dela

(Mignozzi 1993, 48). Po oceni predstavnikov OŠMŠ so ti stiki tudi pri njih pomembno vplivali na boljše poznavanje jezika in kulture sosednjega naroda (PANG 2). To je poudaril tudi ravnatelj OŠMŠ Kerševan: »Spoznavamo metode del, učne pripomočke in organiziranost pouka. Italijanski otroci so zastavljali zanimiva vprašanja, npr. zakaj imamo tako intenziven pouk, toliko učil« (Maccari & Mušič 1988, 32).

Stiki med obema prostoroma so se od sredine sedemdesetih let 20. stoletja dalje še razširili. Učenci in učenke obeh šol so sodelovali na vsakoletnih športnih šolskih mitingih (Nakrst 1986, 135), otroci iz San Vendemiana so bili pogosti udeleženci čezmejnega Pohoda prijateljstva *(Marcia dell'amicizia)*, ki je potekal med letoma 1976 in 1992 po goriških in novogoriških ulicah (Primorski dnevnik 1976b, 3). Njegov specifični namen je bil povezati šolsko mladino, ki je prihajala s čezmejnega goriškega prostora (Šušmelj 2024, 165–167). Skupni pohodi mladine so se organizirali tudi v Benečiji (Maccari & Mušič 1988, 49). V sodelovanju z Osnovno šolo Solkan so slovenski in italijanski otroci med letoma 1972 in 1983 sodelovali na ex temporah. Šlo je za enega večjih umetniških dogodkov na Goriškem − leta 1979 je na njem sodelovalo okoli 780 udeleženk in udeležencev (Maccari & Mušič 1988, 50–51).

Pomen sodelovanja obeh šol lahko umestimo v del širšega procesa povezovanja Jugoslavije (Slovenije) in Italije. Na to nakazuje več dejavnikov. Dogovor med dvema ravnateljema oz. šolama v letu 1966 je hitro prerasel ta okvir, saj so se v projekt najprej vključila, kasneje pa ga prevzela lokalna oz. občinska politična predstavništva ob podpori obeh državnih oblasti. Politični odločevalci so v sodelovanju mladih, neobremenjenih generacij videli možnost, ki bi dolgoročno vodila k utrjevanju vezi, ki bi spodbudila približevanje tako na političnem in gospodarskem kot tudi kulturnem in športnem področju, kar bi pozitivno vplivalo na razvoj obeh območij ter hkrati presegalo predsodke in zamere, ki so sicer zaznamovali 20. stoletje (Maccari & Mušič 1988, 8). Na italijanski strani so že avgusta 1971 poudarili, da razumejo sodelovanje obeh šol kot pomembno iztočnico za vzpodbujanje kulturnega, socialnega, rekreacijskega in gospodarskega sodelovanja med obema narodoma (Comitato Comunale Scambi 1977, 4). Srečanj so se udeleževali tudi vidni politični predstavniki z obeh strani meje, kar je pridodalo k pomenu. Ob izmenjavi v letu 1972 so bili tako na srečanju poleg občinskih predstavnikov prisotni še predsednik republiškega zbora za kulturo Dušan Šinigoj, generalni konzul SFRJ v Trstu Boris Trampuž, predstavnik italijanskega generalnega konzulata iz Kopra in namestnik šolskega skrbništva iz Gorice (Primorski dnevnik 1972a, 3). Šolska mladina je bila tako aktivno vključena v kulturno diplomacijo, kar je bila zavestna odločitev politike.

Otroci so bili imenovani »ambasadorji dobrososedstva«, stiki otrok pa »naložba v prihodnost, ki je novim generacijam razširila pogled na svet« (Maccari & Mušič 1988, 28–29). Še bolj neposreden je bil predsednik novogoriške skupščine Rudi Šimac v izjavi slovenskim učencem in učenkam po izmenjavi leta 1972:

> Opravili ste pomembno nalogo kot najmlajši diplomati iz Italije in Jugoslavije, resnično pomembno nalogo v zbliževanju ljudi med dvema državama. Spoznali ste, da živijo na tej in na oni strani meje ljudje, da morajo na tej in na oni strani mame in očetje zjutraj na delo in se trudijo za vas, otroke, da bi vas vzgojili, došolali. Skratka, na tej in na oni strani meje smo ljudje, ki imamo svojo kulturo, svoje pesnike: pri nas Prešerna, onkraj meje Leonardija; imamo svoje slikarje, glasbenike in druge umetnike. To preprosto spoznanje ni majhna stvar, zelo je pomembno. Tako pomembno, da ga je potrebno utrjevati in gojiti kot bogastvo, da ga ne bo mogla nobena propaganda in zla namera sprevreči v sovraštvo ali podcenjevanje ljudi na tej in na oni strani meje (Šimac 1972, 1).

V okvir kulturne diplomacije bi lahko poleg letovanja in izmenjave vključili še kasnejšo razširitev projekta na športno-rekreativne prireditve, slikarske kolonije, kulturne nastope in jezikovne tečaje.

7. Sklep

Goriški čezmejni prostor je šel v 20. stoletju skozi različne procese, ki so pretresli in zaznamovali to jezikovno, narodnostno in kulturno razno-liko okolje. Nerešeno mejno vprašanje, dogodki iz preteklosti, različna ideološka sistema in še nekateri drugi dejavniki so po drugi svetovni vojni zaznamovali odnose med Italijo in Jugoslavijo, regijama ter lokalnim prebivalstvom. Nova meja, ki je bila v začetku eno od žarišč hladne vojne, se je predvsem po letu 1955 pričela postopoma odpirati, kar je omogočilo vse intenzivnejše stike med obema stranema, ki sta bili zaradi reševanja skupnih vprašanj najprej prisiljeni sodelovati, kasneje pa sta v poglabljanju stikov prepoznali vse več priložnosti za uspešen razvoj čezmejne regije. Organizirano in sistematično povezovanje ter spoznavanje sosedskega naroda je potekalo tudi med šolsko mladino, ki so jo na različne načine aktivno vključili v kulturno diplomacijo. Šlo je za eno zgodnejših in pomembnejših oblik sodelovanja, ki pa ni zajel le goriškega območja, ampak je segel tudi v Benečijo. Od konca šestdesetih let 20. stoletja dalje se je vzpostavilo več dolgoročnih stikov, ki so v ok-viru letovanj, kulturne izmenjave, športnih in kulturnih dogodkov ter drugih srečanj postali tradicionalni. Osrednji namen srečevanj otrok je bil spoznavanje sosedskega jezika, kulture, preseganje predsodkov in

ustvarjanje okolja za uspešno sobivanje obeh narodnih skupin oz. držav. Glede na poročila, medijske zapise in odziv skupnosti, so bili tovrstni stiki sprejeti pozitivno, z množično udeležbo na dogodkih, povezave med šolami pa so tlakovale pot tudi za druge oblike sodelovanja na gospodarskih, upravnih in političnih ravneh. Prispevek je predstavil predvsem slovenski pogled na enega bolj izpostavljenih, a danes slabše poznanih primerov sodelovanja, ki je posebej zaznamoval obdobje druge polovice šestdesetih in sedemdesetih let 20. stoletja – letovanj ter izmenjave učencev in učiteljev šol iz občin Nova Gorica in San Vendemiano. Ti dogodki so bili pomemben del širokega povezovanja obeh občin, ki sta se leta 1973 tudi pobratili. Obe okolji sta gostovanje šolske mladine sprejeli z odprtimi rokami in ga nadgradili s srečevanjem slovenskih in italijanskih družin, učenjem obeh jezikov ter organiziranjem številnih skupnih kulturnih, umetniških in športnih dogodkov. Učenci in učenke so sodelovali na raznovrstnih skupnih prireditvah in tako spoznavali sosedsko okolje, jezik in kulturo ter gradili odnose v čezmejnem prostoru. Šlo je za sistematično delo, podprto s strani (lokalnih) oblasti, ki so v tovrstnih stikih videle možnost poglabljanja sodelovanja in preseganja nezaupanja in celo sovražnosti, ki so bili posledica dogajanja predvsem v prvi polovici 20. stoletja. Pobude iz šestdesetih in sedemdesetih let 20. stoletja so predstavljale temelj, na katerem se čezmejni stiki tako v šolskem kot širšem okolju gradijo še danes. V sodobnem času predstavlja najboljši primer tovrstnega sodelovanja Evropska prestolnica kulture (GO! 20255), ki jo v letu 2025 skupaj izvajata Nova Gorica in Gorica. Gre za prvo čezmejno izvedbo projekta, ki ga financira Evropska unija, predstavlja pa pomemben element v krepitvi evropskega povezovanja različnih kultur, jezikov in narodov.

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Opomba

[1] Prevod citata: Vse prebivalstvo treh občin (op. p. Nova Gorica, San Vendemiano, Colle Umberto) se tega zaveda, toliko bolj, ker se resnično čuti kot dejavni akter

mirovne strategije, ki odpravlja družbene pregrade, ki še vedno — čeprav zelo prikrito — ločujejo beneško in slovensko prebivalstvo.

"In that moment, we felt close, as if the border had been torn down": Contacts between Milojka Štrukelj Primary School and San Vendemiano, 1960s–1980s

Abstract

This article explores the contacts between Milojka Štrukelj Primary School in Nova Gorica and the lower secondary school in San Vendemiano, framing them as a form of regional cooperation between Slovenia and Italy. The partnership began in the 1960s, amidst bloc divisions and an unresolved national border between Italy and Yugoslavia. At the time, the legacies of fascism and the Second World War still deeply resonated on both sides. The article focuses on two key aspects of this collaboration: school holiday camps and the cultural exchange in 1972. Supported by local, regional, and national political institutions, the schools aimed to foster cross-border connections among young people, grounded in mutual respect and the overcoming of prejudice. This ambitious initiative also functioned as a form of cultural diplomacy between the two countries. Drawing on archival documents and press coverage, the article highlights the key features and lasting impact of these contacts, which helped shape the experiences of several generations of Slovene and Italian children.

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Language Dynamics in Society (LanDS): The LanDS Analytical Framework for Majority and Minority-Language Ethnolinguistic Vitality

Abstract

Language Dynamics in Society (LanDS) is an analytical framework to reappraise ethnolinguistic vitality (EV) which is key to societal processes affecting the stability of language groups. LanDS proposes an enhanced academic analysis of EV and Language Promotion and Protection. This EV approach addresses the dynamics of how social players participate in the processes which are beneficial or detrimental to EV. LanDS posits four analytical Developmental Quadrants: Language Transmission and Acquisition, Socialisation and Reinforced Acquisition, Civic Expansion, and Coherent Ethnicisation. Each Quadrant is affected by the four core concepts of Direction, Process, Participation, and Competition. Collective community continuity or instability are shaped by the language group's participation in these key developmental stages.

Keywords

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1. Introduction

Ethnolinguistic vitality (EV) is contingent on language dynamics in society (LanDS), functioning according to interrelated and mutually reinforcing societal processes. These complex dynamics may be positive and beneficial to the overall EV or negative and detrimental, resulting in ethnolinguistic fragility. Both positive and negative aspects – EV and fragility – can, of course, occur simultaneously. For ease of presentation, we discuss these issues from the positive EV viewpoint. From this dynamic perspective, EV ensues from the collective and organisational capacity of a language group to protect and regenerate key intergenerational, communal/social, institutional, and civic processes which are critical to the societal stability and continuity of the group. Therefore, the societal continuity of a language minority is based on its socio-political organisational competence, reinforcing communal activities, and institutional support (cf. Dauenhauer & Dauenhauer 1998, 76–82; Grin 2016; 2024), as well as the amalgamation of individual competences, ideologies/motivations, and practices within viable demolinguistic densities. The holistic and systemic heuristic proposed here as LanDS strives to delineate a planned approach to the protection and promotion of EV as both a consequence and an objective of these socio-economic, civic, and cultural assemblages, which involve various linguistic repertoires and other forms of ethnolinguistic capital.

The structure of this article is as follows. We first introduce the rationale for this new LanDS theory, which we justify through a review of core publications in the existing literature. This review concludes with a discussion of key concepts from our co-authored 2024 publication on Language Policy and Planning (LPP) and Language Protection and Promotion (LPrPr). We then present the LanDS structural theory of circular, sustainable EV; first regarding LanDS' General Tenets (GTs), followed by the discussion and analysis of the social dynamics involved in four Developmental Quadrants (DQs). We elaborate on an initial simplified model to demonstrate the roles of various participants and their interactions. This is followed by a short minority-language (Min-L) case study of Irish. We then argue for the advantages of this new framework and its improvements on much current LPP discourses which are over-reliant on post-structuralist assumptions. We conclude by suggesting further steps to elaborate our theoretical framework and related LPrPr interventions.

This LanDS concept emerges from various sociolinguistic research contexts that demonstrate significant discrepancies and divergence

between empirical findings and policy aspirations inherent in formal provision for minority speakers and their communities (cf. Ó Giollagáin et al. 2007a; 2007b; Ó Giollagáin & Charlton 2015; Ó Giollagáin et al. 2020; Bourgeois 2024a; 2024b). We propose our LanDS framework to improve academic analysis of EV and Language Promotion and Protection (LPrPr) approaches (cf. Ó Curnáin & Ó Giollagáin 2024; Ó Giollagáin & Caimbeul 2021), and Language Policy and Planning (LPP) aimed at sustaining vulnerable Min-L communities. This would entail reassessing efforts to address the inequity in the distributions of public and private resources and agencies. The LanDS approach encompasses both the Min-L and Maj-L perspectives, but in this article we emphasise the Min-L standpoint on EV. For reasons of brevity, this article concentrates on the asymmetrical societal relationship between minoritised bilingualised Min-L communities and socio-politically dominant, often monolingual, Maj-L communities. Nonetheless, the analysis can also be of relevance to many multilingual contexts.

2. Theoretical Conceptualisation

The LanDS approach posits a theory of EV based on the multifaceted societal interactions which determine a minority group's collective continuity, instability, or decline. As societal demise is ubiquitous among language minorities (Crystal 2000; Harrison 2007; Bradley & Bradley 2019), understanding the social dynamics which may culminate in ethnolinguistic shift is an analytical prerequisite for describing, explaining, and prescribing collective, institutional, or state initiatives to seek to arrest or reverse the destabilising trajectory. Min-L societal sustainability or demise are features of complex interactional dynamics and, therefore, operate according to "complex adaptive systems" (Larsen-Freeman & Cameron 2008, 4). LanDS interdisciplinary analysis focuses on the communal/social dynamics within a minority group as well as between the minority and the majority (and other groups). These dynamics frame individual and communal ethnolinguistic behaviour and social psychology.

Our framework rests on key concepts relating to how minority ethnolinguistic societal dynamics operate in socio-political competition with subordinating language majorities, regardless of whether this subordination is accidental or intentional, formal or informal, implicit or explicit. It seeks to address the limitations of existing frameworks, and how they inform or influence existing LPP dispensations for minoritised language groups. Many current LPP approaches are insufficiently fo-

cused on minority societal dynamics or their challenging socio-cultural reality. Since Min-L provision is first filtered through Maj-L political concerns or tolerance, much current minority LPP fails to accommodate or prescribe for many central societal dynamic contexts for Min-L communities.

Our main contention is that sufficiently sociologically informed positive EV outcomes should be maximally explicit in how LPP is formally pursued. Contemporary approaches to LPP tend to leave struggling Min-L communities in a disempowered reactive relationship to highly circumscribed formal, sectoral Min-L official provision, and of course in an even more disempowered relationship to Maj-L dynamics. Much of current LPP fails to increase the capacities and opportunities of the minority group to be proactive players in prescribing feasible strategies to address their societal concerns (see our Irish case study below). As a corollary, the influence of existing EV frameworks on current LPP has not adequately enhanced the collective facilities of Min-L groups to counteract the Maj-L dominated competitive dynamics inherent in the various societal challenges of (post-)modernisation, e.g. how Maj-L dynamics dominate cultural, communicative, and technological innovation. Our EV-informed empirical approach to LPrPr is primarily focused on creating the socio-political and civic conditions capable of increasing the proactive and prescriptive abilities of Min-L groups.

The LanDS framework argues for a reappraisal of current approaches to EV and LPP in order to identify and proactively engage with core social processes underpinning both. This includes processes of primary socialisation in the Min-L; secondary peer-group socialisation of the Min-L and its culture among the young; processes of civic and socio-economic reinforcement of the Min-L in more formal or institutional contexts; and processes that enable participation in formal and informal reflexive social interactions (Giddens 1991, 20–23) in which affiliation processes to the minority's ethnolinguistic identity are experienced as a coherent collective identity. WEIRD[1] modernity (cf. Henrich 2020) involves processes of Maj-L advantages and Min-L disadvantages, entailing an inherent threat to Min-L group stability. Nevertheless, instances of relative stability of Min-Ls are found in WEIRD societies where small-scale cantonisation (local autonomy) applies.

Due to the complex relations between the four DQs in the LanDS framework, our analysis is rooted in Complexity Theory. Complexity Theory seeks to account for the interdependence and interactivity of constituent factors in how dynamic systems are sustained or disrupted. Bastardas-Boada (2013) sets out the challenges involved in adapting as-

pects of Complexity Theory to sociolinguistic dynamics that determine ethnolinguistic group stability or instability:

> Organizations of systems of meaning used between humans, which, although subject to constant intergenerational replacements, maintain (or not) the former in operation and modify them in accordance with their global socio-communicative needs. Linguistic structures live, therefore, in this incessant flow, just as the socio-meanings that are adhered to them, changing and innovating in accordance with the vicissitudes of the general socio-cultural current of peoples. Our challenge, therefore, is to go beyond prevailing perspectives that are more static than dynamic [...] (Bastardas-Boada 2013, 161).

Complexity Theory in language sciences addresses the dynamic, non-linear, and emergent aspects (cf. Larsen-Freeman & Cameron 2008, 2–4) of how various social players adapt and contribute to societal processes. These determine personal and collective affiliation to, social and institutional practice of, and adherence to the civic reinforcement of language(s), as well as the general level of salience of language(s) as embodied dynamic competence and lived dynamic identity. Building on other EV models, especially those proposed by Fishman (1991), Lewis and Simons (E)GIDS (2016), and Landry et al. (2022), our LanDS framework models the complex progression of the individual or cohort as they develop through various social stages. LanDS EV offers an analytical model to explain the influence of competitive social pressures on the individual or cohort as they move from one developmental or collective stage to another (see Figure 3 below).

Given that the majority of the world's living languages are experiencing various degrees of societal fragility and endangerment (Crystal 2000; Ó Curnáin & Ó Giollagáin 2024, 398–399; Lewis & Simons 2016, 3), speakers of these threatened languages are increasingly constrained in their individual and collective capacity or communal agency to adapt to a social dynamic which would support the continuity of the language and culture as lived social practice. From this perspective, participants in endangered language cultures are enmeshed in various mal-adaptive competitive dynamics with a more dominant language culture, dynamics which include a multitude of psychological and interpersonal issues (cf. Bradley 2022, 456; Krauss 1992; Crystal 2000; Nettle & Romaine 2000; Batibo 2005; Hagège 2009; Ó Giollagáin et al. 2007a; 2007b; Ó Giollagáin et al. 2020; Ó Curnáin 2009). This reality is insufficiently addressed in much of the academic literature and discussions of LPP. Indeed, Min-L sociolinguistic discourses which disregard, deny, or

minimalise this challenging Min-L societal reality risk undermining their own relevance as Min-LPP analyses (e.g. the debate following the publication of Ó Giollagáin et al. (2020) in: Nance (2021), McLeod et al. (2022), Armstrong (2021a, 2021b) and Armstrong et al. (2022); for an alternative view in response, see: Ó Giollagáin et al. (2022a; 2022b), Ó Curnáin & Ó Giollagáin (2021) and McEwan-Fujita (2006). In short, post-structuralist LPP has propagated an approach to (Min-L) promotion which has enabled a neo-liberal *laissez-faire* outlook detrimental to vernacular groups in decline (see also our Analysis below).

3. Existing Ethnolinguistic Vitality Frameworks and Their Limitations

Giles et al. (1977) proposed the first EV framework. It posits a structural analysis of intergroup relations based on three variables: status, demography and institutional support. Four status indicators are presented: social, economic, sociohistorical, and language (within and without the minority group). Demographic factors are divided into two categories: numbers (absolute, birth rate, mixed marriages, immigration and emigration) and distribution (national territory, concentration, and proportion). Institutional support can be formal (mass media, education, government services) or informal (industry, religion, culture). They contend that "these three types of structural variables [...] interact to provide the context for understanding the vitality of ethnolinguistic groups" (1977, 309).

The framework is based on Tajfel's (1974) theory of intergroup relations and Giles's (1973) theory of speech accommodation. The former posits that individuals use social categories to define themselves and the world around them. Their knowledge of membership in various social (ethnic) groups, as well as the value they attribute to their membership in such groups in positive or negative terms, shape their social identity and conception of self. Relatedly, Ehala's (2010) EV conceptualisation relies on four social psychological factors: perceptions of group strength differentials, intergroup distance, utility of socio-cultural capital, and intergroup discordance.

In their article, Giles et al. (1977) posit that the more a language group has strong demographics (numbers and proportions), the more it controls important societal institutions, and the higher its status in society, the more it is likely to "survive and thrive as a collective entity in an intergroup context" (1977, 308), thereby enhancing its vitality and

increasing its ability to transmit its language and culture to subsequent generations. However, "a group's subjective assessment of its vitality may be as important as the objective reality" (1977, 318).

Edwards' (1992) taxonomic-typological model describes the complexity of Min-L community make-up based on geographic, demographic, economic, political, and other variables. For instance, he categorises Min-L environments regarding: a language being unique to one state; attitudes of the majority to the minority; community support for the Min-L; type and strength of association between Min-L and religion; and economic development of the region.

Similar to Strubell's (2001) Catherine Wheel Model,[2] Mac Donnacha's (2000) Integrated Language Planning Model stresses the centrality of social and institutional capacity-building measures to reinforce the societal sustainability of the Min-L community and to maintain the relevance of the civic provision for their concerns.

In 2003, UNESCO published a Language Vitality and Endangerment (LVE) framework. It presents an inventory of factors that should be considered when evaluating language vitality, including the rate of intergenerational language transmission, the number and proportion of speakers, the loss of existing language domains, community members' attitudes towards their own language, and governmental and institutional language attitudes and policies. The methodology produces an analysis to determine the level of vitality/endangerment, ranging from "extinct" to "safe" (Brenzinger et al. 2003).

Borrowing from Fishman's (1991) EV framework, presented as the Graded Intergenerational Disruption Scale (GIDS), Lewis and Simons (2016) propose a Sustainable Use Model (SUM) and an expanded GIDS (EGIDS). Fishman's GIDS measures the degree of disruption in intergenerational language transmission, the fundamental pillar of EV. He argued that there were eight levels of EV, ranging from the lowest (the only remaining speakers of the Min-L are members of the grand-parent generation) to the highest (the Min-L is used in education, work, mass media, and government at the national level).

Lewis and Simons adapted Fishman's framework by adding dimensions (official recognition, vehicularity, educational use, intergenerational transmission, identity, and documentation) and levels (motivation, literacy, use in literature, face-to-face functions, etc.). They specify that language use at any level can only be achieved if five conditions are met (Lewis & Simons 2016, 125). First, functions associated with the language must exist and be recognised by the community. Second, a means of acquiring the needed proficiency to use the language for

those functions must be in place and accessible to community members. Third, motivation: community members must perceive that the use of the language for those functions is beneficial in some way. Fourth, the policy environment must not be hostile to the use of the language for those functions. And finally, societal norms must clearly delineate the functions assigned to the Min-L marking the group as distinct from the functions for other languages.

Over the years, Landry (2015; 2018; 2020) and his colleagues (Landry et al. 1989; 1990; 1992a; 1992b; 1994; 1996; 1997; 2003; 2005; 2006; 2007; 2008; 2009; 2022; Allard et al. 1986; 1994; 2005; Deveau et al. 2005; Godin et al. 2022) expanded the EV model, specified variables, hypothesized relations, and measured the interrelations between variables and the impact of each variable on EV, mostly in minority Francophone communities in Canada. Their detailed empirical research produced two main conclusions. First, significant links exist between all variables and between the variables and EV. Second, some links are stronger than others. Thus, outside the family, schools are the most important contributor to linguistic and cultural acquisition and maintenance. Min-L schools, especially if they are managed by minority members and do not only teach subject matters in the Min-L but also teach the group's history and culture, act as a compensatory weight to the family on the scale to tip the balance in favour of additive bilingualism (added ability in language B without loss of language A), rather than subtractive or replacive bilingualism (loss of ability in language A with added ability in language B).

Their initial findings motivated Landry et al. to propose their Self-determination and Ethnolinguistic Development (SED) model (2007; 2022). This "macroscopic" model is based on the proposition that "group vitality in an intergroup context can be conceived of as a power struggle between a top-down force of social determinism and a bottom-up force of minority group self-determination" (2022, 242). The authors explain that social determinism occurs when EV structural factors favouring the dominant language at the societal level lead to subtractive bilingualism among the minority group members and Min-L loss, while self-determination is a force based on a critical social consciousness of these external forces and on strategies and action that focus on social change fostering additive bilingualism and Min-L maintenance (2022, 243). The model posits that objective EV is related to three types of socialisation experiences of minority group members ("enculturation, personal autonomisation, and critical consciousness-raising" (2022, 242); see also Bourhis and Landry's (2008) group vitality and cultural

autonomy model), and how each of these is related to four crucial bilingual development variables: language competencies, group identity, community engagement and subjective ethnolinguistic vitality. The model also posits that different linguistic socialisation experiences and bilingual development have specific effects on Min-L use in different social domains like the family, friends, media consumption and public spaces.

Landry et al.'s model and hypotheses, based on enculturation, personal autonomisation, and critical consciousness-raising, provide an excellent framework for describing, measuring, and predicting EV. However, like the Lewis and Simons framework, it does not grant sufficient importance to the political dynamics involved in almost every step of LPP. They neglect the "black box" in which political decisions are made (Easton 1965a: 1965b), including bureaucratic specifics and implementational challenges of LPP (Bourgeois 2006). They simply assume that requests for EV strategies drawn from empirical research or community initiatives (inputs) will be transformed rationally into effective policies (outputs). The literature in policy analysis shows how irrational the various stages of policy formulation, notably implementation, as well as the various stakeholders involved in each stage, can be (Edwards & Sharkansky 1978; Demszky & Nassehi 2014, 11; Marume et al. 2016; Godenhjelm 2024).

Both frameworks (Landry et al. and Lewis & Simons) assume implicitly that politics is involved, but only as abstract manifestation of interrelations between majority/dominant and minority/subordinate language groups. Our LanDS EV framework, on the other hand, makes this competitive political dimension explicit in its various communal, civic, and broader societal contexts. Account should be taken of the fact that minority and majority groups are not necessarily homogenous in their socio-political and economic objectives. For instance, some may oppose other members of the same language group, for ideological or practical reasons, regularly or sporadically. On the other hand, some members of the majority group may support the minority group's initiatives and defend them in the face of other members of the majority and the majoritarian government. The bureaucracies responsible for the implementation of LPP, which can include both the majoritarian bodies and seconded minority stakeholders, may make or break LPP efficacy. Indeed, bureaucrats may implement policy *à la lettre*, deviate from it, sabotage it, etc., to protect their organisational or individual interests (Wilson 1989; Niskanen 1971; 1994; Gaspard 2024).

In general, the (E)GIDS and other existing EV models risk an overly static interpretation of Min-L sustainability, given their predominant linearity. Our cyclical and multidimensional LanDS framework, on the other hand, incorporates insights from previous models while presenting the key developmental and societal dynamics to include a more socially, individually, and psycho-sociologically attuned representation of EV.[3]

4. Minority Language Protection and Promotion versus Language Neglect and Demotion

Our reconceptualisation of Min-L societal dynamics through our framework builds on two complementary concepts previously developed in Ó Curnáin and Ó Giollagáin (2024, 397, 409):

a) There are positive and negative aspects to the Min-L vitality/fragility spectrum, entailing the propensity for non-optimal Min-L promotion to descend into or acquiesce with Min-L Neglect and Demotion (LND); LND often occurs when Min-L Promotion is pursued as a policy dispensation with insufficient focus on Min-L Protection of the existing speaker group, i.e. Language Promotion without sufficient Language Protection, as discussed in Ó Giollagáin and Caimbeul (2021);

Figure 1: Positive language protection and promotion and negative language neglect and demotion
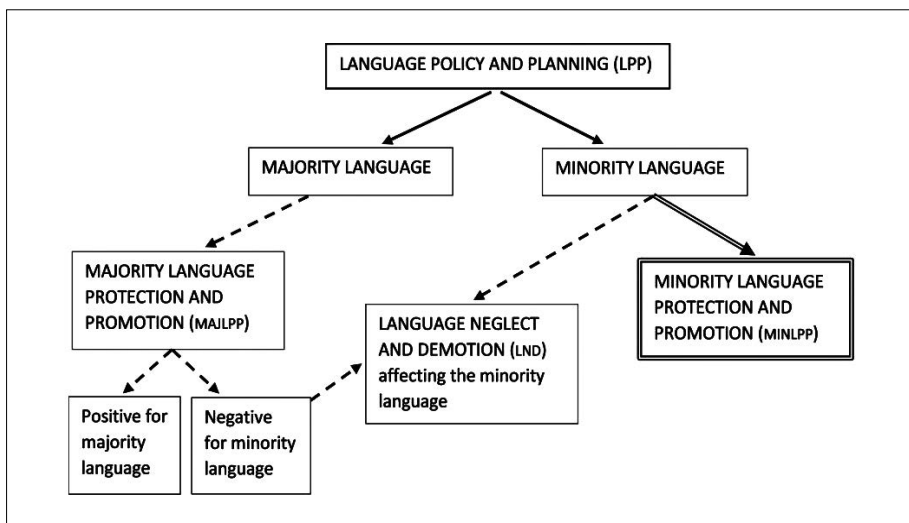
Source: Ó Curnáin and Ó Giollagáin (2024, 397).

b) Unidirectional factors in Maj-L power dynamics drive Min-L affiliation (homophily) and praxis (homopraxis) towards mal-adaptive interaction (heterophily) and interconnectedness (heteropraxis) with the Maj-L language and culture which threatens Min-L individual and community continuity, i.e. a trajectory towards ethnolinguistic shift and even societal erasure;

Figure 2: Two-dimensional space of ethnolinguistic identity scale with ethnolinguistic praxis scale
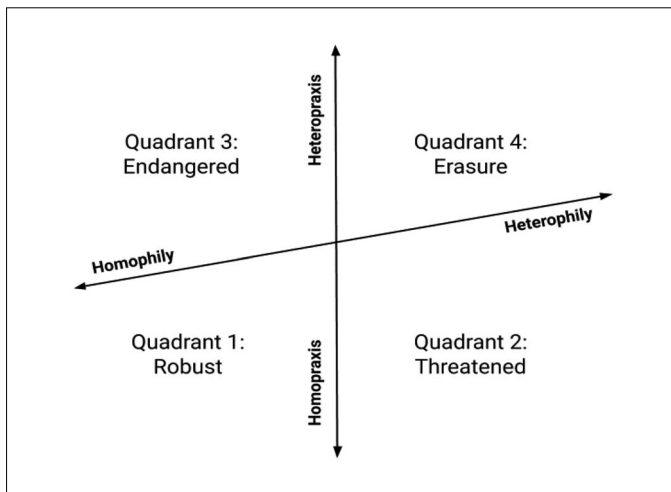
Source: Ó Curnáin and Ó Giollagáin (2024, 409).

5. General Tenets in Minority Social Dynamics of Direction, Process, Participation, and Competition

Our LanDS framework is predicated on the four key General Tenets (GTs): Direction, Process, Participation, and Competition, which we set out below. These four tenets are of central relevance in each of the four Developmental Quadrants (DQs). Ideally, the four DQs entail a progressive movement from one stage to the next, while the internal dynamic in each DQ is affected by these four GTs. The overarching crucial concept of comprehensiveness in sustainable EV, LPrPr and LPP (Ó Curnáin & Ó Giollagáin 2024, 412) entails all these GTs and DQs in dynamic complementary interaction. The four GTs are ever-present influences on the structured and inter-related dynamics of LanDS EV. It is important, however, not to assume an overly categorical interpretation of the

DQ stages, as we envisage an iterative dynamic within and between the processes, as EV is comprised of multiple reinforcing cross-contextual variables. These DQs can be viewed as sequential stages for the individual, as well as spheres of action, participation, and development for the ethnolinguistic group. Other relevant processes can be added to the framework as identified, but the purpose of the LanDS approach is to concentrate on what we consider the core societal issues.

5.1 Direction

The concept of direction in minority social dynamics in Figure 3[4] can be viewed as operating on two directional axes. Firstly, there is a vertical axis indicating the social transfer of the Min-L between generations, including the transmission of the social and cultural capital (Bourdieu 2017, 183–184) associated with the language. The key component, therefore, on the Y-axis (Figure 3) is the transfer of language skills and associated culture from the previous generation(s) to the young. Figure 3 below illustrates this as a vertical trajectory from the primary transfer of the Min-L entailing stages in social DQ1–2 to socialised transfer pertaining also to institutional/formal DQ3–4; as socialised transfer is a continuation from primary transfer of intergenerational transmission on the vertical axis. Critical-period bilingual acquisition can clearly occur outside the home or primary socialisation, for instance in Min-L preschools where Maj-L children can acquire the Min-L. However, the programmed acquisition (Calvet 2006, 60–61) of a Min-L as a secondary language also operates according to a vertical dynamic as it is mostly dependent on the transfer of skills and knowledge from teachers and authority figures in school and educational settings. The cyclical LanDS model is based on the order of four primary DQs from micro- to macro-levels, encompassing the biological and chronological development of the individual or cohort and the expanding nature of the societal and civic networks as the individual or cohort mature and develop socially (see the discussion below about Process).

Levels in Fishman's GIDS diagnostic schema can be easily accommodated in our LanDS cycle: GIDS levels 4 to 1 correspond to DQ3–4, while GIDS levels 5 and 6 correspond to DQ1–2 EV activities. Aspects of GIDS levels 7 to 8 (EGIDS 7 to 10) occur in DQ3–4 reflecting societal issues in DQ1–2. Similar to other complex systems, our DQs can be subdivided to delineate further categorical differentiation.

Figure 3 depicts the four Developmental Quadrants in the sustainable inter-generational social dynamic:

Developmental Quadrant 1 – Transmission and Acquisition of the Language;

Developmental Quadrant 2 – Socialisation and Reinforced Acquisition of the Language;

Developmental Quadrant 3 – Civic, Socio-economic and Institutional Elaboration;

Developmental Quadrant 4 – Coherent Ethnicisation.

Figure 3: Four developmental quadrants of sustainable EV in language community dynamics
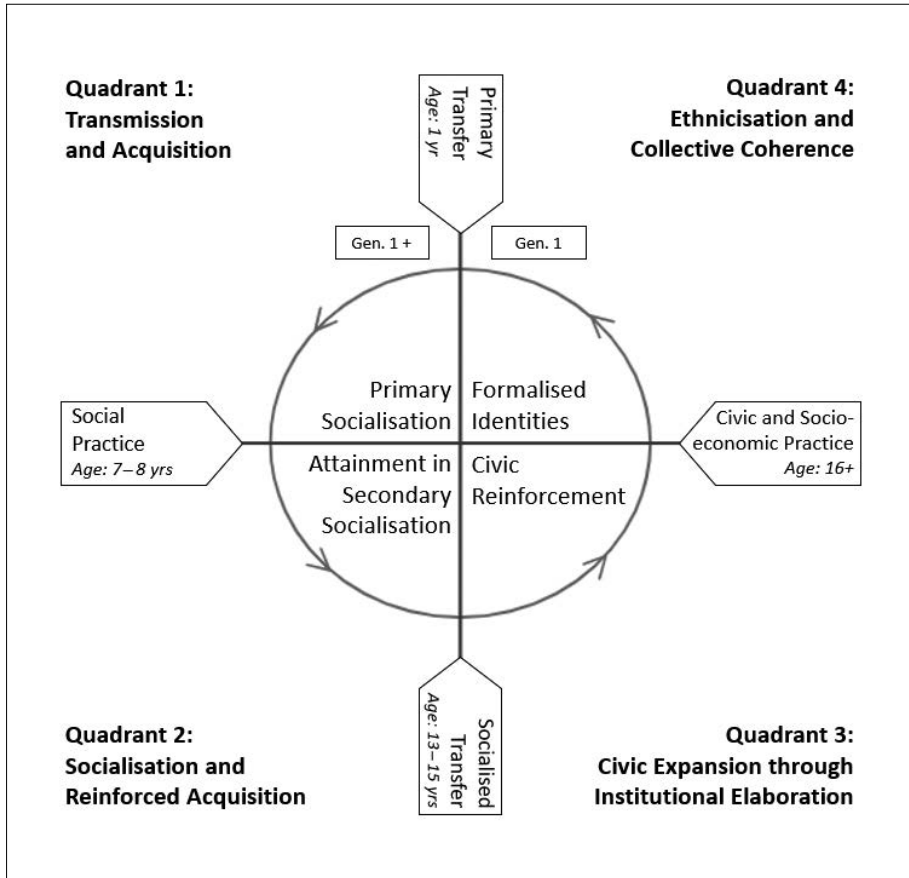
Source: Authors' own representation.

The directional arrows of the circular dynamics in Figure 3 represent sustainable EV flows through the four DQs. Direction in the dynamic can also be observed as operating on a horizontal axis, i.e. the practice of Min-L and culture, i.e. homopraxis, in various (inter-)generational social

and geographic settings. This would include Min-L practice in communities, schools, civic institutions and promotional sectors. Figure 3 above illustrates this as a horizontal trajectory from the Social Practice of language entailed in DQ1–2 to Civic and Socio-economic Practice pertaining to DQ3–4 institutional/formal processes, operating on a monodirectional micro- to macro-context trajectory, as Civic and Socio-economic Practice and positive identity formation, i.e. homophily, is proceeded by the more informal Social Practice in the vernacular social context. The widening DQ stages portrayed in the LanDS framework involves expanding networks of communities of practice, encompassing the dynamic progress from the more micro to societally expansive macrocontexts.

5.2 Process

The concept of Process pertains to the social dynamic of moving progressively within, through, and from one social or developmental stage to another. In this societal dynamic framework, the progression through four DQs indicates optimal adherence to the developments leading to greater societal sustainability. In this context, we can now discuss the four DQs.

Quadrant 1: Transmission. This pertains to the critical-period acquisition of the Min-L and culture through their transmission in the family or primary care context in which the initial processes of primary socialisation occur and embodied socio-cultural competences initially develop (Clark 2009; Montrul 2008; Péterváry 2016; Benmanoun et al. 2013).

Quadrant 2: Socialisation. This involves the maturational and social reinforcement in youth or peer-group practice of the Min-L and culture, following primary transmission in DQ1 (cf. Hasan 1988). This social reinforcement emerges from communal contexts in which the minority group has the capacity to generate sufficient social densities of young people who have previously experienced primary socialisation. This is the Process by which young people become socialised into their minority peer group beyond the home/family context. From this perspective, DQ2 can be portrayed as minority secondary socialisation. This encompasses the social opportunities in which linguistic competences can be reinforced and enhanced through social and cultural exchange between proficient speakers (as relevant to the age cohort).

Quadrant 3: Civic and Socio-economic Expansion. This emerges from the civic reinforcement of the Min-L practice in schools, collective organisations, civic institutions, and other public bodies or fora. Spheres

of employment and socio-economic mobility take place in DQ3. Partner selection and family/household formation occur within DQ3. These processes serve to reinforce formally or institutionally that which has been previously experienced in intimate, informal, and non-programmed social or communal contexts, entailing the advanced developmental stages of adults and groups (cf. Bernstein 1971 (regarding elaborated codes); Hulstijn 2017 (regarding higher language cognition)).

The credibility and effectiveness of the formal and informal language politics in DQ3 and DQ4 may determine: a) the relevant strategic efficacy/traction of Min-LPP; b) actual acceptance level of Min-LPP by the Min-L community; and c) the efficiency and relevance of Min-LPP to the socio-economic, psycho-social and other benefits of adherence to the Min-L group. Indeed, Min-L opinion formation processes, rooted in the doxa of DQ4 public discourses which are only weakly relevant to the episteme of DQ3's societally attested evidence, will inevitably militate against the possibilities of achieving coherent ethnicisation/cogent identity formation, and thus undermine meaningful community-wide adherence to collective rationales to support EV.

Quadrant 4: Coherent Ethnicisation. This creates the broader societal context in which disparate members of the minority group contribute and adhere to sustainable identity, ideological formation, and social reinforcement practices. In the context of competition with Maj-L Ethnicisation, each Min-L generation negotiates and formulates their identity through intra-Min-L and inter-ethnic discourses and participation. The aim of these continual negotiations is to achieve a sustainable compromise between assimilatory majoritarian ethnicisation on the one hand and the attainment of Min-L Civic Expansion with sustaining and (re)vitalising homophily in homopraxis on the other hand (see Figure 2, Q1). This DQ encapsulates aspects of individual and collective processes in which ethnolinguistic issues are consolidated or formalised as consequential and recognisable elements of the group's collective identity. This includes processes of how the identity is individually perceived and collectively ascribed and prescribed. The collective coherence of a minority group's sense of identity can be demonstrated by the desire and capacity of the minority to align identity ascription processes with praxis, including practical efforts to protect or enhance their societal position *vis-à-vis* competing cultural groups. Part of the essence of assimilatory processes is the naturalisation of the prescriptive Maj-L capacities and the denaturalisation of the prescriptive Min-L capacities. The normalisation of Maj-L Civic Expansion is driven by the linguistic pragmatic concept of prioritisation of a common code for communica-

tion. The Process in DQ4 is dependent on the individual's experience of DQ1–3 (see Figure 3), and on how those experiences align with identifiable or common perceptions of the rewards, challenges, and socio-political benefits/disruptions of ascribing to a Min-L collective identity. Importantly, participation in this DQ provides a sense of coherence to the minority's collective identity. It is through involvement in, or experience of, DQ4 that members of the minority community feel that their identity is psychologically, collectively, and societally meaningful to them. In the case of recessive minorities or language groups experiencing significant ethnolinguistic fragility or demolinguistic decline, individuals may maintain a sense of minority identity, but due to issues of the demographic disruption and contraction, it becomes more challenging for them to see how their individual identity can contribute to sustaining a coherent sense of collective identity aligning with embodied praxis.

Through engagement in the psychological and societal identity-forming interactions of DQ4 Processes, individual minority speakers can gain or demonstrate a sense of solidarity through their collective adherence to the group. The Process also encapsulates actions by which groups of people support and take pride in minority organisations that seek to demonstrate and foster positive perceptions of the minority group and a productive sense of collective identity. This perception of a coherent identity is often dependent on community and civic leaders articulating realistic views of both the advantages and challenges to the minority's societal condition. Positing a feasible minority social identity into the future becomes increasingly difficult if minority speakers cannot attest to collective coherence *vis-à-vis* Min-L identity. Incoherent or sectionalist assertions of minority identity, especially appeals to minority identity that are overly dependent on participation in (DQ2–4) formal and informal organisations, or in programmed acquisition in schools (e.g. New-speakerism, cf. O'Rourke & Walsh 2020),[5] can create the social conditions in which individual Min-L identity on the one hand and processes of collective affiliation with minority culture on the other begin to diverge. This divergence in individual and collective identity formation processes (cf. Jenkins (1997, 12–14) on cultural differentiation) has been exacerbated, chiefly discursively but also practically, in recent years by the influence of post-structuralist approaches on formal Min-LPP frameworks (cf. e.g. the discussion on Gaelic LPP in Williams (2023, 110–148, 154–211) and McLeod (2020); MacLeod & Smith-Christmas (2018) and Royles et al. (2024) for Welsh LPP). The post-structuralist approach to Min-LPP can be summarised as prioritising the individualised take-up of Min-L opportunity or programmed practice,

arising from official Min-L promotion, to the detriment of the necessary organisational and strategic focus on the collective societal concerns of the minority group. An all-pervasive challenge for EV, present in all four DQs, is the contraindication of late-modernity and collective participation and action, i.e. the gap between elaborated and fragmenting individualism, including mediatised mobilities, and the necessity for collective identity formation and participation.

The emergence and elaboration of language politics pertains to DQ4. Language politics here refers to:

a) How language issues impinge on the general politics of the Min-L community;
b) The politics of the language minority's engagement with sympathetic or hostile majority politics;[6]
c) The reflexive engagement of the minority with formal language promotion agencies;
d) The minority's engagement with informal as well as officially or academically derived discourses.

In some cases, the lack of political adroitness or weak societal relevance of the formal administration or implementation of DQ3 civic initiatives can have a detrimental effect on DQ3–4 operating as positive dynamics for the Min-L. DQ3–4 are of vital relevance in stabilising the Min-L in society as these DQs provide the critical collective context in which a Min-L cohesive group devises and implements creative approaches to bolster their situation (cf. Fishman 2001). As discussed in Ó Curnáin and Ó Giollagáin (2024, 403) regarding "Anglobalisation" and World Language Systems, demographically large and even mega languages (e.g. French, Hindi, Bengali, non-English European languages, etc.) are involved in this dynamic interplay of individual and collective agency as both minoritised and minoritising language cultures in what can be characterised in its negative aspects as the tragedy of the global sociolinguistic commons.

5.3 Participation as Praxis

The concept of Participation in the dynamics refers to the various social players, participants, groups or communities of practice in varying social, socio-economic, political, and cultural activities pertaining to minority society across DQs, including their involvement in institutional sectors, such as sports clubs and schooling, that aim to serve the communal requirements of the Min-L group.

The social players encompassing the societal dimensions of minority social dynamics include:

- Minority primary language speakers entailing participants in primary Language Culture;
- Minority secondary language speakers entailing participants in a Minority Tangential Culture (see below) relating to the primary Language Culture;
- Minority secondary language learners/speakers encompassing adherents or participants in a Minority Neo-culture (see below);
- Majority members in favour of provisions for the minority;
- Majority members opposed to provisions for the minority;
- Community leaders of the primary Language Culture, and importantly those leaders based in the Min-L social geography;
- Sectoral leaders in the Min-L civic promotion or in LPP bodies;
- Political, bureaucratic and institutional leaders influencing (positively or negatively) civic provision for the primary Language Culture and Min-L civic sectors.

The implication of our framework is that the individual and collective actions (and inactions) of all participants during each of the four processes shape the LPP outcomes and affect Min-L EV.

5.4 Competition between Participants

The fourth GT of Competition between Participants concerns the pivotal competitive dynamics between the various Participants in relation to prescriptive and political power, geo-demography, and socio-economic, civic and cultural resources. A key aspect of the competitive dynamic in EV is the comparative dimension, as Maj-L developments may far outstrip those of the Min-L group, producing a perception of Min-L underdevelopment and restricted options. This competition contributes to positive or negative societal forces determining a supportive or a detrimental dynamic for maintaining the social integrity and the *in situ* salience and EV of the Min-L. From the Min-L group's perspective, the Min-L Participants require greater power to allow for the productive progression through the four DQs. Min-L group relative competitive advantage builds minority confidence and affords the minority collective capacity to address the competitive dynamic with majority speakers and their societal advantages. On the other hand, a Min-L disadvantage and impediments to minority speakers progressing through the four DQs undermines the Min-L and culminates in:

a) the growth of majoritarian power in the minority societal context;
b) the increasing assimilation of minority members into the majority's dominant social and cultural praxis; and, ultimately;
c) the monolingualisation in the Maj-L of a formerly differentiated Min-L group.

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The LanDS theory of EV will have obvious LPP and LPrPr implications as interventions in relevant DQs will vary dependent on the measurable effects of contributing variables in specific DQs and in the overall LanDS dynamics (see the discussion in Analysis below).

6. Social Dynamics of Progression through the Developmental Quadrants of Minority-Language Ethnolinguistic Vitality

Figure 4 illustrates the circular progression from DQ to DQ in Min-L EV. The contracting flow represents the typical threatened ethnolinguistic minority – the contraction of the flow indicating demolinguistic deterioration in the social dynamic, as in the case of language shift pressures. The comparative contraction in the Min-L flow also represents the disjunctures and impediments for the Min-L community to reproduce commensurately its group vitality from generation to generation and to maintain its demolinguistic status. As sections of the Min-L vernacular (L1) community have been experiencing assimilative pressures from the competing stronger ethnolinguistic group(s), the contracting flow depicts the lack of continuity in Min-L transmission from a generation with Min-L competence and social capital to the subsequent generation raised in the language of the competing ethnolinguistic group. As stated regarding Figure 3, Min-L EV is dependent on the four key GTs of Directional, Processual, Participatory and Competitive progression through the DQs by individuals, cohorts and groups. As a fluvial metaphor, EV's directional tenet is that of an intergenerational cycle, recalling, for instance, the familiar water cycle from rain to stream to river to evaporation and rain again. The LanDS logic, therefore, encompasses an evolving, intergenerational, biological/chronological cyclical dynamic operating in the linguasphere with its myriad internal and external interrelations (cf. Mufwene 2001).

Figure 4: The four developmental quadrants in minority-language contracting social dynamics
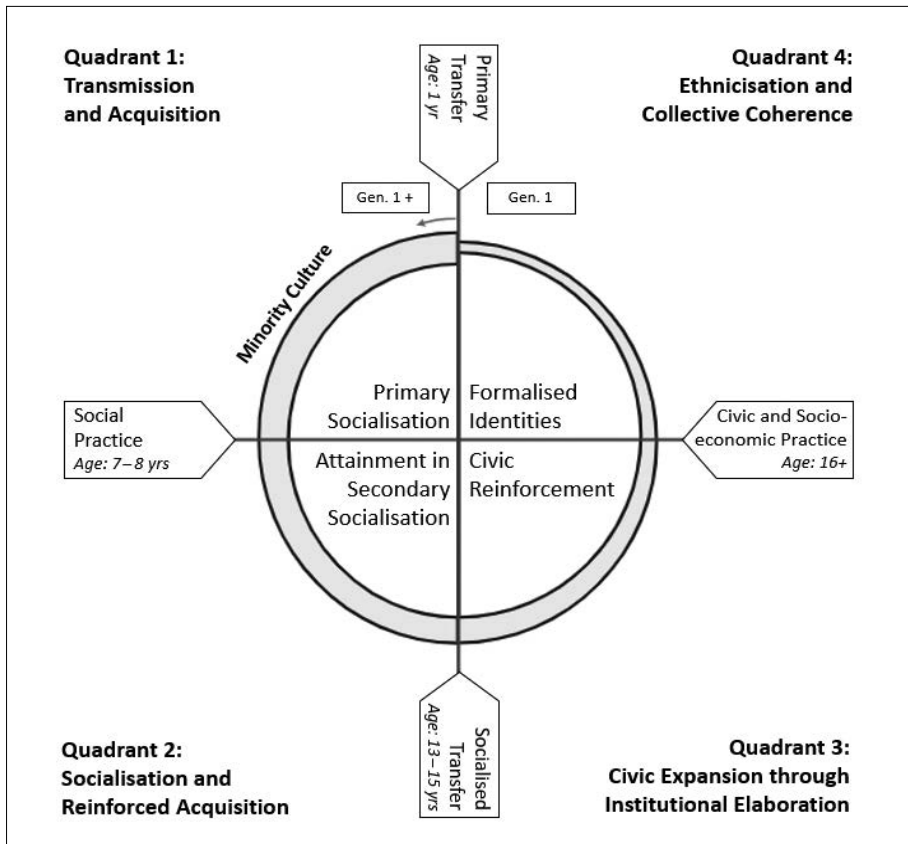
Source: Authors' own representation.

The demographic extent of the linguistic minority is a primary factor in a minority's capacity to preserve its ethnolinguistic vitality, as argued by Giles et al. (1977). Relatedly, Ó Giollagáin et al. (2007a; 2007b; 2020) indicated that maintaining high proportional densities of active speakers in the specific social geographies of the vernacular group is the strongest determining factor in ensuring the social reproduction of the minority in the next generation(s) (see also Norris 2004; Ó Riagáin 1997). The correlation between geodemographic factors and EV is a common conclusion in the literature (Fishman 1991; Landry et al. 2002; Lewis & Simons 2016). Ongoing contractions, therefore, in the absolute demographic extent of the minority group, and significant demise in the geographic social densities of the minority speakers, obviously imply that there are fewer and fewer individuals participating in the four DQs.

Reductions in numbers of participants experiencing the benefits of socialised transfer, and peer and civic reinforcement, militate against possibilities for the successful collective and socio-economic progression from one stage to the next in sufficient numbers and cohort densities to make these processes salient features of the youth minority intra- and inter-group relations. Figure 4, therefore, depicts the social dynamic of a Min-L group contending with the societal pressure of language shift to the dominant language and the ongoing assimilation of the minority group in the normative functions of the dominant culture.

7. Social Dynamics – Majority-language Speakers in the Minority Context

Figure 5: Majoritarian culture in the minority-language social dynamic
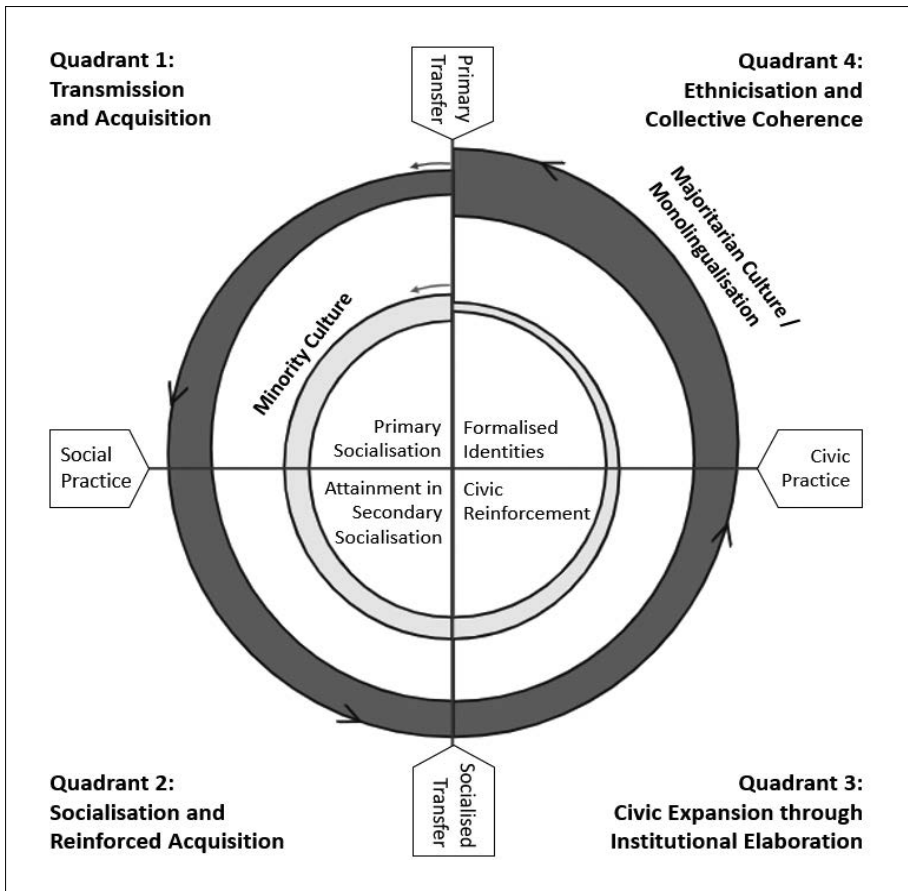
Source: Authors' own representation.

Figure 5 expands on the presentation of the LanDS structure by illus-trating the influence of the Maj-L Participants in the Min-L social dy-namic. The Figure includes a darker grey, expanding flow with direc-tional arrows indicating that the majority speakers act in accordance with a positive dynamic through the DQs in the context of the Maj-L and culture. The expanding dimension to the Majoritarian flow indi-cates the demolinguistic growth of Maj-L speakers through the DQs, and, by corollary, expresses the detrimental or subtractive effect, from a minority perspective, caused by the (dominant) practice of the Maj-L in the social geography, as well as the civic and institutional contexts of the minority group. The outer Majoritarian Culture flow encircles the Minority flow to indicate that minority cultures undergoing LS have to function within the strictures of their subordinate relationship to the power structures, civic dominance and normativising influence of the Majoritarian Culture. From a Maj-L/Lingua Franca perspective, their interventions and influences typically intensify initially at DQ2–4, often implicating the recruitment of parental/early-years input into LS. The mid- and high-level Maj-L interventions are reflected in similar level Min-LPP attempts to generate agency in DQ2–3 concerns in particular.

8. Social Dynamics – Participants in the Tangential Culture and Neo-culture in the Minority Context

In Figure 6, two additional semi-circular bands are added to the Min-L social dynamic – one representing the Tangential Culture in the Min-L society and the other indicating the Minority Neo-culture. The semi-circular band, attached to the outside of the Minority Culture, with a dotted border portrays the Tangential Culture in the Min-L social dy-namic. This Tangential semi-circle represents the role in the minority social dynamic of some Min-L speakers who are not L1 speakers of the Min-L. A Participant in the Tangential Culture refers to a speaker who has acquired the Min-L through participation in some communal as-pects of the Min-L peer-group socialisation in the social geography of the Min-L L1 community. The Tangential Participants (TP) may be con-sidered to be in a tangential relationship with the L1 community as they have had social experience of witnessing the L1 language and culture in their *in situ* social milieu, rather than relying entirely on school-based acquisition of some Min-L competence. As they have not experienced Min-L primary socialisation (DQ1) and have only partial experience of the Process of secondary socialisation (DQ2), their inclusion in the minority social dynamic commences at the intersection of DQ2–3. The

TPs have, therefore, participated in some of secondary socialisation and have the linguistic competence to avail of and contribute to the Civic Reinforcement of the Min-L, hence the Tangential semi-circle pertaining to DQ3–4 and adjacent to the Minority Culture flow. The trajectory on the Tangential partial circle can be considered to align favourably with positive aspects of the Min-L social dynamic in DQ2–4. The trajectory of the TP circle continues through DQ2–4 (marked by a dotted circle).

Figure 6: Tangential Culture and Neo-culture in the minority-language social dynamic
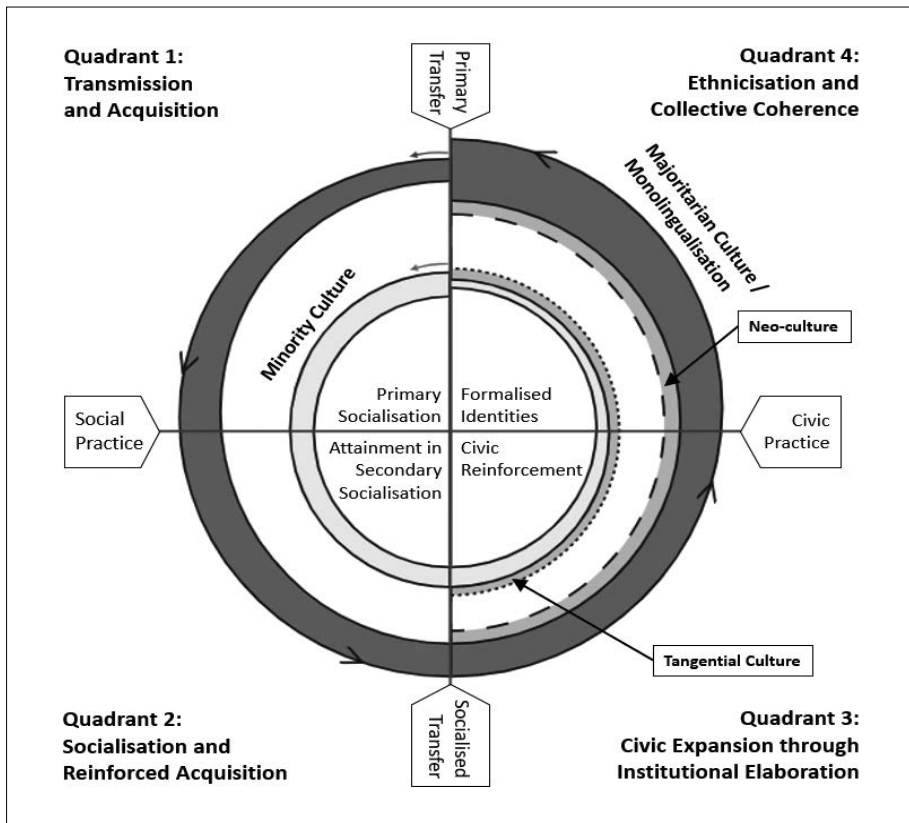
Source: Authors' own representation.

An example of a TP would be an L1 speaker of the competing Maj-L who had the opportunity to actively participate in higher-density minority L1 social networks and to acquire aspects of his or her Min-L competence in social interactions. The TP can be differentiated from the minority L2 learner in that the L2 learners are generally dependent on school-based

pedagogical inputs. Due to aspects of the *in situ* Min-L acquisition process, the TP can be distinguished from Min-L L2 learners in that TPs generally are more likely to achieve a higher level of linguistic attainment in the Min-L and to be more aware of aspects of the social culture associated with the minority than those solely reliant on school-based Min-L learning.

9. Social Dynamics – Participants in the Neo-culture in the Minority Context

Also in Figure 6, an inner semi-circle, adjacent to the Majoritarian Culture and bordered by a dashed line, is added to the social dynamic to represent the Participants who pertain to the Min-L Neo-culture. This semi-circle, therefore, represents the L2 dimension in the minority societal condition, and the effects of the L2 learners' and speakers' interactions in the minority dynamic. Participants in the Neo-culture (Neo-Ps) can be differentiated from both the L1 speakers and Participants in the Tangential Culture in that they have not experienced or gone through DQ1 primary socialisation or DQ2 secondary socialisation as practiced by the L1s or the partial societal experience of TPs in Min-L peer-group practice. In general, the Neo-Ps may ascribe or assert a Min-L identity by virtue of benefitting from pedagogical or curricular provision in Min-L schooling, either by participating in Min-L classes in the Maj-L school system or by virtue of being enrolled in Min-L immersion programmes. The Neo-Ps – in the circumstances where they wish to ascribe to the minority identity – conform to a process of programmed acquisition which entails little or no interaction with those who have been involved in social networks where Min-L socialisation is communally possible, hence the Neo-culture semi-circle pertaining to DQ3–4 and adjacent to the Majoritarian flow in Figure 6.

Neo-Ps can be considered to have a beneficial effect on the dynamic when their concerns align with those of the minority L1 and TPs. This can often be the case when the interests of the Neo-Ps evolve beyond them having a focus on the Min-L as a school subject. As educational provision for Min-L curricular concerns can be costly from the perspective of human resources, institutional energy, political focus, and financial expenditure, a schools-based focus on the minority that fails to develop or engender a societal dimension may be deemed as a drain on resources and energy, and a deflection from the required societal focus. Therefore, from this resource-allocation and outcomes perspective, Neo-Ps may be depicted as contributing negatively or detrimentally

to the minority dynamic. This occurs where the interests or engagement of the Neo-Ps in the Min-L are realised as a desocietalised and decontextualised focus on the Min-L culture. We see this phenomenon in New-speakerist Min-L identity ascriptions and assertions crowding out the group identification practices of vulnerable L1 communities undergoing LS.[7] In such cases, language minorities who are losing their local societal pre-eminence in their traditional social geography find themselves being subsumed into the symbolic requirements that the majority group and majority speakers may have for the Min-L and culture. Put simply, the civic promotion of the Min-L on the one hand and the societal realities of the existing community of Min-L speakers on the other may diverge ideologically.

However, in the cases where initial schools-based engagement with the Min-L may evolve into a more societal and cultural focus (as with the TPs), the Neo-culture can be deemed to align with a positive, supportive minority social dynamic. Hence, certain Neo-Ps in the overall Min-L context can contribute beneficially, particularly in DQ3–4. Intra-diasporic Min-L speakers from other jurisdictions or social geographies, especially where they are Maj-L speakers, may also boost Min-L EV (cf. the case of the Min-L Austrian Slovenians being boosted by Maj-L Slovenian immigrants to Austria discussed in Zorčič & Sorgo (2025)).

10. Social Dynamics – (Re)assimilation of the Participants in the Minority Social and Cultural Dynamic into the Majoritarian Social and Cultural Context

Figure 7 expands the model further by illustrating the assimilatory pull towards the majoritarian culture, associated with the various Min-L Participants. The curved unidirectional arrows represent the assimilatory pull from the Minority, Tangential Cultures, and the Neo-culture to the Majoritarian Culture and to its social dynamics. Figure 7, in essence, expresses the ubiquitous assimilation of minority speakers into majority society. This phenomenon is particularly noticeable in the case of threatened Min-L groups experiencing the detrimental social dynamic of LS.

Figure 7 includes three important flows represented by specific curved arrows:

Black curved arrows: The four curved arrows in each DQ from the Minority Culture to the Majoritarian Culture represent the loss of Min-L

speakers to Maj-L assimilation during the various DQ social dynamics, indicating: disruption to primary and secondary socialisation of DQ1–2; Min-L speakers having no recourse to Min-L Civic Reinforcement as in DQ3; and circumstances where participation in coherent Min-L affiliation, identity-formation, or feasible Min-L politics becomes collectively untenable or societally impossible as in DQ4.

Dotted curved arrows: The two dotted curved arrows in DQ3–4 depict the (re)assimilatory force on TPs back to the Majoritarian Culture. TPs originally emerged out of the Maj-L group via community exposure to Min-L secondary socialisation. However, for those TPs in the social geography of the minority culture who no longer attach social or cultural value (capital) to the social practice of the Min-L, or for those for whom the Min-L no longer holds symbolic value, the re-integration or re-assimilation of the TPs back into the Majoritarian culture becomes inevitable. This occurs for the TPs for whom their practice of the Min-L was both time- and process-specific.

Square-dotted curved arrows: The two square-dotted curved arrows in DQ3–4 depict the (re)assimilatory force on Neo-Ps back to the Majoritarian Culture. Similar to the TPs, the Neo-Ps originally emerged out of the Maj-L group via the Maj-L's interest in the symbolic value of the Min-L. These arrows, therefore, represent the re-integration or re-assimilation of the Neo-Ps back into the monolingualising and mono-ethnicising dynamic of the Majoritarian culture for those whose interest in or commitment to the Min-L has waned.

In the case of endgame LS, the differentiation of the social dynamics of the various participants becomes an irrelevance as assimilation into the subordinating majoritarian culture necessarily becomes the only viable societal option.

Figure 7 depicts the disruption engendered by the majority speakers to the potentially positive dynamic of the minority speakers and the disturbance to their progressive movement through the DQs. For example, the participation of monolingual Maj-L speakers in the schooling of minority speakers will almost certainly lead to the situation where the *lingua franca* of the primary pupils will be the Maj-L, thus precluding the possibility of the undisrupted progress of the young minority speakers through the Min-L peer-group social reinforcement of DQ2 Processes. In this case, for the young minority speakers, their language will be confined to a home language which has limited wider social functions. The narrowing of the social function of the Min-L to increasingly isolated family units or formal contexts is a typical process in LS.

Figure 7: The (Re)assimilatory pull from the minority-language participant categories into the majoritarian culture
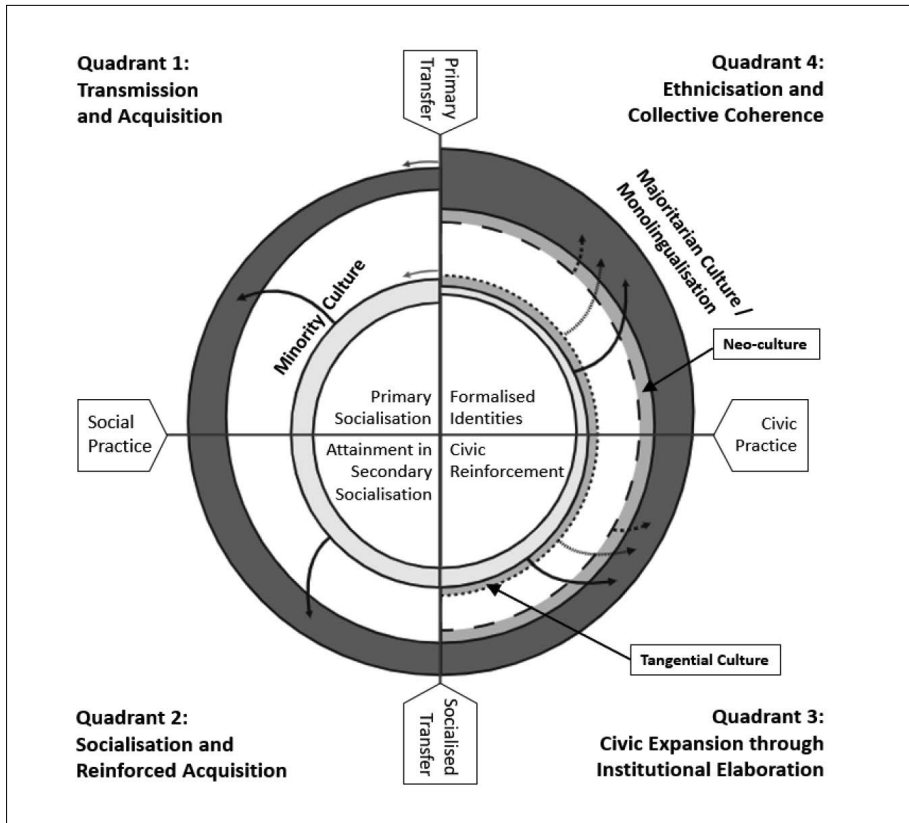
Source: Authors' own representation.

11. Brief Case Study for the LanDS Framework: The Irish-speaking Community

The following subsection includes data on the Irish language and speaker communities in Ireland as an initial case study to illustrate the analytical relevance of the LanDS framework, as Irish is conceivably the most supported Min-LPP endeavour in modern times, providing a wealth of relevant data to all of the theoretical concepts relevant to the theory expounded in LanDS. Some of this data is presented according to our DQ structure:

Quadrant 1 – Transmission: Various studies and data sources indicate that the Irish-speaking vernacular or native-speaking community in the official Gaeltacht now numbers around 20,000 people (Ó Giollagáin

et al. 2007a; 2007b; Ó Giollagáin & Charlton 2015; the demolinguistic data, including age profiles, of the Irish Census on the amount of Daily Speakers of Irish in the Gaeltacht[8]). This statistic represents the demolinguistic extent of the speaker cohorts in the community with the capacity to provide the social-linguistic context in which the Gaeltacht youth cohort can experience the Process of primary socialisation in Irish.

Quadrant 2 – Socialisation: Sociolinguistic surveys in the Gaeltacht indicate that the peer-group use of Irish among the young is less than the proportions of Irish speakers reporting a fluent competence in Irish. For instance, in Ó Giollagáin et al. (2007b), 24% of the respondents in the higher Irish-speaking social density Category A Gaeltacht districts (67%+ daily speakers of Irish) reported in the study's Teenager Survey that they mainly spoke Irish to their friends, despite 91% of the Category A teenagers reporting a fluent or good competence in Irish. See also data from Mac Donnacha et al. (2004) and Péterváry et al. (2014). This implies that only a quarter of the youth in the strongest Irish-speaking Gaeltacht areas have experienced Secondary Socialisation in Irish. The corresponding youth cohort statistic for the whole of the official Gaeltacht districts is 9% of the youth cohort. Attendance at Gaeltacht summer colleges by L2 learners, and other youth courses, provides the social context for Tangential speakers of Irish to emerge.

Quadrant 3 – Civic Expansion: Irish is arguably the most civically reinforced Min-L in the world. Irish is provided for in constitutional recognition, various legislative provisions, official promotional and other civic agency supports (see Ó Giollagáin (2008) for a discussion on the scope of the official provision for Irish-language civic promotion). Primary and secondary schools in the Irish Republic teach Irish as a core curricular subject. This provision in the educational system creates the institutional context in which the young are initially exposed to the symbolic and cultural appeal of Irish as a second language. The status and teaching of Irish in the educational sector provides the pedagogical basis for the growth of the Irish-language L2 Neo-culture (see Figure 6). Academia, arts and media sectors receive relatively generous public subventions to provide Min-L services and conduct Irish-language initiatives and ongoing projects. All the mainstream political parties operating in the Irish State attest to the symbolic value of Irish and the important role of Irish as a significant component of Irish identity. The British Parliament ratified legislation, the Identity and Language (Northern Ireland) Bill, in 2022 to recognise Irish as an official language of Northern Ireland.

Quadrant 4 – Coherent Ethnicisation: Ó Giollagáin and Ó Curnáin (2016; 2024) have argued that the collective coherence of Irish-language identity has been compromised by the prioritisation of L2 concerns in the official approach to Irish-language civic promotion. Ó Giollagáin's (2014b) analysis contends that the official reluctance to differentiate between L1 and L2 sociolinguistic concerns has led to the counterproductive LPP approach where L2 sociolinguistic perspectives are being foisted on the remaining L1 Gaelic communities of the official Gaeltacht, now in crisis. The analysis argues that this L2 prioritisation in the L1 context has contributed to the demise of the Gaeltacht via a LPP misdiagnosis of the sociolinguistic situation, while also encouraging a form of civic denialism about the ongoing societal collapse of Irish-speaking communities in the Gaeltacht. In the Irish context, feasible, differentiated LPP approaches to L1 and L2 requirements have been replaced by irrelevant institutional orthodoxies which are obstructing those with a sincere sense of affiliation with Irish-language identity from engaging in relevant political and institutional endeavours to bolster and protect their language.

12. Analysis

Frameworks and models are measured by their heuristic contribution: whether they encapsulate most (if not all) of the pertinent variables and situations they seek to illustrate. In this case, does the social dynamic theory discussed here describe, explain, and predict the societal phenomena underpinning the prospects for the EV of a minority group? If so, they may also provide a practical (normative) purpose by suggesting effective policies and programmes to enhance the societal sustainability of an ethnolinguistic group. Our contribution is academic: we hope our LanDS framework improves upon existing frameworks, notably those of Fishman, Landry et al., and Lewis & Simons. Our framework is based on our review of the literature on EV, including other frameworks, and on fieldwork experience as well as Min-LPP analysis in several Min-L contexts (cf. Ó Giollagáin et al. 2007a; 2007b; Ó Giollagáin & Charlton 2015; Ó Giollagáin et al. 2020; Bourgeois 2024a; 2024b). The improvement introduced by the LanDS structural theory is that it accounts for the progress of the individual through key developmental (DQs) stages while also indicating the parallel reinforcing social developmental processes (see Figure 3), which entails sociolinguistically relevant General Tenets (GTs) such as comparative resource distribution among Min-L and Maj-L speakers and groups. LanDS focuses on, therefore, the in-

terplay between the individual and society, and society's impact on the individual.

Our LanDS evidence-based and universalising approach provides a useful structured approach for devising policies to improve EV and assessing actual impacts on minority situations. Implicitly, the framework suggests that effective Min-LPP will work as a holistic integration of DQ1–4 and the four GTs, aiming at comprehensiveness pertaining to the individuals and the ethnolinguistic groups, while recognising the foundational relevance of DQ1–2. DQ3–4 build on the formative socialisation processes in DQ1–2. Indeed, prioritising DQ3–4, at the expense of DQ1–2, is unlikely to produce the most beneficial societal outcomes or the optimal cost-effective results from LPP inputs (cf. Grin 2003; 2024).

The case for this new social dynamic approach to EV stems from the growing awareness of a "reality gap" between the formal aspirations for Min-L promotion and the lack of traction of aspirational Min-LPP in existing speaker communities (cf. Ó Giollagáin et al. 2020; 2007a; 2007b; Ó Giollagáin & Caimbeul 2021; Lenoach et al. 2012; Ó Giollagáin & Ó Curnáin 2016; Brookes & Roberts 2013; Ó Riagáin 2008; Iurrebasso 2023;[9] Bourgeois 2024b). Similarly, we propose this new EV framework to: a) support more socially attuned diagnostics of minority speaker realities; and b) provide an analytical context for reformulations of Min-LPP to address issues of societal endangerment in the contemporary Min-L condition (cf. Bradley & Bradley 2019, 1–5). Individualised (or often atomised) language promotion at the expense of Min-L community protection is in danger of eliding the obvious reality that Min-L groups are perishable ethnolinguistic entities. Unless an ethnolinguistic group possesses/generates the social (interpersonal), societal, cultural, institutional, and political capabilities and related collective capacities that frame and orient individual and collective behaviour to maintain and replenish themselves intergenerationally (cf. Ó Curnáin & Ó Giollagáin 2024; Bastardas-Boada 2013, 161) in sufficient societal densities, the prospects of language minorities sustaining themselves as differentiated ethnolinguistic groups will inexorably fade.

As languages are socially perishable, it is critical to understand the social dynamics by which they defend or maintain their vitality in the societal spheres most relevant to their collective maintenance. The expenditure of public money and human resources on providing the institutional opportunities for individual take-up of Min-L opportunities or symbolic practices can only make strategic and financial sense if it is balanced by a policy and support framework that aims to attenuate the

trajectory of demolinguistic decline in the existing minority vernacular group. Admitting officially this Min-L societal challenge would be a first step in mitigating collective Min-L anxieties about minority-community demise (cf. Ó Giollagáin et al. 2020, Chapter 5).

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Our assessment of the limitations of existing EV frameworks is that they are not sufficiently cognisant of: a) the interactional, intra-stage social dynamics in the various societal processes that govern and sustain Min-L practices in primary socialisation (DQ1 above), secondary socialisation (DQ2), civic reinforcement (DQ3), and the processes of psycho-social affiliation and adherence to the minority cultural group (DQ4); and b) the inter-stage interdependency of the productive participation in the various processes to progress positively to subsequent DQ stages in the overall Min-L social dynamic. A new model incorporating these social dynamics and facilitating dynamic progression is required. The Min-L planning cycle, as discussed in Gazzola et al. (2024, 4–5; cp. 2016), for instance, falls within our systemic approach primarily under the scope of DQ3 Processes and initiatives. However, non-optimal Min-L politics emanating from approaches to DQ4 concerns can often lead to dereliction or inertia in what are initially conceived as positive recommendations for Min-LPP engagement with DQ3 concerns. A corollary of these DQ3 impediments to DQ4 progress is that chronic social dynamics in DQ4 language politics can void the civic aspirations and institutional efforts of DQ3, especially when the societal collapse of the Min-L community becomes evident (see Fishman (1991, 143) on the "Irelandization" problem in LPP, where in our terms, DQ3 prioritisation, supported by post-structuralist discourses, offers symbolic institutional engagement to Min-L communities without sufficiently addressing their (post)modern assimilation to Maj-L societal normativity, involved in our DQ1–4). Put simply, the common prioritisation of DQ3 civic concerns at the expense of DQ1–4 comprehensiveness is ineffectual as Min-LPP.

The archetypal trajectory indicated by the grey circle in Figure 3 refers to the societal condition of relatively stable language-in-society maintenance in both multi- / monolingual contexts as experienced in premodernity. Although not central to our framework, Figure 3 can provide a heuristic overview of Maj-L stability historically and in modernity. The central theme in LPP is the unprecedented instability of language-in-society at a global and local level which occurs in (post)modernity caused by the increases in physical and virtual mobility, entailing, for instance, migration and digital revolution. Our framework helps to analyse the four major thematic GTs (Direction; Process; Participation and Competition) which are central to the dynamics of (in)stability in (post)

modernity. This overall framework displays the processes of (post)modern reflexivity in that it engages with actual Min-L societal conditions which both drive the instability and inform the analytical tools and practical interventions to address the socio-cultural, economic, political, demolinguistic, and identitarian interactions between Min-L and Maj-L speakers and groups. It must be acknowledged, however, that formal Min-LPP is either impractical or unfeasible for most ethnolinguistic groups "because of their subordination to an exclusive Dominant MAJLPP" (Ó Curnáin & Ó Giollagáin 2024, 405). In order to address modern problems, one needs to use modern tools. The progression from Figure 3 to 7 is an indication of the processes of sociolinguistic complexification in modernity, where in particular DQ3–4 increase their intensity and, therefore, their societal relevance.

Figure 5 typifies common Min-L contexts with rudimentary and clearly unsuccessful Min-LPP. Figure 5 illustrates the exceptional situations of extensive Min-LPP where there are formal Min-L interventions concentrating in DQ2–3. In a global context, of course, the type of Min-L represented in Figure 6 is mainly found in the highly modernised societies, although even in those societies it is rare. Figure 7 is illustrative of the societal collapse of the Min-L group, again within the rare context of highly modernised LPP interventions.

The overall framework also provides an analytical tool to help clarify the academic, political and civic discussions and approaches to these issues, especially Min-L instability. For instance, an over-prioritisation of any DQ will be less than optimal in addressing Min-L realities. Much of current LPP discussions and interventions revolve around what are primarily DQ3 Processes. The prioritisation of DQ3 contexts appears to be based on the capacity for formal agency among civic bodies to intervene at this level. The romanticisation and aesthetisation of the Min-L culture (i.e. the aesthetic version of linguism)[10] also emanates from these dynamics primarily from within DQ3 (cf. Cronin 2019), and risk deflecting focus through naïve or deliberate attention away from pressing Min-L social concerns. Interventions should encapsulate all DQs holistically (cf. the discussion in Ó Curnáin and Ó Giollagáin (2024) on Min-L comprehensiveness).

As much of current Min-LPP is primarily concerned with supporting institutional provision for Min-Ls,[11] officially backed Min-L provision is chiefly focused on institutional concerns pertaining to DQ3 Processes, such as Min-L media, arts, schooling, and the symbolic civic/administrative visibility of Min-Ls. Formal supports which align with the social dynamics of DQ1–2 rarely occur in Min-LPP. Indeed, the Irish govern-

ment discontinued a DQ1-targeted initiative in 2011, *Scéim Labhairt na Gaeilge* (the Gaeltacht Irish-speaking family grant scheme). One hundred years of the Irish State's LPP exertions and expenditure already abundantly illustrate that the DQ3 institutional focus is unlikely to compensate for deficiencies in DQ1–2 social prerequisites.

The basis to the academic contentions between the mainstream language-in-society approach (cf. Ó Giollagáin et al. 2020, § 8.4.1) and some of the practitioners of the "barren verbiage" of the post-structuralist approach (Edwards 2012, 38) can be located in the lack of agreement about what constitutes the core meaningful unit for assessing a group's EV (i.e. DQ1 Transmission, DQ2 Socialisation, DQ3 Civic and Socio-economic Expansion, and DQ4 Coherent Ethnicisation): the individual practitioner of the Min-L on the one hand, or the interactional capacity of the minority speakers to develop and maintain meaningful levels of collective salience for the Min-L on the other (cf. Williams 2023, 148–151). Both individual needs and collective requirements should be addressed; however, given the reality of language as a social phenomenon, the communal-focused interventions are more effective, as would be expected. Indeed, although the options for the post-structuralist individual may appear to open a broad *vista* of experimental possibilities, an amalgamation of individualised possibilities can never amount to a coherent sense of ethnolinguistic minority identity in the absence of the social salience of the Min-L in a given geography. This salience axiomatically stems from the *in situ* transmission and socialised transfer of the Min-L (see DQ2 above), i.e. the "[o]rganizations of systems of meaning" (Bastardas-Boada 2013, 161).

This language-in-society/post-structuralist dichotomy is akin to academic debates in oncological biology between those concentrating their analysis on individual cells, referred to by Smithers 1962 (cited in Ball 2023, 407–409) as "cytologism", on the one hand, and those whose analysis leads them to argue that "[c]ancer is a disease of organization not a disease of cells" on the other. The analogy in the language sciences would be that the key to understanding language maintenance and shift is not primarily analysable at the level of individual speakers' circumstances, but at the organisational societal level which determines the competitive social and intergenerational dynamics between speakers of Min-Ls and those practising or affiliating with Maj-Ls. Just as studying "internal-combustion engines would not help anybody to understand our traffic problems" (Ball 2023, 407–409), studying exclusively the perspectives of small samples of individual minority speakers in contextual isolation will never lead to a cogent analysis of their societal condition.

Min-L groups mired in a trajectory of societal decline, while also being subject to formal LPP interventions, often manifest common societal and institutional features. We posit six common societal features and five common institutional features:

12.1 Common Min-L Societal Features

1. The loss in absolute numbers and in social densities of vernacular Min-L speakers (Ó Giollagáin et al. 2007a; 2007b; 2020; Ó Giollagáin & Charlton 2015; Roberts & Ó Giollagáin 2024);
2. The ongoing contraction in the social geography of higher density Min-L areas, i.e. an erosion of the social geography of the Min-L (Ó Giollagáin et al. 2020; Jones 2012);
3. A recognisable preference for social use of Maj-L, especially among younger Min-L speakers (Mac Donnacha et al. 2004);
4. Evidence of higher linguistic attainment of the Maj-L among significant proportions of younger Min-L speakers, indicating levels of non-optimal Min-L acquisition even in vernacular contexts (Péterváry et al. 2014; Montrul 2008; Lenoach 2012; 2014);
5. A reduction in the social esteem of Min-L cultural capital (beyond aesthetic or symbolic performance/practice), i.e. Maj-L cultural capital crowding out Min-L socio-cultural practice (Ó Giollagáin & Ó Curnáin 2016; 2024);
6. An observable social trend towards the monolingualisation of the formerly bilingualised minority, i.e. the bilingualisation of the Min-L community as a stepping stone to its ultimate Maj-L monolingualisation (Ó Riagáin 2008).

12.2 Common Min-L Institutional Features

1. Much of official Min-LPP is implemented while simultaneously disregarding the societal reality of Min-L group endangerment or erasure, i.e. Min-LPP often operates in a contradictory relationship with speaker group social challenges (20-Year Strategy for the Irish Language (Government of Ireland 2010): cf. Ó Giollagáin 2014b);
2. Bureaucratic official language plans struggle to achieve more than anaemic levels of social traction in non-institutional speaker communities or social networks (Ó Giollagáin & Caimbeul 2021);
3. Min-LPP tends to emphasise symbolic civic engagement with the Min-L at the expense of pursuing meaningful engagement with speaker group realities, based on credible societal diagnostics of the communities' challenges (e.g. Council of Europe 2023; cf. MacKinnon 2021);

4. Min-L communities observe a gap between aspirations for Min-LPP and day-to-day struggles of the average speaker, i.e. the difficulty of reconciling Min-LPP official assertions with the lived experience of the Min-L speakers (Camshron 2021);
5. Much of the Language-in-Institutions approach, stemming from post-structuralist LPP, operates incongruously vis-à-vis pressing Min-L community Language-in-Society requirements (Lenoach et al. 2012).

The combined effect of the Common Societal and Institutional Features is that state support for Min-LPP has been based on and has propagated a confused analysis of the societal problem it is purporting to address. Thus, it is perceived as undermining its own Min-LPP credibility by promoting a misdiagnosis of identifiable social challenges. In short, by favouring an individualistic (rather than collective) approach to Min-LPP, many in the Min-L community associate the official provision for the minority with the naïve prioritisation of resources and effort. The preference in Min-LPP for the symbolic expression of the Min-L culture, mainly in schools,[12] while discounting evidence of deeper societal pressures often serves to alienate the existing speaker group from language politics of Min-L officialdom (MacLean 2022). Ineffectual official Min-L engagement via the sectoralist approach (arts, media, educational provision, and the symbolic use of the Min-L in civic bureaucracy) to Min-L promotion can create the institutional conditions for the emergence of a clientelist hierarchy (Ó Giollagáin 2024; cf. McLeod 2020, 52–53). As is the case in the Gaelic LPP in Scotland and Ireland, the scope of the standardised political focus (Ó Giollagáin & Ó Curnáin 2024) of the Min-L speaker concerns is constrained by the sectoral interests of this hierarchy. Indeed, the obfuscatory emphasis on the symbolic aspects of the Min-L and of the Min-LPP is in itself a mechanism for control which the Min-L sectoral hierarchy can deploy in acquiescence with Maj-L containment of Min-L problems. In the circumstances where official Min-LPP is in denial or pays scant regard for the difficult societal challenges of Min-L communities, Min-L promotion inevitably becomes enveloped in a pseudo-politics of language issues which is of limited intellectual or political value to communities in societal demise.

Politically and sociolinguistically, Min-L groups undergoing the socio-political process of minoritisation have been subject to five stages of demise:
1. Their political subjugation to a more dominant ethnolinguistic group (delineated in O'Neill 2018; Canny 2010; cf. Hagège 2009, and Kaufman 2004, 6–8);

2. The integration of the dominated ethnolinguistic group into the so-cio-economic market of the dominant ethnic group on terms that are advantageous to the majority's control over the minority (Ó Ria-gáin 1997);

3. The minoritisation of the subjugated group in the established social geography of the dominated group, entailing the extension of the institutional influence of majoritarian concerns in that geography (Gaeltacht Act 2012; cf. Ó Giollagáin 2014a; 2014b);

4. The desocietalisation of the social and cultural capital of the dominated ethnolinguistic group, indicating the socio-cultural assimilation of the minoritised group into the societal norms of the majority, which can occur in tandem with the institutional promotion of the Min-L and culture (Meek 2019, 238–242; Ó Giollagáin & Ó Curnáin 2024);

5. The four previous stages culminate in the erasure of the remaining societal salience of the minority's language and social culture, beyond possible or optional ritualised practice in sanctioned institutions facilitating the symbolised heritage of the eroded culture (Calvet 2006; Ó Giollagáin 2021).

The sectoralist approach to Min-L promotion and its post-structuralist individualised perspective are of limited relevance to Min-L groups enduring the desocietalisation of their social and cultural capital (Meek 2019, 238–242; Ó Giollagáin & Ó Curnáin 2024) which precedes Min-L social erasure. Post-structuralist Min-LPP is realised societally as compulsory bilingualism for the minority speakers and optional, occasional bilingualism for the majority speakers (cf. Ó Giollagáin 2010; 2012). The compulsion involved in the minority experience of bilingualism indicates that the power dynamic favours the majoritarian culture and its discretionary engagement with the Min-L and its speakers. From this perspective, the presentism[13] in much of Min-L formal promotion (cf. May 2005), emanating from the post-structuralist Min-LPP approach, is akin to an analysis at a synchronic level only. Our social dynamic approach, by contrast, entails a diachronic level of analysis, incorporating key stage-to-stage (DQ) Processes in the Min-L social dynamic, and accounts strategically for the historical legacy of prolonged minoritisation, particularly in modernity, but also in historical LS scenarios.

The four DQs in the Figures indicating the four Processes fall into two broad societal categories. The left-hand side of the Min-L social dynamic (DQ1–2) in Figure 6 above expresses the social (more informal) aspects of the broader societal context of Min-L *in situ* practice, while

the more formal, institutional and political aspects of the social dynamic are conveyed on the right hand of the LanDS framework (DQ3–4). This left-right contrast in the Min-L social dynamic also corresponds to the emic and etic perceptions of Min-L society and culture. As Min-L official promotion is commonly dependent on majoritarian political sanction, Min-LPP is largely derived from outgroup or etic assessments of Min-L requirements, which can often occur as colonial-like control, containment and/or majoritarian othering. The social dimensions of language transfer and peer group socialisation and Min-L cultural reinforcement represented on the two left hand side DQs of the Min-L social dynamic diagrams (Figures 3–7) are more likely to operate according to emic concerns, as the social dynamics entailed in the left-hand Processes are derived from interpersonal and communal interactions. In many cases, these are social dynamics which occur independently of formal Min-L initiatives and aspirations emanating from DQ3 institutional concerns, especially. This emic vs. etic dichotomy in Min-L promotion perhaps also explains why official Min-L promotion is more likely to align or curtail its remit to DQ3 concerns rather than formally engaging with the scope of Min-L social dynamics across all four DQs. There is a problem in the reluctance or refusal of post-structuralist LPP to engage strategically with the full scope of minority dynamics in society, beyond its pragmatic alignment with a DQ3 focus. This reluctance explains the perceived inertia and lack of authority of formal Min-L promotion in the minority first-language language community. Such post-structuralist LPP is all the more challenging in neoliberal contexts (cf. Ó Giollagáin et al. 2020; Ó Giollagáin & Ó Curnáin 2024; MacLean 2022; and Ó Giollagáin & Caimbeul (2021, 190–191) on the Min-L "referent class").

Indeed, post-structuralist discourses (e.g. Glaser 2007, 305–308; Dunmore 2018, 38[14]) often ascribe essentialist motivations to ingroup Min-L concerns. However, in such post-structuralist discourses, the Min-L identity, having been desocietalised by Maj-L assimilation, is further undermined by the outgroup essentialisation or "othering" of the disempowered Min-L group identity. Typically, challenges from the Min-L group to the dominance of the Maj-L group tend to be branded as essentialist. This occludes actual essentialised dominance of the Maj-L outgroup. To over-ascribe essentialising ideologies to the Min-L group is to be blind to the essentialised dominance of the Maj-L group (ironically, even when symbolically supportive of the Min-L perspective). In short, the Min-L ideology perceived by Maj-L "gatekeepers" as exhibiting symbolic essentialism is discursively subordinated to the empowered essentialised hegemony, which emerges from the Maj-L

perspective (although this hegemonic discursivism is not recognised as essentialised). Much of the DQ3-focused Min-LPP can be incognisant of the essentialising dynamics of these imbalanced power relations, which in turn risks perpetuating the destabilising imbalances, and, thus, provides an unsound basis for Min-L diagnostics and strategies. Nonetheless, an over-essentialising Min-L tendency should be avoided so as not to fall into the identity trap, entailing a loss of philosophical universalism as a basis for action (Mounk 2023).

13. Conclusion

The LanDS framework makes the case for an analytical social dynamic approach to the DQs contributing to the EV of a group in a minority setting. The framework visualises the sustainability of a language group as a series of the core component social and formal processes which determines a Min-L group's viability or vulnerability: a positive social/formal dynamic contributes to a groups' viability, and negative or subtractive dynamic processes in the Min-L group culminate in its societal decline and erasure. The LanDS framework portrays EV as a societal emergent feature of a Min-L group's capacity to cultivate and enact key social processes of primary and secondary socialisation (entailing the socialised transfer of the minority's language and cultural capital). LanDS EV also entails the Civic Reinforcement of the Min-Ls language and culture, and affiliation processes generating a meaningful sense of belonging to a coherent collective identity. EV is realised, therefore, as the societal outcome of a group's organisational facility to generate and sustain key inter-related social, institutional, civic and affiliative processes on which the societal continuity relies. Just as individual-focused and sectoral-specific interventions will fail to ensure Min-L EV, so will other LPPs that do not follow holistic, communal, and long-term (multiple generations) goals towards sustainability.

In contrast with more circumscribed current approaches which overconcentrate resources, particularly in DQ3, the LanDS approach provides a framework by which empirical evidence from various ethnolinguistic contexts can be tested for positive impact and for assessing returns on investment. Our LanDS EV framework suggests that significant aspects of current LPP approaches to Min-Ls require substantial revision to align Min-LPrPr to the developmental social and formal dynamics indicated in this initial delineation of feasible Min-L societal sustainability.

Applying the LanDS framework entails:

a) Examining the existing levels of focus in current Min-LPP regarding LanDS;

b) Devising Min-LPP approaches that are more relevant to DQ social dynamics and to more optimal EV outcomes;

c) Quantitative and qualitative assessments through demolinguistic and sociolinguistic surveys of the actual, meaningful (rather than purely or predominantly symbolic) engagement with the social dynamics entailed in the four DQs of LanDS and their EV outcomes;

d) Adjusting and amending the ongoing Min-LPP based on the ongoing EV research.

Undoubtedly, existing research evidence (e.g. Ó Giollagáin et al. 2020; cf. Mac Giolla Chríost 2022) already demonstrates the need for an increased and more pertinent focus in Min-LPP on holistic, multi-level solutions with ideological coherence. Issues relating to integrating primary and secondary socialisation of Min-L cohorts and individuals into formal Min-L promotion and protection are pivotal for ensuring the societal viability of Min-L communities.

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Notes

1 WEIRD: Western, Educated, Industrialised, Rich, Democratic – first coined by Henrich et al. (2010).

2 See the discussion in Ó Giollagáin et al. (2020, 370–372) on Strubell's Catherine Wheel model.

3 For reasons of space, we cannot discuss in detail insights from the academic literature relevant to many of the processes entailed in our EV framework, as illustrated in Figures 3–7. This introduction to the LanDS theoretical framework cannot be exhaustive as the framework can easily incorporate additional conceptual tenets, structural quadrants, and inputs (see General Tenets and Developmental Quadrants).

4 The authors are grateful to Nóirín Ní Ghiollagáin for her design work on preparing the LanDS conceptual diagrams (Figures 3–7). Áine Uí Ghiollagáin prepared Figures 1–2, previously published in Ó Curnáin and Ó Giollagáin (2024).

5 In his case study of minority-language education in Prince Edward Island, Canada, Bourgeois (2024a) discusses community and formal support, such as youth extra-curricular Min-L activities and identity reinforcement, needed to counter the assimilatory trend towards the Maj-L when schools replace parents as the principal (often only) agent of transmission of the minority language and culture.

6 It should be acknowledged, of course, that many Min-L groups are not integrated into broader societal contexts by which they can develop a political approach to their concerns beyond their communal situation. This results from them being ignored or too isolated from the political apparatus or discourses that dominate the polity in which they reside (cf. de Sousa Santos (2014, 172) on people living below the "abyssal line").

7 See the discussions on New-speakerism in Ó Curnáin and Ó Giollagáin (2024, 406) and Ó Giollagáin et al. (2020, 386–388).

8 In the 2022 Irish Census (Central Statistics Office / Phríomh-Oifig Staidrimh 2022), 1.7 million people reported an ability in spoken Irish (cf. Ó Giollagáin and Ó Curnáin (2024) for a discussion on the divergence between the symbolic appeal of L2 Irish and the limited vernacular reality of L1 communities).

9 See also the European Language Equality Network statement on the Kontseilua Resolution that Basque-language communities are in a "linguistic emergency" (ELEN 2024).

10 Linguism here refers to a focus in LPP discourses on language without sufficient emphasis on the societal and political context of speaker groups.

11 E.g. states' efforts to adhere to the LPP criteria of the European Charter for Regional and Minority Languages; the prioritisation of L2 concerns in the 20-Year Strategy for the Irish Language (Government of Ireland 2010); the institutional focus in various iterations of the National Gaelic Language Plan in Scotland.

[12] In Canada, minority-language schools are the most important public institution in support of (or, often, in replacement of) parental transmission of the minority language and culture (Bourgeois 2024b). However, schools cannot by themselves save a minority language and culture (Landry & Rousselle 2003). If they are to be of societal relevance, steering them towards EV is required.

[13] Presentism here refers to an overemphasis on present Min-L concerns without sufficient cognisance of past and future issues and dynamics. This overemphasis decontextualises historical and generational legacies and ongoing processes and thereby impedes any current and future realistic Min-LPP.

[14] Smith-Christmas et al. (2018), containing Dunmore's article, has multiple instances of the term "essentialist", all of which are disapproving.

Acknowledgement

Jezikovna dinamika v družbi: analitični okvir za etnično-jezikovno vitalnost večinskega in manjšinskega jezika

Izvleček

Jezikovna dinamika v družbi (ang. *Language Dynamics in Society*, LanDS) predstavlja analitični okvir za presojo etnolingvistične vitalnosti (EV). Ta je ključna za družbene procese, ki vplivajo na stabilnost jezikovnih skupin. LanDS omogoča izboljšano akademsko analizo EV ter spodbujanja in zaščite jezika. Omenjeni pristop se osredotoča na dinamiko sodelovanja družbenih akterjev v procesih, ki EV škodijo ali koristijo. LanDS tako predlaga štiri analitične razvojne kvadrante: prenos in pridobivanje jezika, socializacija in okrepljeno pridobivanje, družbena ekspanzija in koherentna etnizacija. Na vsak kvadrant vplivajo štirje osnovni koncepti: smer, proces, sodelovanje in konkurenca. S sodelovanjem v teh ključnih razvojnih fazah lahko jezikovna skupina vpliva na kolektivno kontinuiteto oz. nestabilnost skupnosti.

Ključne besede

etnično-jezikovna vitalnost, družbena jezikovna dinamika, prenos jezika, etničnost, okvir LanDS, manjšinska sociolingvistika

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Asymmetric Societal Bilingualism in Upper Lusatia: Narratives of Interlingual Upper Sorbian-German Families

Abstract

This article explores language practices and policies within interlingual Upper Sorbian-German families in the context of asymmetric societal bilingualism. In Catholic Upper Lusatia, where the intergenerational transmission of Upper Sorbian has been partially maintained, bilingualism remains largely confined to the minority group. While Upper Sorbian speakers also speak German, the dominant society is monolingual in German. Based on in-depth interviews with six interlingual families, supplemented by ethnographic observations, this study explores language attitudes that position German as the socially dominant language, whereas Sorbian is valued primarily within the family. The analysis reveals that although individual bilingualism is fostered within families and seen as a cultural asset, it does not necessarily translate into broader societal bilingualism, as the dominant language is generally perceived as the more appropriate in public life.

Keywords

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1. Introduction

Language practices and policies in Upper Lusatia, where monolingual German speakers live alongside and together with speakers of both German and Upper Sorbian, highlight the social dimension of bi- and multilingualism and raise questions about its stability and potential sustainability. The Sorbian-German case is an example of asymmetric societal bilingualism, where one segment of the population speaks two languages while another speaks only one (Marti 2023). Although both languages are spoken and officially recognised within the same, more or less defined, territory of the state, they hold minority and majority status, respectively. The majority language is used by a dominant group with greater social power and influence, which may also be numerically larger than other groups of speakers. The minority language is used by a subordinate and/or numerically smaller group within the same area. When a minority language is used by a subordinate group, it tends to occupy a lower social position, with limited legal status and lower prestige (Stavans & Hoffmann 2015). This dynamic is particularly salient when an autochthonous minority language is indigenous to the region and not spoken elsewhere. The relationship between minority and majority languages can be understood differently from a speaker-centred perspective or in terms of legal recognition and rights. From the speaker's view, numerical aspects are less relevant than social power relations and the negative experiences of minorisation resulting from using a non-dominant language (Flubacher & Purkarthofer 2022, 9). From a legal perspective, minority language rights are usually tied to designated territories under the territorial principle (Romaine 2013).

In contexts of unequal power relations between dominant and subordinate groups, language use often follows the principles of linguistic accommodation, favouring the language of the dominant social group. The linguistic subordination norm describes a situation in which minority language speakers switch to the majority language with or in front of majority language speakers (Hornsby 2011). This behaviour is both expected by society and interiorised by minority language speakers. Due to the asymmetrical distribution of language competences in society, convergence towards the dominant language is understood as politeness and courtesy and perceived as the only way to ensure smooth communication (Hornsby 2011). Additionally, the minority language is under pressure because, in terms of utility, it is perceived to have minimal practical and instrumental value in professional and academic contexts (Rosiak 2023). While minority languages may be important for

community life, their overall scope remains limited, as their use is restricted to fewer domains and lower-status contexts.

In situations of asymmetric societal bilingualism, the role of the family and its internal language policy becomes crucial (Lendák-Kabók 2022; 2024). This applies to both families in which both parents speak the minority language and families in which one parent speaks the majority language and the other also speaks the minority language. I refer to the latter as interlingual families. The family creates a space where parents shape and negotiate their aspirations for their children's individual bilingualism away from the public language dynamics, yet still shaped by prevailing societal norms.

In this article, I delve into how asymmetrical societal bilingualism reflects in the narratives of the members of interlingual families in Upper Lusatia, focusing on the perceived superiority of German and the important role of Sorbian in the family context. The unquestioned utilitarian value of German – along with purist ideals and negative attitudes towards features of multilingual speech and repertoires such as code-switching and uneven competence in both languages – positions German as the non-exclusionary, unifying language. This perception is reinforced by the limited instrumental value of Sorbian in achieving communicative goals. The study of Upper Sorbian-German interlingual families highlights the coexistence of positive attitudes towards the minority language within the family and community and towards the dominant language in societal and professional contexts. It shows that bilingual practices in the family setting do not necessarily translate into bilingualism in the public sphere, where norms of language use are slowly changing.

2. The Upper Sorbian-German Relationship: The Research Context

The Sorbs are an autochthonous Slavic ethnic group living in eastern Germany. This study focuses specifically on the Upper Sorbian community in Saxony. According to older estimates, there are between 13,000 and 25,000 Upper Sorbian speakers in Upper Lusatia (Elle 2010, 314–316). While Protestant Sorbian communities have experienced a significant language shift, the Catholic community in the administrative association of municipalities *Am Klosterwasser/Při Klóšterskej wodźe* has managed to maintain the intergenerational language transmission to a certain extent (Walde 2004). Sorbian remains the language of

the community, spoken by about 69% of the population, including 1% who have acquired the language outside the family. The community is strongly attached to Sorbian traditions and customs, which are closely associated with Catholicism, a central pillar of community life.

Although both German and Sorbian are recognised as official languages in Lusatia, societal bilingualism in Upper Lusatia, including in the Catholic area, is asymmetric. Due to historical, political, and social pressures, Sorbian speakers are required to be proficient in German for (at least secondary) education, employment (with some exceptions in Sorbian cultural or educational institutions), and public life. In contrast, most German speakers do not know Sorbian, and it is not even required in Sorbian-speaking areas. This imbalance has led to Sorbian being primarily preserved within families, cultural institutions, and specific communities, while German dominates wider societal interactions, including in the Catholic community context (Dołowy-Rybińska & Ratajczak 2024).

In this article, based on research conducted for my PhD thesis, I will analyse how this asymmetric societal bilingualism is reflected in the discourses of interlingual families.

3. Research Methodology and Interlingual Families

Between 2021 and 2022, I conducted fieldwork in Upper Lusatia, where I grew up and spent most of my life. I interviewed and analysed data from six interlingual Upper Sorbian-German families in Catholic Upper Lusatia. The study explored language practices and family language policies through a biographical lens, which allowed me to focus on participants' experiences while avoiding unconscious bias stemming from my own background. I conducted 19 narrative biographical interviews, treating language biographies as evolving, relational accounts influenced by social dynamics, discourses, and ideologies. These narratives provided insights into language choices, practices, and evaluations within personal and broader social contexts. While the participants focused on their own experiences, their accounts also reflected community-wide attitudes and shared cultural knowledge. As Flubacher and Purkarthofer (2022, 8) note, language biographical research seeks to understand the social dimensions of language practices and ideologies, beyond individual life stories.

For the narrative biographical interviews, I followed Schütze's (1983) approach, allowing the participants to share their own language-related autobiographies before asking clarifying or thematic questions. I spoke

in Sorbian with Sorbian-speaking parents and older children, and in German with German-speaking parents. Younger children participated in language-related discussions through drawing language portraits (Busch 2013).

In addition to interviews, I used ethnographic open participant observations to capture language practices and ideologies in everyday life. Ethnographic methods are well established in sociolinguistic research (McCarty 2011) and widely applied in family language policy studies (e.g., Lanza 2021; Smith-Christmas 2016). Ethnographic approaches help to reveal covert motivations, embedded ideologies, and power dynamics in language practices (Hornberger & Johnson 2011). My aim was to understand how these factors influence language maintenance at both individual and community levels.

Interviews were transcribed using MAXQDA (2022), with basic discourse transcription conventions, noting features like pauses [...], laughter (@), truncated words (z-), loud/stressed syllables (FEJty), uncertain/unintelligible words (#tukli), and my comments (()), although not always consistently. Acknowledging the potential limitations of transcription detail (Pavlenko 2007), I re-listened to selected sections during analysis to minimise misinterpretation.

For data analysis, I used thematic analysis to identify key themes related to language preservation, practices, attitudes, and ideologies. Adopting a combined inductive and deductive approach (Fereday & Muir-Cochrane 2006), I coded the interviews for participant-specific utterances and broader patterns. I then applied content-based discourse analysis, incorporating participant observations, to contextualise the narratives within broader community and social structures (Nekvapil 2003). Examining omissions and implicit details further revealed how participants positioned themselves and their languages within changing language landscapes.

This article is based on interviews with members of six nuclear, heteronormative, two-parent families living in villages in the Catholic part of Upper Lusatia. The families are referred to by codes: an uppercase letter for the family (A, B, C, D, F, J) and italicised lowercase letters for the parents (*m* – mother or *f* – father) or numbers for the child's age. The primary language used by the parents with the children is indicated by lowercase letters (s – Sorbian, g – German). The code smi refers to me as the interviewer.

All couples are interlingual, with one parent speaking primarily Sorbian and the other primarily German to the children. Three German-speaking parents grew up with Sorbian-speaking parents who spoke

German with the family (A*mg*, C*fg*, J*mg*). One Sorbian-speaking parent (J*fs*) started using Sorbian later in life and now speaks it with his children.

The families' language policies (Lanza & Lomeu Gomes 2020) are mostly openly bilingual rather than Sorbian-centred, with the parents wanting to pass on both Sorbian and German to their children. However, few parents discuss whether the German-speaking parent should learn Sorbian. German is the primary language of communication between the partners, with some occasional Sorbian words. Only one parent (J*fs*) uses some Sorbian to address his partner, and one German-speaking parent (J*mg*) occasionally uses Sorbian with her young children at home.

Language use within the families follows various patterns. In three families (B, F, J), the Sorbian-speaking parent uses Sorbian with the children in the presence of the German-speaking parent, while in three others (A, C, D), only German is spoken. All children are active bilinguals and use Sorbian in at least some situations. They tend to use both languages among themselves, with German often being dominant, and most of them use Sorbian with their Sorbian-speaking parent. Some children speak both languages with bilingual peers, although many tend to be more confident with German.

4. German, The Language of Professional Advancement

Language attitudes are evaluative reactions (beliefs, feelings, behaviours) towards language varieties and their speakers. They typically occur along the two basic dimensions of status and solidarity, associated with upward social mobility and with social identity and in-group loyalty, respectively (Kircher & Zipp 2022). German is highly valued on the status dimension because of its utilitarian value in vocational training, tertiary education, and the work environment, and is thus associated with economic opportunities. Although there are job and education opportunities that include Sorbian or build on Sorbian language skills, the utilitarian value associated with German is higher. Sorbian may be seen as an advantage, but German is considered a prerequisite for professional advancement. For some, the link between German and the professional environment is so strong that they do not even consider the possibility of using Sorbian at work. D30, for instance, recalls his surprise at hearing medical staff in a hospital speaking Sorbian during surgery.

(D30)

A to za mnje jara běše tam w H. runje im opej stać a te su tam wšo na serbsce sej unterhaltwali, rozmołwjeli, te cyłe ärzte mit den schwestern. A to ja tak šće gor njejsym widźał. A to sym ja pon tón jednu schwester pon prašał, kak to nětko klopwje, dokelž te tla trjebaja te cyłe fachbegriffe tež, nětko tón skalpel oder daj mi něk to. A dokelž te maja, oder su tam šće jara wjele stare ärzte tež měli, a te schwestern a te su wšě móhli serbsce a tam su te pon na serbsce tam operěrwali. A to sym ja eben myslał: Mensch, kak to tak wšo dźe. To ta šće dawa tajke něšto! To běše wirklich za mnje jara zajimawe. To ja tak šće njejsym widźał. Haj. To běše wirklich intresant.

And there in H., for me it was very [special], especially standing *in the surgery room*² and they were all *talking* in Sorbian, all the *doctors with the nurses.* I had never seen that before. And then I asked one of the *nurses* how it would work, because they also need all the *technical terms,* hand me the scalpel or now hand me this. And because they still have *or* had many old *doctors* there, and the *nurses,* and they all knew Sorbian, they operated in Sorbian. And then I thought: Wow, how it all works. Such things still exist! That was *really* very interesting for me. I hadn't seen anything like that before. Yes. That was indeed *interesting*.

D30's account about the hospital contradicts the common perception that Sorbian does not play a major role in working life. It challenges the conclusion that Sorbian cannot be an instrumental part of professional life because German is important for education and work. D30's astonishment at the language use in the surgery room may be all the greater because it involved an activity in which mistakes can have serious consequences and reliable communication is indispensable. D30's encounter with Sorbian in this situation differs from his previous experiences with Sorbian, prompting him to attribute it to the differing everyday linguistic realities across generations. He says that "many old doctors there, and the nurses" still worked in the hospital and that he was amazed that "such things still exist". He implicitly shows the marginal place of Sorbian (in the sense of active or receptive language use) in his linguistic reality. The implied comparison with older generations suggests his assumption that Sorbian played a more prominent role in the past. Although his positive reaction to hearing Sorbian in the professional context of a surgery can be seen as a moment of re-evaluating its potential, it also highlights that, even in the heart of the Sorbian-speaking area, he sees himself as part of a declining group of Sorbian speakers.

Many participants mention the necessity of German in professional life. Its positive evaluation in terms of usefulness in education and work influences language choices and often comes at the expense of Sorbian. For example, Sorbian-medium instruction in schools is sometimes seen as an obstacle or as unnecessary for further education and employment in a German language context. A*mg* sees German as the most important language for professional life. While she certainly sees opportunities to use Sorbian in specific career choices, such as Sorbian studies or working with a Sorbian craftsman, she notes that "work is also mostly in German", implying that her sons are unlikely to need Sorbian in their working environment.

> (A*mg*, 42)
> *Aber, wie gesagt, für's spätere Leben ist ja dann größtenteils Deutsch @. No, also, es sei denn, die studieren jetzt irgendwas, Sorabistik, oder @ sorbischer Lehrer oder … No, aber, der Großteil wird in Deutsch stattfinden. No. Dass man diese Sprache kann und dass das nicht ausstirbt, ist alles gut. No, aber der Alltag, oder der meiste Teil des Lebens, ist ja dann, also wie gesagt, die Arbeit ja größtenteils auch in Deutsch. Außer man macht jetzt hier irgendwo bei einem sorbischen Handwerker seine Ausbildung, dann spricht man ja auch wieder Sorbisch, aber Berufsschule wird deutsch sein und alles.*
>
> But, as I said, for later life it's mostly German @. Yeah, well, now, unless they study something, Sorbian studies, or @ Sorbian teacher or … Yeah, but for the most part it will be in German. Yeah. It's all good to know this language and that it doesn't die out. Yeah, but everyday life, or most of life, is, as I said, work is also mostly in German. Unless you do your apprenticeship with a Sorbian craftsman somewhere here, then again you will speak Sorbian, but vocational school will be in German and everything.

A*mg*'s reflections indicate that she considers occupations involving or requiring Sorbian to be insignificant. Even though teaching at a Sorbian school involves the use of Sorbian, she depicts everyday life as being predominantly in German. Similarly, even if one trains with a Sorbian craftsman, "vocational school will be in German and everything," and German remains essential. The phrase "most of life" likely refers to the amount of time spent at work, and not necessarily to afterwork life. Implicitly, however, A*mg*'s account highlights how adapting to the language preference of the German dominant speaker in linguistically mixed situations reduces the opportunities for using Sorbian. The perception of Sorbian as a language that can only be used on limited

occasions leads her to question the practicality of receiving education in Sorbian. It becomes strikingly clear that the positive perception of Sorbian as a language with legitimacy to exist is somehow abstract and does not resonate with the lived experience of Sorbian, especially when A*mg* says that, technically, it is good to know Sorbian and not to let it die out, but in everyday life it is rather necessary to use German.

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Students also experience Sorbian as burdensome. The daughter of family C, who is a very proud bilingual, contested the Sorbian-medium education at school and did not want to have it imposed on her. Her reasoning in the quoted excerpt is in line with that of A*mg*. After school, she explains, vocational training requires learning content in German; being taught in Sorbian leaves students ill-prepared for this next stage.

> (C17)
> *A hewak je jen dźěl wučerjow tež dawał, kotrež su, tym, te njejsu tak jara na te serbske drängwali kaž te tamne. Te su pon woboje rěčeli oder tež bóle němske, dokelž te tež wědźa, kaž ja, jen to pon po tym wjac nima eigentlich serbsce, außer, hdyž jen na Serbski gymnazij dźe abo tak. Hewak jen ta, hdyž jen, my tla smy normal wyša šula a potym jen čini jedne wukubłanje abo tak a tam tla to njeje wjace z tym serbskim a pon jen je kaž aufgeschmissen, hdyž jen wšo na serbsce ma a gor njewě kak to wšo na němske rěka. Vor allem bio, chemie, to pak sym ja pon wjesoła była, te su pon, kaž bio, chemie, physik, pon prajili: Ok, wir machen das jetzt auf Deutsch. Die ganzen Fachbegriffe, to lěpje za nas. To sym ja wjesoła była.*
>
> And there were also those teachers who didn't *push* for Sorbian as much as the others. They spoke both languages *or* more German, because they also know, like me, that you don't *really* use Sorbian afterwards, unless you go to the Sorbian grammar school or something like that. Otherwise, we are a normal secondary school after all, and afterwards you go into vocational training or something, and there it's no longer Sorbian and then you're like *lost* if you have everything in Sorbian and don't know what it's all called in German. *Especially biology and chemistry*, but I was glad that they said, like *biology, chemistry, physics, 'OK, we'll do it in German now.' All the technical terms,* it's better for us. So I was relieved.

Learning through Sorbian is only seen as useful for those pursuing further Sorbian education at "the Sorbian high school or similar institution." C17 contrasts this with "we are a normal secondary school", suggesting that after leaving school real life is dominated by German. Her perception of an overly strong Sorbian orientation at school is likely influenced by her parents, who consider German to be important and necessary. C17's mother, C*m*s, experienced difficulties when, after receiving a Sor-

bian education, she began her vocational training in a German-speaking environment. In the following quotation, she recalls meeting young colleagues at work who faced similar struggles and expresses frustration that she and they were not better prepared for the German-medium professional training.

> (Cms, 44)
> *A nětko sym ja to na dźěle tež sobu krydnyła, pola nas je jedyn wukubłanje činił a tón je tež dyrbjał něšto powědać. A tón je so z jednej praktikantku rozmołwjał. A ta ma tež tajki problem. Te su činili jenož serbske, serbske, serbske a nětko wone to pytnu, kajke problemy te maja potom we wukubłanju, hdyž to dale dźe. Z tej němčinu. Haj. Ja sym prajiła, to je pola mnje tež tak było. To mje mjerza, zo to tak je. Zo jen to bóle, m, te em wšě jowle hladaja, zo te te serbske, serbske wažne je, no. Ale z němčinu jen pak eigentlich dalešo přińdźe. Ja njewěm.*

> And now I've also noticed this at work, one of our trainees also had to tell something. And he was talking to an intern. And she has a similar problem. They only did Sorbian, Sorbian, Sorbian and now they realise what problems they have during their training. With German. Yes. I said it was the same with me. It annoys me that it's like that. That you have more, m, here they all make sure that Sorbian, Sorbian is important, isn't it. But you can *actually* get further with German. I don't know.

For Cms, who had always been proficient in Sorbian and had never struggled with it, the difficulty with German was unpleasant. She maintains that Sorbian should not be prioritised over German in school, stating that "you can actually get further with German".

Sorbian-medium schooling is not seen as an opportunity to strengthen the minority language, but rather as an obstacle to mastering the next stage of life. The school's role in raising the prestige of Sorbian is therefore only symbolic, because in reality no one demands knowledge in standard Sorbian. What appears to matter more is the ability to fit seamlessly into a German-language educational and professional environment.

In a similar vein, Afs explains why it is necessary for the local firefighters to communicate in German among themselves in order to prepare for interacting with monolingual German firefighters from other places or coordination points. He argues that hesitation is detrimental to a firefighter's mission, and any efforts to use Sorbian in this specific environment must be subordinated to a smooth communicative ability in German. Speaking German is therefore necessary in order to train communicative confidence for all scenarios.

(A*f*s, 45)

wšo, štož je słužbnje, ja dyrbju němsce činić, dokelž su tam techniske wurazy. Tam by sej jen něhdźe dyrbjał, also to by jen dyrbjał, haj, jen by móhł vielleicht to sčinić, ale hdyž jen nětko něhdźe na jedne zasadźenje jědźe a tam je jedna druha wohnjowa wobora pódla, z-, z [...] kónčin, kotrež žane serbsce njemóžu, pon ja njemóžu na přikład prajić, Tamle ta klupa steji. To, to je kusk hubjene potom. No, oder pon tam steji, dort steht die Feuerwehrpumpe, bitte bedienen, oder das Funkgerät. [...] A pon je, w tajkich wěcach, w zasadźenjach tam tež druhdy wo sekundy dźe. Tam dyrbi potom kóžda ruka cak, cak a to potom ...

everything that's official, I have to do in German, because there are technical terms. You would need to, well, you would need to, yes, you could maybe do that, but if you're going on a mission somewhere and there's another fire brigade there, from [...] ((neighbouring region)), who don't know Sorbian, then I can't say, for example, There is the pump. That, that is a bit bad then. Yeah, *or* there is, *there is the fire pump, please operate it, or the radio unit* [...] And with things like this, during operations, it is sometimes a matter of seconds. Every move has to be done in a flash, and that's ...

Since German is perceived as highly useful and above all necessary in the professional world, societal bilingualism is considered burdensome and time-consuming. Sorbian is viewed as an asset, but it does not replace the need for fluency in German.

5. Sorbian: The Language of Home, Community, and Attachment

In contrast to German, Sorbian is highly valued on the solidarity dimension. It is mentioned more often in relation to family, local community, and care work than in relation to educational and professional advancement. Positive attitudes towards Sorbian in interpersonal relations illustrate its importance for in-group loyalty, and Sorbian, as a language "that is evaluated positively on the solidarity dimension, is one that elicits feelings of attachment and belonging" (Kircher & Zipp 2022, 11). As a result, some participants saw Sorbian as useful in connecting with people who they felt were attached to Sorbian. Positive attitudes towards Sorbian in terms of solidarity and belonging are also noticed and acknowledged by those who feel more attached to or more proficient in German.

All Sorbian-speaking parents in my research spoke Sorbian with their children, underscoring its importance for direct interpersonal

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communication and for the perception that its acquisition is linked to intergenerational transmission in the family and to close ties between individuals. The importance of Sorbian for the family was not explicitly mentioned, likely because the same applies to German. The use of both languages has to be negotiated within the family, with both languages contributing to family identity. What was explicitly addressed was the family's role in passing on Sorbian, especially by Sorbian-speaking participants who agreed with their partner to prioritise German over Sorbian in formal education. If German is seen as a prerequisite for later education and parents want their children to be prepared for it already during primary or secondary school, then it seems logical that they emphasise the importance of Sorbian for interpersonal relationships in the intimate family sphere.

C*m*s and C*f*g expressed dissatisfaction with the current bilingual teaching concept, because they would like the teaching to be entirely or mainly in German. In the quoted excerpt, the beginning of our conversation refers to the fact that the teachers at their children's school do not like it when the pupils talk to each other in German and encourage them to speak Sorbian. C*m*s, on the other hand, thinks it is good that her children speak German with their peers and actively use both languages, Sorbian and German, from the beginning. Asked about her assumption about the teachers' motives, she says that the teachers were probably worried that the Sorbian language would disappear. In response, she tells me that she considers the use of Sorbian in the family to be more important for the preservation of the language than its use in school.

(C*m*s, 44)
C*m*s: *Ja pak sym z tej wučerku nětko tež powědała, [...] Ja sym prajiła, em: Haj, šón, zo tene fajn, super, te słowa te pon so zhubja, hyno, tene cyłe wurazy, te wulke a tak dale. Ja pak sym prajiła: Ta serbska rěč jenož wostanje, hdyž jen jow w swójbje serbsce powěda. To je nětko moje persönlich měnjenje, hyno. Kaž hdyž něchtó nětko něšto studěruje a Bóh wě što, a doma, zno sym ja tež dožiwiła, te w serb-, wirklich něšto serbske činja a studěrowane su a wšo, ale doma wone němsce powědaja z tymi dźěćimi. To tla tež bekloppt! Nětko moje měnjenje, no. Tajke bychu to dyrbjeli grode! Ja přeco praju, štož doma powědane wodwje, to, to budźe wostać. A nic ...*
smi: *Nó.*
C*m*s: *Nó. To je nětko moje měnjenje. Ja njewěm. Ja jemol tak praju. M.*
smi: *No haj, wone jen ważny dźěl je! Also bjez- To žane prašenje njeje. Nó.*
C*m*s: *Hdyž jen kóždy dźeń něšto powěda.*

smi: *Nó, nó.*

C*m*s: *A jowle te maja tón móžnosć. Hdyž mój muž doma je – hdyž wón jónu doma je – nětko su tla wone starše, to je hinak, hyno. Te z tym němsce powědaja, ze mnu wone serbsce powědaja.*

smi: *M. Also z Wami je skerje serbsce takrjec a to, na gut, hačrunjež wón praji a- genau-*

C*m*s: *A hdyž pak wón nětko tu je a my smy hromadźe, ja druhdy mol něšto nutř rjesnu, serbske, ok. To pak je wuwzaće. Najbóle my němsce powědamy pon hromadźe.*

C*m*s: But I have also spoken to the teacher, […] I have said, um: Yes, okay, it's fine, super, these words are disappearing, right, all these terms, the big ones and so on. But I said: The Sorbian language remains only if you speak Sorbian here in the family. That's my *personal* opinion, right. And not if someone studies God knows what, and at home, I have already experienced that, they-, they *really* do something Sorbian and have studied and everything, but at home they speak German with the children. I mean, that's *crazy*! Well, that's my opinion, yeah. Such people would have to ((speak Sorbian at home/with their children))! I always say, what is spoken at home, that, that will stay. And not …

smi: Yeah.

C*m*s: Yeah. That's my opinion. I don't know. That's what I would say. Hm.

smi: Well, it's an important part! So without- That's not a question. Yeah.

C*m*s: If you talk a little bit every day.

smi: Yeah, yeah.

C*m*s: And here they have the opportunity. When my husband is at home – when he's at home – now they're older, it's different, right. They speak German with him, with me they speak Sorbian.

smi: Hm. So with you more Sorbian, so to speak, and that, well, although he says and- *exactly-*

C*m*s: And when he's here now and we're together, I sometimes throw in something, in Sorbian, okay. But that's an exception. We mostly speak German together.

By emphasising the importance of transmitting Sorbian within the family, C*m*s defends the decision to have her children taught in German, distinguishing between educational and interpersonal language use. If the latter is in Sorbian, the former does not necessarily have to be in Sorbian. Furthermore, she believes that Sorbian language education at school is less credible without home language transmission. For C*m*s, using Sorbian in private life is authentic, and indicates that someone is serious about Sorbian, and, ultimately, that they are part of the Sorbian community.

Many participants reflected on their childhood and youth without too much reference to language. J*f*s recalls Sorbian community life, the

youth club, parties, the firefighters, and village festivities in a positive, emotional and expressive manner.

(Jfs, 40)
… also kaž prajene, přeco hromadźe dźerželi, to je super było. […] a pon smy započeli tón jugendclub wutwarić a činić a WŠO sami. A pon smy my […] zaso přeni króć meju stajili. A PON je něšto lós było. My smy FEJty činili, ty, jesusmarja! A to su tež zes WJESki wjele, wjele wjace ludźi tež přišli. Nětk tla, to tla total mało. … To sy ty sobu měrkwał, zo to kusk šće bóle, na wie sagt man, mehr angenommen war das Ganze. Das war so Dorffeste tež. My smy přeco z wohnjowej wobory te wjesne swjedźenje činili a my smy přeco zno jako dźěći, jako młodostne sobu činili tamle. A pon smy my tam sobu nutř #tukli ((wukli?)), no … und mitgemacht, das war … te wjesne swjedźenje, das war schon, dorfleben war schon GANZ anders wie jetzt, hyno. […] Jowle, hier, kermušu. To je něšto jara wosebite było. Wjele, wjele wjace lós było. Wjace pomocniki su tež richtig, also da kannst du jeden, konntest du jeden fragen, die haben immer mitgemacht. Wšojedne štó. Auch die nicht so oft in der Jugend waren oder so. Hattest du die angesprochen, Ja komm ich. To je to, to je echt …

… as I said, we always stuck together, which was great. […] and then we started to build up the *youth club* and EVERYTHING on our own. And then we […] put up the maypole again for the first time. And THEN there was something going on. We had PARties, Jesus! And many, many more people came from the VIllage. Now it's just a few. … You noticed that it was a bit more, *how do you say, more accepted. That was, also village festivals*. We always prepared the village festivals with the fire brigade and we always took part there as children, as young people. And then we joined in, yeah … *and took part, that was …* the village festivals, *that was really, village life was REALLY different from now*, right. […] Here, *here*, church fairs. That was also something very special. There was much, much more going on. There were more helpers, *so you can ask anyone, you could ask anyone, they always helped*. No matter who. *Even those who weren't with the youth so often. If you asked them, Yes, I'll come.* That's it, that's *really* …

Jfs did not grow up speaking Sorbian in his family but began using it in the community he felt so good in. The positive way in which he describes his youth in the village highlights his motivation to start using Sorbian. Although he does not mention language directly in the quote, he refers to a place where the people he felt at home with spoke Sorbian to each other.

D28 similarly emphasises the significant role of Sorbian traditions and local customs in her life, confirming the connection of Sorbian language and identity with the local community.

(D28)

A tajke něšto ja tež rady chcem, zo moje dźěći to pon sobu wzaja, a zo wone to tež wuknu a tež tón lubosć namakaja, tež naše tradicije. To je tajke něšto rjane, ja přeco prajim, haj, tajkeho křižerja oder tajku družku, to je něšto jara fajn. A ja wo tym zno tajk-, ja sym zno feuer und flamme za tajke něšto a ja bych to rady, zo moje dźěći to pon tež mol maja. Dokelž ja tež přeco widźim, ja mam tež wšo tu a to by fajn było, hdyž tam mol irgendněchtó tak nutř rosće a to pon tež tak, tajku lubosć za to dóstanje. Also, mi to šón bych jara wažne było, hdyž ja pon mol dźěći dóstanjem, zo to pon wšo tak dźe, dokelž pola nas tež wšo tak normal je, zo znajmjeńša tajki, tajki hauch von serbšćina nutřka je.

And I would also like my children to take this with them, and that they also learn this and find this love, also our traditions. It's something so beautiful, I always say, yes, such a *křižer*[3] or such a *družka*[4], that is something very fine. And I'm really, I'm *really enthusiastic* about it and I would like my children to have it too. Because I see that I have everything here and it would be great if someone would grow into it and also develop such love for it. So that would be very important to me, if I ever have children, that it all goes like that, because everything is so normal with us, at least such a, a *touch of* Sorbian is in it.

D28's choice of words, such as *tón lubosć namakaja* ("find this love") or *Feuer und Flamme* ("really enthusiastic"), shows her attachment and her desire to pass this wealth on to her future children. Although she sees Sorbian as a self-evident part of life ("everything is so normal with us") and closely connected to what is dear to her, her ambitions to pass on Sorbian seem somewhat restrained when reading her remark that "at least such a, a touch of Sorbian is in it". D28 seems to be aware of the changing linguistic environments in which she and her mother grew up, as she is less confident in speaking Sorbian than her mother. She makes a conscious effort to use more Sorbian than she did in her youth – with her mother and others outside her close circle of friends. Her lowered aspirations when imagining passing on Sorbian to her future children may stem from a realistic assessment of what is feasible and a desire to avoid disappointment.

6. Conclusions

In contexts of asymmetric societal bilingualism within autochthonous minority settings, language maintenance within the family presents a significant challenge. While families play a crucial role in intergenerational transmission, they do not operate in isolation; their language

choices are shaped by broader societal pressures that favour the dominant language. In interlingual families, the use of the minority language is constantly negotiated, constrained by societal norms and beliefs that often limit the domains and contexts in which it is used.

The perception that the minority language is less useful or valuable in wider communication, particularly with non-minority speakers, weakens the motivation and pressure to achieve fluency. While emotional attachment to the minority language may remain strong within families and communities, its functional role is often overshadowed by the need for fluency in the dominant language. As a result, basic communicative competence in the minority language may be accepted as sufficient, while mastery of the dominant language is considered essential.

From a language policy perspective, this study emphasises that individual bilingualism does not automatically translate into societal bilingualism. Structural constraints make it difficult for individuals to maintain the minority language without external support. Therefore, effective measures to strengthen minority languages must go beyond encouraging individual family-based language policies. They should also focus on fostering a more favourable social environment – one that strengthens the minority language, enhances its visibility, and demonstrates its social and economic value. Only through such a comprehensive approach can the vitality of minority languages be preserved in the face of pressures from the dominant language and society.

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Notes

[1] In this article, I set aside additional languages that contribute to individual bi- and multilingualism, as the focus is on societal bilingualism in a majority-minority context.

[2] Italics in the English translations indicate cases of code switching.

[3] *Křižer* – Easter rider: dressed in distinctive attire and forming processions, men on horseback proclaim the resurrection of Christ by singing hymns and praying on their way to a partner Catholic parish village.

[4] *Družka*: the festive Sorbian-Catholic traditional costume worn by unmarried girls on special occasions.

Funding

Asimetrična družbena dvojezičnost v Gornji Lužici: primer jezikovno mešanih lužiškosrbsko-nemških družin

Izvleček

Članek preučuje jezikovne prakse in politike v jezikovno mešanih lužiško-srbsko-nemških družinah in ugotavlja asimetrično družbeno dvojezičnost. V katoliški Gornji Lužici, kjer deloma še poteka medgeneracijski prenos gornjelužiške srbščine, ostaja dvojezičnost v veliki meri omejena na pripadnike manjšine. Medtem ko govorci gornjelužiške srbščine govorijo

tudi nemško, pa je jezik večine izključno nemščina. Na podlagi poglobljenih intervjujev s šestimi jezikovno mešanimi družinami in etnografskih opazovanj študija raziskuje jezikovno realnost, kjer je prevladujoči jezik v družbi nemščina, lužiška srbščina pa je cenjena predvsem v domačem okolju. Ugotovitve kažejo, da se dvojezičnost posameznikov v družinah sicer spodbuja in velja za kulturno vrednoto, a se ta ne odraža nujno v širši družbeni dvojezičnosti, saj v javnem življenju za ustreznejšega na splošno velja prevladujoči jezik.

Ključne besede

asimetrična dvojezičnost, manjšinski jezik, jezikovno mešane družine, gornjelužiška srbščina

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Successful Multiculturalism in Education: Analysing the Integration of the Jewish Community in Ukraine

Abstract

The research aims to analyse how Ukraine effectively implements multicultural principles in education to promote mutual understanding and harmonious coexistence among diverse cultural groups. The methodology involves synthesis as well as cultural, conceptual, and structural analyses, through which the research identifies the key elements contributing to the successful integration of multicultural values. These elements include fostering an educational climate that supports intercultural interaction, drawing on historical experiences to deepen understanding and tolerance, and ensuring educational strategies are tailored to embrace diverse cultural narratives. The findings emphasise the importance of maintaining openness to diversity, which facilitates the creation of an educational realm where every cultural identity is valued and actively engaged. The outcomes underscore the importance of structured teacher training in multicultural competencies, supported by specialised foundations and community centres that provide the necessary resources for these educational frameworks.

Keywords

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1. Introduction

The modern world is undergoing constant changes related to cultural diversity, which requires new approaches to education. Multicultural education has become a key factor in jointly building a future for diverse cultural communities (Shulha 2019; Moon 2019). Cultural diversity is not merely the presence of different ethnic groups; it also presents a wide range of opportunities and challenges within the modern educational environment (Moon & Jeon 2022). The relevance of multicultural education and its successful implementation is growing in today's world, where societies are facing unprecedented intercultural interaction. In multinational countries with diverse cultural heritages, multicultural education is particularly important in developing effective strategies for integration and mutual understanding across different cultural groups. Creating a favourable educational environment that acknowledges the diversity and values of each culture is becoming an important factor in the development of citizenship, tolerance, and cultural understanding (Aviv et al. 2024).

Hlukhota (2022) emphasises that the concept of multicultural education reflects the evolution of modern society and its approach to diversity. According to the author, multicultural education initially recognised the relevance of tolerant relations between cultures, influenced by integration processes that shaped international relations. Modern trends emphasise the need for intercultural interaction and dialogue aimed at enriching diverse cultures (Rexhepi et al. 2024). However, the author argues that the introduction of multicultural education in educational institutions is often accompanied by difficulties in cultural assimilation and potential conflicts. In this context, educational policy should aim to prepare the younger generation for cultural challenges and serve as a mediator between cultures. It is important to recognise that the evolution of multicultural education has moved from a monocultural paradigm towards an inclusive approach that respects cultural diversity. Nonetheless, challenges remain in developing pedagogical strategies that take into account the diversity of ethnocultural groups in the global environment.

In addition, Supsiloani et al. (2023) note that the lack of specific policies and regulations may hinder the systematic and comprehensive implementation of multicultural education. This can lead to a lack of structured learning, resulting in varying interpretations and approaches to integrating multicultural education into the learning process, which may reduce the effectiveness of multicultural education in promoting

mutual respect, understanding cultural diversity, and early resolution or prevention of social conflicts. Another important issue is the risk of interethnic conflicts on the backdrop of racism. Even though multicultural education is developing in progressive and open countries, this does not exclude the emergence of such conflicts. Chang and Woo (2022) argue that traditional methods of multicultural education can often be ineffective for solving such complex problems. Instead, more detailed and critical approaches to multicultural education are needed. Educational programmes must include content that promotes awareness and understanding of cultural diversity and actively identifies and counteracts stereotypes, discrimination, and prejudice.

Ghim and Ryu (2020) believe that policies for the development of multicultural education can be implemented in a localised manner, covering certain territories or districts with the largest number of multicultural students. In this way, the state can focus its attention on the development of individual curricula and initiatives and provide more effective regulation and funding. Choi and Park (2018) also identify numerous problems associated with the implementation of multicultural education and note that the current issue requires more research and publicity, as well as active state support.

While previous studies focus on the general problems of implementing multicultural education, they tend to overlook the specifics of integrating multicultural education within individual communities and fail to highlight examples of successful practice. This gap may hinder the development of this area in general. Therefore, this study focuses on the role and effectiveness of multicultural education in the context of the successful experience of the Jewish community in Ukraine. Its purpose is to examine the key aspects and factors that influence the successful implementation of multicultural education in Ukrainian society, using the specific example of the Jewish community. The study seeks to analyse strategies, methods, and practices that create favourable conditions for the interaction of different cultures and contribute to the formation of a tolerant society. The present research is an important step towards understanding and using the positive experience of multicultural education to create a more harmonious society.

2. Materials and Methods

This research examines the implementation of multicultural education in Ukrainian public schools, focusing specifically on the incorporation and portrayal of Jewish cultural and educational experiences within this

framework. Rather than concentrating solely on Jewish schools as distinct entities within Ukraine's educational system, the study investigates the integration of Jewish cultural narratives, identities, and teaching practices into the national educational framework. The analysis covers the integration of multicultural educational strategies in general Ukrainian schools serving minority communities, including the Jewish population; the contributions of Jewish community institutions and educators in developing these strategies; and the required skills of teachers working in mainstream Ukrainian schools to provide culturally diverse education that includes Jewish cultural elements.

The theoretical basis includes academic works by scholars specialising in the study of multicultural education in the world, as well as official regulatory documents. The study employs synthesis and structural, cultural, and conceptual analyses. Data is derived from sources that are directly pertinent to the Jewish community's assimilation in Ukraine's educational framework. The inclusion criteria were defined by geographic relevance (Ukraine), cultural focus (multicultural education involving ethnic communities, especially the Jewish community), educational context (practices and policies pertaining to multicultural education and ethnic minorities), and acceptable data types (academic articles, governmental reports, policy documents, historical records, case studies, surveys). This ensured a concentrated examination of the Jewish community's experiences within Ukraine's diversified educational framework.

Structural analysis was employed to investigate the connections and functions of key stakeholders within the educational system, namely government entities, educational institutions, and community organisations, emphasising how these interactions influence the implementation of multicultural education (Karimi 2022). Secondary data sources, including policy papers, educational legislation, and government reports, were examined to comprehend the institutional structure governing multicultural education in Ukraine. The structural study entailed delineating the institutional frameworks and power dynamics within the Ukrainian educational system. Critical documents, including legislation pertaining to national minorities, educational policies, and evaluations of multicultural education implementation, were examined to evaluate the contributions of diverse stakeholders in formulating educational methods. The research concentrated on examining the interactions among government entities, school administrators, and community organisations that affect the formulation and implementation of multicultural education initiatives. This investigation revealed the

underlying obstacles and enablers within the educational system that influence the effective implementation of multicultural education. The structural analysis showed how educational policies are influenced by institutional elements through the examination of stakeholder interactions, highlighting how these factors can assist or hinder the incorporation of multicultural values into the curriculum.

Cultural analysis was used to examine how cultural elements, such as customs, values, and historical narratives, influence the implementation and efficacy of intercultural education (Lv et al. 2022). This approach entailed the examination of secondary data sources, including historical records, cultural studies, and Jewish community archives, to comprehend the cultural environment in which multicultural education operates. Significant cultural artefacts, including educational resources, cultural traditions, and religious practices, were analysed to evaluate their impact on educational methodologies and the incorporation of Jewish cultural values into the wider Ukrainian educational system. The cultural study concentrated on examining academic papers, historical documents, and official data that delineate the influence of the Jewish population on educational practices in Ukraine. Particular attention was given to Jewish cultural norms and educational practices, focusing on the integration of Jewish values and traditions into curricula and extracurricular activities. This approach assisted in recognising cultural barriers to integration, as well as cultural assets that promote the efficacy of multicultural education. The study utilised cultural analysis to clarify the particular cultural dynamics that affect the incorporation of multicultural education. It revealed how Jewish cultural heritage and educational methods are either accepted or contested within the broader educational framework of Ukraine. This approach was crucial in revealing the influence of cultural elements on the adoption and efficacy of multicultural education initiatives.

The synthesis approach was applied to combine several sources of secondary data, including scholarly publications, policy documents, and studies on multicultural education in Ukraine, with a specific focus on the Jewish community (Onghena 2023). The data was synthesised to provide a cohesive framework for comprehending the factors that facilitate the successful implementation of multicultural education in Ukraine. A comprehensive analysis of the literature revealed major themes and trends, integrating results to illustrate the evolution of multicultural education in Ukraine and the special role of the Jewish community within that context. The process entailed a comprehensive examination of existing academic research, governmental regulations,

and historical records pertaining to multicultural education in Ukraine. The synthesis of these data enabled the research to integrate insights from many scholars, policy papers, and case studies into a cohesive understanding of the subject matter. Data from sources including legislative texts, multicultural education policies, and educational results reports were synthesised to discern common trends and deficiencies in the literature. The synthesis technique established a comprehensive framework for the study by identifying recurrent themes and linking various findings. This process enabled to provide a comprehensive perspective on the present condition of multicultural education, specifically with the application of these frameworks to the Jewish population in Ukraine. This strategy proved crucial in integrating diverse data into a cohesive theoretical model.

A conceptual analysis was employed to clarify and critically evaluate the fundamental ideas that support the study, including multicultural education, cultural integration, tolerance, and ethnic identity (Valchev 2022). Secondary data sources, mainly academic literature, policy papers, and theoretical articles, were used to investigate the definitions, interpretations, and implementations of these ideas within the Ukrainian educational system. This approach entailed a comprehensive examination of the literature to delineate the fundamental ideas integral to the research. The concept of multicultural education was examined by reviewing scholarly concepts and their relevance to the Ukrainian setting. Likewise, the notions of cultural integration and ethnic identity were examined within the framework of Jewish education, focusing on their interpretation in both academic literature and policy texts. The investigation included a comparison of various conceptualisations of these notions across cultures to enhance the understanding of their applicability in Ukraine. The objective of the conceptual analysis was to guarantee clarity and consistency in the use of essential terminology and ideas. It facilitated the establishment of a unified theoretical framework for the research by clarifying the definitions of fundamental ideas and evaluating their use in both scholarly debate and educational practice. This technique provided for a comprehensive knowledge of the theoretical foundations of multicultural education and clarified how these concepts manifest in the policies and activities related to multicultural education in Ukraine.

The combination of synthesis and cultural, structural, and philosophical studies enabled a thorough and nuanced comprehension of the implementation of multicultural education in Ukraine, especially concerning the Jewish population. The use of secondary sources, includ-

ing previous research, policy papers, and historical records, enabled a comprehensive examination of the topic. Each technique was essential for revealing various aspects of the educational process, including cultural influences, institutional frameworks, theoretical perspectives, and practical applications.

3. Results

Ukraine is a country characterised by rich cultural diversity. Multicultural education in Ukraine has developed steadily over time. Its development represents a history of cultural bridging aimed at discovering and understanding diversity and at learning together the values of different ethnic and national groups. The evolution of this concept spans periods of dramatic change in the political, social, and educational spheres. The first steps towards the introduction of multicultural education in Ukraine can be traced back to the Soviet era, when attempts were made to unite different cultures and ethnicities under the general idea of socialist coexistence (Zajda 2023). However, political constraints and managerial decisions often led to a formal approach to this issue, likely without considering individual cultural characteristics.

After gaining independence in 1991, Ukraine began an active re-evaluation of its educational system, including in the context of multicultural education. This period was marked by a desire for greater cultural freedom and increased attention to cultural diversity. In the 2000s, the government of Ukraine recognised the need to intensify policies aimed at building a tolerant society and addressing ethnic and cultural diversity (Gladushyna 2022). During this period, concepts and approaches to the implementation of multicultural education in the national educational system began to take shape. Government initiatives and measures aimed at teaching and implementing multicultural education received support from both educational institutions and the public. Thus, in the 1990s, a number of basic legislative acts were adopted to regulate education in Ukraine and promote the introduction and development of multicultural education. The first steps included the adoption of the Law of Ukraine No. 1060-XII On Education (1991) and the Law of Ukraine No. 2494-XII On National Minorities in Ukraine (1992).

The next step was to recognise multicultural education as a distinct and important element of Ukraine's educational policy. In the early 2000s, the meaning and implementation of multicultural education in Ukraine began to be more clearly defined through various legislative acts.

One of the key regulatory documents was the Law of Ukraine No. 651-XIV On General Secondary Education adopted in 1999 (later replaced by a new version, i.e. the Law of Ukraine No. 463-IX On Complete General Secondary Education (2020)), which was the first to formally enshrine the principles of multicultural education within the educational process of general education institutions. The current regulatory document also mandates the creation of appropriate conditions for children with special educational needs, ensuring inclusive education that takes into account their individual needs. This law outlines the main directions and approaches for integrating multicultural education into the Ukrainian school system and allows foreigners and stateless persons legally residing in Ukraine to obtain full general secondary education on equal terms with Ukrainian citizens. In addition, the Law of Ukraine No. 2402-III On Protection of Childhood (2001) was adopted, which took into account the children's cultural specificity and needs and provided for the creation of favourable conditions for their full development, with due consideration of their cultural identity – an important step towards ensuring a multicultural approach in education.

A new version of the Law of Ukraine No. 2145-VIII On Education was adopted in 2017, becoming a key regulatory document in defining the concept of multicultural education and finally enshrining it as one of the fundamental principles of Ukraine's educational policy. This law defined the main goals and objectives aimed at ensuring mutual understanding, tolerance, and equal opportunities for all cultural groups in society through the educational process. In 2022, the Law of Ukraine No. 2827-IX On National Minorities (Communities) of Ukraine was adopted, replacing the previous version of this regulatory document. It granted national minorities the right to education in their native language. This was an important step towards ensuring equal opportunities for cultural groups and national minorities to freely choose educational standards and methods. Together, these laws have become the foundation for the development of multicultural education in Ukraine, providing a legal framework and incentives for the creation of an educational environment that acknowledges the diversity of cultural groups. They have identified priorities to ensure the participation and development of all ethnic communities within the educational process, thereby contributing to the building of a tolerant and culturally diverse society. It is also worth noting that throughout Ukraine's formation and development, the search for effective ways to implement multicultural education has remained an important and ongoing concern.

Over the past decades, the trend towards the development of multicultural education has intensified, driven by increasing international exchange, migration processes, and cultural interaction. A new need has emerged to study and understand different cultures and to promote tolerant coexistence among different ethnic groups. Scholars, teachers, and the public have expressed their views and suggestions on how to make multicultural education more effective. In particular, the introduction of multicultural education into the school and higher education systems has become a priority. New educational laws adopted since independence reflect efforts to integrate the study of cultural aspects of different nationalities into the general educational process. The current stage in the development of multicultural education in Ukraine focuses on a deeper understanding of and attention to cultural diversity (Belando-Montoro et al. 2020). Efforts are now aimed at introducing more active teaching methods and establishing cooperation between educational institutions of different ethnic groups. Due to changes in approaches to teaching and developing cultural diversity, Ukrainian multicultural education has undergone changes aimed at improving the understanding and acceptance of different cultures.

The development of multicultural education in Ukraine can be illustrated through the example of the Jewish community, which reflects the specific features of cultural and ethnic interaction and influence in Ukrainian society. The Jewish educational tradition, spanning millennia and grounded in rich cultural, linguistic, and religious heritage, continues to influence the cultural landscape of Ukraine. Jewish education in Ukraine developed in harmonious symbiosis with other nationalities, particularly Ukrainian, Polish, Crimean Tatar, Hungarian, and other cultures, forming a unique environment of interaction and cultural exchange. Over time, Jewish education in Ukraine went through various stages, including periods of cultural flourishing. During the late Middle Ages, when Jewish schools in Ukraine served as centres for studying the Torah and the Talmud (Khiterer 2021), educational institutions were formed, playing a prominent role in preserving Jewish tradition and religious heritage. In the early 19th century, however, the Jewish community faced assimilation pressures, with some members trying to adapt to the local culture by abandoning their traditions and educational values (Zelenska 2023).

In 1844, government educational institutions – Jewish schools of the first and second grades – were established in Ukraine, modelled after parish and county schools. However, according to a decree issued in 1873, these institutions later underwent reorganisation. The

second-grade schools were closed, and the first-grade schools were transformed into elementary Jewish schools with an emphasis on the study of the Russian language by limiting the subjects taught in Jewish schools. These measures aimed to reform the education system for the Jewish community, focusing on increasing the influence of the Russian language and restricting traditional Jewish subjects. In 1887, a percentage quota was introduced, limiting the number of Jewish students in educational institutions. These restrictions proved catastrophic for Jewish students, as many were forced to discontinue their education. Such policies became obstacles to obtaining education and the further development of the Jewish youth at that time.

The events of this era led to the loss of a significant part of the uniqueness and specificity of Jewish culture and education. It was not until the end of the 19th century that Jews were finally granted rights to education and educational autonomy, albeit severely limited. During this time, Jewish education in Ukraine took various forms, with significant attention given to hederim (traditional Jewish schools). These institutions were founded on a religious basis but provided education not only from the perspective of Judaism but also focusing on teaching literacy and the study of the native language (Hebrew). These private Jewish schools were subject to control by directors and inspectors of public schools. Despite strict controls, many proprietors of these educational institutions violated regulations by deviating from curricula and work schedules or by employing uncertified teachers. To address these violations, the regulatory document On Compliance by Proprietors of Private Jewish Schools with Laws and Orders Relating to Said Schools was adopted in 1898. It aimed to ensure compliance with laws and orders by proprietors of private Jewish schools through explanatory work among school founders. Emphasis was placed on the necessity of adhering to legislative norms, and fines and judicial sanctions were introduced for repeated violations. Thus, although the Jewish community had regained the opportunity to receive education while preserving cultural and national identity, the development of education for Jews faced a series of obstacles and bureaucratic hurdles. The endeavour to open new educational institutions often met with negative reactions and refusals, as documented in archival records. Bureaucratic restrictions and refusals to grant requests for the establishment of educational institutions for Jewish families became common practice during that period, complicating the possibilities for founding new educational facilities.

Another challenging period in the education of the Jewish community in Ukraine was during the Soviet Union era. In the 20th century,

the Soviet authorities integrated Jewish education into the framework of the general educational system, partially restricting the community's autonomy in this sphere (Raspe 2022). A significant issue was the restriction of access to university education for Jewish youth, creating considerable challenges for obtaining higher education and developing professional skills. This policy led to a decline in traditional Jewish education developed in previous years. However, it also prompted Jewish communities to seek ways to preserve their cultural heritage. Furthermore, it is important to note that, despite difficult moments in history, both Jewish and Ukrainian communities demonstrated wisdom and the ability to preserve their cultural heritage. In their interaction, they skilfully drew upon shared values, traditions, and experiences to preserve and strengthen their cultural roots within Ukrainian society.

Over time, in each historical epoch and in the context of diverse political, economic, and social challenges and perspectives, there has been a gradual development of mutual understanding and cooperation among representatives of various national communities (Ukrainian, Jewish, Hungarian, Crimean Tatar, Polish). Key factors in fostering such interaction included efforts towards tolerance, cultural adaptation, and the preservation of a shared historical heritage, contributing to the peaceful coexistence of different cultural and national groups in Ukraine. The contemporary process of Jewish education in Ukraine in the 21st century is characterised by the development of educational institutions that offer a wider range of educational programmes, including both religious and secular education. The state supports the preservation of the cultural heritage of the Jewish community and its educational development by providing funding for schools where instruction is conducted in both Ukrainian and Hebrew. Since Ukraine's independence, there has been a growing awareness of the importance of intercultural interaction, but only in recent decades has there been an intense increase in attention to the development of multicultural education, which includes the study, preservation, and support of the cultural traditions of various ethnic groups.

The Jewish community in Ukraine plays an important role in the development of multicultural education by contributing a variety of cultural and historical aspects that enrich the country's educational space. There are educational institutions, museums, and centres across the country specialised in the study and promotion of Jewish culture. In recent years, interest in Jewish culture has grown considerably within educational institutions. Schools and universities now offer special courses and programmes covering the history, traditions, and religious

heritage of the Jewish community. In addition, there are centres and initiatives aimed at studying the cultural heritage of the Jewish community, providing information, educational material, and opportunities for intercultural interaction. Thus, the Ukrainian state pays attention to the implementation of multicultural education aimed at creating a tolerant approach towards representatives of different cultures, including the Jewish community. This process is divided into several stages that combine awareness-raising, the development of tolerant attitudes, and the introduction of multicultural education into the Ukrainian educational process (Table 1).

Table 1: Ukrainian approach to the implementation of multicultural education

Stage of development	Characteristic
1st stage	This stage begins with raising awareness of Jewish culture and traditions. Children and young people are introduced to the history, religion, art, and literature of the Jewish community. Lessons, lectures, cultural events are used to acquire knowledge and form ideas.
2nd stage	This stage focuses on the development of a tolerant attitude towards representatives of the Jewish community. A clear idea of equality in rights and freedoms for representatives of other nationalities (Jews) is developed, using discussions, trainings, and other forms of work to overcome possible stereotypes.
3rd stage	This stage provides for the introduction of multicultural education into the Ukrainian educational process as a necessary and inseparable component. It includes the development of educational programmes, textbooks, and materials that correspond to the principles of multicultural education.

Source: Compiled by the authors based on Shwed (2021) and Abzal (2022).

In general, it should be noted that this approach to the implementation of multicultural education systemises the process, starting with the assimilation of the cultural heritage of the Jewish community, moving on to the formation of a tolerant attitude towards it, and ending with the integration of this education into the general educational framework.

The structure of the educational process in the context of multicultural education, including the experience of the Jewish community in Ukraine, consists of several key components that interact with one another and determine the effectiveness of the educational system. Firstly, it includes programmes and curricula that structure the content and direction of educational activities. In the context of multicultural education, these programmes should consider various aspects and the historical context, while promoting mutual understanding and toler-

ance among representatives of different cultural groups. In addition to educational content, teaching methods and learning approaches are also important, as they focus on creating a favourable environment for interaction and cooperation among students from different cultures. In the international multicultural educational process, the role of teaching staff and their views on intercultural learning are essential (Kim & Jung 2021). Qualified teachers who understand and embrace cultural diversity act as catalysts for intercultural understanding. They foster an open and receptive atmosphere where students can freely express themselves and explore cultural differences. In addition, improving multicultural education is a necessary step in the European integration process. For example, respect for and acceptance of cultural diversity in society – as well as the coexistence of cultures and religions without the loss of national and cultural identity – lead to spiritual and cultural enrichment (Vasylyk 2019), which are the postulates of European consciousness.

The next aspect of improvement is the infrastructure of educational institutions, which directly affects multicultural education. Modern educational environments should be adapted to support diversity and interaction between different cultural groups (Prontenko et al. 2019a). In particular, the availability of multilingual teaching, culturally oriented resources, and special measures to support students from different cultural backgrounds play an important role in creating a favourable educational environment (Henehan & Duarte 2024). It is also important to consider that the management and administration of educational institutions should ensure the sustainable development of multicultural education (Chaika 2022). Such management should include strategic planning, the development of appropriate policies and programmes that promote intercultural understanding, and the introduction of monitoring and evaluation tools to assess the effectiveness of existing multicultural educational programmes (Ovcharuk et al. 2023). Taking these components into account in the structure of the educational process becomes the basis for the successful implementation of multicultural education, as demonstrated by the Jewish community in Ukraine. By integrating programmes, teaching methods, pedagogical approaches, and management strategies, educational institutions can create a sustainable and fruitful environment for the development of intercultural understanding and support for cultural diversity (Abbasova et al. 2023).

Another important aspect of multicultural education is the methods employed by educational institutions. Educational methods constitute a complex system of pedagogical approaches aimed at facilitating inter-

cultural education (Suranchiyeva et al. 2023). Teaching is a fundamental component that actively fosters intercultural discussion and mutual understanding (Zelenin et al. 2023). Additionally, educational institutions adopt practices that focus on exploring different cultural and historical contexts. These methods include the study of traditions, customs, language, creativity, and other aspects of different cultures, enabling students to broaden their worldviews and deepen their understanding of cultural differences. Other methods of multicultural education include strategies aimed at developing tolerance and respect for cultural differences. These approaches help students build awareness and acceptance of diversity as an integral part of modern society. They include the use of interactive technologies and pedagogical innovations aimed at supporting the study and understanding of various cultural aspects through modern educational approaches and technologies. Overall, the combination of these methods contributes to the creation of a diverse and inclusive pedagogical practice that promotes the development of a tolerant and multicultural learning environment.

The Jewish community in Ukraine has faced considerable obstacles in implementing multicultural education, primarily owing to historical trauma and cultural opposition. Historically, the Jewish population in Ukraine has experienced significant persecution, including restrictions on their cultural and religious practices during the Soviet era and earlier periods of political turmoil. These traumatic experiences have contributed to a perception of cultural vulnerability and a reluctance to fully engage with larger educational frameworks. Consequently, Jewish educational institutions often prioritise the preservation of their cultural identity over adopting multicultural pedagogies. This can lead to opposition to educational reforms advocating for the inclusion of other cultural viewpoints. This opposition is exacerbated by fears of losing unique Jewish traditions and values amid a widespread movement towards homogenisation within the educational system.

The Jewish community also faces substantial resource constraints, especially regarding teacher training and educational materials. Insufficient financing for specialised teacher development programmes designed to enhance intercultural competence presents a major barrier to the effective integration of Jewish cultural perspectives into mainstream education (Prontenko et al. 2019b; Levchenko et al. 2021). Many educators lack the necessary expertise to teach cultural diversity effectively or to engage with pupils from diverse cultural backgrounds, particularly those from Jewish communities (Bocheliuk et al. 2019). Moreover, there is a shortage of educational resources that accurately represent

Jewish cultural, religious, and historical perspectives. Textbooks and curriculum frequently misinterpret the Jewish experience, leaving educators with inadequate tools to teach Jewish culture in an authentic and meaningful way (Ernar et al. 2021). These constraints hinder the establishment of an inclusive multicultural education system that could enhance awareness and appreciation of Jewish culture among students from various backgrounds.

The main stakeholders in intercultural education are state institutions, educational institutions, teachers, students, and representatives of different cultural communities (Strelnikov & Vytkalov 2023). State institutions act as the main actors, defining education policy and legislation and promoting the implementation of multicultural education through regulations and financial support (Ketners 2024; Shahini 2024). Educational institutions and educators play a key role in implementing state policies by integrating multicultural education through curricula, teaching methods, and teacher training (Ramankulov et al. 2015). They also create educational materials, organise cultural events, and promote a tolerant environment within schools. Students, as active participants in the educational process, engage with and respond to multicultural education and can advocate for greater attention to diversity and cultural tolerance. Representatives of different cultural communities also play an important role in the context of multicultural education, contributing their own unique perspectives and thus enhancing cross-cultural understanding and interaction. Their active participation in cultural events and exchange of experience is vital for the successful implementation of multicultural education.

It is important to note that Ukraine is making significant efforts to create a tolerant and open society through the systematic implementation of multicultural education in its educational processes. This activity is reflected in the adoption of key legislative acts aimed at developing culturally conscious education and supporting diversity within the educational system. The introduction of multicultural education is considered a strategic step towards building a harmonious society. Ukraine's successful experience in implementing multicultural education rests, firstly, on establishing a legislative framework that defines multiculturalism as a key aspect of educational policy. This provides the foundation for the development of educational programmes and textbooks that consider cultural characteristics and diversity in society. Secondly, the success of the Ukrainian experience lies in the preparation of teachers to deliver multicultural education. Thanks to specialised training, teachers acquire the necessary knowledge and methodological approaches

to effectively foster tolerant attitudes towards different cultures among students (in educational institutions of all levels). In addition, the successful implementation of multicultural education in Ukraine is manifested in a wide range of educational activities aimed at raising awareness of diverse cultures, including exhibitions, museums, thematic lessons, and cultural events. These initiatives are supported by the existence and active work of specialised institutions, such as Jewish educational centres, associations, communities, and foundations.

Interethnic conflicts and preconceptions in varied educational environments can compromise intercultural education by fostering distrust, exclusion, and animosity (Grütter et al. 2021). Stereotypes foster discriminatory behaviour, obstruct communication and collaboration, and may marginalise specific populations (Limaj 2022; Khamzina et al. 2020). This fosters an insecure and unendorsed environment, adversely affecting pupils' mental health and academic achievement. Discrimination sustains bias, hindering the efficacy of multicultural education and turning classrooms into arenas of cultural disagreement rather than spaces for mutual respect. These conflicts adversely impact student relationships, learning results, and the implementation of multicultural courses by diminishing cross-cultural conversation and collaboration. Students may experience exclusion, which results in diminished academic performance, especially among marginalised populations. To mitigate these tensions, it is essential to cultivate an inclusive workplace through anti-bias training, encouraging intercultural discourse, incorporating diverse perspectives into curricula, and ensuring educators are equipped to confront preconceptions and prejudice effectively.

Given these aspects, the successful implementation of multicultural education in Ukraine is based on the recognition and active implementation of multicultural values and principles in all areas of the educational system. This allows society to understand and appreciate cultural and ethnic differences and promote mutual understanding and tolerance among representatives of different cultures. It is also important to acknowledge that the Jewish community has undergone a challenging journey in gaining autonomy and rebuilding its cultural identity, considering all the difficulties it has faced along the way. In contemporary Ukraine, the state provides support to all national minorities, helping them adapt and integrate into Ukrainian society. Under these circumstances, the most pressing issue for the Jewish community today is the preservation of its cultural identity in the context of globalisation and integration into Ukrainian society. Efforts to preserve unique educational traditions and values sometimes conflict with the general tendencies

to harmonise socio-cultural groups in the country. However, the Jewish community seeks to address these issues through collaboration with the government, engagement of civil organisations and foundations, and the development of educational programmes and centres aimed at preserving and developing Jewish education and culture.

Additionally, the Jewish community remains committed to preserving its traditions. In the modern Ukrainian environment, many Jewish customs are upheld. Notable examples include the celebration of religious holidays such as Rosh Hashanah (Jewish New Year) and Yom Kippur (Day of Atonement), which are important for the Jewish community and are maintained as a historical legacy. They are marked by special religious rituals, including prayers, fasting, and festive dinners. Another significant tradition is education and upbringing of children in accordance with Jewish values, customs, and norms. Furthermore, Jewish traditions manifest in various artistic and cultural expressions, such as music, dance, and diverse artistic exhibitions, serving as crucial elements in the cultural development and heritage of the Ukrainian Jewish community. Ukrainian Jews maintain an interest in Jewish language, literature, history, and faith, directing efforts towards passing this legacy on to future generations through educational institutions and cultural programmes.

Effectively implementing multicultural education within the Jewish community in Ukraine requires addressing numerous critical factors that influence the integration of Jewish cultural perspectives and the general inclusivity of the educational system. These factors include the historical context of Jewish education, the readiness of educators, and the degree of support from both the community and government. Table 2 outlines the primary elements and factors influencing this process, along with recommendations for measures that could improve its efficacy.

Although the elements outlined in Table 2 establish a basis for a more inclusive educational setting, ongoing initiatives are essential to ensure that multicultural education not only accommodates but also actively honours the cultural identity of the Jewish community. The partnership between educational institutions, community organisations, and governmental entities will be essential in establishing a sustainable framework that fosters cultural diversity within Ukraine's educational system. Policymakers must prioritise the establishment and funding of teacher training programmes centred on multicultural education, particularly those designed to address the cultural, historical, and educational needs of ethnic minorities, including the Jewish popu-

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lation. This may entail compulsory professional development seminars for educators, focusing on cultural sensitivity, anti-bias methodologies, and techniques for incorporating various viewpoints into the curriculum. Furthermore, authorities should consider establishing incentives for schools that effectively implement multicultural initiatives, promoting the dissemination of best practices and resources.

Table 2: Key aspects and factors influencing the successful implementation of multicultural education within the Jewish community in Ukraine

Aspects	Factors influencing success	Further actions needed
Cultural integration	Historical integration of Jewish education with other communities	Increase collaboration between Jewish educational institutions and mainstream schools.
Teacher training	Lack of training on multicultural competencies	Develop specialised teacher training programmes focused on Jewish cultural education.
Curriculum development	Limited representation of Jewish culture in mainstream curricula	Integrate Jewish history, traditions, and values into national educational materials.
Government support and legislation	Support from Ukrainian laws on national minorities	Ensure consistent enforcement of multicultural education policies, especially for minorities.
Community engagement	Active role of Jewish community centres and organisations	Strengthen partnerships between community centres and schools for cultural events and educational programmes.
Social and emotional support	Need for safe spaces to discuss cultural differences	Establish counselling services and peer support networks to address discrimination or exclusion.
Intercultural dialogue and cooperation	Engagement with other ethnic and cultural groups	Foster interethnic dialogues in schools to promote mutual understanding and respect.
Cultural resources	Lack of educational materials reflecting Jewish cultural perspectives	Create and distribute more culturally relevant educational resources for Jewish students and educators.
Public awareness	Growing awareness of the importance of cultural diversity	Launch public campaigns to raise awareness of the value of Jewish culture in the broader Ukrainian context.

Source: Own compilation.

The successful implementation of multicultural education relies on the dynamic interaction of several interconnected factors: historical awareness, educator training, curriculum development, institutional support, and community involvement. Collectively, these pillars bolster and uphold inclusive educational approaches. Historical understanding provides a foundation by cultivating cultural sensitivity and empathy. Teaching children about the diverse histories of communities, including the Jewish experience in Ukraine, fosters comprehension of minority perspectives. However, awareness alone is insufficient without integration into pedagogical practice. This underscores the significance of teacher preparation, which equips educators with historical knowledge and multicultural pedagogical competencies to counter prejudices and foster inclusive classrooms.

Teacher training and curriculum development are intricately interconnected. Even well-qualified educators require access to culturally responsive resources that represent minority histories, literature, customs, and practices within the national narrative. Collaborative curriculum development with community groups and officials ensures content accuracy and respectfulness. This culturally enriched curriculum improves teacher preparation by offering practical resources and context-specific examples.

Institutional support and legal frameworks are essential for sustaining these initiatives. Legislation such as Law of Ukraine No. 1060-XII On Education (1991) and Law of Ukraine No. 2494-XII On National Minorities in Ukraine (1992) mandates multicultural education, fosters equitable access, and enables educators to implement inclusive methodologies. Institutions offer tools for professional development, oversee implementation, and cultivate environments that embrace language and cultural diversity.

Community interaction is essential for shaping educational material and enhancing its significance. Collaborations with Jewish organisations and cultural centres provide genuine resources and offer feedback mechanisms that prevent superficial portrayals. Community engagement enhances education outside the classroom through extracurricular activities and public events, fostering intercultural interaction among students and families. These elements constitute an interrelated framework wherein historical awareness, teacher training, curriculum inclusivity, institutional support, and community collaboration collectively enhance effective multicultural education.

The evaluation of multicultural integration in education required a multifaceted approach, as its effects are evident at institutional, peda-

gogical, and community levels. This study assessed the efficacy of multicultural education using qualitative and quantitative metrics derived from secondary sources, including state education reports, independent evaluations by civil society organisations, and published case studies from local schools and community initiatives. The indicators included curricular inclusion, teacher preparedness, student involvement, interethnic collaboration, and the existence of cooperative structures between educational institutions and cultural groups.

A primary indicator of successful intercultural integration is the inclusion of minority histories and narratives into the national curriculum. In Ukraine, multicultural education is officially acknowledged as significant, and initiatives have been undertaken to integrate aspects of ethnic minority cultures and histories into educational curricula. Research by Svyrydiuk et al. (2022) shows that multicultural education in Ukraine remains at an early stage of development. Their analysis of schools in the Cherkasy region revealed that although multicultural and national-patriotic orientations are included in educational content, the overall standard of multicultural education is inadequate and uneven. The study emphasises the necessity for a more thorough and systematic integration of minority histories and cultural narratives nationwide. Incorporating minority histories and narratives into the national curriculum is a vital indicator of the effectiveness of multicultural education. Ukraine has made attempts to integrate the experiences and contributions of other ethnic groups, especially the Jewish minority, into educational materials. Research suggests that although certain elements of diversity exist in educational programs, the total degree of multicultural education among students requires further improvement (Svyrydiuk et al. 2022).

Teacher training programmes focused on intercultural competence are vital for successful integration. Research underscores the necessity for educators to acquire cultural, ethno-historical, and ethno-psychological knowledge to comprehend the diversity of the contemporary world and the particularities of cultural expressions across different socioeconomic strata (Ovsiienko et al. 2023). The cultivation of these competencies allows educators to structure pedagogical processes that promote dialogue among individuals from diverse cultures. Student participation, especially among immigrant and minority populations, is a significant measure of effective intercultural integration. Research on Ukrainian adolescent refugees within European educational systems, namely in Austria, Germany, and England, indicates that social elements, particularly peer relationships and supportive student-teacher

interactions, profoundly influence the overall well-being and integration of these children (Kolbel 2024). These findings highlight the significance of cultivating inclusive environments that facilitate the social integration of all pupils.

Collaborative initiatives between educational institutions and community organisations enhance the significance and authenticity of intercultural education. Partnerships with cultural institutions or local museums can bring real-life stories into classrooms, enriching the learning experience. These collaborations ensure that the depiction of cultural identities in education is rooted in lived experiences, fostering mutual cultural understanding and respect. Although Ukraine has made progress in incorporating multicultural principles into its educational framework, continued efforts are essential to tackle ongoing challenges. Improving curricular inclusivity, expanding teacher training initiatives, promoting student participation, and reinforcing community partnerships are essential measures for attaining comprehensive multicultural integration in education.

Educators should be encouraged to integrate Jewish cultural narratives into their teaching materials and curricula, enabling Jewish students to see their heritage reflected in their educational experience. Schools should enhance community engagement by collaborating with Jewish cultural organisations and centres to develop educational programmes, workshops, and extracurricular activities that honour cultural variety. Ultimately, promoting open discourse in classrooms about cultural differences and establishing secure environments for students to express their perspectives helps cultivate a more inclusive and supportive atmosphere, which is crucial for the long-term success of multicultural education. Focused efforts on creating their own educational institutions, supporting cultural initiatives, and preserving traditions and language contribute to the preservation and development of Jewish education in Ukraine, reinforcing the preservation and regeneration of the national cultural heritage.

4. Discussion

Multicultural education explores and discusses a wide range of aspects aimed at developing a tolerant and open society. One of the key topics is the understanding of, and interaction between, different cultures. Banks and McGee Banks (2019) underscore the importance of recognising cultural and ethnic diversity in modern education. They emphasise the close relationship between multicultural education and the enrich-

ment of the learning environment through the inclusion of different cultural approaches and views. A central focus of their work is the analysis of the problems of inequality and discrimination in education. These issues are examined through the lens of social justice in the context of educational institutions, with detailed analysis of various forms of inequality that exist in contemporary education, including unequal access to resources, unequal learning opportunities, and systematic discrimination based on race, ethnicity, or social status. Furthermore, their work highlights the importance of understanding and eliminating these negative phenomena in the educational system. The authors propose social justice strategies based on creating more equal learning conditions for all students. These strategies should include developing policies that promote inclusivity, improving curricula to reflect the diversity of cultures and beliefs, and creating an environment that supports diversity and mutual respect.

Recent scholarship also highlights the need to consider the diversity of cultures in educational processes, placing significant emphasis on employing various approaches and strategies to ensure equal opportunities for students from different cultural and ethnic backgrounds. However, the present study focuses on the implementation of multicultural education in the specific context of a single country and ethnic group, considering national characteristics and requirements for the educational system. By contrast, earlier research emphasises more generalised aspects of inclusiveness and social justice in education in general. This study therefore focuses on specific measures designed to ensure equal learning conditions for students from different cultural backgrounds and to build a more tolerant society through education. It also summarises the principles of social justice and offers strategic guidance. The results obtained in the current study place more emphasis on concrete actions aimed at implementing these principles in the educational process at the state level.

The work of Choi and Mao (2021) points out the importance of developing teachers' competencies for the successful implementation of multicultural education in the general educational process. The authors argue that the development of teachers' competencies in multicultural education helps create a more adaptive and inclusive learning environment for students from different cultural and ethnic groups. They identify the importance of teachers having the opportunity to develop skills that will enable them to work effectively with learners from different cultures, understand their characteristics and needs, and adapt their teaching methods and curricula to these diverse contexts. Thus,

the development of teachers' competencies in the field of multicultural education is identified as an important factor in ensuring the successful implementation of these approaches in the general educational process.

The article by Abacioglu et al. (2022) thoroughly examines existing professional development programmes for teachers, revealing their fragmentation and inconsistency. The authors point to a gap between existing programmes and the practical needs of teachers to prepare them to work effectively in a multicultural environment. They put forward several recommendations to improve the situation, including the creation of comprehensive professional development programmes that focus on all aspects of multicultural education, as well as the active involvement of teachers from different cultural backgrounds in the design and implementation of these programmes. They highlight the importance of teacher professional development for effective teaching in multicultural classrooms, emphasising that improving it in the context of multicultural education will contribute to achieving key goals.

While current research also emphasises the importance of developing teachers' professional skills in delivering inclusive multicultural education, the present article extends this discussion by examining the role of various actors involved in the implementation of multicultural education, focusing not only on teachers and the need to develop their professional skills but also on a wide range of stakeholders in the educational process. The results highlight the importance of the influence of legislative bodies, NGOs and other stakeholders in the formation and implementation of multicultural education strategies. This approach allows for an in-depth analysis of the influence of each actor on the success of the implementation of such mechanisms in the educational process. In particular, the article emphasises the importance of interaction between these actors, noting that they form a complex network of influence that jointly determines the directions and subtleties of implementing multicultural education in the general Ukrainian educational process. This analytical approach helps identify tools and strategies that ensure an appropriate level of support and implementation of multicultural education in Ukrainian society.

The research by Hammarén and Lunneblad (2022) identifies shortcomings in current methods of multicultural education. One major issue is the lack of emphasis on the interplay and context of various civilisations. The authors point out that while many existing programmes are aimed at providing information about different cultures, they do not provide real-life experience of interaction between people from these

cultures. This can limit students' understanding and acceptance of other cultures as they do not have the opportunity to practically apply the knowledge they have acquired. In addition, the authors critique the neglect of the importance of home culture in traditional approaches to multicultural education. They emphasise that each individual has their own unique home culture, which has a significant impact on the formation of their overall personality and beliefs. Ignoring this aspect can lead to an inaccurate understanding and assessment of the cultural aspects of each student's personality, creating gaps in the process of education and tolerance development. The authors underline that such flaws can expose the ineffectiveness of multicultural education. Insufficient attention to the interaction between cultures and neglect of home culture can lead to increased segregation and interethnic conflicts, which, in turn, can lead to an increase in stereotypes, rejection and misunderstanding, which disrupts the process of interaction and development of tolerance in society.

Meanwhile, Samuelsson and Swärd Ulriksson (2021) outline several aspects that make multicultural education unpredictable and challenging. One of the main factors is the diversity and complexity of cultural relationships and the difference in approaches to teaching and educating students from different cultural backgrounds. Each culture has its own unique characteristics, values, traditions, and ways of thinking that can interact and conflict with other cultures, which directly creates difficulties in adapting educational approaches that must be flexible and consider the diversity of students. It is also important that multicultural classrooms represent different ethnic, linguistic and socio-economic groups, which requires teachers to develop even more adaptability and flexibility in their work to be able to meet the needs of different students. In addition, there is a need to study and develop new teaching methods and strategies aimed at working effectively with different cultures and the individual needs of students. Such strategies must be constantly adapted and modified to respond to changing conditions and student diversity. Therefore, as the authors note, the complexity and unpredictability of multicultural education demand flexibility, openness and constant readiness to adapt teaching methods to accommodate the diversity of cultures and student needs.

In the context of Ukraine, the development of multicultural education reflects the country's specific historical and cultural conditions. Ukraine has achieved notable progress in integrating multicultural education into its general educational process. This is largely driven by the presence and activity of various associations, foundations, and or-

ganisations that help in the implementation and support of educational programmes for various segments of the population, including distinct communities such as the Jews. This contributes to the formation of a more tolerant and understanding society, where cultural diversity is considered a positive feature that enriches and strengthens the social context. However, it is important to note that the adaptation of new approaches to education and an adequate response to student diversity remain key challenges that require further study and development in the context of Ukrainian education in particular. In general, the study confirms the presence of multiple perspectives in the context of the implementation of multicultural education, demonstrating its complexity and significance for modern society.

5. Conclusions

In line with the main objective of the current research, and based on the analysis of key aspects of multicultural education through the example of the Jewish community in Ukraine, several important conclusions can be drawn. It should be noted that the implementation of multicultural education in Ukraine is a promising and long-standing initiative at the state level. The introduction and development of this educational approach, particularly in relation to the education of the Jewish community of Ukraine, has been made possible by a developed infrastructure of specialised organisations and foundations aimed at supporting educational projects for certain segments of the population. An important aspect of the positive implementation experience is the awareness of the need to consider the cultural characteristics and traditions of the community when developing educational programmes.

The study confirmed that educational programmes should be flexible and adaptable, taking into account the specifics of Jewish culture and other cultures that coexist alongside it. Furthermore, one of the key aspects is the recognition of the role of multicultural education in the formation of a tolerant society. The implementation of such programmes contributes to an increased level of mutual understanding, openness, and tolerance within Ukrainian society as a whole. In addition, this approach helps the country enter the European space. The importance of inclusiveness in the learning environment should also be emphasised. Creating favourable conditions for students from different cultural and social backgrounds is key for the successful implementation of multicultural education. The study also determined that the successful implementation of multicultural education requires state

support and positive public attitudes. The involvement of the state, local authorities, and the society as a whole is crucial for the success of multicultural education programmes and projects.

To reinforce the results, governments should prioritise financing for teacher training programmes focused on multicultural education that encompass cultural sensitivity and anti-bias methods while establishing incentives for schools that successfully implement multicultural efforts. Educators should integrate Jewish cultural narratives into their curricula, collaborate with community organisations to develop educational activities, and promote open discourse to cultivate a more inclusive and supportive learning environment. Thus, the present article offers a unique perspective on the successful implementation of multicultural education through the analysis of Ukraine's experience with the Jewish community and can serve as a basis for further research in the field of intercultural understanding and education. Further research could focus on studying the Ukrainian model of multicultural education, considering the specifics of the socio-cultural context and political environment of other countries, and improve or develop additional or alternative variations of this approach.

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Primer uspešnega multikulturalizma v izobraževanju: analiza integracije judovske skupnosti v Ukrajini

Izvleček

Članek analizira uresničevanje načel multikulturalizma na področju izobraževanja v Ukrajini, katerega namen je spodbujanje medsebojnega razumevanja in sožitja različnih kultur. Uporabljene metode vključujejo sintezo ter kulturno, konceptualno in strukturno analizo, s pomočjo katerih so opredeljeni ključni elementi, ki prispevajo k uspešnemu vključevanju vrednot multikulturalizma. Ti zajemajo oblikovanje izobraževalnega okolja, ki je naklonjeno medkulturnim stikom, izboljšanje medsebojnega razumevanja in strpnosti na podlagi zgodovinskih izkušenj ter razvoj izobraževalnih strategij, prilagojenih za sprejemanje različnih kulturnih narativov. Ugotovitve poudarjajo pomen odprtosti za raznolikost, ki omogoča oblikovanje izobraževalnega prostora, v katerem je vsaka kulturna identiteta cenjena in dejavno vključena. Rezultati prav tako kažejo na pomen strukturirane krepitve kompetenc učiteljev na področju multikulturalizma ob podpori specializiranih fundacij in skupnostnih centrov, ki zagotavljajo potrebna sredstva za tovrstno izobraževanje.

Ključne besede

kulturna inkluzivnost, izobraževalna infrastruktura, raznolikost, družbeno sožitje, vključenost

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Who Prefers to Stay? Individual and Institutional Factors Supporting Immobility among Minority Hungarian Higher Education Students

Abstract

Based on the migration models proposed by J. Carling, de Haas, and K. Schewel, we examine the immobility aspirations of minority and majority Hungarian students in Central Europe. Our aim is to identify individual as well as institutional factors that we hypothesise support students in developing their immobility aspirations. We analyse empirical data collected through a survey in 2019 among students of Hungarian-language higher education institutions in Hungary, Ukraine, Romania, Slovakia, and Serbia (N = 2,210). The results of multivariate and logistic regression analyses show that the development of immobility aspirations is supported by socio-demographic factors and social networks, as well as by institutional and academic factors, such as training programmes preparing students for local professions, and a greater degree of trust in the higher education institution and role partners.

Keywords

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1. Introduction

Social science analyses of (im)mobility agree that not all individuals are driven to migrate by the same adverse circumstances[1] (Arango 2000; Golovics 2019). Thus, individual characteristics that are not primarily economic in nature but nevertheless affect individuals' perceptions of the good life also play a role in their decisions. These factors influence personal life goals, preferences, and subjective well-being (de Haas 2021). As a consequence, these characteristics may not only constrain migration, but may also counteract its hoped-for benefits (Gray 2011; Mata-Codesal 2015; Schewel 2020; Stockdale & Haartsen 2018).

The relevance of our research lies in the identification and explanation of these factors in the Hungarian minority-majority communities in the Carpathian Basin. A highly skilled workforce is not only a guarantee of economic and cultural development of the region (Corcoran & Faggian 2017; Faggian & McCann 2008) but also an existential issue for minority communities in particular. Community members who are most at risk of assimilation are those with lower educational attainment (Sütő 2020). It follows that maximising human capital in regions with minority-language higher education institutions, particularly with regard to graduate retention, is key for ensuring the economic and social well-being of communities (Abel & Deitz 2012; Haapanen & Tervo 2012; Venhorst et al. 2010). The relevance of our research is further enhanced by migration indicators. In each of the countries under study – Hungary, Ukraine, Romania, Slovakia, and Serbia – the number of ethnic Hungarians has been steadily decreasing since 1990 (Péti et al. 2020; Obádovics 2019; Tátrai et al. 2018). Population decline is the result of multiple factors, such as natural population change, life expectancy at birth, and the ageing index, but migration also plays a prominent role in Central European countries and regions. Although direct comparisons between countries and regions are difficult due to different statistical methodologies and other limitations, research consistently finds that the rate of emigration of minority Hungarian communities is particularly high. In the 2010s, the highest emigration rate was recorded among Hungarians from Vojvodina, followed by those from Transcarpathia and Transylvania, while the lowest emigration rates were recorded in Hungary and the regions of Felvidék (Péti et al. 2020).

Still, Central European students' immobility plans and the individual and institutional factors behind them remain an understudied area of research. Examining these topics is all the more relevant as research on international migration does not provide a satisfactory framework

for understanding the behaviour of immobile people and rarely focuses on the social processes preceding migration and the planning phase of migration. Staying is rarely considered a phenomenon worthy of study in the academic discourse on migration, although it undoubtedly contributes to the understanding of complex migration patterns.

Based on the migration models proposed by Carling (2002), de Haas (2021), and Schewel (2020), we examine Hungarian students' aspirations to stay. We follow the line of research suggesting that both mobility and immobility are possible responses to an individual's life circumstances or changes therein (Fischer & Malmberg 1997). It is important to note that we do not assign a value to individuals' (im)mobility strategies, nor do we consider staying superior to migration. Rather, our aim is to use statistical analyses to identify individual as well as academic, institutional factors that may support students in developing their immobility aspirations. In doing so, we aim to contribute to the academic discourse analysing the migration decisions of minority and majority Hungarians in Central Europe.

2. Theoretical Background. Understanding Immobility

In the academic discourse on migration, interpreting immobility as a migration strategy is a relatively recent approach. Various studies agree that, like migration, immobility is a complex and dynamic phenomenon that is the result of a conscious choice, which is reinterpreted by individuals throughout their life course (Al-Khudairy 2024; Carling 2002; Carling & Schewel 2018; Gruber 2021). Jørgen Carling's (2002) aspiration/ability model was among the first to consider staying at home a conscious choice. According to this model, mobility and immobility strategies are determined by individual aspirations and abilities. Based on combinations of different levels of individual aspirations and abilities, the concept proposes three categories of migration: (1) migrants are individuals who have both the aspiration and the ability to migrate, immobility is associated with the lack of either factor; those who aspire to migrate but are unable to do so are classified as (2) involuntary non-migrants (involuntary immobility); and those who believe that it is preferable to stay rather than to migrate regardless of their level of ability are classified as (3) voluntary non-migrants (voluntary immobility) (Carling 2002, 12). In Carling's theory, migration aspirations and abilities are determined by factors at both micro- and macro- level.

For a more precise understanding of immobility, de Haas replaced Carling's concept of ability with the concept of capability, which is more dynamic from an individual perspective. He interprets individuals' mobility as the capability to choose where to live freely, which includes the option to stay (de Haas 2021). Schewel refined the theory further and introduced the category of acquiescent non-migrants (acquiescent immobility) to better understand the behaviour of immobile people who neither aspire to nor have the capability to migrate. She adds, however, that individuals' capabilities and aspirations are not static characteristics and need to be disentangled analytically to be able to understand why differences in mobility aspirations arise under similar macro conditions. Schewel argues that retaining factors which support staying and facilitate immobility include language skills, social relationships, location-specific knowledge, local economic advantages, and the time spent in the home country. Immobility may also be supported by negative interpretations and repel factors such as economic, political, and cultural uncertainties in relation to the destination. Staying is also reinforced by internal constraints, which relate to reasons why individuals do not consider migrating in the first place, including traditional gender roles (Schewel 2020).

The categories are best understood as ideal types but offer a coherent conceptual framework for understanding (im)mobile behaviour (Carling & Schewel 2018; de Sherbinin et al. 2022).[2]

Table 1: Individual (im)mobility types derived from the aspiration/capability models

		Mobility capabilities	
		Low	High
Mobility aspirations	High	Involuntary immobility	Voluntary immobility
	Low	Acquiescent immobility	Mobility or Involuntary mobility

Source: Carling (2002), de Haas (2021), Schewel (2020).

Models of staying and immobility strategy formation seek to explain the characteristics of individuals who, unlike those who are mobile, respond to the same impulses by staying. In addition to identifying macro factors such as the social, economic, and political environment, studies also focus on individual attributes, referring to individuals' social and sociodemographic status as well as family and community ties (Schewel 2020). The models suggest that individual aspirations, considerations,

and calculations form a construct with the interpretations of previous migration impulses in the immediate social context, which then determines how much and in which ways individual socio-demographic factors (gender, age, etc.) shape (im)mobility aspirations (Carling 2002).

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Empirical analyses of the factors influencing immobility focus mainly on adult individuals. Empirically, studies show that immobile adults tend to be older (Zaiceva 2004; Fernández-Carro & Evandrou 2014), they are culturally diverse, more often female (Morrison et al. 2007; Mata-Codesal 2017), more likely to live in a rural setting (Creighton 2013), and have lower cultural capital (Debray et al. 2023). Research also detects that they are more closely connected to local social networks, more religious, and have higher levels of trust in social institutions (Hagan & Ebaugh 2003; Debray et al. 2023). Analyses that consider majority-minority affiliation, defined by citizenship, among individual attributes, focus on differences between ethnic minorities and the majority white population. Research shows that ethnic minorities are more likely to be immobile than their white counterparts, which is mostly explained by labour market and social ethnic discrimination (Kass & Manger 2012; Coulter 2013). We also know from analyses of the immobility aspirations of highly educated individuals that aspirations to stay are not favoured by more successful higher education, with more successful students having lower aspirations to immobility (Corcoran & Faggian 2017). International research has therefore identified a number of individual factors that play a role in the development of immobility strategies, particularly among adults. However, studies examining the age cohort of tertiary students have received relatively little attention so far, and studies analysing individual factors determining immobility within the same population group but in different social contexts, majority and minority, based on citizenship status are rare (Haug 2000).

When examining the (im)mobility of minority Hungarians, it is essential to mention the case of Hungarian-Hungarian migration, i.e. the migration of minority Hungarians to Hungary. This phenomenon is a specific form of international migration and has a significant impact on the social and economic structure of the region (Kincses 2023). Since the aim of our research is to explore the factors determining (im)mobility decisions, we treat Hungarian-Hungarian migration in the same way as any other migration process to any other destination country. The focus of our study is on immobility, so we do not directly include the destination country of migration decisions in our analysis.

Based on the theoretical and empirical findings presented above, our analysis aims to identify the individual, academic, and institutional

factors which support students in developing their immobility strategy. We formulate our hypotheses based on previous theoretical models and the results of international research.

H1 Due to the unfavourable economic situation in the Hungarian minority regions of Central Europe, the low labour market activity of the communities, and the different linguistic-cultural environment (Bárdi 2017; Szanyi & Susánszky 2018), we assume that students in minority communities have lower aspirations to stay compared to students in majority communities.

H2 We hypothesise that older people and those from rural backgrounds are more likely to be characterised by a tendency towards immobility.

H3 We assume that individuals' embeddedness in the community and an extensive social network provide them with social capital which supports staying.

H4 We assume that those who perform better in their studies have lower immobility aspirations than their less successful counterparts.

H5 We assume that students' high degree of trust in institutions and role partners supports staying.

3. Research Methods

The analysis relied on the empirical research database PERSIST 2019.[3] The underlying survey was conducted in the 2018/2019 academic year as part of the National Research, Development and Innovation Office (NKFIH) project no. 123847 titled The Role of Social and Organisational Factors in Student Attrition by the University of Debrecen Center for Higher Educational Research and Development (CHERD-H). The survey involved 2,199 Hungarian higher education students in the Carpathian Basin, one of the easternmost higher education regions of the European Higher Education Area. We analysed Hungarian-language higher education institutions and institutional units in Romania, Ukraine, Serbia, and Slovakia (Babeş-Bolyai University (BBTE), Emanuel University of Oradea, Ferenc Rákóczi II Transcarpathian Hungarian College of Higher Education, Constantine the Philosopher University in Nitra, Mukachevo State University, University of Oradea, Partium Christian University (PKE), Sapientia Hungarian University of Transylvania, J. Selye University, University of Novi Sad, Uzhhorod National University) together with

institutions in Eastern Hungary (University of Debrecen, University of Nyíregyháza, Debrecen Reformed Theological University, Saint Athanasius Greek Catholic Theological College) because the social composition of the latter institutions is the most similar in Hungary to the examined institutions outside Hungary. Sampling was based on the data provided by the institutions. The sample from Hungary is representative of the target population in terms of faculty, field of study, and form of funding. In our analysis, we consider the students in the Hungarian sample as majority students (N = 1,034). Students from Slovakia, Romania, Serbia, and Ukraine were minority Hungarian students (N = 768). These students were surveyed in their university/college courses in randomly selected groups (N = 1,165). The database included full-time bachelor's students in their second year and second-year or third-year students from undivided programmes offering a master's degree (in institutional units with a small number of students, students in higher years were also included in the sample) (Kovács & Pusztai 2024).

We performed statistical analyses using the SPSS 22 statistical software package. We applied descriptive statistical analyses, the chi-squared test, and CHAID (chi-square automatic interaction detector) analysis. We used logistic regression to estimate which of these factors made it more or less likely that a student belonged to the group with immobility plans.

4. Measurements

4.1 Dependent Variable

4.1.1 Immobility Aspiration

In our analysis, we examine students' (im)mobility behaviour in terms of their (im)mobility aspirations. This is because, on the one hand, social psychology concepts consider an individual's aspirations and intentions as a determinant of their actual behaviour (De Jong et al. 1985; Van Dalen & Henkens 2008; Creighton 2013), while on the other, plans represent a valid, statistically verifiable indicator of (im)mobility aspirations, since the results of a 2019 study covering more than 160 countries showed that a 1% increase in the number of people planning to migrate increased actual migration between the same countries by 0.75% (Carling 2019; Tjaden 2021).

On this basis, the following question was used to determine students' (im)mobility aspirations: "Do you plan to work abroad after

graduating?" The answers related to planning and its timing, or conversely, to the lack of planning: (1) Yes, I would like to settle abroad permanently; (2) Yes, I would like to work abroad in the long term; (3) Yes, I would like to work abroad in the short term; (4) I definitely do not want to work abroad; (5) I do not know. Based on Carling's model, we classified students who planned to work abroad after graduation as those with mobility aspirations, and students who had no such plans as those with immobility aspirations (Carling 2019). We classified students into groups based on their responses regarding mobility aspirations and found that 53.4 percent of students (N = 2,210) planned to stay, or in other words, aspired to immobility. We present our results for this group of students.

The results showed a statistically significant difference between the student groups. Cell values for residuals adjusted for sample size showed that among those with immobility aspirations, majority students were overrepresented, while among those with mobility aspirations, minority students were more common than expected (Table 2).

Table 2: Majority-minority students by mobility plans (%)

	Minorities (N = 762)	Majority (N = 1038)
Immobility aspirations	49.6**	**55.1****
Mobility aspirations	**50.4****	44.9**
Total	100	100

Source: PERSIST (N = 2,210).

**p ≤ 0.01; values in bold indicate a significantly higher proportion than implied by a random distribution; adjusted residuals > 2.

4.2 Independent Variables

4.2.1 Socio-Economic and Demographic Characteristics

We included seven basic socio-economic and demographic measures in our analysis: respondents' gender, age, type of municipality of residence at age 14, stability of their financial situation, parental status, parents' education, and work experience abroad. To ensure the success of the analysis, the continuous variable of respondents' age was categorised by CHAID analysis based on the target variable of (im)mobility aspiration: group of 19 years old or younger, 20–23 years old, and 24 years old or older. These age categories were included in the multivariate analysis.

4.2.2 Characteristics of the Social Network

Students' social capital was examined in several dimensions. We analysed the specific type of social capital they can access through their religiosity and membership in religious communities. Religiousness was examined using self-classification. Respondents were asked to identify the statement that best describes themselves: (1) I am religious; (2) I try to follow the teachings of my church; (3) I am religious in my own way; (4) I cannot say whether I am religious or not; (5) I am not religious; (6) I am definitely not religious; (7) I have different beliefs. Their religious affiliation was measured by personal (frequency of prayer) and communal (church attendance) religious practice.

The next dimension of students' social capital is the inter- and intra-generational communication patterns that show the institutional embeddedness of higher education. We differentiated between relationships with peers, classmates, and lecturers when examining contact patterns. Respondents were asked to indicate whether they had a lecturer at their current higher education institution with whom they: (1) discuss course material and academic issues outside of class time; (2) discuss topics other than course material; (3) discuss fiction, talk about literature, art; (4) talk about public issues; (5) talk about personal problems; (6) talk about future plans; (7) is in regular contact by email; (8) pay attention to personal career development; (9) play sports, talk about healthy lifestyle.

Intragenerational relationship patterns were measured by the following question. Respondents indicated whether they have a friend among their fellow students with whom they: (1) discuss their academic problems;, (2) discuss their personal problems; (3) regularly spend free time together; (4) discuss their plans for the future; (5) visit or call when ill; (6) ask to borrow a book or notes; (7) discuss academic issues; (8) discuss reading, culture, public issues; (9) discuss art; (10) study together; (11) play sports together. In both cases, the different ways of communication were combined and included as an index in the analysis.

4.2.3 Academic Characteristics

Our analysis included several dimensions of academic performance. On the one hand, we measured students' academic performance with 19 questions covering their participation in the Scientific Students' Associations Conference or National Scientific Students' Associations Con-

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ference, research group membership, publications, scholarship awards, participation in talent support programmes, membership in colleges for advanced studies, plans to obtain a doctoral degree, etc. The individual items measuring students' academic performance were aggregated (mean: 2.67; standard deviation: 2.63) and the resulting academic performance index was used for further analysis. On the other hand, students were also asked about interruptions in their learning path (i.e., either normal progress or interrupted, delayed progress) and the acquisition of an advanced language certificate (having or not having an advanced language certificate).

Our analysis also included an indicator of students' trust in their institutions and role partners. Respondents were asked to rate on a four-point Likert scale how much they trust: (1) the university/college management; (2) university/college faculty management; (3) university/college administrators; (4) university/college lecturers; (5) majority of fellow students; (6) university/college student government; (7) university/college faculty student government; (8) electronic learning system message senders. A composite trust index (mean: 22.49; standard deviation: 4.89) was also produced based on the responses.

5. Results

The main question of this analysis was to identify the socio-demographic, social network-related, and academic variables described above that made immobility aspirations more or less likely for minority and ethnic minority students. We used multivariate logistic regression analysis with students' immobility aspirations (0 = planning to migrate; 1 = not planning to migrate).

Based on the results of the models, we found significant differences between minority and majority students. For minority students, living in a village before the age of 14 and not having worked abroad significantly increase the chances of staying at home. Among majority Hungarian students, the perception of the stability of their financial situation, the low educational level of their mother/guardian, and the lack of work experience abroad play a decisive role in increasing the chances of staying in the area. Of particular note is the positive relationship between financial stability and planning to stay at home, as the questions measuring stability included an option to answer if the situation improved.

Among the indicators of social embeddedness, personal religious practice positively increased the odds of planning immobility for minorities. Intragenerational ties had a significant effect in both groups,

but in a negative direction, i.e. they reduced the probability of planning to stay at home.

Among the variables related to academic career, we found significant effects only for majority students. Fields of study that prepare students for local professions, such as law and teacher training, and the lack of a higher level language exam increase the chances of staying in the country. One of the key findings of our analysis is that for both groups of students, trust in the higher education institution and role partners has a strong positive effect on the intention to stay at home.

Table 3: Results of the logistic regression model with respect to immobility aspirations of minority students (0 = planning to migrate: n = 355; 1 = not planning to migrate: n = 369)

	Coeffi-cient (B)	Standard error (SE)	Wald	Signifi-cance	Oddsratios Exp(B)
Constant	-2.243	1.039	4.664	.031	.106
Socio-demographic factors					
Gender (0 = male; 1 = female)	.494	.306	2.606	.106	1.639
Age (1 = under 19; 0 = not)	-.439	.527	.695	.405	.644
Age (1 = over 24; 0 = not)	.548	.427	1.648	.199	1.731
Place of residence (1 = rural; 0 = not)	.518	.243	4.541	.033	1.678
Place of residence (1 = urban; 0 = not)	-.120	.322	.140	.708	.886
Financial situation (0 = unstable; 1 = stable)	.286	.246	1.349	.246	1.331
Has children (0 = no; 1 = yes)	.605	.786	.593	.441	1.832
Mother's educational attainment: tertiary education (0 = no; 1 = yes)	.176	.300	.344	.557	1.192
Father's educational attainment: tertiary education (0 = no; 1 = yes)	.025	.326	.006	.939	1.025
Mother's educational attainment: primary education (0 = no; 1 = yes)	.202	.260	.602	.438	1.223
Father's educational attainment: primary education (0 = no; 1 = yes)	-.105	.250	.177	.674	.900
No work experience abroad (0 = has work experience abroad; 1 = no work experience abroad)	.859	.355	5.851	.016	2.362
Social network					
Religiosity (0 = does not follow the teachings of a church; 1 = follows the teachings of a church)	.320	.275	1.350	.245	1.377
Personal religious practice (1 = prays several times a day; 0 = less often)	.562	.359	2.449	.118	1.755

Community religious practice (1 = goes to church several times a week; 0 = less often)	.236	.471	.251	.617	1.266
Intergenerational contact with instructors (index: 0–9)	.002	.042	.003	.954	1.002
Intragenerational contact with peers (index: 0–11)	-.134	.042	10.111	.001	.874
Academic performance					
Legal training (0 = no; 1 = legal training)	.789	.922	.732	.392	2.201
Teacher education (0 = no; 1 = teacher education)	.070	.225	.096	.756	1.072
Learning path (0 = interrupted; 1 = stable progress)	.016	.530	.001	.976	1.016
Academic performance (index: 0–19)	-.049	.049	.985	.321	.953
No advanced language certificate (0 = has such a certificate; 1 = does not have such a certificate)	-.100	.438	.052	.819	.905
Institutional trust					
Institutional trust (index: 0–32)	.066	.023	8.229	.004	1.068

Source: PERSIST (N = 2,210).

The model is significant at the p < 0.05 level; the -2lnL fit indicator decreased from 620.739 to 563.387; Nagelkerke pseudo R2 = 0.160; Cox & Snell R2 = 0.120; Hosmer and Lemeshow test 0.803 (p > 0.05) indicates a good model fit. The regression was carried out using the Enter variable selection method (METHOD = ENTER). Values of the odds ratio Exp(B) above one indicate a higher chance of inclusion and values below one a lower chance of inclusion relative to the reference group.

Table 4: Results of the logistic regression model with respect to immobility aspirations of majority students (0 = planning to migrate: n = 423; 1 = not planning to migrate: n = 615)

	Coeffi- cient (B)	Standard error (SE)	Wald	Signifi- cance	Oddsratios Exp(B)
Constant	-2.263	.757	8.937	.003	.104
Socio-demographic factors					
Gender (0 = male; 1 = female)	-.137	.173	.621	.431	.872
Age (1 = under 19; 0 = not)	-1.422	.985	2.082	.149	.241
Age (1 = over 24; 0 = not)	.534	.340	2.473	.116	1.707
Place of residence (1 = rural; 0 = not)	.435	.215	4.113	.043	1.545
Place of residence (1 = urban; 0 = not)	-.030	.192	.024	.878	.971
Financial situation (0 = unstable; 1 = stable)	.889	.207	18.511	.000	2.432

Has children (0 = no; 1 = yes)[4]	19.859	13229.839	.000	.999	421547441.879
Mother's educational attainment: tertiary education (0 = no; 1 = yes)	.381	.201	3.603	.058	1.464
Father's educational attainment: tertiary education (0 = no; 1 = yes)	-.114	.223	.261	.609	.892
Mother's educational attainment: primary education (0 = no; 1 = yes)	.624	.242	6.670	.010	1.867
Father's educational attainment: primary education (0 = no; 1 = yes)	-.267	.210	1.609	.205	.766
No work experience abroad (0 = has work experience abroad; 1 = no work experience abroad)	1.472	.417	12.452	.000	4.356
Social network					
Religiosity (0 = does not follow the teachings of a church; 1 = follows the teachings of a church)	.093	.275	.114	.735	1.097
Personal religious practice (1 = prays several times a day; 0 = less often)	.984	.470	4.392	.036	2.676
Community religious practice (1 = goes to church several times a week; 0 = less often)	.387	.617	.392	.531	1.472
Intergenerational contact with instructors (index: 0–9)	-.039	.033	1.397	.237	.962
Intragenerational contact with peers (index: 0–11)	-.110	.036	9.204	.002	.896
Academic performance					
Legal training (0 = no; 1 = legal training)	1.083	.413	6.877	.009	2.954
Teacher education (0 = no; 1 = teacher education)	1.092	.212	26.437	.000	2.980
Learning path (0 = interrupted; 1 = s progress)	.003	.351	.000	.994	1.003
Academic performance (index: 0–19)	-.073	.047	2.420	.120	.930
No advanced language certificate (0 = has such a certificate; 1 = does not have such a certificate)	.566	.236	5.736	.017	1.762
Institutional trust					
Institutional trust (index: 0–32)	.030	.017	3.258	.071	1.031

Source: PERSIST (N = 2,210).

The model is significant at the $p < 0.05$ level; the -2lnL fit indicator decreased from 1029.769 to 901.732; Nagelkerke pseudo R2 = 0.209; Cox & Snell R2 = 0.155; Hosmer and Lemeshow test 0.926 ($p > 0.05$) indicates a good model fit. The regression was

carried out using the Enter variable selection method (METHOD = ENTER). Values of the odds ratio Exp(B) above one indicate a higher chance of inclusion and values below one a lower chance of inclusion relative to the reference group.

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6. Summary

In this study, we aimed to identify the socio-demographic, social network-related, and academic determinants of migration aspirations among minority and majority Hungarian higher education students in Central Europe. Based on Carling's concept, we joined the line of research that interprets immobility as an individual strategy, determined by individuals' aspirations and abilities.

The results of bivariate analysis confirmed our hypothesis that minority status makes plans to stay less likely, which is presumably explained by the relatively unfavourable economic situation of the Hungarian minority regions in Central Europe, the low labour market activity of the communities, and the different linguistic-cultural environment.

As with several other areas of research, empirical analyses on migration have detected gender differences and explored the different effects at play behind the phenomenon (Boyd & Grieco 2003). Despite the fact that many more men migrate worldwide (International Organization for Migration & United Nations, 2000, 7), women increasingly have the possibility of developing an autonomous migration strategy based on conscious choice, and are not characterised by chain migration alone (Gödri 2005). According to gender-focused explanations of migration, gender differences in mobility are related to different gender role perceptions specific to a given socio-cultural context, which could even override the effect of macroeconomic factors on migration. Gender differences in (im)mobility are thus strongly influenced by the different role perceptions determined by the social context as well as by the immediate environment and the family, a notable example of which is caring for the elderly, which is mostly carried out by women (De Jong 2000). Previous surveys of students in the region clearly showed a decreasing share of university students identifying with traditional gender roles and an increasing share identifying with modern gender roles (Fényes & Pusztai 2020). Our data also confirmed this, as there was no significant gender difference in university students' immobility aspirations. One may draw the cautious but statistically sound conclusion that our data can refute the experience often presented in international research that mobility reflects a specific dimension of gender inequality.

Previous research clearly shows that age also affects individuals' mobility aspirations. Older people are less mobile, mainly due to the fact that they have had more opportunities to become embedded in the community and to acquire location-specific cultural and economic knowledge. The longer individuals live in a place, the stronger their ties to their community and that place (Fischer & Malmberg 1997). Some researchers argue that the duration of time spent in the home country is the best predictor of positive emotional attitudes and attachment to the home country and its residents, thus supporting immobility aspirations (Lewicka 2011). Although our bivariate analysis found a significant relationship between age and immobility aspirations, the logistic regression model with other variables included did not find age to be a determinant of the chances of immobility, so our second hypothesis had to be partially rejected.

The results of previous studies in the region clearly show that an important indicator of students' social status is how the place of residence ranks in the hierarchy of settlements (Pusztai & Márkus 2019). Living in a small settlement is a disadvantage in terms of access to educational institutions, cultural opportunities, and possibly job opportunities. Our results show that the village lifestyle increases the aspirations of minority Hungarian students to stay in the village, which may be explained by the settlement structure of minority Hungarian regions. In line with other research findings, the sample has a high proportion of minority students from lower-ranking settlements in the settlement hierarchy (Veres 2023). The second hypothesis concerning settlement type is therefore only valid for minority students.

Individuals' (im)mobility aspirations are guided by several factors other than rational economic considerations of utility maximisation (Schewel 2020), but financial considerations are undoubtedly part of the decision-making process. A remarkable result of our analysis is that the perception of financial stability and predictability doubles the likelihood of planning to stay at home among majority Hungarian students.

Empirical research on the phenomenon of immobility clearly identifies family relationships as a factor in staying, with evidence showing that having children makes staying more likely (Mulder & Malmberg 2014). However, the values of our logistic regression model are inconclusive in this case, presumably due to the small number of elements.

A key dimension of students' social background is their parents' educational attainment. In all examined minority and majority Hungarian regions, those with a tertiary degree are underrepresented (Bocsi

et al. 2022). In our study, only one in three students had parents who had completed tertiary education, with another third on their path to become first-generation graduates. This specific situation motivated our research question about the role of family influences in students' immobility aspirations. In accordance with previous research, we found evidence of the importance of impulses from mothers and stepmothers, but only for majority students.

A noteworthy result of our study is that for both groups of students, work experience abroad reduces the chances of planning to stay in the country. This is because even a short period of work experience abroad can provide students with intercultural skills and abilities that greatly increase the chances of future successful interactions with individuals from other ethnic or cultural groups.

Research on (im)mobility often finds that individuals' embeddedness in social networks and the social context surrounding them has a significant impact on (im)mobility decisions. According to the affinity hypothesis, close ties to peers, friends, and community members support aspirations to stay (Haug 2008). Schewel goes so far as to say that social capital helps explain why, despite rational arguments, people consider "home" to be a better place to live than "elsewhere" (Schewel 2020, 340). In our case, the study of religiosity and religious practice is also crucial because of the empirical evidence that participation in local religious communities, i.e. "location-specific religious capital", can affect immobility decisions (Myers 2000, 757) as churches and other places of religious practice represent local community-oriented institutions in people's lives (Irwin et al. 2004). According to our data, there is a correlation between religious practice and immobility only for the majority students surveyed: their personal religious practice increases the chances of staying at home. Among the other variables, the embeddedness in the network of peer relationships still has an impact on the propensity to stay at home, and this is the case for all students, but the odds ratios seem to have a negative impact on the propensity to stay at home for both minority and majority students. Our results therefore only partially support our third hypothesis.

Empirical research on the migration of graduates finds that individuals' human capital is correlated with their (im)mobility aspirations. Successful students, i.e. those who graduate with good grades from prestigious universities, have a higher propensity for mobility as the return to migration may be higher and the risks lower for them compared to their less successful peers (Baryla & Dotterweich 2001; Corcoran & Faggian 2017). This suggests that immobility is more likely with a less successful

higher education career. Based on our results, we have to reject our fourth hypothesis: there was no significant correlation between the variables measuring academic achievement and immobility aspirations in any of the student groups. At the same time, however, fields of study that prepare students for local professions increase the decision to stay several times more.

Previous analyses of international migration already demonstrate that trust in formal social institutions is related to the propensity to migrate. Empirical evidence shows that perceptions of the inadequate functioning of social institutions and a loss of trust may lead to migration (Baudassé et al. 2018; Golovics 2018). Analyses on institutional integration in higher education also agree that trust influences and often determines students' behaviour within and outside the institution (Dzimińska et al. 2018; Pusztai 2011; 2018), while also affecting students' social skills, social network patterns, value systems, academic performance, successful graduation, volunteering, and even health behaviour. Among Hungarian higher education students in Central Europe, for example, empirical evidence shows that a loss of trust leads to drop-out and departure from the institution (Pusztai 2011; 2018). Nevertheless, the relationship between students' migration plans and trust in higher education institutions is an understudied area of research. Our analysis confirmed our hypothesis that higher levels of institutional trust among students make it more likely that both majority and minority students plan to stay.

7. Conclusion

In our study, we investigated the individual and institutional factors supporting the immobility aspirations of Hungarian higher education students in Central Europe. Our analysis adopted a novel approach, focusing on an age cohort of young people in higher education, a less studied target group in previous international research, and distinguishing between groups of students within the same population but with different citizenship status. In this way, our results not only enriched the academic discourse analysing the migration decisions of Central European Hungarians, but also contributed to a more nuanced understanding and application of aspiration/ability models. Our results clearly show that the immobility aspirations of minority and majority Hungarian students are influenced differently by various individual factors. The most important result of our study is that, in addition to the sociodemographic individual and network characteristics already known

from previous international empirical studies, factors related to higher education institutions also influence young people's (im)mobility decisions, and that a higher level of trust towards higher education institutions and role partners encourages both minority and majority young people who have already graduated to stay at home after completing their studies.

The results of this thesis should be interpreted in accordance with the limitations of the methodology. We are aware that, from a migration perspective, the cohort of tertiary students can be considered a special group, because their higher education may inherently lead to a higher propensity to migrate compared to the adult population. We also anticipate that, due to possible selection bias in the minority student population on which the sample is based, minority students studying in higher education institutions may have higher aspirations to remain in the country than their counterparts studying in non-Hungarian-speaking institutions. Furthermore, we are also aware that the results of the data analysis only show whether and in what direction the factors included have an impact on students' immobility aspirations, i.e. our analysis does not provide a complete explanation for understanding the migration strategies of Hungarian students in Central Europe. That said, our results have significantly contributed to a more nuanced understanding of social and institutional patterns of aspirations to stay and provide tangible results for regional development and education policy makers. To strengthen our explanations, further in-depth multivariate analyses are needed to examine other influential characteristics of students and identify the effects of the cultural context.

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Notes

[1] According to UN data from 2020, only 3.6% of the world's population has taken part in migration (United Nations 2020).

[2] The theoretical frameworks discussed above do not conceptualise forced migration due to the argument that all migration involves individuals' choices (Carling 2002).

[3] The data that support the findings of this study are available from the corresponding authors, but restrictions apply to their availability. These were used under license for the current study, and, so, are not accessible by the public. Data are however available from the corresponding authors upon reasonable request and with permission of the School Ethics Committee of Doctoral Program on Educational Sciences at the University of Debrecen.

[4] Only 0.9% (9 people) of the majority Hungarian student sub-sample have children. The outlier for this variable in the model is related to the low number of items.

Acknowledgement

Kdo raje ostane? Individualni in institucionalni dejavniki, ki vplivajo na nemobilnost študentov pripadnikov madžarske manjšine

Izvleček

Članek na podlagi modelov, ki so jih razvili J. Carling, de Haas in K. Schewel, preučuje nemobilnost oziroma težnje madžarskih študentov, tako pripadnikov večine kot manjšine, da po zaključku študija ostanejo v domačem okolju. Namen članka je opredeliti individualne in institucionalne dejavnike, zaradi katerih študenti ne načrtujejo selitve v tujino. Analiza temelji na empiričnih podatkih, pridobljenih leta 2019 s pomočjo ankete med študenti visokošolskih institucij z madžarskim učnim jezikom na Madžarskem in Slovaškem ter v Ukrajini, Romuniji in Srbiji (N=2,210). Rezultati multivariatne in logistične regresijske analize kažejo, da na nemobilnost vplivajo družbeno-demografski dejavniki in socialna omrežja, pa tudi institucionalni in akademski dejavniki, kot so izobraževalni programi, ki študente pripravljajo na lokalne poklice, ter večja stopnja zaupanja v visokošolsko institucijo in ključne akterje.

Ključne besede

kulturna inkluzivnost, izobraževalna infrastruktura, raznolikost, družbeno sožitje, vključenost

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Adaptation of Migrants Returning to Their Historical Homeland

Abstract

The relevance of this research is determined by the fact that unsuccessful adaptation can lead to social isolation, unemployment, and other negative consequences, affecting the stability of society. This study aims to analyse the key factors and mechanisms that ensure successful sociocultural, economic, and psychological reintegration in the context of repatriates' adaptation processes. The total number of respondents was 273 Kazakh repatriates. The sociocultural adaptation of Kazakh repatriates in Kazakhstan shows several key trends. Mastery of the language of the historical homeland (Kazakh) ranges from medium to high. Attitudes towards traditions are diverse, with more than a third of respondents highlighting the positive influence of traditions on social interaction. While half of the repatriates actively participate in cultural and social activities, challenges arise in balancing traditional values with modern societal norms. As regards economic adaptation, most repatriates successfully secure employment within a short period and develop stable labour relations. The study emphasises the need for targeted support programmes, such as language courses, cultural orientation activities, and psychological counselling, to address the multifaceted challenges of adaptation.

Keywords

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1. Introduction

The relevance of research on the adaptation of repatriates returning to their historical homeland is determined by two main factors. Firstly, many repatriates face adaptation difficulties upon their return. These are related to linguistic differences between them and the natives, as well as differences in culture, traditions, and education. If repatriates do not speak the language of the country they are returning to, they may find it difficult to communicate with locals, find a job, or access education. Returning to a country where repatriates have not lived for many years may also cause culture shock. In addition, repatriates returning to the historical homeland may face employment problems. Furthermore, returning to the historical homeland may trigger psychological problems, including feelings of loss, frustration, and insecurity. Thus, the return to one's home country can be a dramatic experience, marked by the discrepancy between expectations and the real state of affairs. These problems trigger difficulties in adaptation, which in turn lead to negative consequences for repatriates. The adaptation of repatriates is crucial for their successful integration into society. If they fail to adapt, they may experience social isolation, unemployment, crime, and other problems. This can create additional social challenges for the country, potentially exacerbating already existing internal pockets of instability.

In the scientific discourse of Kazakhstan over the past three years, several studies have addressed repatriation, with a focus on issues related to migrants returning to Kazakhstan. Some studies also examine international experience. For instance, Davletbayeva et al. (2023) studied international practices of state support for the return of compatriots to their homeland. The main idea emerging from the study is that the impact of ethnic repatriation on the economy depends on several factors: state policies towards repatriates; individual characteristics of repatriates; and the socioeconomic situation in the country.

In the context of repatriation to Kazakhstan specifically, terminological, sociocultural, and economic aspects were considered. For instance, Bulbul (2023) explored the dynamics and reasons for changes in terminology used in scientific research over the past thirty years. He noted that different terms are used in the literature to describe the return of ethnic Kazakhs to Kazakhstan. When the emphasis is on the legal status of the repatriate, the most appropriate term is *oralman*. If the focus is on ethnic origin, the most appropriate term is ethnic return migration. When the focus is on the diaspora's connection with the historical homeland, the preferred term is diasporic return or diasporic migration to the homeland.

Yergenbolatkyzy (2022) and Askarov et al. (2024) considered topical issues related to the economic and social integration and socialisation of repatriates upon their return to Kazakhstan. These researchers conclude that the existing mechanisms of adaptation and integration of repatriates in Kazakhstan are ineffective. As a result, repatriates face difficulties in adjusting to a new environment, securing employment, and learning the local language and culture. Babazhanova et al. (2023) noted that repatriates who returned to Kazakhstan from other countries had a positive impact on the development of Kazakh culture. They brought with them new cultural traditions, and samples of art and literature, which enriched and diversified Kazakh culture.

Adaptation issues were also addressed by Tajibayeva and Kabakova (2023), who analysed the peculiarities of adaptation of repatriated students in the learning process, comparing Kazakhstani and foreign experience. The authors confirm that the motivation of repatriated students in higher education has several features that should be considered for successful adaptation and integration into the educational environment. In the first and second years of study, communicative, social and prestige-related motives dominate. In the third and fourth years of study, educational, cognitive, and professional motives begin to dominate. Among repatriating students with a low level of learning motivation, motives of failure avoidance and communicative motives tend to prevail (Spytska 2023b; Kaikenov et al. 2024). A separate case study is the research of Mukhatayeva and Marcos (2022), who analysed Kazakhstan's deradicalisation programme for persons returning from armed conflict zones. They identified several systemic problems that hinder rehabilitation and integration efforts: the lack of specialists capable of implementing rehabilitation and reintegration programmes for persons returning from conflict zones; unresolved social and financial problems of repatriates; and social stigma, which creates an anti-terrorist bias against returnees.

Kazakh researchers addressed various aspects of repatriation. However, the available research base did not provide a comprehensive analysis of the sociocultural, economic, and psychological aspects of adaptation among migrants returning to their historical homeland. Therefore, this study aims to analyse the main factors and mechanisms for successful sociocultural, economic, and psychological reintegration as part of adaptation processes among migrants returning to their historical homeland. The study sets the following tasks:

1. To investigate the influence of sociocultural aspects such as language, customs, and values on the process of sociocultural adaptation of returned migrants.

2. To study the factors affecting labour market participation and the economic success of returned migrants.
3. To investigate the impact of mental health on the success of psychological reintegration of migrants returning to their historical homeland.

2. Materials and Methods

The interdisciplinary approach to studying the adaptation of repatriates returning to their historical homeland involved the integration of knowledge and methodologies from different scientific fields such as sociology, economics, and psychology. This approach centred on a fuller and deeper understanding of the multifaceted aspects of adaptation and the interrelationships between the different spheres of repatriates' lives. In terms of sociocultural adaptation, the interdisciplinary approach examined the impact of language, customs, and values on the processes of sociocultural integration. In economic terms, factors influencing employment and economic success were considered, providing a deeper understanding of the socioeconomic aspects of adaptation. Regarding mental health and psychological reintegration, the interdisciplinary approach included analyses of general psychological state, stress and anxiety levels, and sleep quality.

Within the framework of general scientific theoretical methods, the system analysis method was used to review the phenomenon as a system consisting of interrelated elements. This allowed for a comprehensive coverage of the complexity of the adaptation process, emphasising not only individual aspects but also their interactions. This method was used to highlight the importance of an integrated view of the repatriation process for a thorough understanding of its dynamics. To present a holistic picture of repatriation in Kazakhstan, a synthesis method was employed, which involved integrating research information from each level of adaptation. The synthesis method was used to analyse the adaptation of repatriates in Kazakhstan by integrating data on sociocultural, economic, and psychological aspects, enabling the formation of a multidisciplinary understanding of the repatriation process. This approach facilitated an in-depth analysis of the interrelationships and mutual influences between different spheres of repatriates' lives, revealing a complex network of factors affecting their adaptation.

The empirical basis of the study is sociological research conducted through a questionnaire survey. The study involved a total of 273 respondents. The snowball method was used to form the sample. This

method starts with an initial respondent who meets the research criteria. This respondent is then invited to participate in the study and asked to refer acquaintances, friends, or relatives with similar experiences of return migration. This selection strategy allowed for a wider and more diverse set of respondents. To enhance data reliability, a pilot test was conducted with a small group of respondents prior to the main data collection phase. This ensured the clarity and relevance of the questions, as well as their alignment with the research objectives. Based on feedback from the pilot test, adjustments were made to improve question precision and reduce ambiguities. Reliability and validity of the survey data were assessed using statistical measures. The internal consistency of the survey was evaluated, and steps were taken to ensure that key sections met acceptable reliability standards. Additionally, face validity was established by consulting experts in sociology and psychology, who reviewed the questionnaire items for relevance and comprehensiveness. These measures strengthened confidence in the study's findings and enhanced the scientific rigor of the methodology.

As mentioned above, the interviewees were invited to distribute the questionnaire to their acquaintances, friends, or relatives with repatriation experience (Appendix A). The questionnaire was administered offline between January and April 2023. It was observed that the majority of respondents possessed higher education degrees and were employed. These characteristics might influence the interpretation of the study results and should be considered when analysing the data. The gender and age structure of the respondents is presented in Table 1.

Table 1: Distribution of gender and age of respondents (N = 273)

Age categories	Male	Female
18–25	14	20
26–30	29	30
31–40	38	47
41–50	30	32
51–60	9	12
61+	4	8
Total	124	149

Source: Compiled by the authors.

The study data were analysed using IBM SPSS software. Univariate distributions were obtained to identify the frequency and main trends in the adaptation of migrants returning to their historical homeland, focus-

ing on economic, cultural, and psychological challenges. Additionally, bivariate analyses, such as cross-tabulations and chi-square tests, were conducted to explore relationships between demographic variables (e.g., age, gender) and adaptation outcomes. This approach provided a clearer understanding of the key factors influencing the adaptation process while maintaining analytical precision.

3. Results

3.1 Sociocultural Adaptation of Repatriates

In general, sociocultural adaptation includes assimilation and acceptance of new customs, traditions, language, and other aspects of culture, as well as changes in social behaviour and interaction with the surrounding society. Ager and Strang (2010) developed a conceptual model of sociocultural adaptation that includes the following main components: acquiring knowledge and understanding of the host society's culture, developing skills of communication and interaction with its members, adopting new social roles and identity, and forming social ties in the host society. Berry (1997) considered sociocultural adaptation as a process in which individuals adapt to a new culture while maintaining their cultural identity. The author distinguishes four models of sociocultural adaptation: integration – individuals retain their cultural identity and simultaneously integrate into the host society; assimilation – individuals fully accept the culture of the host society and lose their cultural identity; segregation – individuals remain isolated from the culture of the host society and retain their cultural identity; and marginalisation – individuals cannot integrate into the host society and cannot retain their cultural identity.

Ward et al. (2001) considered sociocultural adaptation as a process that includes the following stages: culture shock – individuals experience difficulties in adapting to the new culture; orientation – individuals begin to learn the new culture and try to adapt to it; stabilisation – individuals adapt to the new culture and begin to feel comfortable in it; individualisation – individuals integrate elements of the new culture into their own. The context of sociocultural adaptation can be applied to repatriates – people returning to their home country after a long stay abroad. Repatriation is also a form of migration, and the process of adaptation to one's native culture may involve several aspects similar to those described above. First and foremost, repatriates may need to update their knowledge of their home culture, considering the changes

that occurred during their absence. This may include learning new sociocultural features and refreshing their knowledge of traditions and changes in social life. Linguistic challenges are also an important aspect of repatriation.

The study conducted among Kazakh repatriates provides valuable data on language skills and their impact on daily life. Overall, the Kazakh-Russian language situation among repatriates appears to be quite diverse. Approximately 40.3% of the study participants rated their proficiency in Kazakh as average, suggesting some insecurity or insufficient practice in using their native language. It is important to note that only 14.3% of respondents are confident in their good command of the Kazakh language, which may reflect their level of linguistic self-identification. On the other hand, regarding the Russian language, more than half of the respondents (54.3%) reported fluent speaking, indicating that Russian is also widely used and may assist with adaptation in the new country of residence. It is important to note that approximately 23.4% of respondents rated their Russian language skills at an intermediate level, which may reflect the diversity of language competence levels. Interestingly, despite the differences in language skills, the majority of repatriates (68.2%) do not report facing difficulties due to language barriers. This may indicate that many of them have successfully adapted to the language environment of their new place of residence. Regarding the impact of language skills on daily and professional life, 46.2% of respondents believe that language skills have a neutral impact. Nevertheless, about one-third of the respondents (34.1%) noted a positive impact of language on everyday and work-related aspects, which may indicate the importance of language as a factor of successful social integration and professional adaptation.

The survey results show diversity concerning the observance of traditions and customs among Kazakh repatriates. Half of the survey participants (52.8%) express their devotion to traditions and customs when returning to their native country. This may indicate a strong desire to preserve their cultural and historical identity in the new environment – an important element of cultural heritage preservation. At the same time, about half of the respondents (48.7%) claim that traditions have a neutral influence on their relationships with family, friends, and colleagues. This may indicate that for some repatriates, traditions do not play a key role in their daily life and interactions. Notably, over a third of the respondents (37%) reported that traditions have a positive influence on social interaction. This may reflect the power of cultural practices in strengthening community and forming positive relationships in soci-

ety. The results of the survey on participation in the cultural and public life of their native country reveal diversity in the level of involvement among respondents. Almost two-fifths of survey participants (39.2%) actively participate in the cultural and public life of their home country, showing a high level of interest in activities, traditions, and events that shape the cultural environment. In contrast, approximately half of the respondents (48%) rarely or never participate in such events. This difference may be due to various factors such as geographical distance, time constraints, or changing personal interests.

The survey results on the importance of preserving the cultural values of the country of departure when returning to the historical homeland emphasise the notable diversity in opinions and attitudes among the respondents. It is assumed that such diversity may be caused by individual experience, the degree of adaptation, as well as the impact of historical and sociocultural factors. Approximately one-third of respondents (31.1%) have a neutral attitude towards the importance of preserving cultural values. This may indicate that for this group, return to the historical homeland is not necessarily accompanied by an active desire to preserve traditions. However, one-fifth of respondents (20.5%) generally consider it important to preserve the culture of the country where they resided before returning to their historical homeland. This may indicate a strong connection and respect for the cultural heritage of their previous place of residence. On the other hand, over a third of respondents (37.3%) do not consider this aspect important. This may be due to various factors, including changes in priorities, successful adaptation to the new environment and culture, or lack of emotional attachment to the previous place of residence.

The survey results regarding the level of public support in the process of adaptation in the home country show that respondents express a variety of opinions on this issue. Almost half of the survey participants (46.9%) generally assess the level of support in society as high. This result indicates that a significant proportion of respondents feel supported by society during the adaptation period, which may have a positive impact on their integration and comfort. About a quarter of the respondents (23.8%) indicated that community support was medium. This may indicate that for this group of respondents, the impact of community support was not overly pronounced, but it was not absent either. Only 16.1% of respondents indicated that community support was low. This proportion may represent those who felt less supported or faced difficulties in the adjustment process, which is important for understanding the challenges faced by some repatriates.

The analysis of the results of the survey on cultural and customary problems when returning to the home country reveals several key issues faced by repatriates (Chart 1). A significant proportion of respondents experience difficulties due to conflicts between cultural expectations and their experiences abroad. This may indicate difficulties in adapting their previous cultural experiences to the new conditions in their home country. It is also noted that many repatriates find it difficult to establish new social ties in their home country. This may be due to changes in the social environment as well as the redefinition of social roles after return. The need to overcome stereotypes and prejudices from others is also highlighted as an important aspect. This can hinder the process of social integration and interaction within society.

Chart 1: Main cultural and customary problems of repatriates upon return to their home country
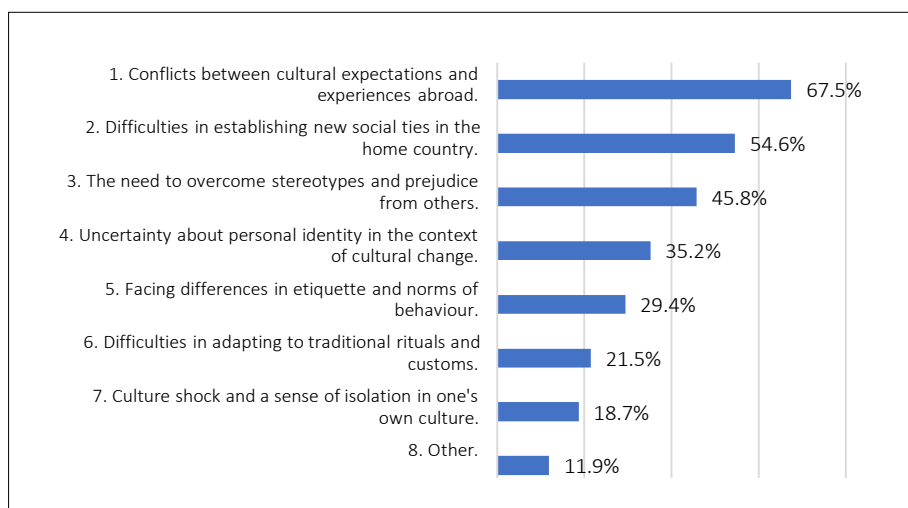
Source: Compiled by the authors.

Thus, the study highlights the complex nature of the adaptation of Kazakh repatriates, including language, observance of traditions and customs, active participation in cultural and social life, as well as the importance of support from society. Successful adaptation is shaped by the interplay of these factors, highlighting the need for targeted pro-grammes and support for repatriates in their integration process. The findings point to the heterogeneity of sociocultural adaptation among Kazakh repatriates, which emphasises the importance of an individual-ised approach in providing support and developing adaptation strate-gies. Particular attention should be devoted to linguistic aspects and the

preservation of cultural traditions. However, in addition to sociocultural factors of adaptation, economic factors also play an important role in the integration of repatriates.

3.2 Economic Adaptation of Repatriates

The involvement of repatriates in the economic life of their native country largely depends on the success of their labour integration. Labour integration is a complex process that includes not only the search for employment but also adaptation to new labour market conditions and learning new professional skills. Zhapakov et al. (2020) analysed the historical aspects of the formation of the Kazakh diaspora and irredenta abroad and provided information about the return of *oralmans* (Kazakh for repatriates) to their homeland. In addition, they examined the problems faced by *oralmans* upon their return home. The main problem was unemployment. This makes the labour integration of repatriates particularly relevant. However, at the same time, European experience shows that migration has a positive impact on labour markets and sustainable economic development. It can increase employment rates, decrease unemployment, raise labour productivity, reduce poverty, and improve education and living standards (Noja et al. 2018). These findings suggest that migration (or repatriation) can be an important factor in promoting sustainable economic development.

According to the results of the author's survey, more than one-third of the respondents, namely 36.6%, stated that the process of finding a job upon returning home took them from one to three months. This indicates that a significant proportion of repatriates find employment relatively quickly. However, about one-fifth of respondents (20.6%) reported that it took them three to six months to find a job, while less than one-fifth (13.2%) reported that their job search was longer than six months. These figures indicate that some repatriates find it difficult to integrate into the labour market of their home country after a long absence. Only 12.5% of respondents reported that they were able to find a job in less than a month. While some find employment quickly, most repatriates take longer to do so.

From the respondents' answers to the question about the job search methods they considered effective, online search platforms proved to be the most common. More than a third of the survey participants, 38.6%, said that accessing job vacancies through online platforms was their main tool. This indicates widespread use and popularity of online job search resources among repatriates. The second most effec-

tive method was personal connections and recommendations. About a quarter of respondents, 24.5%, reported that professional connections and recommendations from acquaintances were important to them. A small percentage (12.8%) claimed to have received a job offer from previous employers. Therefore, maintaining contacts with previous jobs can be useful and may even lead to re-employment. The results of the survey on the economic stability of repatriates show that almost half of the respondents (47.3%) had never changed jobs since returning, indicating that a significant proportion of repatriates achieved stability in their professional lives, preferring long-term employment relationships. About a quarter of respondents (23.4%) stated that they had changed jobs once or twice. Less than one-fifth (16.1%) said they had changed jobs three to five times. Only 7.7% of respondents said they had changed jobs more than five times. However, it is important to consider that the survey did not explicitly include a parameter related to the duration of respondents' stay in Kazakhstan prior to assessing their employment stability. Adaptation is a dynamic process that evolves over time, and the relationship between employment changes and the duration of stay could provide valuable insights into the stages of economic adjustment. Future studies should incorporate temporal parameters to better assess how employment patterns develop during the adaptation process.

The second important component besides labour integration is economic well-being. Survey results regarding satisfaction with salary levels show that there is a significant polarisation of opinions on this issue. Approximately one-third of respondents (30%) expressed satisfaction with their salary level, which may indicate that for this group of repatriates, economic well-being is satisfactory. At the same time, another third of respondents (33.4%) are generally dissatisfied with their salaries. Almost a quarter (23.8%) have a neutral opinion thereon. Respondents were also asked to assess their overall economic success in the home country. Here again, opinions were divided. One-third of the respondents (33.3%) rated their economic success as average. This may indicate that there is a certain stability and satisfactory level of economic activity for this group of repatriates. Almost a quarter of respondents (23.8%) assessed their success as satisfactory, while 28.3% consider themselves economically unsuccessful. Thus, the results of the survey on the assessment of economic success emphasise that repatriates have different views on their situation and there are both positive and negative perceptions of their economic success in the home country.

Two additional questions addressed career prospects. A majority of respondents, 41.1%, expressed a neutral attitude towards the impact

of their international experience on their careers in their home country. This may indicate that for this group of repatriates, international experience does not have a clear positive or negative impact on their career development. However, 27.8% of the respondents confirmed that their international experience had a positive impact on their careers in the home country. This may indicate that for a certain part of repatriates, international experience is seen as valuable and relevant in their home labour market. Thus, the results indicate that there is no consensus among repatriates regarding the impact of international experience on their careers in their home country, and this is an issue that may elicit a variety of personal and professional evaluations. The results of the assessment of career prospects among respondents revealed a diversity of perceptions of future professional development. Almost a third of the survey participants (30.2%) rated their career prospects in the home country as high, which may indicate an optimistic view of the future and confidence in favourable conditions for professional development. An average rating of career prospects in the home country was given by 35.8% of respondents, while 25.8% of respondents assessed their career prospects as low.

In the context of career development, a multiple-choice question was posed to identify the main difficulties repatriates face in achieving success in a new workplace after return (Chart 2).

Chart 2: The main problems of repatriates in the professional sphere upon return to their native country
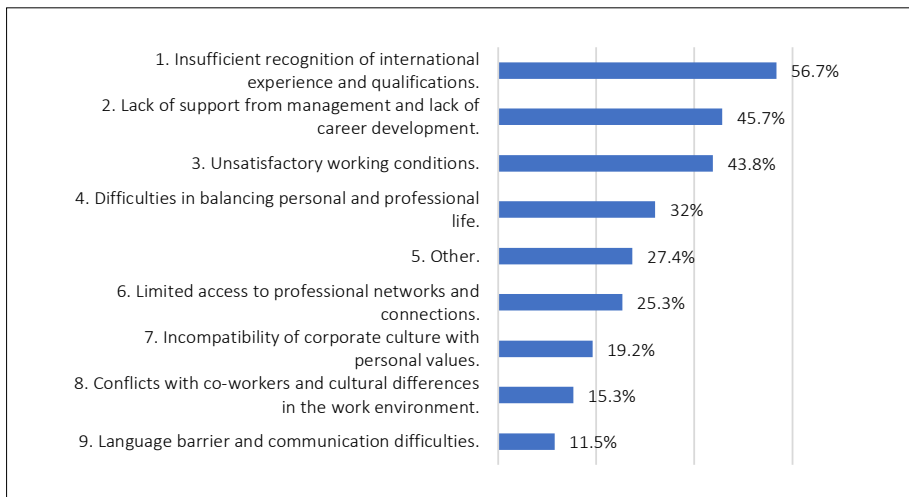
Source: Compiled by the authors.

The most frequently cited issue is the lack of recognition of international experience and qualifications. This result indicates the high importance of perceiving their international experience and qualifications in the context of their home country. It is possible that repatriates feel a lack of recognition of their international experience, which may affect their professional confidence. The second most common issue is the lack of support from management and limited career development opportunities. The third issue relates to unsatisfactory working conditions, which may relate to the physical working environment, poor organisation of the work process, and social aspects of working life.

Overall, the analysis shows that repatriates usually integrate into their home labour market successfully, finding a job within a short period. However, there is noticeable diversity in their perceptions of satisfaction with salary levels and career prospects. The effectiveness of job search depends on the use of online platforms and personal connections. It is also important to note that overcoming difficulties, such as the lack of recognition of international experience and working conditions, remains a challenge for repatriates. Thus, successful integration requires not only professional skills but also careful attention to aspects of social and professional adaptation in the home country. In addition to the sociocultural and economic adaptation, the psychological aspect is also important, as it represents the most profound dimension of the repatriates' adaptation process.

3.3 Psychological Adaptation of Repatriates

Psychological adaptation refers to an individual's adaptation to new conditions and requirements of the environment at the psychological level. This process involves changes in the emotional sphere, cognitive functions, as well as in the mental state of a person. Ukrainian researchers distinguish four types of psychological adaptation: normal adaptation – successful coping with typical problems without violating personality structure or social norms. It can be protective (using defence mechanisms) and unprotective (without them). Problems are solved by social-psychological mechanisms; mixed type – a combination of protective and unprotective mechanisms in a situation of partial frustration, where the individual may display defensive aggression; deviant adaptation – satisfaction of individual needs within a group, but with deviation from the expectations of other participants, which may manifest itself in non-conformism, innovation, or conflict with group norms (Spytska 2023a); and pathological adaptation – the use of pathological mechanisms or

behaviours, leading to the formation of pathological character complexes beyond normal behaviour (Overchuk & Shindirovskaya 2021). Acculturation theory suggests four psychological strategies available to immigrants: integration, assimilation, separation, and marginalisation (Scottham & Dias 2010). According to K. J. Aroian (1990), psychological adaptation requires resolving a dual task: overcoming grief over losses and shocks related to leaving the country and mastering the resettlement conditions related to novelty and language.

While these frameworks provide valuable insights, understanding the specific coping strategies employed by repatriates is essential for addressing psychological adaptation. Repatriates manage stress and anxiety through methods such as seeking social support from family and community networks, engaging in cultural or religious practices, and participating in social or professional activities (Sakhiyeva et al. 2015; Duanaeva et al. 2023). Emotional challenges, including isolation and cultural dissonance, are often addressed through self-help techniques like journaling, mindfulness, or familiar hobbies. Some repatriates, however, may require targeted psychological interventions, such as counselling or support groups. Personalised recommendations are crucial for supporting repatriates in overcoming psychological barriers. Tailored programs focusing on emotional resilience training, mental health resources, and peer networks can ease the adaptation process (Ronzhes 2023; Lewinski 2016). These strategies should account for unique stressors, such as language barriers, generational expectations, and varying levels of cultural familiarity, to create more effective and responsive support systems.

In the context of repatriates' psychological adaptation, several key aspects determine their overall psychological well-being. Upon return, the respondents present different variants of well-being. A significant portion of them, namely 29.6%, report a neutral state, which may indicate the absence of pronounced emotional reactions. At the same time, 30.9% experience positive emotions, which may indicate joy or satisfaction with the return, while 29.6% of respondents report negative emotions, which may indicate stress or even depression. One important factor is the level of stress and anxiety, which can have a significant impact on the adaptation process. The survey results indicate a diversity of emotional reactions among repatriates upon their return home. Almost half of the respondents, namely 49.8%, reported experiencing almost no emotional stress, which may indicate a relatively smooth and positive transition to the new environment. However, almost a third of the respondents (31.9%) reported frequent or constant emotional

stress. While the majority (53.6%) expressed feelings of anxiety, for some (22.8%), this emotion was absent, which may indicate an easier adaptation or availability of resources for emotional support. It is also noteworthy that for 13.3% of repatriates, the level of anxiety decreased, which may indicate a gradual adaptation and adjustment to the new environment.

Sleep problems are another important indicator (often latent) of the quality of mental health. Sleep disturbances can indicate emotional or adaptation difficulties. The majority of respondents (57.6%) reported occasional or infrequent sleep problems. This may be due to recurrent stressful situations, adaptive challenges, or other factors affecting emotional well-being. It is important to note that 20.8% of the study participants experience sleep problems regularly. Another important indicator of mental stability is the need for psychological assistance. This may also be related to stigmatisation and prejudice, which ultimately create barriers to seeking psychological help. Thus, this indicator can only partially clarify the problem of psychological adjustment of repatriates. Only 24.1% of participants express a clear need for such assistance, which may reflect both individual requests for support and willingness to seek professional help. At the same time, more than half of the respondents (56.9%) do not feel the need for psychological assistance.

The survey also revealed the main thematic constructs of psychological problems in the process of adaptation in the home country (Chart 3). This question was multivariate.

Chart 3: The main problems of repatriates in the personal-psychological sphere
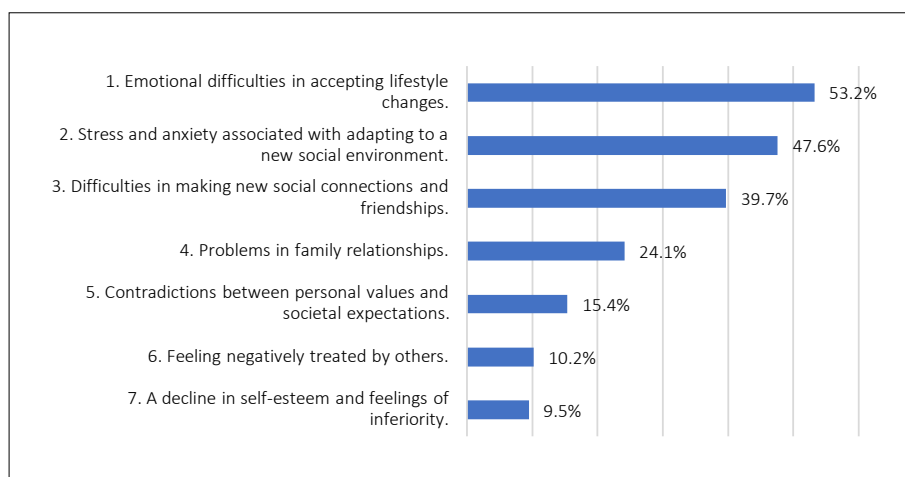
Source: Compiled by the authors.

At the top of the list are emotional difficulties associated with accepting lifestyle changes. This may include a sense of loss of familiar environment, lifestyle, and cultural patterns. The process of accepting change can be emotionally challenging and takes time to adjust to the new reality. In second place are stress and anxiety related to adapting to a new social environment. Moving to another country or area is often accompanied by cultural differences, language barriers, and changes in social dynamics (Leleka & Moskalenko 2023; Pochwatko & Naydonova 2023). These factors can cause stress and anxiety in repatriates, complicating the integration process. The third place was occupied by difficulties in establishing new social ties and friendships. This reflects the social aspects of adaptation, where repatriates may struggle to find community, understand local customs, and make new friends. Social isolation or feelings of rejection can affect overall psychological well-being.

In general, the process of psychological adaptation of repatriates is a complex journey marked by emotional and social difficulties. The sense of loss of a familiar environment, stress, and anxiety are the most common emotional challenges faced by repatriates. Social aspects are also important aspects of adaptation, including difficulties in establishing new social ties and friendships. The low need for psychological help may indicate existing stigmas, which emphasises the importance of creating a supportive environment that encourages awareness and the use of professional help services. Access to emotional support, including social resources and culturally sensitive psychological support, is essential for the successful adaptation of repatriates.

4. Discussion

The study of sociocultural, economic, and psychological adaptation of repatriates in Kazakhstan provides a comprehensive overview of the situation, identifying both successful and problematic aspects. The study highlights successful aspects of adaptation, such as economic well-being and active participation in cultural life. However, the problems identified, such as conflicts in cultural expectations and difficulties in establishing social ties, emphasise the need for targeted support to help repatriates better adapt to their new environment.

The study by Malaysian scientists Aljofan and Anees (2022), conducted in the Gulf Cooperation Council countries, examined the influence of work roles on the job adaptation of repatriated students. A work role is defined as a set of expectations associated with a particular job (Alishli et al. 2024). It includes factors such as duties, authority, responsibil-

ity, interaction with others, and expectations of the organisation. Their study found that repatriates' work roles are positively correlated with their job adjustment, except for role freedom, defined as the extent to which an individual has control over their job. The results of the study showed that repatriates who have more control over their jobs have better job adjustment. The study also showed that career ambition and career expectations have a positive effect on repatriates' workplace adjustment. The Malaysian researchers' study used an empirical methodology similar to that of the present study, with both utilising online surveys. However, key differences should also be noted. First of all, unlike the present study, which comprehensively examines three types of adaptation (sociocultural, economic, and psychological), the Malaysian study focuses on the economic level of adaptation. In addition, the Malaysian study focuses on finding correlative relationships between the indicators. The present study, on the other hand, did not use bivariate analysis, which may indicate a methodological limitation.

Fischer and Schwarzkopf (2023) studied factors influencing the process of reintegration of repatriates returning from Asia, with special attention to social support and the role of the community. The main focus is on examining the influence of the community on the reintegration process of repatriates upon their return to Germany. The article identifies a variety of factors that influence this process and considers the impact of social support and the role of the community in successful return. The results of the study highlight the variables that influence the reintegration process of repatriates returning from Asia. These variables have both positive and negative effects on successful reintegration into society after a certain period spent abroad. Particular attention is given to identifying the role of social networks in the home country, as the lack of social support negatively affects the reintegration process. This causes repatriates to prefer to stay in known repatriate communities where they can get the necessary support. The German study relied on a qualitative methodology and focused more on social adaptation, while the present study addressed adaptation levels in greater depth.

A Korean study by Ha and He (2022) addressed the adjustment stress experienced by Third Culture Kids (TCKs) in early adulthood upon their return to Korea. The ABC-X family stress model was used to analyse the effects of various variables on the level of return adjustment stress. The main findings of the study emphasise that Korean TCKs experience moderate levels of return-related stress, along with significant changes in cultural identity. Among survival resources, high levels of self-efficacy and social support are highlighted, while adaptability and family cohe-

sion are rated at a medium level. Additionally, variables found to significantly influence Korean TCKs' stress upon return include self-efficacy, social support, and cultural identity change. Greater stress is observed for those with low levels of self-efficacy, weak social support, and significant changes in cultural identity. Like the present study, the Korean study used a quantitative methodology, namely a questionnaire survey. However, its scope was limited to a narrow age group, whereas the present study considered almost all age categories.

Geeraert et al. (2022) examined the gap between expectations and experiences among individuals returning home after studying abroad, focusing on its impact on well-being. Their findings reveal that negative mismatches – when expectations were not met—were associated with lower levels of well-being, while positive mismatches, where adaptation exceeded expectations, improved well-being. This demonstrates the significant role of expectation management in the adaptation process. Although both studies employed quantitative methodologies, the UK study primarily focused on a younger, predominantly female sample, whereas the present study provides a more balanced gender representation and broader age range, offering a more comprehensive perspective on adaptation dynamics.

The study of Chinese scientists Shen et al. (2022) emphasises the importance of considering the happiness of urban youth in the context of the Healthy China 2030 plan. Based on extensive social research on social practices in China, the paper applies hierarchical linear regression models and structural equation models to identify factors affecting the happiness level of urban youth returning to China. The findings indicate that the happiness of urban young repatriates is not only influenced by their sociodemographic characteristics such as age and education but to a large extent by their professional development, institutional factors (particularly the employment and entrepreneurship policy system), and social factors (physical environment and urban-rural relations), which are different from those affecting ordinary citizens. Additional research demonstrates that professional development indirectly affects the happiness levels of urban young repatriates through relationship adjustment, collective adjustment, and material adjustment. Institutional factors also have an indirect impact through relationship adaptation and material adaptation, while social factors have an indirect impact through relationship adaptation, collective adaptation, and material adaptation. Unlike the present study, the Chinese study focused on the level of happiness of repatriates. Nevertheless, this issue is closely related to the psychological aspect explored in the current study. Another important

difference is that the Chinese study focused on young people, while the present study considered all age groups.

Swiss scientists Heinzmann et al. (2023) conducted a comparative analysis of two mobile students forced to end their stay abroad early during the first wave of the COVID-19 pandemic and to return home after seven and eleven weeks, respectively. The interview data were subjected to qualitative content analysis to reveal how the pandemic outbreak affected the lives and experiences of both students. The results of the analysis suggest that the COVID-19 pandemic was a stressful event for both students, impacting their social contacts and readaptation process in their home environment. However, the experiences of these students differed significantly, which may be due to differences in their prior social contacts, goals related to being abroad, and the adopted strategies to adapt to the new environment. The Swiss study is similar to the present study in that it also examined stress levels among repatriates. However, its methodology differed significantly, as it employed a qualitative approach based on just two interviewees. The author believes that this is an extremely small sample, even for qualitative research.

Overall, the analysed studies indicate that the adaptation of repatriates is a complex process that can be conditioned by various factors, both individual and external. The most important factors influencing the adaptation of repatriates include the alignment or misalignment between repatriates' expectations and experiences; the presence or absence of social support (from family, friends, colleagues); the difference between home and host cultures; and successful professional development.

To address these challenges and enhance the adaptation process, specific policy measures can be proposed, such as language courses tailored to the needs of repatriates with intermediate proficiency levels, which would significantly improve their ability to integrate into local communities and workplaces. Additionally, cultural orientation programmes could facilitate smoother social adaptation by familiarising repatriates with contemporary traditions and societal norms in Kazakhstan. Implementing career counselling services and initiatives to recognise international qualifications would help overcome professional barriers, such as limited career opportunities and the undervaluation of overseas experience. Lastly, accessible psychological support programmes, including counselling services and peer support groups, could alleviate the emotional challenges repatriates face, such as stress, anxiety, and social isolation. By adopting these targeted strategies, the

adaptation process can be significantly improved, ensuring a smoother reintegration of repatriates into their historical homeland.

5. Conclusions

The analysis of the sociocultural adaptation of Kazakh repatriates revealed several trends. The level of proficiency in the Kazakh language varies from average to high. Attitude towards traditions and customs among the repatriates are diverse, with over a third of them emphasising the positive impact of traditions on social interaction. Regarding participation in cultural and social life of their native country, half of the repatriates reported being actively involved. Opinions on the importance of preserving the cultural values of the country upon return also vary. Analyses of problems experienced upon return revealed conflicts between cultural expectations and experiences, difficulties in establishing new social ties, and the need to overcome stereotypes and prejudices.

In terms of economic adaptation, labour integration of repatriates in Kazakhstan is generally successful. Most repatriates find employment within a relatively short period and have stable labour relations. The economic well-being of repatriates is also generally satisfactory. About half of the repatriates are satisfied with their salary level and a third consider themselves economically successful. However, there are certain problems that may hinder the successful labour integration of repatriates, such as insufficient recognition of repatriates' international experience and qualifications, insufficient support from management, lack of career opportunities, and dissatisfaction with working conditions.

The psychological adaptation of repatriates is a complex process that can be accompanied by various emotional and psychological difficulties. Stress and anxiety levels among repatriates are relatively high. Sleep problems are also common. The need for psychological help among repatriates is relatively low, which may be due to various factors including stigmatisation and prejudice. The main psychological problems faced by repatriates are emotional difficulties related to accepting lifestyle changes, stress and anxiety related to adapting to a new social environment, and difficulties in establishing new social ties and friendships.

Prospects for further research should focus on the study of state support for the adaptation of repatriates. In this context, both legal frameworks and social policies that support the integration of repatriates in Kazakhstan are important.

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Acknowledgement

Appendix A

Survey

Dear respondent!
We invite you to take part in the survey regarding the adaptation of migrants returning to their historical homeland. We guarantee full confidentiality of your answers, which will be used only in conjunction with the answers of other respondents. Please choose one answer option, unless otherwise indicated.

1. How fluent are you in Kazakh language?
1. Fluent
2. Intermediate
3. Pre-intermediate
4. Beginner
5. Hardly speak Kazakh
6. Hard to answer

2. How fluent are you in the Russian language?
1. Fluent
2. Intermediate
3. Pre-intermediate
4. Beginner
5. Hardly speak Russian
6. Hard to answer

3. Have you encountered difficulties due to language barrier?
1. Yes
2. No
3. Hard to answer

4. How do your language skills affect your daily communication and working life in your home country?
1. Very positively
2. Positively
3. No effect
4. Negatively
5. Very negatively
6. Hard to answer

5. To what extent do you adhere to the traditions and customs of your culture when you return to your home country?
1. To as much as possible
2. To some extent
3. Barely adhere
4. Don't adhere
5. Hard to answer

6. How do customs affect your relationships with family, friends or colleagues?
1. Positively
2. No effect
3. Negatively
4. Hard to answer

7. How actively do you participate in the cultural and social life of your home country after your return?
1. Full active participation
2. Participation in some events
3. Rarely participate in events
4. No participation
5. Hard to answer

8. How important is it to you to preserve the cultural values of the country you lived in upon returning to your historical homeland?
1. Highly important
2. Important
3. No difference to me
4. Somewhat unimportant
5. Not important
6. Hard to answer

9. How do you assess the level of support from the community in the process of your adaptation in your home country?
1. Very high
2. High
3. Average
4. Low
5. Very low
6. Hard to answer

10. What specific cultural and customary challenges do you experience upon return? (no more than three options can be selected)
1. Difficulties in adapting to traditional rituals and customs
2. Conflicts between cultural expectations and experiences abroad
3. Difficulties in establishing new social ties in the home country
4. Facing differences in etiquette and norms of behaviour
5. The need to overcome stereotypes and prejudice from others
6. Culture shock and a sense of isolation in one's own culture
7. Uncertainty about personal identity in the context of cultural change
8. Other (state your answer): _____

11. How long did it take you to find a job upon return?
1. Less than a month
2. 1–3 months
3. 3–6 months
4. More than 6 months
5. Hard to answer

12. What job search methods have been most effective for you?
1. Search platforms on the Internet
2. Personal connections and references
3. Invitations from former employers
4. Participation in professional events
5. Other (state your answer): _____

13. How many times have you changed jobs since your return?
1. Not a single time
2. 1–2 times
3. 3–5 times
4. More than 5 times
5. Hard to answer

14. Do you feel satisfied with your salary level?
1. More than satisfied
2. Mostly satisfied
3. Yes
4. Not really
5. Very dissatisfied
6. Hard to answer

15. How would you rate your current economic success in your home country?
1. Highly successful
2. Successful
3. Average succes
4. Unsatisfactory
5. Not successful
6. Hard to answer

16. How does international experience affect your career and job opportunities in your home country?
1. Positively.
2. No difference to me.
3. Negatively.
4. Hard to answer.

17. How do you assess your career prospects in your home country?
1. Very high
2. Hig
3. Average
4. Low
5. Very low
6. Hard to answer

18. Which of the factors listed above do you think represent the main challenges to succeeding in a new job upon return? (no more than three options can be selected)
1. Language barriers and communication difficulties
2. Insufficient recognition of international experience and qualifications
3. Conflicts with co-workers and cultural differences in the work envi ronment
4. Limited access to professional networks and connections
5. Unsatisfactory working conditions
6. Lack of support from management and lack of career development
7. Difficulties in balancing personal and professional life
8. Incompatibility of corporate culture with personal values
9. Other (state your answer): _____

19. How would you rate your overall psychological state upon return?
1. Very positive
2. Positive

3. Indifferent
4. Negative
5. Very negative

6. Hard to answer

20. How often do you experience emotional stress related to the process of adaptation in your historical homeland?
1. Rarely
2. Sometimes
3. Often
4. Very often
5. Constantly
6. Hard to answer

21. Compared to your time abroad, have you noticed an increase in your anxiety levels since returning?
1. Yes, significantly
2. Yes, although insignificantly
3. No changes
4. No, anxiety level has decreased
5. Hard to answer

22. How often do you experience sleep problems upon return?
1. Rarely
2. Sometimes
3. Often
4. Almost constantly
5. Constantly
6. Hard to answer

23. Are you seeking professional help or support to maintain your mental health?
1. Yes, regularl
2. Yes, sometimes
3. No
4. Hard to answer

24. Which of the following psychological problems do you consider to be the main ones in the process of adaptation in your home coutry? (no more than three options can be selected)
1. Difficulties in making new social connections and friendships

2. Emotional difficulties in accepting lifestyle changes
3. Stress and anxiety associated with adapting to a new social environment
4. Problems in family relationships
5. A decline in self-esteem and feelings of inferiority
6. Contradictions between personal values and societal expectation
7. Feeling negatively treated by others
8. Other (state your answer): _____

25. Please indicate your gender:
1. Male
2. Female

26. Please indicate your age: _____

27. Please indicate your education:
1. Primary education (less than 9 grades).
2. Basic secondary education (full 9 grades).
3. Complete secondary (or vocational) education (11 grades).
4. Undergraduate higher education (technical school, universities of I, II accreditation levels).
5. Incomplete higher education.
6. Full higher education (universities of III, IV accreditation levels).

Prilagajanje izseljencev povratnikov na življenje v domovini

Izvleček

Ob povratku v svojo izvorno domovino se izseljenci pogosto srečujejo z različnimi izzivi, tako ekonomskimi v smislu omejenih možnosti zaposlitve kot kulturnimi v prilagajanju lokalnim tradicijam in psihološkimi, kot sta stres in družbena izključenost. Raziskovalni pomen študije izhaja iz dejstva, da lahko neuspešna prilagoditev povzroči socialno izolacijo, brezposelnost in druge negativne posledice, kar vpliva na stabilnost celotne družbe. Namen članka je analizirati ključne dejavnike in mehanizme, ki zagotavljajo uspešno družbeno-kulturno, ekonomsko in psihološko reintegracijo povratnikov. Raziskava, v kateri je sodelovalo 273 kazahstanskih izseljencev, je na področju družbeno-kulturnega prilagajanja pokazala več ključnih dejavnikov. Raven znanja (kazahstanskega) jezika se giblje od srednje do visoke. Različen je tudi odnos povratnikov do tradicional-

nih navad in običajev, pri čemer več kot tretjina anketirancev poudarja pozitiven vpliv tradicije na družbene interakcije. Polovica povratnikov se aktivno udeležuje kulturnih in družbenih dejavnosti, vendar usklajevanje tradicionalnih vrednot s sodobnimi družbenimi normami predstavlja svojevrsten izziv. Kar zadeva ekonomsko prilagajanje, si večina povratnikov relativno hitro zagotovi zaposlitev in razvije stabilna delovna razmerja, ostajajo pa ovire, kot so nepriznavanje mednarodnih delovnih izkušenj in omejene možnosti za poklicno napredovanje. Na psihološkem področju uspešno prilagoditev zavirajo čustvene stiske, povezane s spremembami življenjskega sloga, občutek osamljenosti in težave pri vzpostavljanju trdnih družbenih vezi. Članek poudarja potrebo po ciljno usmerjenih podpornih programih, kot so jezikovni tečaji, kulturna orientacija in psihološko svetovanje, ki bi zajeli različne izzive prilagajanja izseljencev povratnikov na novo družbo.

Ključne besede

izseljenci povratniki, znanje jezika, tradicije, kulturne vrednote, delovna integracija, duševno zdravje

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Types of Social Orientations of Young People in the System of Interethnic Interaction in Multiethnic Cities (On the Example of Bishkek)

Abstract

The relevance of the study of types of social identity in Bishkek is conditioned by the need to eliminate social stereotypes regarding different ethnic groups and demonstrate possible productive behaviours to avoid interethnic conflicts. The purpose of this study was to investigate the productive and unproductive types of social orientations within the multiethnic city of Bishkek. The following methods were used: the method of analysing sociological information, statistical, comparative, analytical and synthetic methods. According to the 2022 Census, Bishkek is home to many nationalities, including Kyrgyz, Russians, Uzbeks, Tatars, Dungans, Kazakhs, Turks. The primary focus of this study is on the youth aged 18–29. This paper can be used to investigate the experience of interethnic interaction on the example of different countries of the world, to consider conflict-causing factors and stereotypes in multiethnic structures.

Keywords

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1. Introduction

The consideration of ethnic interaction in Kyrgyzstan with the study of types of social identity is relevant, since there is still some tension in the country related to the ethnic factor. Despite the fact that there are already many studies that consider the nature of interethnic interaction in Kyrgyz cities and rural areas, the sociological personality types have not been investigated. Understanding the different types of social identity helps us understand not only how society thinks as a whole, but also how each type of identity is linked to being tolerant or intolerant of ethnic minorities (Damkier & Ozer 2024).

Studying the types of social identification allows assessing the problems that exist in a particular society. In the context of ethnic interaction in Kyrgyzstan, the relevance of the study is quite high, since tension is still felt in society and there are a significant number of stereotypes about different ethnic groups. It is necessary to qualitatively analyse the nature and models of relationships in communication in a multiethnic society, for example, in Bishkek. Social identity is a person's sense of belonging to a particular social group based on shared characteristics, values, and experiences. Thus, the types of social identities reflect the relations between ethnic groups as fully as possible, so they were used to investigate the interdependence between ethnic origin and attitude towards a person.

Interethnic interaction refers to the social, cultural, and political exchanges and relationships between different ethnic groups within a society (Volkov & Poleshchuk 2019). It includes how ethnic groups negotiate their identity, resources, and social space in relation to one another, as well as the cooperative and conflictual elements of these interactions. In the context of this study, interethnic interaction is explored through the lens of how various ethnic groups in Kyrgyzstan, particularly the Kyrgyz and Uzbeks, engage with each other in areas such as politics, economics, language, and cultural practices. Historical, social, and political factors can influence these relationships, affecting whether they promote harmony, understanding, or conflict. A more thorough investigation of this idea will yield a more sophisticated comprehension of the ways in which interethnic dynamics impact national identity and social cohesiveness in multiethnic nations such as Kyrgyzstan.

Tolerance and intolerance indicate a willingness (or unwillingness) to accept or respect people with different backgrounds, beliefs, or behaviours without discrimination. The features of these terms within the Kazakh society were investigated by Aimaganbetova et al. (2023).

The study was based on a survey of students in Almaty using Google Forms. The results of the analysis showed a high degree of extremism, in particular, the cult of power, aggressive manifestations, coercion, and conformism. The main theses presented in the work correlated with the concept of tolerance and its perception in society, but the types of social identities of Kazakhs were not considered. Kazakbaeva (2021) emphasised the need to investigate youth policy. In particular, issues related to technical support, the quality of education and student academic performance, socio-political activities of youth, crime, and security were considered. However, the issue of interethnic communication in the structure of a multiethnic city has not been considered.

Communication, whether in-person or digital, is essential in influencing social relationships, identity development, and civic engagement, especially among youth. Dzisah et al. (2024) examined the influence of social media on youth socialisation, political engagement, and employment in Ghana, revealing that, although digital platforms facilitate freedom of expression and participation, they simultaneously create contradictions in youth involvement in socio-political matters. Nonetheless, their research, derived from an extensive survey, lacks qualitative profundity, potentially reducing the intricacies of digital activism to a simplistic framework. Schwartz et al. (2024) investigated inter-brain synchrony in face-to-face versus texting communication among youth through hyperscanning EEG. The authors revealed that although texting facilitates some degree of neural synchronisation, in-person interaction cultivates markedly stronger fronto-temporal connections. They highlighted the superiority of in-person contacts for profound social connections, albeit they did not adequately consider contextual characteristics such as emotional tone and social intent in digital communications.

Equality is the basis for cross-border integration, as indicated in the paper by Parmanasova et al. (2022), the main purpose of which was to investigate the current state of intercultural communication in the European Union and Ukraine. This paper presented a mechanism for communication between representatives of different social types with government agencies but did not pay attention to ethnic diversity. Kamchybekova and Abdullaeva (2021) studied the concept of civil identity in Kyrgyzstan, taking into account ethnic specifics. The authors identified it as an individual's sense of belonging to a nation-state, integrating both ethnic self-identification and shared civic values, norms, and responsibilities, fostering patriotism and national unity. The survey results showed that among ethnic minorities, 23.8% of Tajiks, 20.2% of Uzbeks, and 14.4% of Russians consider Kyrgyzstan their homeland.

The study is based on the analysis of centuries-old experience of interaction between different ethnic groups in Kyrgyzstan, but it does not focus on productive and unproductive behaviours in interethnic communication. Yaban and Sayil (2021) studied the similarities in the socio-value orientations of adolescents using a personality-oriented approach. After the analysis, it was determined that the similarity in value positions between children and parents was lower than between father and mother. The researchers focused on the prosocial behaviour of descendants, but the study did not actualise ethnic differences between socio-value orientations.

The purpose of this study was to consider the manifestations of types of social identity (productive and unproductive: receptive, exploitative, hoarding, marketing) in the context of interethnic communication in Kyrgyzstan using the example of the multiethnic city of Bishkek. Based on the outlined purpose, the tasks were set to study statistical data on interethnic interaction in Kyrgyzstan, in particular Bishkek, and analyse the main types of social identity in Kyrgyz society. The subject of the study is statistical data related to communication between representatives of different ethnic groups in Kyrgyzstan. The study focuses on youth aged 18–29 years.

The paper consists of five sections, which include Introduction, Materials and Methods, Results, Discussion, and Conclusions. At the end of the paper, the Reference list is presented.

2. Materials and Methods

This paper used data from the Population Censuses of 1989, 1999, 2009, and 2022 (Goskomstat SSSR 1992; NSC 1999; NSC 2009; NSC 2023b). Statistical data obtained during the analysis of the ethnic situation in Kyrgyzstan were also used. The study of ethnic interaction between Kyrgyz and ethnic minorities was based on the concept of personality by Fromm (1994). This theory fits best for the study as it categorises social orientations, explaining how youth engage in interethnic interactions. This typology helps to clarify patterns of tolerance, conflict, and identity formation in Bishkek, linking social structures to individual behaviour in a multiethnic context.

The method of analysing sociological information was used to transform empirical data obtained in the course of various sociological studies for their differentiation, selection, and further study. In particular, data were provided on changes in the ethnic composition in a multiethnic city, the influence of ethnicity and religion on the choice of a

candidate in elections using the example of Bishkek, the influence on the political choice of voters, and the distribution of interethnic conflicts in 2011–2015 by region in Kyrgyzstan. The data obtained during the analysis were presented in tables and charts for better visualisation of information.

The statistical method was used to analyse the sociological data provided in papers that examined the ethnic situation in Kyrgyzstan, in particular, the level of conflict and tolerance in communication between different ethnic groups. Thus, quantitative data were presented confirming the changes in the ethnic structure and mentality of Kyrgyz society over the past 30 years. Based on the statistical data obtained, conclusions were drawn about the types of social orientation of young people.

Comparative analysis in this study was used to compare different types of social identity manifested in conditions of ethnic interaction on the example of Bishkek city and Kyrgyz society in general. In particular, such identities as productive and unproductive (receptive, exploitative, hoarding, marketing) were considered. The study of these types emphasised the most striking features of this group. The analytical and synthetic method was used to consider theoretical aspects related to the ethnic structure of different countries of the world, socio-value orientations, the level of social cohesion and adaptability, the idea of ethnic boundaries, global identity, and the foundations of cultural exchange between representatives of different ethnic groups within the same multiethnic space. Using the analytical and synthetic method, the main problems actively studied by sociologists, psychologists, and linguists in the context of ethnicity were outlined.

Thus, this paper applied the main methods that contribute to the presentation of statistical data of sociological surveys and observations in Kyrgyz society, particularly in Bishkek city (method of analysis of sociological information, statistical, and comparative methods), and an additional analytical and synthetic method used to investigate theoretical information in different ethnic contexts. Notably, only with the help of all these methods was it possible to study in depth the topic related to the types of social identity in Bishkek.

3. Results

Interethnic relations in Kyrgyzstan's capital, Bishkek, have a long and complicated background that has been influenced by numerous historical, social, and political elements. Like many other Central Asian towns,

Bishkek became a multiethnic centre during the Soviet era as a result of migration programs that attracted people from many ethnic backgrounds to urban areas. The city became home to a diverse population, including Russians, Uzbeks, Kazakhs, and other ethnic minorities, which established a unique sociopolitical fabric characterised by a mixture of cultures, languages, and traditions. A centralised Soviet identity was also imposed during this time, which did not eliminate the underlying tensions between various groups even though it did repress some ethnic distinctions (Nasritdinov 2023). These interethnic dynamics started to change when Kyrgyzstan attained independence in 1991, with ethnic Kyrgyz being the largest group. This resulted in new patterns of interaction between the different ethnic groupings, both cooperative and conflictual.

The ethnic makeup of Bishkek continued to change in the post-Soviet era, reflecting the influx of native Kyrgyz people as well as the movement of ethnic Russians (Nasritdinov 2023). A growing sense of Kyrgyz nationalism during the early years of independence occasionally exacerbated tensions with ethnic minorities, particularly Uzbeks and Russians. Political unpredictability, economic hardship, and the lack of a strong sense of national identity all contributed to these conflicts. Over the years, however, there has been a shift towards greater interethnic cooperation, driven by economic necessity and the increasing recognition of the value of diversity in shaping Kyrgyzstan's future (Leupold 2021). Interethnic relations in Bishkek are still complicated, though, with some ethnic groups still being marginalised and conflicts arising over things like political representation, language rights, and cultural recognition. Therefore, the historical development of interethnic relations in Bishkek illustrates how migration, nationalism, and the changing processes of ethnic identity construction interact dynamically within a post-Soviet society.

Due to interethnic contacts and a high degree of migration during the Soviet period and during the period of independence of Kyrgyzstan, Bishkek was established as a multiethnic city. Based on the Population Censuses of 1989, 1999, 2009, and 2022 (Goskomstat SSSR 1992; NSC 1999; NSC 2009; NSC 2023b), it is possible to trace how the percentage ratio between the peoples living in the city changed. The most numerous ethnic groups in Bishkek in 2022 are presented in Table 1. Comparing the modern ethnic composition of the population of Bishkek with 1989, a significant increase in Kyrgyz (from 22.88% to 85.1%) and a decrease in Russians (from 55.72% to 10%) can be noted. Despite the global changes that have occurred over the past 30 years, ethnic groups

such as Uzbeks, Kazakhs, and Tajiks have shown slight fluctuations in the population from 1989 to 2022 (less than 1%). This relative stability suggests that some minority groups are more structurally embedded in Bishkek compared to Russians, whose migration patterns are more influenced by post-Soviet geopolitical shifts. The ethnic core of Bishkek consists of indigenous peoples (Kyrgyz), peoples belonging to the post-Soviet space (Russians, Uzbeks, Kazakhs, Tajiks, Ukrainians), and other peoples of Central Asia (Uighurs, Dungans, Turks). Germans represent the largest group among European peoples (0.1%). Other ethnic groups are represented by 0.4% (Goskomstat SSSR 1992; NSC 2023b).

Table 1: Changes in the ethnic composition of the multiethnic city of Bishkek

Year	Ethnic group									
	Kyrgyz people	%	Russians	%	Uzbeks	%	Uighurs	%	Kazakhs	%
1989	141,841	22.88	345,387	55.72	10,390	1.68	10,977	1.77	8,943	1.44
1999	398,000	52.21	252,831	33.17	12,393	1.63	13,143	1.72	12,064	1.6
2009	552,957	66.16	192,080	22.98	11,801	1.41	13,380	1.60	9,013	1.1
2022	953,399	85.1	112,120	10	14,429	1.3	7,442	0.7	7,001	0.6

Year	Ethnic group									
	Tatars	%	Koreans	%	Dungans	%	Turks	%	Tajiks	%
1989	16,984	2.74	10,043	1.62	2,618	0.42	908	0.15	709	0.11
1999	15,817	2.1	12,710	1.67	3,558	0.5	2,277	0.3	1,828	0.2
2009	12,712	1.5	12,014	1.44	4,040	0.5	3,149	0.4	817	0.1
2022	4,264	0.4	4,165	0.4	2,779	0.2	1,784	0.2	1,699	0.1

Source: Compiled based on the results of the Population Censuses (Goskomstat SSSR 1992; NSC 1999; NSC 2009; NSC 2023b).

In a broad sense, social orientation refers to a person's awareness of their position at the level of social relations, in particular, intergroup and interethnic; in a narrower sense, social orientation refers to a person's choice of a model of their own behaviour and ways to achieve their goals (Geisler & Allwood 2018; Seberger & Patil 2021; Larsen et al. 2021). Fromm (1994) identified two main categories of social orientation: unproductive and productive. Unproductive social orientations, in turn, include the following: receptive, exploitative, hoarding, and marketing orientations (Foster 2017; Hanif 2023).

The basis of receptive orientation is individuals' awareness that the source of all goods is outside them. In particular, it is associated not

with the production of ideas but with their absorption. They also differ in dependence and passivity and often require outside help to solve problems (Fromm 1994; Ho et al. 2012; Nikkola et al. 2022). A passive attitude towards the political situation may indicate a receptive orientation in Kyrgyzstan. Many voters, for example, rely on the opinion of respected people (19% – great influence, 27% – some influence), food distribution (9% – great influence, 21% – some influence), billboards, booklets, inscriptions on vehicles (4% – great influence, 11–15% – a certain influence) when choosing a candidate (Chart 1). Moreover, about 15% of voters could not name the political parties known in their region (CISR 2020). In Bishkek, about 30% of voters were not ready to vote in the 2020 elections. In the system of relations between ethnic groups, a third of Bishkek residents (34%) recognised that internal conflicts were the most serious problem in Kyrgyzstan. Such a high indicator suggests a certain passivity among a large part of the residents in relation to this issue. In particular, they are confident that the problems associated with interethnic conflicts should be solved by the authorities, thus relieving themselves of responsibility for maintaining the necessary level of tolerance in the region.

**Chart 1: Influence on the political choice of voters in Kyrgyzstan**
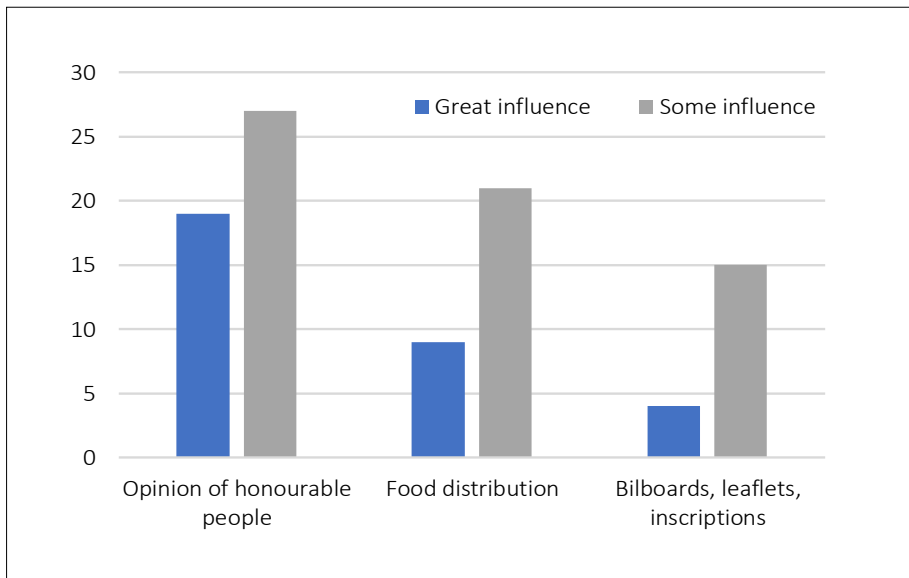
Source: Compiled based on data from the CISR (2020).

Exploitative orientation is characterised by obtaining all the necessary benefits through strength or ingenuity in various spheres of life. These

individuals have a habit of taking advantage of others' accomplishments in both professional and interpersonal contexts. The tendency towards an exploitative orientation confirms the existence of interethnic conflicts due to the activation of extremist groups with a radical attitude (Fromm 1994; Davis et al. 2018; Sun & Liu 2022). According to the data presented in the 8th, 9th, and 10th periodic reports of the Kyrgyz Republic for the period from 2011 to 2015 (United Nations 2016), 160 interethnic conflicts were recorded (Chart 2). The distribution of interethnic conflicts across regions could suggest that some of these conflicts could stem from resource competition, economic inequalities, and political representation issues, rather than individual social orientations alone.

Chart 2: Distribution of interethnic conflicts in Kyrgyzstan in 2011–2015 by region
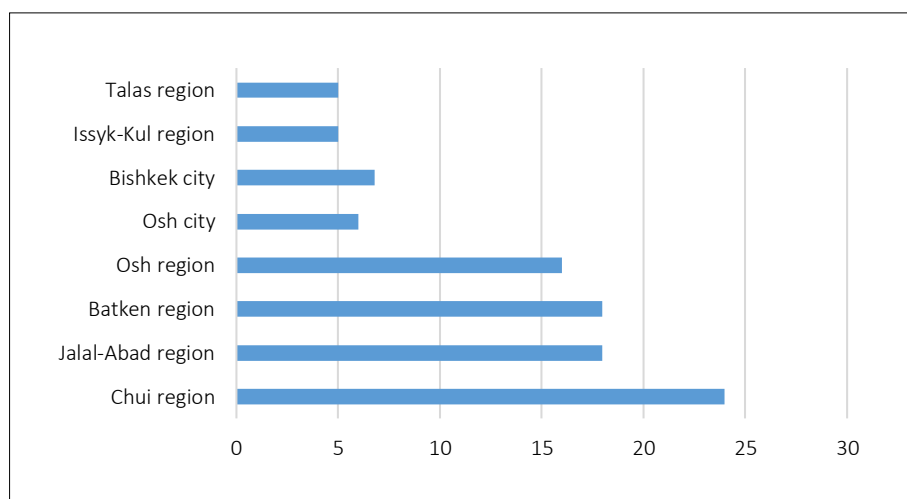
Source: Compiled based on the materials of the United Nations (2016).

In general, crime among the age groups of 18–24 and 25–29 years has significantly decreased (NSC 2023a) (Table 2). The potential for conflict is accumulating due to the stigmatisation of traditional values and conservatism in society (Niu et al. 2025). Everyday violence among young people arises from the inability to resolve conflicts in a non-violent way and the lack of non-violent behaviours among adults (Yang et al. 2025).

Youth is the stage of life between childhood and adulthood, which is typically defined by cultural, social, and legal factors and often refers to individuals aged 15–29 (Larsen et al. 2021). In this study, the focus was on the age group of 18–29, as this demographic is actively shaping their

civic identity while navigating social, political, and cultural integration within a multiethnic society.

Table 2: Crime rates among young people in Kyrgyzstan

Age	Year						
	1994	2005	2015	2019	2020	2021	2022
18–24 years old	4,258	3,458	1,467	794	892	967	830
25–29 years old	3,196	2,343	1,412	783	865	1,062	885

Source: Compiled based on the materials of the NSC (2023a).

Individuals with hoarding orientation are characterised by special thrift and even avarice in both material and spiritual goods; therefore, they have a great desire to get as much as possible, but at the same time, any spending on their part poses a great threat to them (Fromm 1994; Liu et al. 2022; Benko 2023). Thus, people with this type of social orientation gravitate towards the past and are afraid of anything new. According to a study by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH (Möller-Slawinski & Calmbach 2015), some young people aged 18–24 would like to go back to the past and become children to get a sense of greater freedom. This is likely due to abrupt growing up, where the person has no time to learn about themselves and is orientated towards others' expectations. In addition, the young generation with a hoarding character type lacks aspirations for an individual path and a desire to observe traditional values in everything (Malul & Sokar 2025).

The hoarding type of social orientation can manifest itself in the rejection of certain social and religious values (Fromm 1994; Verkuyten & Yogeeswaran 2020; Town et al. 2022). Based on the associations of youth with tolerance presented in Table 3, it can be concluded that there is a lack of acceptance of certain groups, particularly punks and homosexuals. Despite the fact that Islam is seen as the predominant religion in Kyrgyzstan, there is a desire for maximum isolation from the Arab form of Islam, particularly in urban areas, because contemporary young are afraid of potential radicalisation associated to religious identity. The influence of Islam, as both a personal belief system and a cultural framework, affects how individuals perceive their roles within a multiethnic society. Religious teachings, for instance, place a strong emphasis on moral behaviour, communal ideals, and the virtue of tolerance (Lee & Chung 2025; Kim & Chung 2025). These teachings can promote positive social orientations, including interethnic cooperation

and respect. However, religion can also be used to draw boundaries. For example, some interpretations of Islam may cause people to be sceptical about or even hostile towards religious behaviours that are seen as radical or alien, such as wearing the hijab (Bañales et al. 2024). In Bishkek, where there is a clear separation between more conventional and contemporary religious expressions, this dynamic is especially apparent among the youth. The increasing religiosity among young Kyrgyz, especially in urban areas, can foster a stronger sense of community, but it can also contribute to the exclusion or marginalisation of individuals who do not conform to these religious norms, affecting overall social cohesion (Sestito 2025). Young people may be sceptical of people who have changed Islam to other religions and may even show intolerance in everyday life (Podoprigora et al. 2019). Ethnicity, as a rule, is not the basis for discrimination, but on a subconscious level, there is some tension due to interethnic clashes in the south of Kyrgyzstan, in Bishkek and its suburbs (Möller-Slawinski & Calmbach 2015; Kogan et al. 2020). The data might also indicate generational shifts in moral and social attitudes, where youth distinguish between different forms of tolerance (political, cultural, religious). The association of tolerance with disability rights and equality suggests a growing awareness of human rights, even if some conservative social attitudes persist.

Table 3: The associative series correlated with the word tolerance among the youth of Kyrgyzstan

Positive		Negative
Compassion	Different peoples live together	Discrimination based on social status
Respect	Equal rights	Gender discrimination
People with disabilities	Everyone is equal	Against homosexual relations
Homeless people	Against racism	Against punks

Source: Compiled based on the materials of Möller-Slawinski and Calmbach (2015).

Individuals with a marketing type of social orientation value everything in the world as a commodity that needs to be sold for profit; therefore, at every opportunity, they try to impress and show their advantages, increasing the chances of success (Fromm 1994; Funk 2010; Jian 2017). A manifestation of this type of social orientation may be a sense of superiority of the Kyrgyz over other ethnic groups. For example, there is a widespread perception among the younger generation that traits such as smoking and alcohol consumption or disrespect for elders are
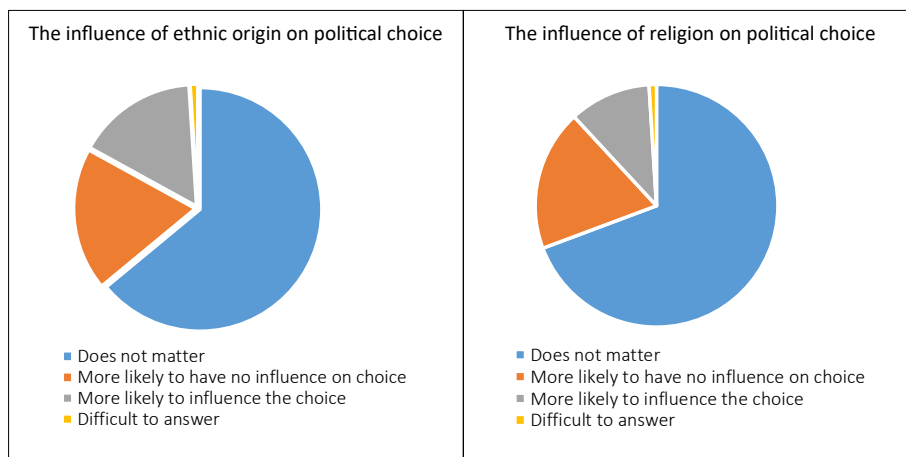
more associated with other ethnic groups, in particular Slavic ones. The younger the age group, the higher the level of tolerance towards other nationalities (Möller-Slawinski & Calmbach 2015).

The level of discrimination is also influenced by the experience of informal communication with representatives of other ethnic groups (Sestito 2025). In the border areas and Bishkek, there is a negative attitude towards Uzbeks living in Kyrgyzstan. This is directly related to the interethnic clashes between Kyrgyz and Uzbeks in southern Kyrgyzstan in June 2010 in Osh. These conflicts arose from historical grievances, specifically around competition for resources, territory, and political authority. The prolonged political and economic marginalisation of ethnic Uzbeks in southern Kyrgyzstan intensified tensions. The riots were brought on by a complicated interplay of regional politics, economic inequality, and outside factors; the political unrest that followed President Bakiyev's removal exacerbated pre-existing ethnic prejudices and mistrust between Kyrgyz and Uzbeks (Hager et al. 2019). It is also argued that the Osh riots were not only the product of ethnic hatred but also of social and economic divisions, where interethnic relations were frequently strained due to competition for resources (Reeves 2023). The growing influence of Islamic identity in the region further exacerbated ethnic divisions, creating a sense of us vs. them among various communities. The state's failure to mediate fairly between ethnic groups, combined with a lack of social cohesion, led to the eruption of violence. Moreover, the aftermath of the violence left a lasting legacy of mistrust between Kyrgyz and Uzbeks, with ongoing difficulties in rebuilding interethnic relationships. Discrimination against Uzbeks is also carried out at the educational level; in particular, from 2000 to 2022, the number of schools with the Uzbek language of instruction decreased from 141 to 43 (by almost 70%) (NSC 2023b). Thus, the marketing type of social orientation is aimed at reducing the status of the languages of ethnic groups and restrictions in education in their native language, which leads to difficulties in admission and further professional development.

Productive orientation represents a type of character that demonstrates the need to develop all the capabilities of an individual, which is their main goal. Thus, all actions aim to implement future plans. This type of social orientation is characterised by independence, honesty, calmness, creativity, and a tendency towards productive logical thinking (Fromm 1994; Turhan & Ayataç 2021; Cudowska 2023). Kyrgyz youth with a productive type of social orientation are characterised by the need for self-realisation, individualism, personal growth, as well as the desire to distance themselves from social expectations.

Tolerance towards different ethnic groups can be judged by the survey Public Opinion Poll: Residents of Kyrgyzstan, August 6 – August 15, 2020, which was conducted by SIAR Research and Consulting at the request of the Center for Insights in Survey Research (CISR 2020) International Republican Institute. The results were presented in the Demographic Yearbook of the Kyrgyz Republic and sorted by regions and cities. Citizens aged 18 and over participated in the survey. The margin of error is approximately ±2.8 points. To the question "Will the ethnic origin of the candidate influence your choice?" in Bishkek, the following results were obtained: 64% answered that ethnic origin does not matter, 19% – rather will not affect the choice, 16% – rather will affect the choice, 1% had difficulties answering this question. To the question "Will religion influence your choice?" 70% of Bishkek residents answered it does not matter, 19% – the probability is less, 11% – the probability is more, less than 1% did not answer this question (Chart 3).

Chart 3: The influence of ethnicity and religion on the choice of a candidate in the elections (Bishkek)

The influence of ethnic origin on political choice

The influence of religion on political choice

- Does not matter
- More likely to have no influence on choice
- More likely to influence the choice
- Difficult to answer

Source: Compiled based on data from the CISR (2020).

Social media and technology have played a bigger part in influencing young people's social orientations in recent years. Social media platforms, such as Facebook, Instagram, and TikTok, have transformed how youth interact with each other, access information, and form their views on various social, political, and cultural issues (Ronzhes 2023). These platforms give young people a place to express their own identities and perspectives in addition to keeping them up to date on global trends and ideas. Social media's ability to make a variety of viewpoints

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accessible has the potential to extend young people's perspectives by raising their knowledge of multicultural values and encouraging a sense of global interconnectedness (Mialkovska et al. 2024). But there are negative aspects as well, like the possibility of being exposed to divisive materials and the strengthening of echo chambers, which can mould conservative or extreme viewpoints and possibly sow discord in society.

Beyond typical social media, the influence of technology on young people's social orientations also extends to the larger digital environment, which includes online forums, gaming groups, and digital news sources (Lewinski et al. 2016). These forums give young people a chance to participate in conversations on a range of social topics, frequently supporting international causes like gender equality, human rights, and climate change advocacy. More social interaction has resulted from the growth of online communities and digital activism, as young people use these platforms to organise protests, campaigns, and advocacy efforts (Pluzhnyk et al. 2024). However, there are drawbacks to social media's influence as well, like the dissemination of false information, cyberbullying, and the temptation to project an idealised online persona (Kennard et al. 2025). Thus, even though social media and technology might enable young people to question established conventions and promote social change, it is essential to understand the nuances of its impact and weigh the advantages of the digital era against any potential hazards.

This study's findings reveal the complex relationships of social orientations among youth in Bishkek associated with interethnic interactions. The findings reveal that over 70% of youth demonstrate a productive social orientation, prioritising self-development, individuality, and rational thought, hence fostering more tolerant interethnic relations. Approximately 30% exhibit unproductive orientations, classified as receptive, exploitative, hoarding, and marketing kinds. The receptive orientation is characterised by political apathy and an expectation that authorities would address interethnic problems, whereas the exploiting orientation is linked to violent behaviours that exacerbate interethnic tensions. The hoarding approach cultivates scepticism towards different ethnic groups, frequently resulting in religious and cultural intolerance, while the marketing orientation is associated with a perceived superiority of indigenous Kyrgyz over minority groups, thereby fostering linguistic and educational prejudice. The trends indicate that although most young individuals in Bishkek pursue personal development and interethnic harmony, a notable segment continues to engage in exclusionary and conflictual behaviours, influenced by historical grievances, socio-political instability, and cultural prejudices.

4. Discussion

By looking at the multiethnic city of Bishkek as an example of different types of social orientations, it was discovered that most of the people who live there are tolerant of non-indigenous people, but there is still some tension in society and stereotypical thinking. Over the past 10 years, the situation in the interethnic cities of Kyrgyzstan has changed in favour of productive interethnic cooperation. The following problems remain in Kyrgyzstan's multiethnic cities: the unwillingness of residents to take an active part in resolving interethnic conflicts, the use of violent communication, a fairly high crime rate, an unfriendly attitude towards some religious communities and their traditions, and restrictions on rights in the educational and cultural spheres.

In multiethnic societies, there remains a need for positive interaction between different multiethnic groups (Volkov 2017). Hashim et al. (2016) identified five main models of social interaction. These include such things as exchange, conflict, competition, collaboration, and non-verbal communication. It is important to note that the causes of conflicts were not directly caused by racial problems; at the same time, stereotypes were present when communicating with representatives of different ethnic groups. When analysing Kyrgyz society, the study also focused on the fact that, as a rule, conflicts are of a social or religious nature and are not related to interethnic interaction, although some disagreements and stereotypes regarding other ethnic groups still occur. This aligns with the study's findings, where youth exhibiting productive social orientations contribute to collaboration and exchange, while those with unproductive orientations, particularly exploitative and marketing types, reinforce competition and conflict. The value of the researchers' paper lies in analysing the interaction between students and developing strategies to respond to possible conflicts.

The concept of intergroup prosocial behaviour is introduced by Xiao et al. (2023), linking it to the construction of social identity and intergroup relations in the student's age. The study aimed to examine social dominance, social positions, belonging to social groups, and prosocial obligations. During the survey conducted at the multiethnic public Southwestern University, four profiles of intergroup prosocial behaviour were identified: self-serving, altruistic, egoistic, and reverse ethnic racial bias, and their correlates were analysed. These characteristics correspond to the youth of Bishkek, where constructive social orientations coincide with altruistic and cooperative inclinations, promoting tolerance. In contrast, unproductive orientations, especially the hoarding variety, may foster scepticism and discriminatory attitudes. The researchers

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highlighted possible ways to reduce the number of intergroup conflicts and build a just and equitable society. The method of forming prosocial behaviour between representatives of different ethnic groups can also be used as an example of Kyrgyz society, in particular, through fostering tolerance and considering the interests of different ethnic groups.

For young people in a crisis, for example, the coronavirus pandemic, socio-value orientations play a huge role. Research by Moosa et al. (2021) is a survey on the personal values of young people in Maldivian society; in particular, attention is paid to such parameters as openness to change, self-improvement, and self-excellence. Based on the survey results, the Maldivian community tends to be pro-social, which provides for openness to change, reflection of collectivism in social structures, and self-improvement. The study of Kyrgyz social orientations has shown that representatives of the younger generation, on the contrary, perceive changes as something radical and negative. This suggests that promoting flexible socio-value orientations, particularly through education and intercultural dialogue, could be instrumental in reducing interethnic conflicts and fostering long-term social cohesion. The researchers' idea of the need to develop socio-value orientations that allow maintaining balance in a crisis can be used to eliminate or prevent interethnic conflicts.

The study of the cohabitation of ethnic residents and migrants in multinational cities and their interethnic relations is emphasised by Pratsinakis et al. (2017). The results of the author's research confirmed that close interethnic relations have been established in many European cities; that is, the stereotype of the negative impact of migrants on the level of social cohesion has not been confirmed. Neighbourhood relations, as a rule, develop in informal social conditions and play an important role in the socio-spatial development of the urban network. The researcher's approach to understanding the interaction between indigenous people and migrants has dispelled stereotypes about communication in multiethnic European cities, which are important in the context of modern processes of globalisation. A study of social identities in Kyrgyzstan found that one-third of the people there have negative ideas about people of other ethnicities. Implementing strategies to strengthen social cohesion, such as encouraging informal interethnic interactions and community-based initiatives, could help mitigate these negative perceptions and foster a more integrated multiethnic society in Kyrgyzstan.

A conceptual diagram of the factors influencing the level of social cohesion was presented in the paper by Clarke et al. (2023). By social

cohesion, the researchers meant a certain number of reasons that contribute to staying in a certain social group. Based on the results of the study, the most effective ways necessary to strengthen social cohesion are the following: crime reduction, provision of maintenance services for public gatherings, and accessibility of cultural events. The study of social cohesion did not pay attention to ethnic factors of interaction, which may become a subject for further study in this area. Because Kyrgyzstan has problems with social cohesion, especially in Osh and Bishkek, the above research methods can be very helpful in making it easier for different ethnic groups to live together in one cultural space.

Experimental data presented by Grimalda et al. (2023) and collected in countries such as the USA, Italy, Argentina, and South Africa showed that global identity increases the level of social cooperation, while local or national identities may show a negative trend in cooperative relations. Thus, this study is important in relation to the development of international relations, as it demonstrated a wide sample of countries around the world. Researchers also noted that communities with a global social identity can yield greater benefits at both local and national levels. In the context of studying social identities in Bishkek, it can be said that the Asian experience of cooperation and awareness of global identity is much lower than in European countries. Therefore, it is imperative to implement international initiatives to foster collaboration among diverse ethnic groups and cultivate a global identity alongside national and local identities.

The legal framework governing interethnic relations significantly shapes the social dynamics and integration of ethnic groupings in Kyrgyzstan. The Constitution of the Kyrgyz Republic (2010) enshrines the principle of equality before the law for all citizens, regardless of their ethnic background, which is fundamental for ensuring equal treatment and opportunities in a multiethnic society. The Concept of Strengthening the Unity of the People and Inter-Ethnic Relations in the Kyrgyz Republic (MOJ 2013) serves to strengthen this constitutional guarantee. Its goal is to address the difficulties of interethnic relations by advocating for policies that safeguard minority groups' rights and guarantee their participation in all facets of public life. These legal mechanisms are vital for building a sense of national unity since they provide a framework for the protection of minority rights and the elimination of discrimination based on ethnicity. The actualisation of these legal concepts may be hampered by issues like social tensions, economic inequality, and political instability that frequently impede the practical application of these policies. To make these legal measures work to promote social cohesion

and interethnic peace, the government must remain committed and all ethnic groups must actively take part.

The study of ethnic boundaries and adaptive features of different ethnic groups in interaction occupies an important place in the study by Bunce and McElreath (2017). The researchers demonstrated five key mechanisms indicating the dynamics of cultural differences. In particular, among the options for adaptation in an interethnic society are the following: bargaining, acceptance of social norms and their choice, social education, and socialisation in childhood. According to the researcher, bargaining is one of the best ways to interact in a multiethnic society. The study of Kyrgyz society has demonstrated that the marketing type of social identity is an unproductive mechanism for establishing multiethnic contacts. The mechanisms of adaptation of researchers are not suitable for all ethnographic contexts, since bargaining leads to the destruction of interethnic interactions and not to their development in Kyrgyzstan.

Thus, after studying modern research, it is possible to identify key issues in the global scientific discourse. Among them are the following: social cohesion, adaptability of different ethnic groups, the development of an understanding of ethnic boundaries, the level of global and national identity, the foundations of cultural exchange between ethnic groups, socio-value orientations, and their impact on building relations between ethnic groups. Many concepts are considered based on the European experience or a comparison of European and Asian or African experiences. At the same time, the presented models of socio-value orientations, social cohesion, and global identity can be implemented based on the Kyrgyz experience, in particular, for establishing ties in a multiethnic society.

5. Conclusions

According to the statistics of 2022, the most numerous ethnic groups in Bishkek are Kyrgyz, Russians, Uzbeks, Kazakhs, Tatars, Koreans, Dungans, Turks, and Tajiks. Based on this, it is important for Kyrgyzstan to maintain a balance between ethnic groups, ensure their effective interaction, combat ethnic conflicts, and promote tolerance.

The receptive type of social orientation of youth in Kyrgyz society is characterised by the following: awareness that everything depends on the outside world, dependence and passivity, absorption of ideas rather than their production. Using the example of a passive position in relation to the political situation, one can trace the manifestation

of this social orientation. Kyrgyz people are ready to make a political choice based on the position of other people and commercials. Opinion polls have confirmed that about a third of Bishkek residents recognise interethnic conflicts as one of the important problems of society that the authorities must deal with, but they are not ready to take direct part in this. Exploitative orientation is associated with the use of violent patterns of behaviour and communication within Kyrgyz society. This is evidenced by a fairly high crime rate, in particular, in the cities of Osh and Bishkek. Conflicts, as a rule, arise based on the stigmatisation of traditional ways of life and conservatism, as well as the inheritance of adult behaviour patterns.

The hoarding type of social orientation in Kyrgyzstan manifests itself at the level of attraction to the past and unwillingness to build a future in a multiethnic society. This pattern of behaviour may also be associated with the rapid maturation of young people, the lack of time for internal searches, which is why there is no desire for individualism. At the interethnic level, the hoarding type of social orientation manifests itself through scepticism, hostility to other nations, and Islamophobic sentiments due to the radicalisation of the religious component by some ethnic groups.

The manifestation of the marketing type of social orientation is characterised by an effort to make an impression, to rise, to take advantage of all possible chances, but at the same time, individuals perceive all the benefits (both material and spiritual) as a commodity. Thus, at the level of interethnic relations, there is a sense of superiority of indigenous people over other ethnic groups, in particular, disrespect for elders or a tendency to alcohol are often regarded by Kyrgyz as traits characteristic of Slavs. Because of this, linguistic and cultural discrimination may arise, the manifestations of which can be observed on the example of relations between Kyrgyz and Uzbeks in the border area. Productive orientation allows maximising individual character traits and demonstrating growth and development. Such individuals are characterised by calmness, honesty, hard work, productivity at work, and analytical thinking. Opinion polls have confirmed that approximately 60–70% of Kyrgyz youth have a productive orientation.

Priority tasks in further research may include the following: developing a system for assessing the type of social identity, comparing personality types according to sociological surveys, studying the nature and nature of interethnic stereotypes and conflicts. It should be pointed out that when studying multiethnic spaces, it is necessary to conduct new surveys, but also consider the already available statistical results.

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Socialne usmeritve mladih v medetničnih interakcijah v multietničnih mestih: primer Biškeka

Izvleček

Preučevanje tipov socialnih identitet v Biškeku izhaja iz potrebe po pre-seganju družbenih stereotipov o posameznih etničnih skupinah ter opre-delitvi možnih produktivnih vedenj, ki bi lahko preprečevala medetnične spore. Namen študije, ki se osredotoča predvsem na mlade, stare od 18 do 29 let, je raziskati produktivne in neproduktivne socialne usmeritve v multietničnem mestu Biškek. Metodologija vključuje analizo socioloških podatkov ter statistične, primerjalne, analitične in sintetične metode. Po podatkih popisa iz leta 2022 v Biškeku živi več narodnosti, vključno s Kirgizi, Rusi, Uzbeki, Tatari, Dungani, Kazahstanci in Turki. Študija lahko služi kot referenca za preučevanje medetničnih interakcij v drugih državah ter za opredelitev stereotipov in vzrokov za spore v multietničnih okoljih.

Ključne besede

kirgiška družba, statistični podatki, popis prebivalstva, raziskave, spori

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Anthroponyms in the Kazakh and Turkish Languages: A Historical Review of Their Studies and Structural Features

Abstract

This study examines the origin and historical development of anthroponyms in the Kazakh and Turkish languages. Drawing on 21 academic sources, including books, peer-reviewed articles, and conference papers, it aims to detect similarities and differences in the evolution of anthroponyms and their use in contemporary linguistic contexts. The analysis revealed a lack of specific studies on the morphological structure of anthroponyms in both Kazakh and Turkish. The study confirmed the significance of general onomastics and anthroponymy in understanding the morphological structure of anthroponyms in these languages and highlighted ongoing disagreements on the role of the Turkic linguistic basis in their emergence and development. The obtained results can be used in the teaching of Kazakh and Turkish in academic settings and can also support efforts to preserve cultural heritage.

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1. Introduction

Anthroponyms hold a special place in every language, while anthroponymy – as a branch of onomastics that studies them – is gaining increasing significance. The term anthroponymy is of Greek origin and is composed of two roots: *anthrōpos*, meaning human, and *onoma*, meaning name. Thus, anthroponymy refers to the study of anthroponyms as individual or collective names of human beings. Formation, development, etymology, semantic aspects, structural system, transmission, and other aspects of anthroponyms have been widely explored. Nevertheless, anthroponymy is still considered a relatively new branch of science, leaving numerous gaps in existing data. Therefore, it is possible to assert that the study of anthroponyms is a relatively young yet highly promising area of science.

This study is relevant because proper names constitute an integral part of the linguistic corpus and can reflect the emergence and evolution of a particular language. Furthermore, studies in anthroponymy can contribute to other disciplines, including history, sociology, or human geography, thereby fostering interdisciplinary research.

According to Siebenhütter (2020), anthroponymy (or anthroponomastics) studies proper names that can take a plethora of forms, including, but not limited to, given names, patronymics, surnames, pseudonyms, cryptonyms, suffixes, andronyms, and gyneconyms. Arifoğlu (2020) notes that anthroponymy investigates the functions performed by these linguistic units, including socio-cultural, ethnic, confessional, and aesthetic aspects. Akar et al. (2023) further emphasise that, since most of these functions have evolved over time, the study of anthroponyms often relies on a historical lens.

Emelia and Hasibuan (2021) observe that a historical perspective is equally applicable to the study of anthroponyms in the Kazakh and Turkish languages, which, due to their shared Turkic basis, are believed to have much in common. The present study, however, stresses that despite this common basis, the anthroponymic corpus of each nation has developed in direct connection with its history, language, customs, traditions, religion, worldview, and other characteristics. This assumption rests on the studies of Ainabek et al. (2024) and Jagessar (2020) and implies that notable differences emerge when anthroponymic resources formed over the long history of these nations are compared. Koile et al. (2022) argue that one of the main reasons for these differences is that people of similar origin, speaking the same language but living in two different geographic environments, are influenced by diverse fac-

tors such as history, politics, society, and culture of the neighbouring nations.

The study aims to provide a comprehensive assessment of anthroponyms in Kazakh and Turkish. Specifically, it seeks to define anthroponyms and their place in both languages; differentiate between the various types of anthroponyms in Turkic languages; examine the morphological features of personal names in modern Kazakh and Turkish; and examine the rules governing the creation of anthroponyms in these languages.

2. Materials and Methods

The study employed secondary data analysis to gain a comprehensive understanding of the features and roles of anthroponyms in the Kazakh and Turkish languages. A diverse range of sources was utilised, including historical texts, linguistic databases, ethnographic studies, and cultural anthropology research. These sources were selected based on their relevance to the evolution of anthroponyms and their reliability in providing accurate linguistic and socio-cultural insights. Selection criteria included academic credibility, depth of analysis, and relevance to the study's objectives. Only sources published in reputable journals, endorsed by linguistic experts, and directly relevant to the study of anthroponyms were included. This rigorous selection process ensured the dependability and usefulness of the data, enhancing the methodological basis of the research.

The analysis began with defining anthroponyms and identifying their significance in Turkish and Kazakh. This involved synthesising data from academic journals, language dictionaries, and historical records to trace the origins and functions of proper names in both languages. The study then delved into the socio-cultural, ethnic, confessional, and aesthetic dimensions of anthroponyms, analysing how these factors have influenced their evolution over time. A key part of this analysis was evaluating the role of anthroponyms in the 21st-century Kazakh and Turkish and comparing these roles to the functions ascribed to specific anthroponyms in previous decades or centuries to detect whether the onomastic units under study have maintained their relevance over time. It was also crucial to identify areas such as education and cross-cultural communication where an understanding of anthroponyms preconditioned successful interactions.

The study further implied differentiating between various types of anthroponyms in Turkic languages. This stage involved the analysis of a

sample of anthroponyms from both languages to gain a nuanced understanding of how they originated and what functions were assigned to them at different points in their history. Anthroponyms were classified into four distinctive categories to illustrate the evolution of Kazakh and Turkish languages under the influence of geographical and other external factors. Moreover, a deeper historical analysis was conducted to see whether anthroponyms in the selected languages shared common origins.

Further research encompassed theoretical approaches to the study of morphological features of personal names in modern Kazakh and Turkish. A secondary analysis of data collected since 1999 was performed to differentiate between five types of morphological structures in these languages. The decision to gather data since 1999 was driven by significant historical and linguistic events that occurred around this period. For instance, the dissolution of the Soviet Union in 1991 led to substantial cultural and linguistic shifts in Kazakhstan, influencing naming conventions and the use of anthroponyms. Similarly, Turkey experienced socio-political changes that impacted language use and naming practices. By focusing on this period, the study aims to capture the dynamics of anthroponyms in response to these transformations. Comparative analyses across linguistic, philosophical, and socio-cultural dimensions were conducted to assess the possibility of creating a universal cultural space in the 21st-century reality.

The final stage of the study involved formulating the rules of creating anthroponyms in Kazakh and Turkish. At this stage, a thorough comparative analysis of the most common anthroponyms in both languages was carried out to illustrate how different approaches to constructing anthroponyms preconditioned their meanings and their evolution over time. Further assessment was performed to examine whether the detected rules remain relevant today and how they might inform research in linguistics, history, sociology, or interdisciplinary studies.

3. Results

Pseudonyms are used to replace personal names, such as Sabalaq, Bürkıt, Qyrağy, Qortyq, Bolys. Cryptonyms and pseudonyms are used to maintain anonymity, such as Qoñyr, Qyr balasy, Aqyn, Ūmytylğan, Azamat. An andronym is a name that links a woman's name to her husband's surname, which is a widespread practice among Slavic peoples. Examples include Dolina – Dolinuşka and Morozova – Moroziha. Different shades of morphological, derivational, and lexical-semantic features

emerge from several of these structural types of anthroponyms. Lexical and grammatical features also change depending on the function of structures that give colour or alter the meaning of a word. Personal names are not static; the complex structure of names in Kazakh and Turkish reflects family traditions, folk values, connection with nature, and human aspirations. Therefore, anthroponyms have many derivatives and complex structures. The anthroponyms of each nation exhibit lexical, semantic, grammatical, and phonetic features. Furthermore, anthroponyms serve several key functions, including sociocultural, ethnic, confessional, and aesthetic functions (Table 1).

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Table 1: Functions of anthroponyms in Kazakh and Turkish

Function	Description	Examples/Impact
Sociocultural	Reflects societal values, traditions, and cultural heritage.	— **Bolys**: Reflects traditional values and family ties.
Ethnic	Indicates ethnic identity and heritage.	— **Qortyq**: Demonstrates cultural significance in naming practices.
		— **Sabalaq**: Represents ethnic roots and traditions.
		— **Bürkıt**: Highlights ethnic pride and historical significance.
Confessional	Relates to religious beliefs and practices.	— **Azamat**: Reflects Islamic influence on naming practices.
		— **Aqyn**: Indicates religious and spiritual connotations.
Aesthetic	Emphasises beauty, elegance, or positive qualities.	— **Qyrağy**: Conveys aesthetic appeal and positive attributes.
		— **Ūmytylğan**: Represents beauty and elegance in naming.

Source: Authors' own representation.

Turkish anthroponyms have not changed significantly under the influence of historical and sociocultural factors (Shashkina et al. 2025; Kongyratbay 2020). It is easy to determine the bases of anthroponyms in the Kazakh and Turkish languages (Emelia & Hasibuan 2021). However, the knowledge that came with Islam formed a new group of Kazakh and Turkish names. Earlier Turkic names were typically associated with concrete, material concepts, whereas abstract names were more common in the anthroponyms of the Arabic language. In any vernacular language, anthroponyms are divided into male and female names

(Ovcharuk 2024). However, names such as Baian, Janat, Saltanat, Nūrly, Symbat, and Qymbat in Kazakh, and İağmur, Seven, and Sanaz in Turkish can be used for both males and females.

There is no generic category in the Turkic languages (Romaniuk & Yavorska 2022). This term refers to a broad classification that encompasses various specific instances. In the context of Turkic languages, the lack of a generic category for names means that there is no overarching system dictating the form or structure of names based on gender or other characteristics. This allows for greater flexibility and diversity in naming practices.Therefore, there was no need to use final sounds to mark the difference between male and female names. By contrast, in Arabic, male and female names are often deliberately distinguished by their final sounds. When Arabic names were incorporated into Turkic anthroponyms, forms such as Äli – Älia, Ğali – Ğalia, Sälım – Sälima, Ait – Aida emerged, maintaining the Turkic naming style. In the Kazakh language, similar variants appear, such as Gülnär – Gülnära, Aizat – Aizada, Aiperı – Aipara. With a single change of sound, several related names were formed: Ğabbas, Qapas, Qappas, Qadır – Kädır, Hakım – Käkım, Ğalymbek – Qalymbek.

Turkic identity was shaped by both economic and geographical features. Therefore, Kazakh and Turkish names can be grouped according to the semantic features of common personal names:
1. Anthroponyms that preserve elements from the language of the ancient Turkic period.
2. Anthroponyms that are formed through the interaction of languages.
3. New names that are created by political, social, and economic changes in society.
4. New names that are created through meaning changes influenced by sound interactions.

The European Huns formed political alliances with several Turkic peoples (such as the Bulgars, Avars, on-Ogur) or Turkic-related groups (such as the Mazhar), who had settled in Eastern Europe. They were known to have spoken Turkish. The names of individuals from ruling dynasties, such as Karaton, Munjuk (meaning beads or flags), Attila, Ilek, Dengizik (meaning sea), Irnek, Aybars, Oktar, Arykan, Basyk, Kursyk, Atakam, Eshkam were retained (Urban 2021).

In the anthroponymy of the Kazakh and Turkish languages, continuities with ancient Turkic materials can be proven. The use of personal names during this period displays various structures, including root words, derivative words, and compound words. The morphological fea-

tures of personal names in modern Kazakh and Turkish are based on lexical meanings (Stadnik 2024; Kononchuk 2024). The regularity of the creation of anthroponyms has been preserved in Turkic knowledge. In modern Kazakh and Turkish, five morphological types of anthroponyms can be identified:

1. Personal names, given to children, usually with the consent of the family, clan, tribe, and siblings.
2. Men's names, provided based on customs and traditions linked to heroism, passing a certain life stage, and fulfilling the goals and objectives of a certain social environment. Works on anthroponymy (Sümer 1999) describe these as signs of adulthood, integration into society, and reaching a new stage of life. This is evidenced by the poems *Qorqyt ata jyrlarynan, Alpamys, Manas, Er Tūğyryl*, and *Er Tarğyn*. At the next stage, the descriptive name Er is added to men who have earned masculine names. Based thereon, new names appeared in later periods: Ermūrat, Erlan, Erjıgıt, Erjan, Ernūr, and Erman.
3. Tribal names, associated with anthroponymy andbelieved to be a combination of the names Ashina-Bor-kin, Ashina-Mish, and Ashina-Nizok. This pattern is found in complex anthroponyms in modern Kazakh and Turkish such as Karakerey Kabanbai, Shakshak Zhanibek, Kerey Zhanibek, Kanzhigaly Bogenbai, Shapirashty Nauryzbai in Kazakh, with comparable examples in Turkish.
4. Dynasty or state names, examples of which include Alp Qūtlūq, Bılge qağan, Eltemış-Bılge qağan, Kü-lüg-Bılge qağan. This category also includes anthroponyms with newer semantics, such as Atatürık and Elbasy in both Turkish and Kazakh.
5. Individual names assigned to identifiers, such as Eñsegei boily Er Esım, Qarğa boily Qaztuğan, Aqsaq Temır, Aldar köse, Qoja Nasyreddin, Sudyr Ahmet, Qanışer Abylai, and Pañ Nūrmağambet.

Both Turkish and Kazakh feature numerous anthroponyms derived from the names of tribes and clans. Names such as Qazaqbai, Türıkpen, Türık, Ertürık, and Oğyz are found in both languages. In addition, the study of personal names in Kazakh and Turkish can be divided into Kypchak and Oguz anthroponyms. The same pattern is observed in other branches of the Turkic languages. Although the Turkic peoples were divided into different branches, the foundations of each branch have been preserved among other people.

The linguistic analysis of modern Kazakh and Turkish anthroponyms reveals that various open derivational suffixes have been employed

over time, many of which trace their roots to ancient Turkic and Indo-European language structures. These suffixes not only contribute to the construction of names but also shed light on the deep historical and cultural connections between Turkic and Indo-European-speaking peoples:

1. *-ar/-r:*

This suffix is a common feature in Turkic tribal names and also appears in personal names. It denotes association with a particular group, often indicating ethnic or geographical affiliation. It can be seen as a marker of origin or belonging. This suffix has ancient roots in Turkic languages, likely used in the formation of ethnonyms for various Turkic tribes (e.g., Tat-ar, Bulg-ar, Khaz-ar, Maz-ar). These suffixes reflect the early development of Turkic-speaking societies and their organisational structure based on tribal affiliations. In modern anthroponyms, this suffix continues to denote collective identity and heritage, as seen in names like Zhan-ar, Suv-ar, and Man-ar. The persistence of this suffix highlights the continued relevance of tribal connections in personal naming traditions.

2. *-man/-men:*

The suffix *-man* or *-men* is an Indo-European-derived suffix that is typically used in personal names. It often denotes a person belonging to a certain group, tribe, or ethnicity and is commonly found in the names of notable individuals or ancestors. Historically, it carried meanings like man or son of. Its use in Turkic languages, particularly in anthroponyms like Tugman, Ayman, and Uzman, reflects the historical contact between Turkic and Indo-European-speaking populations, possibly through migration or trade. Furthermore, it appears in ethnonyms such as Turk-men, Ku-man, and Chu-man, highlighting the linguistic and cultural exchanges between these groups.

3. *-as (-az, -ys):*

The suffix *-as* (and its variants *-az, -ys*) can serve as a marker of association, sometimes reflecting a personal or professional characteristic. It is often used in both personal and ethnonym formation. It can suggest nobility or a special status and shows both Turkic and Iranian language influences. Examples include names like Sanaz, Elmas, and Savas, as well as ethnonyms like *qyrğ-ys* and *hak-as*, reflecting the influence of pre-Islamic and early Islamic Turkic culture. The use of this suffix suggests a process of cultural assimilation and the integration of foreign naming conventions into Turkic languages over centuries. It also indicates the role of honorifics and societal roles in naming conventions.

4. -aq (-ek, -yq, -q, -ik, -k):

The suffix *-aq* (and its variants *-ek, -yq, -q, -ik, -k*) generally signifies belonging or origin and is often used in tribal or ethnonymic contexts. It is found in both Kazakh and other Turkic language groups, forming names that indicate geographical or ethnic affiliation. This suffix is particularly important in the formation of Turkic ethnonyms, as seen in names like Kazakh, Kumyk, Kipchak, and Pecheneg. It reflects a time when people were primarily identified by their tribe or region, a common feature of pre-modern societies. This suffix also appears in modern Kazakh and Turkish anthroponyms such as Safak, Adaq, Ardaq, and Erık, indicating the continued presence of ethnic and tribal identification in personal naming practices.

The use of these suffixes in Kazakh and Turkish anthroponyms reveals a rich linguistic history. Ancient suffixes like *-ar/-r* and *-man/-men* showcase the long-standing interactions between Turkic and Indo-European-speaking peoples. These suffixes have evolved but their core meanings have been preserved, reflecting the persistence of ethnic identity and social organisation in these cultures. The incorporation of Indo-European elements, such as *-man/-men*, suggests early intercultural contact, likely during periods of migration, trade, or conquest. Furthermore, the usage of suffixes like *-as* and *-aq* indicates the importance of names as markers of both personal and collective identity, a concept that has been preserved in modern naming conventions.

The semantic categories of anthroponyms in Kazakh and Turkish can be grouped as follows:

1. Names of animals, birds, and weapons, reflecting the nomadic lifestyle and habitat: Ertūğyryl, Tai, Qūrtqa, Barys, Qabylan, Alparslan, Arystan, Qasqyrbai, Börıbai, Attyly, Jylqybai, Altūq.
2. Relative names: Nağaşybai, Bauyrjan, Ağabek, Atabai, Anapa, Atabek, Äkejan, Ağastan, Emre.
3. Tribal and clan names: Dulat, Üisınbai, Naiman, Arğynbai, Qoñyratbai, Oğyz, Kerei.
4. Anthroponyms derived from the names of special professions and degrees: Tarhan Darqan, Qağan, Batyr. There are also many anthroponyms derived from the name of the ancient Turkic language *bi/bek:* Atabek, Atabi, Älıbi, Batyrbek, Janarbek, Syrlybek.

Adjectives that have become nouns in Kazakh and Turkish are frequently used as personal names. Variants of substantive adjective forms are also found in Kazakh: Emrin (reconciliation), Qiubat (rude), Eren (saint), Erdoğan (strong eagle), Erol (strong), Emin (honest), Beiza, Körkem,

Ädemı, Äsem, Dana, Erdem (kind), and Ediz (tall). Some names feature numerals: Besbai, Jetpısbai, Alpys, Myñbai, Jüzbai, Birche, Birimli, Toquz.

There was also an appeal to numerals in case of Kenje (*bek, gül, bai*) and Tūñğyş(*bai*). Pronouns-based names include Özal, Özak, Bukul, Butın, Özbir. Additionally, some names derive from verbs: Tölegen, Bölegen, Jaras, Qoldas, Gelmek, İylmaz, Solmaz, Durdy, Tapdyg, Tabyldyk, İrtumyş. The structure of anthroponyms in modern Kazakh and Turkish stems from:

1. Root words: Batyr, Mange (Möñke, meaning eternal), Alyp, Quan, Quat, Marqai, Torğai, Tarqan (Darqan), Mehmet (Mahmet), Mūrat, Nazar, Ömır, Temır, Jıgıt, Qylyş, Berık, Eren, Arzu, Azel, Teñız, Zeinep, Jūldyz, Ümıt, Şeşek, İlkin, (Ilkı- first), Tug, Tün.
2. Derivative words (root and suffix): Aidyn, Aidan, Maily, Qobylandy, Qojban, Aitas- Aitaş, Ağeke, Ağaly, Ailin (Aily), Aişel (Aişe), Kökşe, Attyly, Küler, Sezım (Sezen), Sana (Sanaz), Qūtsal (Qūtşy), Qarasa (Qaraşa), Konker, Dirench, Moldan.
3. Compound words: Qarlyğaş, Ainūr, Erlan, Mūratbek, Kenjebek, Tūñğyşbai, Aqjūldyz, Aijūldyz, Baibarys (Beibarys), Ertūğyryl, Aichoban (Aişopan), Gohan (Kökhan).

The first notable feature in the use of the anthroponyms Teñız (*bai*) and Deniz in Kazakh and Turkish is that they are used either individually or in combination with words. The second feature refers to the obsolete form of the root they share. In modern Kazakh, the common root of the words *tereŋ*, meaning deep, and *teŋiz*, meaning sea, is *te*, which is now considered a dead root. The original form of this dead root is *tan* (with *te-ta* also used in ancient Turkic). Notably, Kazakh root words do not contain two consecutive consonants.

Therefore, anthroponyms in Turkish, as in other Turkic languages, are analysed to determine whether the original root is combined with an additional morpheme. It is also necessary to analyse the complex forms of anthroponyms in the Kazakh and Turkic languages. Complex anthroponyms in Kazakh reveal a broad range of social activities.

Valikhanov (1958) also notes the functions of complex anthroponyms. Anthroponyms in Kazakh and Turkish include names tied to beliefs such as İeter, Tursun, Turdy, Toqtar, and Qalsyn. The morphological structures of complex anthroponyms fall into four main types:

– combined anthroponyms;
– integrated anthroponyms;
– phrasal anthroponyms;
– abbreviated anthroponyms.

Combined anthroponyms have been widely used since ancient times. The genesis of their constituent parts differs. Examples include complex words like Qalibek, Nūrlybek, İslambek, Zamanbek, Bazarbai, Turgut, Furkan, Nūrbai, Asanbai, Mamanbai, Batyrbai, Erğazy, Erbai, Erbol, Aidogan, Tanriverdi, Tezer, Teker. Many Kazakh anthroponyms derive from Turkic and Arabic-Persian languages.

Among the combined anthroponyms, a new feature in both languages, especially over the last century, is the creation of personal names from the first syllables of parents' names . For example, Ilfa – the name of the daughter of Zhansugurov and Gabitova – consists of the first syllables of the names of her parents. In the Kazakh language, such anthroponyms were used widely in Soviet times, including politicised, ideologised names such as Marklen (Marks – Lenin), Mels (Marks – Engels – Lenin – Stalin), and Vilena (Vladimir Ilyich Lenin). A similar morphological structure is found in Turkish names. For example, the father's and mother's names are Ilkay and Emine, respectively, and their child is named Ilkem.

Integrated anthroponyms – compound words that have undergone morphological changes – include Altan, Arykan, Berkant, Bojkurt, Joşkun, Aiten, Dogujtug, Mahambet, Gülbaram, Mūqadıl, Narkes, and Qojban. Phrasal anthroponyms, common in the Turkic period, include Aisūlu, Künsūlu, Erbai, Küntudy, Aituğan, Täñırberdı, Qūdaibergen. The first foundation for the collaborative creation of such personal names is word combination. The meanings were later combined.

Turkish two-component anthroponyms also differ. For example, Gilmaz Garatokimli, Seljuk Umit are used both with and without affixes. Among the Kazakh and Turkish names, some even derive from pseudonyms. For example, Nesin in the name Aziz Nesin is an affixed word that was transferred to the derivational function. These kinds of features determine the complex morphological structure of anthroponyms in modern Kazakh and Turkish languages. The names Karaman, Karasai, Karmys (people), Kozhban, Koldas, and Möñke are not used by modern Kazakhs and Turks but are often found in ancient scriptures and are thus purely Turkic.

Notably, the meaning of components of a word can change in contact with the second word. For example, in names like Karaman and Karasai, the component man means person and has long been used in the Turkic languages, while sai – soi means origin or place of origin. Used in combination with these words, kara (usually meaning black) is not used in the usual sense of colour, but to represent strength.

Additionally, the first component of the name Kozhban – *kozh* is not used separately in the Kazakh language. In the ancient Turkic languages, verbs such as *kozhyraigan* and *kozhyrap* were formed from the word *kozh*, which means *orasan ulken* (huge or big). This is probably why these names have become obsolete due to semantic changes in their subsequent meanings. Mönke has not been used as a name in the meaning of eternal for the past 70–80 years.

4. Discussion

The study of anthroponymy, or the linguistic analysis of personal names, remains a vital and dynamic field within linguistics, particularly in the context of the Kazakh and Turkish languages. This field has retained its relevance from the 19th century to the present day, offering valuable insights into the shared Turkic foundations of these languages and their cultural significance. By examining the types, roles, and compositions of anthroponyms, researchers can uncover the intricate linguistic and cultural tapestry that binds these languages.

Early investigations into Kazakh and Turkish anthroponyms revealed their deep-rooted connections to the ancient Turkic period, where names often carried concrete, material meanings. However, with the advent of Islam, a new group of names emerged, characterised by more abstract and spiritual connotations. This evolution underscores the dynamic nature of anthroponyms, which adapt to political, social, and cultural changes over time. Researchers such as Ashimbayeva and Zhanabekova (2023), Giraut (2020), and Temirgazina and Andryushchenko (2023) emphasised the importance of anthroponyms in understanding modern Turkic languages, highlighting their role in reflecting societal values, traditions, and cultural heritage.

While many researchers highlight the similarities between Kazakh and Turkish anthroponyms, it is crucial not to oversimplify their relationship. The notion of a common linguistic and cultural space for these languages was explored by Siebenhütter (2020) and Yelibayeva et al. (2019), who support the idea that the shared elements in anthroponyms across Kazakh and Turkish languages reflect a deeper cultural unity. However, this research also challenges the popular belief that Kazakh and Turkish anthroponyms are purely of Turkic origin, an issue that requires further scrutiny.

Contemporary anthroponyms in Kazakh and Turkish languages continue to evolve, reflecting the influence of various languages and cultures (Denys 2024; Toktagazin et al. 2016). The integration of historical

and modern perspectives is crucial in language learning strategies, as it enhances understanding and aids in teaching language evolution and continuity over time (Ternov et al. 2024; Romaniuk 2021). Understanding the differences between anthroponyms in the two languages is just as important as recognising their shared characteristics, as these differences reflect the distinct political and social contexts in which each language has developed (Ainabek et al. 2024; Shaimerdinova 2022).

The morphological structure of anthroponyms in Kazakh and Turkish languages is complex and multifaceted (Chyzhykova 2024; Kongyratbay 2021). These names often comprise root words, derivative suffixes, and compound structures, each contributing to their lexical, semantic, grammatical, and phonetic features. The use of open derivational suffixes, such as *-ar/-r, -man/-men, -as,* and *-aq*, highlights the historical and cultural connections between Turkic and Indo-European languages. These suffixes not only aid in the construction of names but also reflect the deep-seated ethnic and social organisation within these cultures. Urban (2021) addressed this gap by exploring these structures, revealing the legitimacy of morphological formation in the two languages, both belonging to the agglutinative language group.

While the historical lens has contributed greatly to our understanding of the development of Kazakh and Turkish, it is important to acknowledge that these languages continue to evolve. Contemporary anthroponyms in both languages reflect influences from Turkish, Arabic, Persian, Russian, and European languages (Yerekhanova et al. 2023). These developments highlight the dynamic nature of the languages as they adapt to political, social, and cultural changes over time. The integration of historical and modern perspectives is considered a vital component of language learning strategies, as emphasised by Sarsenbay et al. (2023) and Turayevich (2021).

Anthroponyms serve various functions, including socio-cultural, ethnic, confessional, and aesthetic roles. For instance, names like Bolys reflect traditional values and family connections, while Qortyq and Sabalaq signify ethnic identity. The confessional function is evident in names like Azamat, which reflects Islamic influences. Aesthetic names, such as Qyrağy and Ūmytylğan, emphasise beauty and positive qualities. These functions illustrate the broader communicative tasks that anthroponyms perform across different contexts, contributing to a more comprehensive understanding of their role in society (Isaeva et al. 2023).

While many researchers highlight the similarities between Kazakh and Turkish anthroponyms, it is crucial not to oversimplify their relationship. As noted by Ainabek et al. (2024) and Shaimerdinova (2022), understanding the differences between anthroponyms in the two lan-

guages is just as important as recognising their shared characteristics. These differences, particularly in relation to Arabic and Persian influences, reflect the distinct political and social contexts in which each language has developed. Despite these differences, the root, derivative, and complex structures in Kazakh anthroponyms have largely retained their Turkic origin, highlighting the resilience of traditional linguistic forms.

In conclusion, the study of Kazakh and Turkish anthroponyms reveals both shared linguistic and cultural roots and distinctive developments shaped by political, social, and religious influences. The morphological structure of these names, comprising roots, derivatives, and compound forms, reflects deep historical connections to both Turkic and Indo-European language families, underscoring the dynamic evolution of these languages. While both languages retain common features in their personal naming practices, such as the use of open derivational suffixes and socio-cultural functions, they also exhibit differences, particularly in the integration of Arabic, Persian, and European influences. These differences, along with the continued evolution of names in contemporary contexts, highlight the adaptability of anthroponyms to societal changes. By examining both the similarities and unique characteristics of Kazakh and Turkish anthroponyms, researchers can gain a deeper understanding of the cultural and linguistic identity of these two closely related but distinct languages.

5. Conclusions

The only notable differences in the morphological structures of anthroponyms in Kazakh and Turkish are related to pronunciation; otherwise, their forms and morphological features have much in common. There are practically no scientific works studying the morphological structures of anthroponyms in these languages; existing research tends to address only the social meanings, motivations, semantic groups of anthroponyms, and the historical emergence and use of personal names.

Many questions also remain concerning the general problems of anthroponyms, particularly the etymology of individual names. However, no studies in which the morphological features of specific anthroponyms would be revealed and each type would be analysed separately were found. Opinions about the morphological structure of anthroponyms are often found in scientific works devoted to different stages of language development. Ideas, opinions, claims, and statements about the morphological structure of anthroponyms are found in research work. These insights help determine the vocabulary and word composition of

each period of the history of the language, analyse sentence structure, indicate the position of word groups, and identify phonetic features.

These opinions were collected while studying the morphological structure of personal names in Kazakh and Turkish. Summarising this research, it may be concluded that:

1. There are no specific studies on the morphological structure of an-thronyms in the Kazakh and Turkish languages.
2. Opinions and reflections on the morphological structure of anthro-ponyms in the Kazakh and Turkish languages appear mainly in the studies on general onomastics and anthroponymy.
3. The opinions on Kazakh and Turkish anthroponyms suggest that they do not deviate from their Turkic basis, though they vary in later periods due to social transitions and differences in thoughts, per-spectives, and cognition.
4. The morphological structures of anthroponyms in the Kazakh and Turkish languages share similarities, particularly in semantic conti-nuity and grammatical organisation of semantic units.
5. The morphological structures of personal names in these languages can serve as markers of historical periods and reflect spiritual and traditional values.

The results of this research can inform further linguistic studies seeking to understand the evolution of anthroponyms in both languages and their role in present-day Kazakh or Turkish language environments. The obtained findings can also be applied in language learning, especially to reveal the dynamic nature of language and how it transforms over time to meet the demands of changing linguistic, cultural, economic, and socio-political contexts.

Furthermore, research results can support efforts aimed at preserv-ing cultural heritage. In this case, a nuanced understanding of anthro-ponyms reveals the richness of national languages and can motivate their promotion not only within their countries but also internationally. Despite extensive academic investigation, this study has several limita-tions, notably its inclusive focus on recent academic studies, most of which were published in the past five years.

For future research, it is suggested to compare recent academic studies with older ones to gain a nuanced understanding of how inter-pretations of anthroponyms in the Kazakh and Turkish languages have changed over time. It is also recommended to analyse how the changed interpretation of anthroponyms in the Kazakh and Turkish languages has transformed the teaching of these languages to native speakers and foreign students.

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Antroponimi v kazaščini in turščini: zgodovinski pregled študij in strukturnih značilnosti

Izvleček

Študija preučuje izvor in zgodovinski razvoj antroponimov v kazaškem in turškem jeziku. Podatke črpa iz 21 akademskih virov, vključno s knjigami, recenziranimi članki in konferenčnimi prispevki, s pomočjo katerih skuša opredeliti podobnosti in razlike v razvoju antroponimov in njihovi rabi v sodobnih jezikovnih kontekstih. Analiza omenjenih virov nakazuje na manko specifičnih študij o morfološki strukturi antroponimov tako v kazaščini kot v turščini. Študija potrjuje pomen splošne onomastike in antroponimije pri razumevanju morfoloških značilnosti antroponimov v teh dveh jezikih in opozarja na še vedno prisotna nesoglasja glede vloge turške jezikovne osnove pri njihovem nastanku in razvoju. Pridobljeni rezultati so lahko uporabni pri poučevanju kazaščine in turščine v akademskem okolju ter kot podpora prizadevanjem za ohranjanje kulturne dediščine.

Ključne besede

slovnica, zgodovina, struktura, onomastika, etimologija

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The Role of Museums and Galleries in the Formation of Cultural Landscapes and Tourism

Abstract

This study evaluates cultural landscapes and tourism in Kazakhstan, Kyrgyzstan, Albania and Ukraine, based on a survey of 443 residents. The cultural landscape ratings are: Astana (4+), Bishkek (2–3), Tirana (4–5), and Kyiv (3.5). Cultural tourism development is rated as follows: Astana (3), Bishkek (3–4), Tirana (4–5), and Kyiv (3). The cultural landscape and tourism are influenced by political power, national identity, economic development, tourist interest, cultural carriers, historical monuments, infrastructure, and investment in culture. The survey also examines preferences, visit frequency, and accessibility of cultural institutions. Kyiv sees the highest visit frequency, while Bishkek has the lowest. Museums, galleries, cinemas, theatres, and cultural parks are key destinations, but many respondents report low accessibility and inclusivity. Lists of cultural institutions were created for mapping the cities' main attractions.

Keywords

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1. Introduction

The formation and development of museums and galleries as cultural institutions have been accompanied by qualitative changes in their activities. These are directly related to the evolving roles these cultural institutions have played over time. For example, in Ancient Greece, the prototypes of museums were just born and were focused on serving the religious needs of local residents. With the advent of Aristotle and his *Lyceum*, research and systematisation of existing exhibits were added to the functions of these early museum forms. During the Renaissance, museums and galleries became places of storage and exhibition of particularly valuable collections, access to which was restricted. Possessing unique cultural exhibits became a marker of social status and power. From the Enlightenment era onward, museums gradually became the centre of scientific research and access to them, accordingly, expanded. These cultural institutions contributed to the improvement of the intellectual level of the population by serving educational functions – a trend that continued through the 19th and 20th centuries (Bennett 1995). Today, museums and galleries do not just store, study, and exhibit cultural artefacts. They are places of formation of a system of cultural values of a certain society and its collective memory. They have become national assets that reflect the cultural and national identities of individual ethnic groups. The role of museums and galleries as centres of production and concentration of national identity is highly relevant in modern humanitarian research (Shershova & Chaika 2024). It is studied by researchers including Komova, Lei, Wang, Gao, Alraouf, Whitehead et al. Special attention is paid to museum practices as ways to preserve national identity in a changing socio-cultural space, for example, during combat operations or active migration processes (Komova 2024; Lei 2023). Specific cultural or national identities and their depiction in the narratives and cultural practices of local museums and galleries, such as Muslim or Viking identities, have also been separately investigated (Alraouf 2016; Wang & Gao 2024; Whitehead 2024).

In the context of contemporary global society, the need for a clear and distinct national identity has become increasingly significant. Modern societies, especially those emerging from historical shifts and political transformations, are grappling with questions of how to preserve, interpret, and promote their cultural heritage (Dyomin et al. 2020). This challenge is particularly evident in the role that museums and galleries play in shaping cultural landscapes and promoting cultural tourism.

Museums and galleries are not merely repositories of artefacts; they serve as dynamic spaces where national, regional, and local identities are discussed and interpreted. These cultural institutions allow communities to connect with their past, while also positioning them for future development in an ever-globalizing world. The hypothesis guiding this study posits that modern society has a need for national identity and is increasingly aware of the role that museums and galleries play in the interpretation of cultural landscapes. As global cultural dynamics shift, there is a growing realization of the importance of cultural tourism, which involves not only the appreciation of heritage but also the active participation in its preservation and representation. Studies such as those by Szeidl and Aubert (2021) emphasize the link between cultural identity and cultural institutions, arguing that the role of cultural sites extends beyond mere tourism to become a tool for reinforcing national identity. Similarly, Davis (1999), in his research on ecomuseums, highlights the significance of place and its role in the development of local identity, asserting that museums are integral to the cultural narrative of a region.

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Furthermore, scholars like Davies et al. (2010) and Hudson (1987) assert that museums and galleries serve as crucial mediators in the interpretation of cultural landscapes. Museums are recognized not only as educational spaces and places of knowledge exchange but also as symbols and forums of social and cultural engagement, with the potential to shape collective memory. According to Šola (1997), the evolution of museums has moved towards a more participatory model, allowing for diverse voices and interpretations to be heard and acknowledged. This evolution aligns with the work of Simon (2010), who emphasizes the importance of participatory practices in museum settings that foster a deeper, more inclusive cultural engagement. Smith (2006) and Watson and Waterton (2016) further support this argument by highlighting how cultural heritage practices have become more inclusive and dynamic, facilitating a broader understanding of national identity that transcends static, traditional models of heritage preservation. In this context, museums and galleries have become key players in the construction and communication of national and cultural identities, as they not only preserve artefacts but actively shape the ways in which societies understand their own histories.

In addition to the qualitative preservation and reflection of national identity, museums and galleries must adhere to the main principle – accessibility, ensuring that opportunities for cultural self-knowledge and

cultural exchange are available to all. This includes accessibility for diverse groups of the population of the same culture and for representatives of other cultural communities (Heredia-Carroza et al. 2024). Recent research has thus focused on the digitalisation of museum collections, inclusivity of the museum space, readiness of cultural institutions to meet modern trends, digital twins, etc. (Yezhova 2023; Feinstein et al. 2024; Nogare & Murzyn-Kupisz 2024; Walker 2024).

In other words, the activities of museums and galleries as modern cultural institutions are directly related to the development of the cultural landscape and cultural tourism of a particular city or country. This is explained by the fact that the cultural landscape, while being geographically defined, is also shaped by cultural narratives and myths of the societies that inhabit it. The cultural values produced in this area by a particular society are further preserved and displayed in museums and galleries, making them centres of concentration of national identity. As such, these cultural institutions, being an integral part of the cultural landscape, contribute to the activation and improvement of both domestic and foreign cultural tourism.

In such context, existing research on cultural landscapes highlights several key areas of focus, including: the examination of national identity through the cultural landscape of a particular country, such as Kazakhstan or Albania (Bickert 2018; Kozbagarova & Srail 2023); the identification of new fundamental cultural landscape formation in different countries (Bushati 2023; Mussatayeva & Yermagambetova 2022); the production of relevant methods for the preservation of cultural landscapes (Polyvach 2024); the study of individual regions of the cultural landscape of the country (Rouse et al. 2021); or the examination of certain legal aspects of the preservation of sacred places in the cultural landscape (Mussatayeva et al. 2024). The analysis of these scientific developments shows that the selected research subjects are sufficiently generalised since they are focused on studying the cultural landscape of the entire country. If the subject of the study is a specific object of the cultural landscape, then preference is given to a geographical object, for example, a valley or urban settlement as a sacred place of society. Particular attention is paid to the formation of national identity in former socialist countries through their cultural landscapes. This may indicate that the conducted research is more theoretical or ideological than applied. Therefore, in the context of humanitarian research, there is a need to examine cultural landscapes in various countries to form effective practical methods for preserving, developing, and popularising these cultural landscapes, upgrading cultural tourism within these

territories, and changing the approach to the general interpretation of cultural landscape as such. This is because the cultural landscape is not limited to natural or architectural objects alone. In the modern socio-cultural space, it also carries a value-based dimension, shaped directly by the activities of cultural institutions such as museums and galleries.

Therefore, the aim of this study is to compare the state of the cultural landscape and tourism in the four capitals, using new approaches to understanding the key terms of the subject. The following tasks were set to achieve this goal:

1. Analyse existing approaches to understanding the terms cultural landscape and cultural tourism and offer interpretations of their meanings.
2. Conduct a social survey on the state of the cultural landscape and cultural tourism in four capital cities, using the interpretations of these terms.
3. Conduct a comparative analysis of the results obtained and identify future prospects through the lens of the development of the tourism industry and cultural practices related to identity formation.

The authors conducted a sociological survey to assess the cultural landscape and tourism in four capitals: Astana, Tirana, Bishkek, and Kyiv. The survey targeted a random sample of local residents, ensuring diverse representation across age, gender, and occupation. This method was chosen to obtain broad, reliable insights into the public perception of cultural and tourism development in these cities.

2. Materials and Methods

The second stage of the study involved a sociological survey. The survey was conducted throughout April 2024, specifically on weekends (Saturdays, Sundays) to attract more respondents. The survey was conducted in four capital cities: Astana (Kazakhstan), Tirana (Albania), Bishkek (Kyrgyzstan), and Kyiv (Ukraine). Special attention was paid to the locations where the survey was administered, such as the main or central streets of cities. In Astana, the sociological survey was conducted on Nurzhol Boulevard; in Kyiv, on Khreshchatyk Street; in Tirana, on Skanderbeg Square; and in Bishkek, on Ala-too Square. These public places were chosen intentionally to cover a larger number of participants in the survey.

The selection of respondents was random. The survey involved individuals of varying age groups, genders, and cultural and professional

backgrounds. A key criterion was that all participants had to be local residents of these capitals. This ensured that respondents were fully or partially aware of the cultural activities of their city. For the survey results to be reliable, each participant was briefly explained what is meant by the terms cultural landscape and cultural tourism in this study before filling out the questionnaire. An example of the questionnaire is provided in Appendix A. From a cultural standpoint, questionnaires were provided to respondents in their state language, that is, Kazakh, Kyrgyz, Ukrainian, and Albanian.

The number of survey participants and the distribution by gender, age, and field of activity vary across the four cities. In Astana, 105 people took part in the survey (60 of women and 45). 20 respondents had ties to the field of culture (employees, volunteers, students of cultural and artistic specialities), while 85 did not. In Tirana, 113 respondents participated (64 women and 49 men). 26 of them had ties to the field of culture and 87 did not. In Bishkek, the number of participants in the sociological survey reached 108 (56 women and 52 men). 10 respondents from the total number had ties to the field of culture, while 98 did not. In Kyiv, 117 respondents joined the sociological survey (73 women and 44 men). 29 participants were associated with the cultural sphere, while 88 respondents were not involved in any cultural activities. The age ratio of participants in the four capitals is provided in Table 1.

Table 1: Age ratio of participants in the sociological survey in Astana, Bishkek, Tirana, and Kyiv

| Age | Name of the capital | | | |
	Astana	Bishkek	Tirana	Kyiv
Under 18	15	7	21	11
From 18 to 24	15	28	19	23
From 25 to 34	35	31	37	29
From 35 to 44	20	22	23	27
From 45 to 54	10	13	7	22
From 55 to 64	5	5	5	2
65+	5	2	1	3

Source: Compiled by the authors.

The results of the study were processed using Microsoft Excel spreadsheets. Methods of data normalisation, standardisation, and correlation analysis were also used to work with statistical data.

3. Results and Discussion

3.1 Approaches to Understanding the Terms Cultural Landscape and Cultural Tourism

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Within the framework of modern cultural studies, the phenomenon of cultural landscape is examined through various approaches developed and refined by different researchers. Each scientific approach maintains a distinct perspective in interpreting this cultural phenomenon, which in turn determines the results of the study and practical advice on development and interaction with the cultural landscape. One of the earliest approaches to understanding the term cultural landscape is geographical. This approach to the interpretation of the cultural landscape goes back to the work of American geographer Karl Sauer, who is widely regarded as the founder of this concept (Bell 2018). According to this approach, the cultural landscape is a product of the interaction of natural and human factors. In other words, the cultural landscape is a territory transformed through human activity, reflecting the cultural, social, and economic features of society (Urdabayev et al. 2024). Karl Sauer also emphasised that people shape the landscape by adapting natural resources to their needs, creating settlements, agricultural systems, roads, and other elements of infrastructure (Bell 2018). All these transformations are superimposed on the natural environment, creating a unique space that reflects the cultural values, traditions, and technological level of a particular society. In addition, the geographical approach considers the cultural landscape a document that captures various stages of social development. By examining cultural landscapes, it is possible to see how land use, architecture, and settlements forms have changed over time (Remeshevska et al. 2021; Rexhepi et al. 2024). Thus, the cultural landscape is an important source of information for understanding the historical dynamics and cultural evolution of society. Davis (1999) highlights the role of ecomuseums as a form of cultural landscape that not only reflects the physical environment but also enhances community participation in the cultural processes that shape landscapes. This idea can be linked to the way local people interact with and define their environments, which is central to the experience of cultural tourism.

In addition to the geographical approach, the historical and cultural approach also plays a role, as it views the landscape as a space saturated with symbolic meaning and closely connected with the history and cultural identity of society (Nora 2011). Here, the cultural landscape

is understood not just as a physical space changed by humans but as a carrier of cultural memory, which reflects key historical events, traditions, and social processes. This approach is especially important when examining the role of museums and galleries in the formation of cultural landscapes, as they serve as centres of concentration of cultural identity.

One of the key representatives of this approach is French historian Nora (2011), who introduced the concept of "places of memory". He argued that the cultural landscape is an important element of collective memory in which ideas about the past that form national and cultural identity are fixed. According to Nora, landscapes such as monuments, historical cities, and sacred places carry symbols that are important to society and become a kind of "sealed" memories of the past. The cultural landscape is thus the result of a centuries-old history and cultural legacy that is passed down from generation to generation. Therewith, the historical and cultural approach emphasises not only material objects, such as architectural structures or archaeological sites, but also non-material aspects, including myths, legends, and rituals associated with certain places – referring to the sacred dimension of cultural landscapes.

Two additional approaches to the interpretation of the term cultural landscape that are also relevant for the selected analysis are the anthropological and ecological perspectives. One is predetermined by the activities of the United Nations Educational, Scientific, and Cultural Organisation (UNESCO), and the other focuses on the landscape as a result of interaction between humans and the environment. The anthropological approach views the cultural landscape as a space where people interact with the environment, filled with cultural meanings and symbols (Kalaganov et al. 2018). This approach focuses on how people perceive, interpret, and transform the landscape through their practices, customs, and rituals. Here, the cultural landscape is understood not so much as a static object, but as a dynamic process that reflects the society's cultural and social life.

One of the key theorists of the anthropological approach is British researcher Ingold (2018). In his works, he argued that the landscape is not just a physical space, but actually a "living fabric" in which a person is constantly in the process of interaction with the world. He believed that the cultural landscape is formed through everyday actions of people: walking, building, farming, and through a symbolic understanding of these actions in the context of culture. As for the ecological approach, the international organisation UNESCO played a key role in its formation and development (Mitchell et al. 2009). UNESCO defines the cultural

landscape as "a collection of cultural and natural elements that represent a harmonious interaction between man and nature over time" (Mitchell et al. 2009). In this context, the cultural landscape is considered a valuable legacy that must be preserved not only for cultural but also for ecological purposes. The ecological approach also highlights the importance of sustainable management of cultural landscapes (Ivashko et al. 2020). This means that both cultural and environmental factors must be considered when planning and using landscapes. For example, agricultural landscapes that have existed for centuries are not only a cultural value but also an important ecosystem that needs to be protected and maintained (Romanchuck et al. 2017; Zymaroieva et al. 2021). A disruption of the balance between nature and culture can lead to the degradation of both ecological and cultural components of the landscape (Fedoniuk et al. 2024).

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Based on the results of the analysis of existing approaches, it can be concluded that differing interpretations of cultural landscape lead to differences in scientific research and semantic confusion. Therefore, this study defines the cultural landscape as not merely the result of interaction between humans and the environment, but as the synthesis of natural and cultural spaces, together with geographical objects and cultural institutions that serve as carriers and places of concentration of cultural values and national identity of a particular society. Thus, this definition refers to the cultural landscape as a place of cultural and historical memory and determines the substantial role of cultural institutions such as museums and galleries in its formation and preservation (Gamaliia & Artemenko 2023).

In addition to examining approaches to the interpretation of cultural landscape, it is also worth paying attention to the term cultural tourism, which is directly related to the activities of museums and galleries. Today, there are several approaches to its understanding, each focusing on different aspects and offering its own research methods, similar to the case of cultural landscape. The economic approach, for example, considers cultural tourism as an important source of income for regions and countries with rich cultural heritage (Rachiotis & Poulaki 2024). This approach focuses on the economic benefits that cultural tourism brings: creating jobs, attracting investment, developing infrastructure, and improving the standard of living of the local population. Proponents of this approach emphasise the importance of competent management of tourist flows and marketing strategies that help attract tourists and maximise the economic effect of cultural objects and events (Butenko et al. 2023; Rachiotis & Poulaki 2024).

The socio-cultural approach focuses on the impact of cultural tourism on society and culture. It studies how tourists interact with the cultural heritage and local population and how these interactions affect identity, traditions, and cultural practices. This approach considers cultural tourism as a two-way process: tourists gain a unique cultural experience, while the local community can be subject to changes under the influence of external cultural influences. Researchers of this approach examine issues such as the authenticity of cultural objects, the impact of tourism on the preservation of cultural heritage, and possible risks of "commercialisation" of culture (Lopes & Hiray 2024).

The anthropological approach to understanding cultural tourism focuses on its examination through the prism of everyday practices and rituals (Myskiv & Nycz-Wojtan 2022). In this context, cultural tourism is considered a way of learning and participating in cultural traditions and customs, which contributes to mutual understanding between cultures. Anthropologists investigate how cultural landscapes and monuments are perceived by tourists and how these perceptions relate to the ideas and practices of the local population (Lopes & Hiray 2024). The anthropological approach is also interested in issues of cultural exchange and the transformation of traditions under the influence of tourism.

The aesthetic approach considers cultural tourism in terms of perception of beauty and cultural value. This approach focuses on the visual and emotional experience that tourists gain by interacting with cultural objects and landscapes. It examines how cultural artefacts, architecture, art, and natural landscapes shape the aesthetic perception of tourists and how this perception affects the interest in the culture and heritage of a particular region (Shevchenko 2024).

The political approach examines the role of politics in the development and management of cultural tourist destinations. It focuses on how state policy and international relations shape approaches to the preservation of cultural heritage, its popularisation and its use as a tourist resource. The political approach also considers cultural tourism as a tool of "soft power" through which states can promote their culture and improve their international image (Chu 2024). In this context, cultural tourism becomes not only an economic and cultural phenomenon but also a political tool.

Lastly, the ecological approach connects cultural tourism with sustainable development and environmental protection. This approach highlights the importance of preserving natural and cultural resources for future generations. It considers cultural tourism as a means of raising awareness about the need to protect the environment and cultural

heritage (Shahini et al. 2022). In particular, this approach is closely related to the ecological approach to understanding the term "cultural landscape".

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Each of these approaches offers a unique perspective for understanding cultural tourism as a multi-layered phenomenon in which economic, socio-cultural, political, and environmental aspects intersect. However, to conduct a sociological survey, this study applies a unified interpretation of the concept of "cultural tourism" – defined as cultural practices that promote national cultures and the exchange of cultural values. This definition will cover all aspects of cultural tourism, including politics, economics, and ecology.
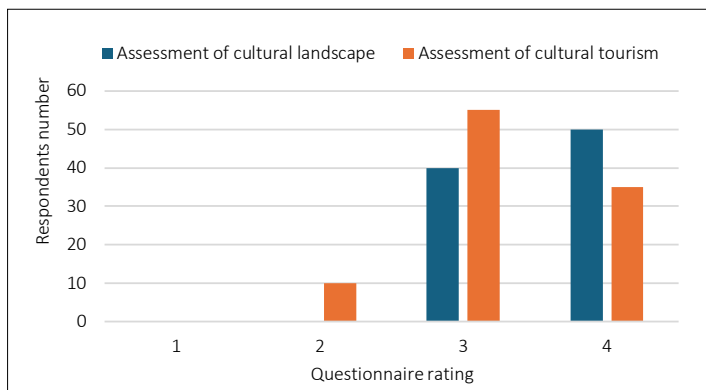
3.2 The State of the Cultural Landscape and Cultural Tourism in Four Capitals: Astana, Bishkek, Tirana, and Kyiv

The second stage of the study involved a sociological survey in the capitals of Kazakhstan, Albania, Kyrgyzstan, and Ukraine. The purpose of this experiment was to determine the state of their cultural landscape and the level of cultural tourism based on the responses and comments of local residents. The collected data would later inform practical recommendations for improving cultural landscapes and tourism, and allow for comparative analysis of the cultural sphere in the four selected capitals.

First, we present the results of the survey conducted in Astana. Astana residents were asked about the current state of the city's cultural landscape and the level of cultural tourism (Chart 1). As noted by Smith (2006), cultural landscapes can be seen as sites where material and symbolic heritage converge. This aligns with the situation in Astana, where the transformation of the city and its new cultural identity reflect a complex negotiation of historical legacies and modernity, influencing the city's tourism development.

Chart 1 shows that most residents of Astana rated the state of the city's cultural landscape above average, with 50 respondents assigning a score of 4, and 15 assigning the highest score of 5. According to the participants of the sociological survey, these assessments are linked to the active modernisation of Astana's cultural space since it became the capital of Kazakhstan in 1997. As a result of these socio-cultural processes, the city's architecture has not only improved but also regained its unique national style. However, respondents also expressed concern about the influence of Western trends on the development of the city's cultural landscape, fearing that their active adoption could overshadow Astana's traditional elements and cultural meaning.

Chart 1: Assessment of the state of the cultural landscape and the level of development of cultural tourism in Astana

Source: Compiled by the authors.

Local residents rated cultural tourism lower than the state of the cultural landscape. Some responses indicated scores as low as 2 points. Although the brand of Astana as a tourist city is actively developing, Astana residents report most of the tourists being either Kazakhs from other cities or tourists from Central Asia. This is partly due to the lack of attractive cultural institutions and the low efficiency of museums and galleries. In addition, Astana residents were asked to identify the key factors they believed affect the state of the city's cultural landscape. The answers to this question are presented in Table 2.

Table 2: Factors influencing the state of the cultural landscape in Astana

Factors influencing the cultural landscape	Number of respondents selecting this factor
Level of economic development of the city	90
Local government policy on preserving cultural legacy	70
Activities of public organisations and initiatives	35
Investments in culture and art	55
Educational level of the population	50
Development intensity and architectural solutions	45
Tourism and interest in the city from visitors	70
Interaction between different cultural groups	30
Local traditions and customs	30
Ecological state and presence of green zones	50
Media and their influence on cultural processes	45

Changes in the demographic structure of the population	25
Accessibility of cultural institutions and events	50
Residents' attitude toward their cultural heritage	55
Globalisation and influence of foreign cultures	45

Source: Compiled by the authors.

Based on the information in Table 2, it can be concluded that local residents of Astana most frequently identified the economic development of the city, local government policies, and tourist interest in the city as key factors influencing the state of the cultural landscape. These results can be attributed to the earlier socio-cultural processes in the city of Astana – specifically, as already mentioned, the relocation of the capital to Astana and the subsequent modernisation of the city's cultural space. Cultural tourism, according to Astana residents, was influenced by the factors outlined in Table 3.

**Table 3: Factors influencing the state of cultural tourism in Astana**

Factors influencing cultural tourism	Number of respondents selecting this factor
Number and quality of cultural institutions (museums, theatres, galleries)	35
Ecological state and cleanliness of the city	40
Attitude of local residents toward tourists	50
Availability and quality of local kitchens	15
Price level for services and goods for tourists	40
Cooperation with international tourism organisations	35
Weather conditions and climate	60
Local culture and traditions	65
Availability of information for tourists (language barriers, information centres)	35
Quality of excursion programmes and guides	35
Advertising campaign and promotion of the city as a tourist destination	45
Organisation of cultural events and festivals	45
Security level in the city	50
Infrastructure development (transport, hotels, restaurants)	70
Availability of historical and cultural monuments	75

Source: Compiled by the authors.

In Table 3, the answers to the question about the factors influencing cultural tourism in Astana show that, according to Astana residents, the presence of historical and cultural monuments, high-quality infrastructure, and features of local culture and traditions are the most significant drivers of the development of cultural tourism in the city. This suggests that Kazakh culture is of great importance to the local population, who see it as a reflection of their national identity.

Considering the importance of cultural institutions in the development and improvement of the cultural landscape and tourism, the survey respondents were asked to indicate the cultural institutions they often visit. The results for Astana residents are shown in Chart 2.

Chart 2: Statistics on cultural institutions visited by local residents of Astana
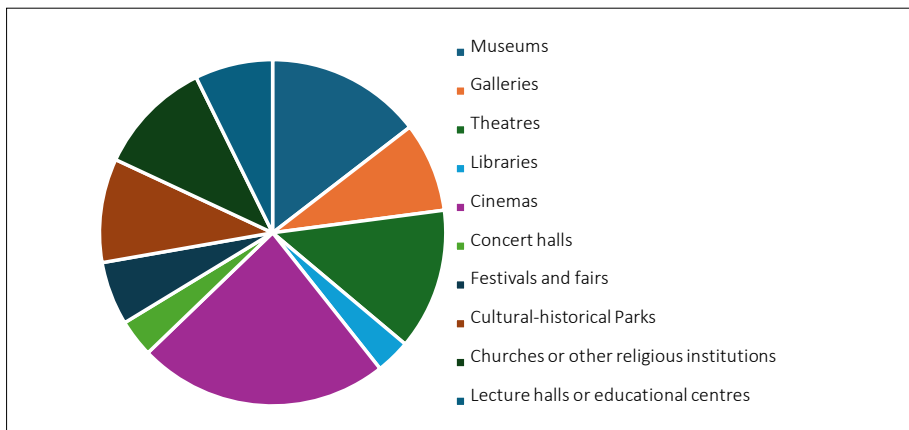
Source: Compiled by the authors.

Chart 2 shows that most of the respondents – 87 out of 105 – preferred to visit cinemas. Visits to museums and galleries are much lower – 54 and 31, respectively. According to survey participants, this reflects a limited availability and variety of museums and galleries. Notably, all respondents affiliated with the field of culture reported visiting museums and galleries. This may indicate that certain cultural institutions are more focused on interacting with culturally aware audiences. However, this trend may negatively affect cultural tourism, which aims to spread knowledge about a particular culture to both the local population and representatives of other cultures. As for the frequency of visits to cultural institutions, the survey yielded the following results: 9 respondents visit the institutions weekly, 23 respondents – several times a month, 15 respondents – once a month, 21 respondents – several times a year, 3 – once a year or less, 11 – only for special events, 16 respondents

– when there is free time, and 7 respondents – when something new interesting appears. From these answers, it can be observed that the trend of visiting cultural institutions by Astana residents is positive since every fourth respondent from Astana visits cultural institutions several times a month. This indicates that local residents are interested in their culture and prefer to spend their free time exploring their traditions and national identity. Such a tendency should be supported by concrete actions on the part of both the authorities and cultural institutions to ensure the availability of a national cultural product. As regards the accessibility of cultural institutions in Astana, survey responses are as follows: 34 participants indicated that institutions are fully accessible to all; 39 participants consider cultural institutions accessible to most but with certain restrictions; 13 participants believe they are accessible only to certain groups of the population; 2 consider them inaccessible due to the high cost of tickets; 4 see them as unavailable for families with children due to the lack of special programmes; 11 participants indicated limited availability (e.g. open only on certain days or hours); and 2 participants said institutions are inaccessible to persons with limited physical capabilities.

Based on the data obtained, it can be argued that most Astana residents see the existing cultural institutions as fully accessible or accessible to most. In other words, there are prospects for further development, which, in turn, expands the range of opportunities for improving both the cultural landscape and cultural tourism of Astana. At the end of the survey, respondents were also asked to list the museums and galleries they would like to see on the cultural map of the city. Among them are the National Museum of the Republic of Kazakhstan, The Book Museum, the Berik Alibai House-Museum, Atameken, and the Museum named after C. Seifullin, Has Sanat, Nur Alem Museum.

The next capital where the state of the cultural landscape and cultural tourism was analysed is Bishkek (Kyrgyzstan). The residents' ratings of the cultural landscape and cultural tourism are presented in Chart 3.

The information from Chart 3 reflects a relatively low-quality state of the cultural landscape and the development of cultural tourism in the capital of Kyrgyzstan. First, local residents of Bishkek attributed this to the prevalence of Soviet-era architecture and Soviet elements in the environment, which they felt had overshadowed the national identity of the Kyrgyz people. Respondents also noted that Bishkek has a significant number of Islamic architectural sites (approximately 50 mosques), which are not just an integral part of the city's cultural landscape but also help preserve some aspects of the Kyrgyz cultural code and cultural

memory. The same statistics apply to cultural tourism: local residents of Bishkek indicated that their city primarily attracts domestic tourist, that is, a high attendance of Kyrgyz citizens. When asked about the factors influencing the state of Bishkek's cultural landscape, respondents chose the following options (Table 4).

Chart 3: Assessment of the state of the cultural landscape and the level of development of cultural tourism in Bishkek
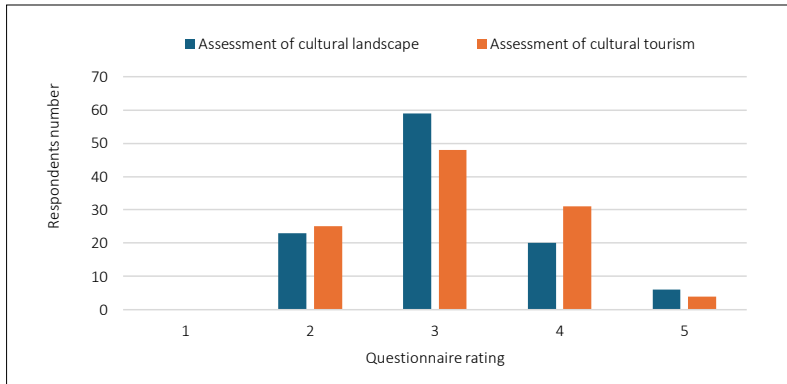
Source: Compiled by the authors.

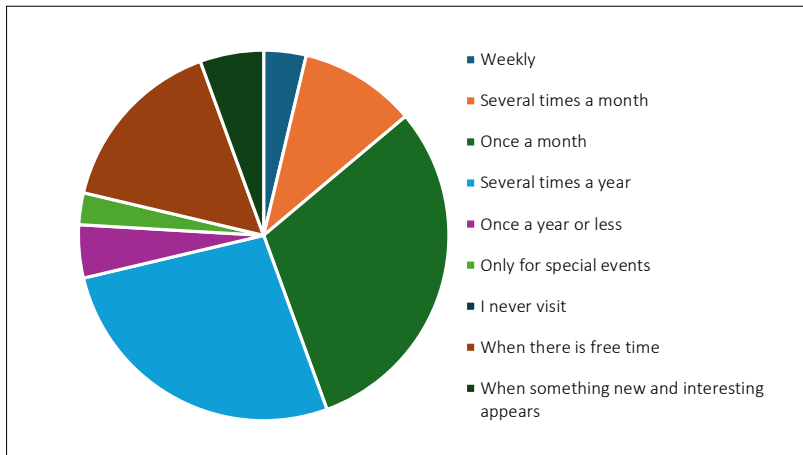**Table 4: Factors influencing the cultural landscape in Bishkek**

Factors influencing the cultural landscape	Number of respondents selecting this factor
Level of economic development of the city	84
Local government policy on preserving cultural legacy	56
Activities of public organisations and initiatives	22
Investments in culture and art	47
Educational level of the population	49
Development intensity and architectural solutions	38
Tourism and interest in the city from visitors	54
Interaction between different cultural groups	33
Local traditions and customs	46
Ecological state and presence of green zones	20
Media and their influence on cultural processes	15
Changes in the demographic structure of the population	48
Accessibility of cultural institutions and events	57
Residents' attitude toward their cultural heritage	68
Globalisation and influence of foreign cultures	21

Source: Compiled by the authors.

Analysing the data in Table 4, it can be argued that local residents of both Bishkek and Astana identified several key factors influencing the state of the cultural landscape: the economic development of the city, local government policies aimed at preserving cultural heritage, the attitude of local residents toward their culture, accessibility to cultural institutions, and the interest of visitors toward the city. While Kyrgyzstan is extremely rich in natural and cultural assets, its capital still lacks a high-quality marketing policy (Imankulov et al. 2024). This is confirmed by the fact that nearly 80% of respondents noted a low level of availability of information for tourists about Bishkek and a relatively low number of cultural events that might attract visitors. Additional responses to the question regarding the factors influencing the development of cultural tourism in the city were as follows: 79 respondents chose "the number and quality of cultural institutions (museums, theatres, galleries)", 34 – the ecological state and cleanliness of the city, 45 – the attitude of local residents toward tourists, 12 – accessibility and quality, 51 – price level for services and goods for tourists, 20 – cooperation with international tourist organisations, 33 – weather conditions and climate, 74 – local culture and traditions, 54 – the quality of excursion programmes and guides, 42 – advertising campaign and promotion city as a tourist destination, 39 – level of security in the city, 69 – development of infrastructure (transport, hotels, restaurants), and 72 participants the presence of historical and cultural monuments.

Local residents of Bishkek believe that their capital holds significant potential for the development of both cultural tourism and the cultural landscape. This belief is reflected in the number of museums and galleries they would like to see on the cultural map of the city: the National Historical Museum of the Kyrgyz Republic, the Memorial House-Museum of M.V. Frunze, the Kyrgyz National Museum of Visual Arts named after Gapar Aitiev, the Zoological Museum, the Geological Museum, the Memorial House – Museum of I. Razzakov, the Open-air Sculpture Museum, and the Memorial House – Museum of S. Chuikov. Respondents working in cultural institutions or studying cultural and artistic disciplines also mentioned the Museum of the National Academy of Arts named after T. Sadykov.

The statistics on visits to cultural institutions by local residents, shown in Chart 4, offer an additional insight into how cultural engagement can contribute to improving the state of the cultural landscape and tourism of Bishkek.

Chart 4: Statistics on visits to cultural institutions by local residents of Bishkek

- Weekly
- Several times a month
- Once a month
- Several times a year
- Once a year or less
- Only for special events
- I never visit
- When there is free time
- When something new and interesting appears
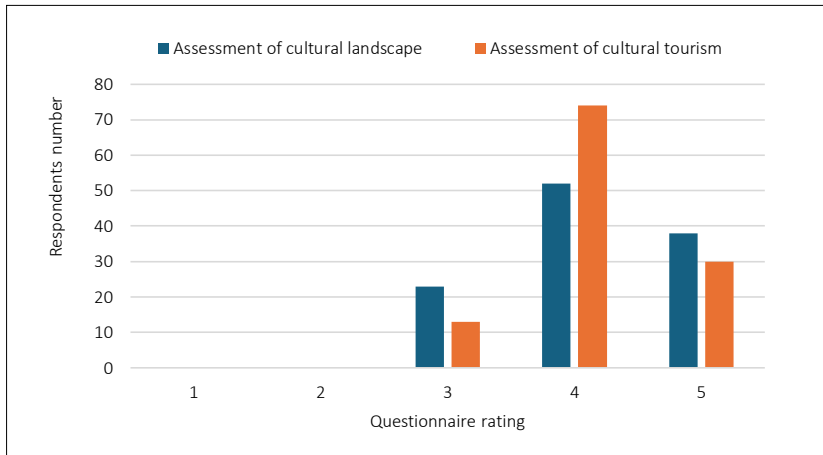
Source: Compiled by the authors.

Almost a third of the participants from Bishkek visited cultural institutions either once a month or several times a year. As respondents themselves noted, such statistics are related to the opening of certain exhibitions or cultural events. In general, among all existing cultural institutions, local residents of Bishkek preferred museums (71 respondents), galleries (53 respondents), and theatres (65 respondents). The analysis of the level of accessibility of these institutions revealed the following: 17 respondents indicated that all cultural institutions are fully accessible; 28 respondents said most are accessible, but with certain restrictions; 31 indicated that they are accessible only to certain groups of the population; 2 reported they are inaccessible due to high-cost tickets; 3 said they are unavailable for families with children due to lack of special programmes; 12 reported that they are only accessible on certain days or hours; and 15 respondents considered these institutions inaccessible to persons with disabilities. Thus, based on this information, it can be concluded that the residents of Bishkek consider local cultural institutions as relatively difficult to access, and not accessible to everyone. Primarily, this may be due to the non-inclusive design of many architectural structures in the city. Respondents noted that while ramps or elevators have been added to new or recently restored museums and galleries, such features are still absent in older cultural institutions. This omission violates one of the main principles of modern cultural landscapes and tourism: accessibility.

In addition to residents of Astana and Bishkek, respondents from Tirana (Albania) also took part in the sociological survey. Their assess-

ment of the state and development of the cultural landscape and cultural tourism in Tirana is shown in Chart 5.

Chart 5: Assessment of the state of the cultural landscape and the level of development of cultural tourism in Tirana

Source: Compiled by the authors.

As shown in Chart 5, residents of Tirana assessed the cultural landscape and cultural tourism of their city at a higher level. According to respondents, this is primarily due to the country's geographical location in South-Eastern Europe, along the Adriatic coast. This positioning makes Albania a holiday destination and significantly increases its tourist potential, particularly in the field of culture. Local residents of Tirana considered the eclectic architectural style, which also reflects their multi-layered unique national identity, to be particularly attractive for tourists. The integration of both socialist and religious landmarks in the cultural space of the city contributes to foreign visitors' interest in Albanian history and traditions. In addition, local residents of Tirana identified the following factors influencing the cultural landscape of the city (Table 5).

The prevailing factors influencing the cultural landscape of Tirana, as presented in Table 5, are determined by historical processes that have affected the Albanian people. This is especially true for local government policies, economic conditions, development intensity, and architectural solutions. The change of political views of the authorities regarding cultural policy and, in particular, the principles of forming the cultural landscape led to radical changes in the city's urban space. For example, during the socialist era, buildings in the socialist style pre-

vailed in Tirana. Following post-socialist transition, the local population resumed the construction of religious objects that had been previously banned. Currently, respondents expressed concern about the impact of globalisation and European cultural trends on their cultural landscape. This is due to the fact that in the context of increasing globalisation, migration processes, and the desire to align with modern norms, Albanians risk losing the uniqueness and tradition of their culture. In addition, data from Table 5 show that culture and national traditions remain extremely important to local residents.

**Table 5: Factors influencing the state of the cultural landscape in Tirana**

Factors influencing the cultural landscape	Number of respondents selecting this factor
Level of economic development of the city	56
Local government policy on preserving cultural legacy	42
Activities of public organisations and initiatives	29
Investments in culture and art	35
Educational level of the population	34
Development intensity and architectural solutions	67
Tourism and interest in the city from visitors	71
Interaction between different cultural groups	23
Local traditions and customs	59
Ecological state and presence of green zones	53
Media and their influence on cultural processes	22
Changes in the demographic structure of the population	19
Accessibility of cultural institutions and events	16
Residents' attitude toward their cultural heritage	66
Globalisation and influence of foreign cultures	43

Source: Compiled by the authors.

Analysing the factors influencing the cultural tourism of the city, respondents from Tirana chose the following answer options: the number and quality of cultural institutions (museums, theatres, galleries) – 41 participants; the ecological state and cleanliness of the city – 68 participants; the attitude of local residents toward tourists – 39 participants; the availability and quality of local cuisine – 16 participants; prices for services and goods for tourists – 35 participants; cooperation with international tourist organisations – 27 participants; weather conditions and climate – 51 participants; local culture and traditions – 46 participants;

availability of information for tourists (language barriers, information centres) – 40 participants; quality excursion programmes and guides – 28 participants; advertising campaign and promotion of the city as a tourist destination – 66 participants; organisation of cultural events and festivals – 35 participants; security level in the city – 50 participants; infrastructure development (transport, hotels, restaurants) – 51 participants; the presence of historical and cultural monuments – 82 participants. The results show that residents of Tirana see the presence of historical and cultural monuments, as well as the ecological state of the city, as having a special impact on cultural tourism in their city. However, they also noted that their cultural institutions, such as museums and galleries, lack effective marketing strategies since tourists focus more on geographical features, architectural sites, or aspects of national culture while overlooking interesting modern museums. When asked about their preferred cultural places in Tirana, respondents indicated that they most often visit cultural and historical parks or complexes (72 respondents), followed by museums and galleries (56 and 47 respondents, respectively). Other popular options were cinemas (42 respondents) and mosques (45 respondents), which are undoubtedly sources of the national identity of Albanians. The statistics on local residents visiting cultural places are shown in the diagram below (Chart 6).

Chart 6: Statistics on visits to cultural institutions by local residents of Tirana
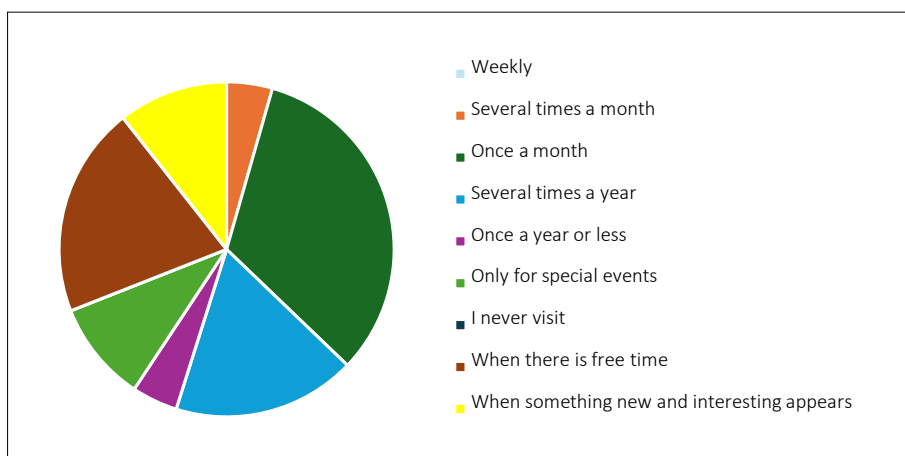
Source: Compiled by the authors.

The data from Chart 6 confirm that local residents of Tirana typically visited cultural institutions once a month or several times a year. These figures also indicate that they preferred to spend time in city's open

spaces, exploring geographical or architectural landmarks. However, this approach does not contradict the fact that local residents of Tirana are aware of the presence of museums and galleries in the cultural landscape of their city. The cultural institutions mentioned include the Tirana National Archaeological Museum, the National Historical Museum, the Museum of Natural Sciences, the Sali Shijaku House, the Tirana Pyramid, VivArt Gallery, and especially Bunk'Art 2, which many Albanians consider one of the most unique museums in their country. Despite this awareness, local residents of Tirana indicated that museums and galleries are still difficult to access. This is confirmed by statistics: 23 participants noted that institutions are accessible to the majority but with certain restrictions, 31 participants indicated they are accessible only to certain groups of the population, while 50 participants considered them inaccessible to people with disabilities or limited physical capabilities.

Accessibility issues largely stem from the fact that cultural institutions do not provide ways for people with limited physical abilities to get in and move around the premises. Additionally, information about activities and locations in some museums is not publicly available, which does not allow planning a visit in advance. Such facts reflect a negative trend in the functioning of cultural institutions, which may, in turn, cause a superficial perception of Albanian culture and national identity by tourists.

The last city where the survey was conducted was Kyiv (Ukraine). Local residents assessed the state of the cultural landscape and cultural tourism in their city as follows (Chart 7).

Information from Chart 7 indicates that Kyiv residents currently assess the state of the city's cultural landscape slightly above average. These estimates are influenced, first and foremost, by the respondents' places of residence in Kyiv, as most cultural and historical monuments and cultural institutions are located in the central part of the city. Areas outside the centre – on the right or left banks of the Dnipro river – are largely residential and predominantly consist of houses of socialist architectural style or new buildings. However, despite this disparity, local residents still identify distinct features within Kyiv's cultural landscape. These include a large number of green spaces, historically and nationally important monuments and buildings, and a variety of museums and galleries. Key factors reported by residents as influencing the state of the cultural landscape of the city include: the level of economic development of the city (78 respondents); the policy of local authorities to preserve the cultural legacy (73 respondents); the activities of public or-

ganisations (60 respondents); investment in culture (57 respondents); intensity developments and architectural solutions (64 respondents). This choice of factors reflects the past negative experiences of local residents when cultural buildings were demolished and residential buildings were built on their site, or when local authorities, without consulting the population, decided to rename or close certain institutions or allowed the construction of multi-storey buildings in protected areas. Wherever possible, actions of public organisations and civic initiatives managed to avoid harmful consequences for the cultural landscape of the city. Kyiv residents also believe that the cultural landscape of the city is not limited to cultural places or historical parks and that investment in culture, particularly in the activities of museums and galleries, could contribute to the promotion of the city's brand among tourists and representatives of other cultures.

Chart 7: Assessment of the state of the cultural landscape and the level of development of cultural tourism in Kyiv
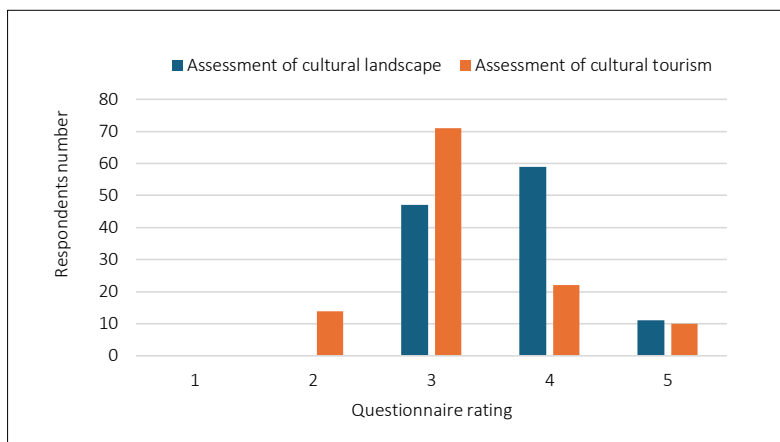
Source: Compiled by the authors.

As for cultural tourism, Kyiv residents currently rate it quite low. This is due to the ongoing martial law in Ukraine and the fact that Kyiv is one of the most dangerous cities in the country for both residents and tourists. As a result, the number of tourists from abroad has substantially decreased. According to Kyiv residents, only foreign journalists or documentary photographers can be found in the centre of the city. Residents of other cities of Ukraine can also be met in Kyiv, which indicates a possible partial domestic tourism. For security reasons, most of Kyiv's museums have removed and evacuated their permanent collec-

tions, leaving only temporary exhibitions of modern art. More detailed information on the factors affecting the level of cultural tourism in Kyiv are presented in Table 6.

Table 6: Factors influencing the state of cultural tourism in Kyiv

| Factors influencing cultural tourism	Number of respondents selecting this factor
Availability of historical and cultural monuments	67
Infrastructure development (transport, hotels, restaurants)	59
Security level in the city	109
Organisation of cultural events and festivals	23
Advertising campaign and promotion of the city as a tourist destination	45
Quality of excursion programmes and guides	32
Availability of information for tourists (language barriers, information centres)	43
Local culture and traditions	64
Weather conditions and climate	15
Cooperation with international tourism organisations	37
Price level for services and goods for tourists	48
Availability and quality of local kitchens	17
Attitude of local residents toward tourists	50
Ecological state and cleanliness of the city	41
Number and quality of cultural institutions (museums, theatres, galleries)	65

Source: Compiled by the authors.

Despite the difficult political and socio-cultural situation in Kyiv, local residents noted a positive trend in the presence of cultural institutions. This is supported by survey results presented in Table 6: 24 respondents visit cultural establishments weekly; 42 respondents visit several times a month; 20 respondents visit once a month; 10 respondents visit several times a year; 3 respondents visit once a year or less; 8 respondents only attend special events; 5 respondents attend during their free time, and another 5 when something new and interesting is offered. They explain these statistics with the intention to learn as much as possible about their culture and traditions and, in some cases, with fear of losing their national identity. Such facts indicate that the cultural landscape, as defined earlier, is not just a territory with geographical or architectural features, but a semantic space filled with places of concentration

of national identity and cultural legacy – museums, galleries, theatres, etc. Chart 8 presents the statistics on Kyiv's local residents' selection of cultural institutions for visiting.

Chart 8: Statistics on cultural institutions visited by local residents of Kyiv
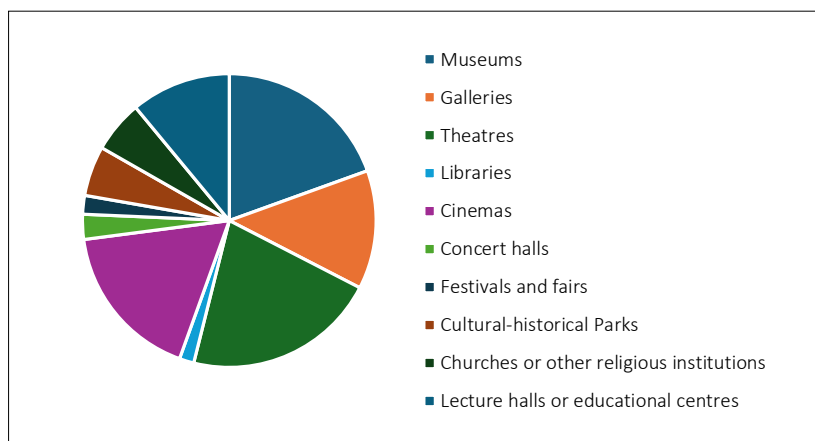
Source: Compiled by the authors.

Data from Chart 8 shows that Kyiv residents preferred to visit museums and theatres. According to respondents, they often attend the same exhibition several times within a month, while individual cultural projects attract up to 50,000 visitors per month. The same statistics apply to theatres, as local residents of Kyiv tend to buy tickets several months in advance. All these facts indicate that attendance has increased – most Kyiv residents visit cultural institutions several times a month. Among the leading museums and galleries are the National Art Museum of Ukraine, the National Centre Ukrainian House, the Khanenko Museum, the Kyiv Art Gallery Museum, the National Museum of the History of Ukraine, the National Museum of Taras Shevchenko, the Museum of the Sixtiers, the National Museum of the History of Ukraine in the Second World War, the Ivan Honchar Museum, the National Museum of Folk Architecture and Life (open-air museum). However, almost every respondent of the sociological survey noted that museums are not fully adapted for inclusivity (35 respondents consider them to be accessible to most, but with certain restrictions, 37 respondents find them accessible only to certain groups of the population, 40 respondents indicate they are inaccessible to persons with limited physical capabilities). Therefore, the issue of accessibility of Ukrainian cultural institutions remains unresolved.

3.3 Comparative Analysis of the Obtained Results

To begin with, the results of the sociological survey reflect the methods by which the four capital cities try to combine past and present cultural practices, the development of the tourism industry, and identity-building processes in their cultural landscapes. The example of the capitals of Kazakhstan, Albania, Ukraine, and Kyrgyzstan illustrate how local residents re-formulate their national identity after a prolonged socialist influence: they accept their past, analyse the experience gained, and reconstruct their national identity based on previous practices, or draw on past events and try to revive their pre-socialist identity. In any case, the development of the cultural landscape is a question of national identity (Cherkes et al. 2024). The construction of mosques and Islamic architecture in post-socialist Tirana represents an attempt to reclaim lost elements of Albanian identity. Similarly, the modernisation of Astana reflects an ongoing search for a new national identity. Cultural landscapes serve as repositories of cultural memory and, according to Carvalho et al. (2023) and Tengberg et al. (2012), carriers of information about the cultural significance of a place. Watson and Waterton (2016) emphasize the role of heritage sites in representing cultural narratives that are vital to understanding the identity of a community. This is particularly relevant in cities like Tirana and Astana, where the cultural landscape is actively shaped by the interaction of national and international influences, and cultural institutions play a key role in maintaining these narratives.

However, it is important to understand that the cultural code does not just exist in the surrounding space – it must be expressed and materialized. The logic of forming a cultural landscape is approximately as follows: a society inhabits a given territory within which it implements its cultural practices. Representatives of the society give these practices material content and collect them in one place. Any cultural practices that are inherent in a person as a representative of a certain society with a certain culture are a reflection of its identity (Chernyshev et al. 2020). Therefore, specific material places in the landscape are a collection of elements of first cultural and then national identity. Examples of such places include: Muslim temples, whose integration within the cultural space and perception by representatives of other cultures were studied by Bornioli et al. (2023); socialist monuments studied by Bickert (2018) in the context of "Albanism" and the formation of Albanian identity; and other post-colonial elements studied by Eldar (2024). In the course of the study, museums and galleries were identified as key places of concentration of national identity in the cultural landscape since "museum

collections are a reflection of the cultural landscape and, accordingly, national identity" (Habjanič & Perko 2018).

Based on the data obtained from a survey of local residents of Astana, Bishkek, Tirana, and Kyiv, it can be concluded that the role of museums as an integral part of the cultural landscape is significantly underestimated in the context of their involvement in cultural tourism and as a tool for forming social identity. Although local residents recognized their importance in the modern cultural process, the activities of these museums and galleries are largely directed inward, toward professionals from the field of culture. Yet, these professionals are already working on the problem of identity and need interdisciplinary research. Meanwhile, the average member of society may be interested in self-knowledge as a representative of a certain culture. As noted by Zou et al. (2022), such self-knowledge is possible through museum tourism. By recognising and discovering other identities through visiting local museums, one can get to know themselves.

In conclusion, museums and galleries as cultural institutions, cultural landscapes, and cultural tourism as cultural phenomena share a common mission: the accumulation, preservation, and reproduction of national identity. Once the role of museums and galleries is properly assessed, the state of the cultural landscape and the level of cultural tourism will inevitably improve.

4. Conclusions

At the beginning of this study, it was established that the formation of cultural institutions such as museums and galleries has undergone substantial transformations in their functions and roles within society. With the progression of historical epochs, the tasks that these institutions performed also changed, moving from sacred needs to the preservation of cultural heritage, scientific research, and the formation of national identity. Based thereon, it was assumed that modern museums and galleries play an important role in shaping the cultural landscape and contribute to the development of cultural tourism. Through the analysis of geographical, historical, cultural, anthropological, and ecological approaches, the author proposed a definition of "cultural landscape" as the unification of geographical and cultural objects within the framework of natural and cultural spaces as sources and places of concentration of cultural values and identity of society. Considering economic, political, environmental and socio-cultural aspects, cultural tourism was defined as the practice of popularising and exchanging cultural values.

A sociological survey was conducted among local residents of Astana, Tirana, Bishkek, and Kyiv. The results from Astana revealed the following: out of 105 respondents, 65 rated the state of the city's cultural landscape at 4 points or higher; and 55 local residents rated the level of cultural tourism at 3. The main factors influencing the state and development of the cultural landscape and tourism included the economic and political level of the city, the interest of tourists from Kazakhstan, the presence of substantial historical places, high-quality infrastructure, and features of local culture. The priority places to visit included cinemas and museums, with the average frequency of visits being once a month. In Bishkek, 82 out of 108 respondents rated the cultural landscape of the city between 2 and 3 points, while 79 survey participants rated cultural tourism between 3 and 4 points. The factors influencing the cultural landscape and tourism in Bishkek mirrored the data obtained in Astana, with additional emphasis on limited access to information and cultural institutions. The average frequency of visits to cultural institutions in Bishkek is several times a year, with museums, galleries, and theatres listed as priorities. In Tirana, the sociological survey revealed that 90 out of 113 respondents rated the local cultural landscape between 4 and 5 points, and 104 participants gave the same rating to cultural tourism.

Political and economic factors, as well as the intensity of city development, were identified as major influences on the cultural landscape. Globalization and the ecological condition of the city were noted as particularly impactful for cultural tourism. The average frequency of visits to cultural institutions in Tirana was once a month or several times a year, with cultural and historical parks and museums being the most visited. In Kyiv, due to the ongoing military situation, ratings for the state of cultural landscape and tourism were lower: the average rating for landscape was 3.5, and for tourism, 3. Influential factors included political power, community initiative, and cultural investment. A very high attendance of museums and theatres was also reported.

The results of the sociological survey serve as basis for developing practical marketing recommendations to improve the activities of museums and increase the importance of their role in the cultural landscape of these capitals. During the survey, respondents also identified cultural institutions local residents would like to see added to the cultural map of their cities. The creation of such maps and clusters aimed at increasing the level of cultural tourism is a key task for further research.

Looking ahead, future studies should further explore the active participation and inclusion of the local population in the interpretation of

the cultural landscape, particularly within museums and galleries. While the current study is focused on specific national contexts, there is an opportunity to expand this research by focusing on the importance of including local communities in shaping cultural narratives. Future studies could consider the influence of generational, cultural-religious, and linguistic-national differences, offering a deeper understanding of how these factors impact public engagement with cultural heritage.

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Appendix I

Example of a questionnaire for a sociological survey of the state of the cultural landscape and cultural tourism in four capitals (Astana, Tirana, Bishkek, Kyiv)

Questionnaire for the participants of the sociological survey		
1.	Specify your age	under 18 from 18 to 24 from 25 to 34 from 35 to 44 from 45 to 54 from 55 to 64 65 +
2.	Specify your gender	Male Female
3.	Do you have any relation to the field of culture?	Yes No
4.	How do you assess the cultural landscape of your city? *choose an option from 1 to 5	1 – very bad 5 – excellent
5.	How do you assess the state of cultural tourism in your city? *choose an option from 1 to 5	1 – very bad 5 – excellent
6.	What do you think affects the cultural landscape of your city? *you can choose several options	Level of economic development of the city Local government policy on preserving cultural legacy Activities of public organisations and initiatives Investments in culture and art Educational level of the population Development intensity and architectural solutions Tourism and interest in the city from visitors Interaction between different cultural groups Local traditions and customs Ecological state and presence of green zones Media and their influence on cultural processes Changes in the demographic structure of the population Accessibility of cultural institutions and events Residents' attitude toward their cultural legacy Globalisation and influence of foreign cultures

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7.	What do you think affects cultural tourism in your city? *you can choose several options	Availability of historical and cultural monuments Infrastructure development (transport, hotels, restaurants) Security level in the city Organisation of cultural events and festivals Advertising campaign and promotion of the city as a tourist destination Quality of excursion programmes and guides Availability of information for tourists (language barriers, information centres) Local culture and traditions Weather conditions and climate Cooperation with international tourism organisations Price level for services and goods for tourists Availability and quality of local kitchens Attitude of local residents toward tourists Ecological state and cleanliness of the city Number and quality of cultural institutions (museums, theatres, galleries)
8.	What cultural institutions do you prefer to visit in your city? *you can choose several options	Museums Galleries Theatres Libraries Cinemas Concert halls Festivals and fairs Cultural and historical parks or complexes Churches or other religious institutions that organise cultural events Lecture halls or educational centres where cultural events are held
9.	How often do you visit selected cultural institutions?	Weekly Several times a month Once a month Several times a year Once a year or less Only for special events I never visit When there is free time When something new and interesting appears Depending on the season or time of year

10.	How accessible are the cultural institutions you have chosen for different groups of the population?	Fully accessible to everyone Available to most, but there are certain restrictions Available only for certain population groups Not available for persons with limited physical abilities Unavailable due to the high cost of tickets Unavailable due to remote or poor transport links Unavailable due to language barriers Unavailable for families with children due to the lack of special programmes or conditions Available only on certain days or hours I don't know / Hard to say
11.	Do you think museums and galleries are important in shaping the cultural landscape and tourism of your city? *a question with a short answer	Briefly describe your idea.
12.	What museums and galleries should be featured on the cultural map of your city? *a question with a short answer	Give examples.

Source: Compiled by the authors.

Vloga muzejev in galerij pri oblikovanju kulturne krajine in kulturnega turizma

Izvleček

Namen študije je oceniti raven razvoja kulturne krajine in kulturnega turizma v glavnih mestih štirih držav: Kazahstana, Kirgizije, Albanije in Ukrajine, na podlagi avtorjeve razlage pojmov »kulturna krajina« in »kulturni turizem«. S tem namenom je bila izvedena empirična študija, in sicer anketa med lokalnimi prebivalci teh prestolnic, v kateri je sodelovalo 443 anketirancev. Stanje kulturne krajine je v Astani ocenjeno s 4 ali več točkami, v Biškeku z 2 do 3 točkami, v Tirani s 4 do 5 točkami, v Kijevu pa s 3,5 točke. Stopnja razvitosti kulturnega turizma je na splošno ocenjena na naslednji način: Astana – 3 točke, Biškek – 3 do 4 točke, Tirana – 4 do 5 točk in Kijev – 3 točke. V skoraj vseh prestolnicah po mnenju lokalnih prebivalcev na kulturno krajino in turizem vplivajo politična oblast in njen odnos do kulturne dediščine, oživljanje nacionalne identitete, gospodar-

ski razvoj, zanimanje turistov in nosilcev kulture, prisotnost zgodovinskih spomenikov, dostopnost, razvita infrastruktura in naložbe v kulturo. Anketa je zajela tudi preference, pogostost obiskov in dostopnost kulturnih ustanov. Največja pogostost obiska je zabeležena v Kijevu, najmanjša pa v Biškeku. Med najbolj priljubljene sodijo muzeji, galerije, kinematografi, gledališča ter kulturni in zgodovinski parki. V skoraj vseh prestolnicah anketiranci poročajo o slabi dostopnosti kulturnih znamenitosti. Udeleženci ankete so pripravili tudi sezname muzejev in galerij, s pomočjo katerih bodo oblikovani kulturni zemljevidi glavnih mestnih znamenitosti.

Ključne besede

dostopnost, kulturne ustanove, kulturni zemljevid mesta, nacionalna identiteta, kulturna izmenjava

Guidelines for Contributors

General — The editorial board of Treatises and Documents, The Journal of Ethnic Studies welcomes the submission of scholarly articles in the field of ethnic and minority studies, especially on racial and ethnic relations, ethnic identity, nationalism, xenophobia, the protection of (ethnic, national, linguistic, religious, and other) minorities, migration, multiculturalism and related subjects. The journal is particularly but not exclusively- interested in discussions regarding ethnic and minority issues in the so- called Alpine-Adriatic-Panonnian area. However, the policy of the editorial board is also to publish excellent contributions with relevant content from different parts of the world, which we would be happy to present to our scientific audience.

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Articles that are submitted must be original, unpublished material and should not be simultaneously under consideration – either in whole or in part – for publication elsewhere.

The journal encourages the submission of articles in English, since this enables authors to present their ideas and work to a broader public. The abstracts of the articles are always published in the language of the article in English and in Slovenian.

Authors who do not have native or equivalent proficiency in English must prior to submission have the article read by someone with this proficiency. This step ensures that the academic content of your paper is fully understood by journal editors and reviewers. Articles which do not meet these requirements will most likely not be considered for publication.

Manuscripts should be submitted in electronic form and must include:
- the submitted article, with the title in the language of the article and in English;
- an abstract of the article in the language of the article and in English; this should include a brief presentation of the issues discussed, the methodology used, the main findings and the conclusions;
- 3 – 7 key words in the language of the article and in English.

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