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CONTENTS

СОДЕРЖАНИЕ

Рецензии на книги

Russian Journal of Linguistics
ISSN 2687-0088 (print), ISSN 2686-8024 (online)

2024 Vol. 28 No. 3 491–511
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The pragmatics of denial and resistance: Some theoretical and methodological considerations

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Abstract

This paper presents a theory of audience-resistance and speaker-denial. The paper commences with the problem of definition, encompassing an analysis of the scope and nature of denial and resistance. The data for this study were primarily obtained from mainstream and social media postings in two languages: English and Arabic. The article primarily draws on discourse and socio-cognitive frameworks. The paper's principal question is how and why Arab and English speakers may resist or deny a remark. Previous research on resistance to figurative language has focused predominantly on the rhetorical trope of metaphor and on what drives the English political and media elite to reject a metaphoric expression. However, this raises an important question that is rarely asked: how and why do members of the general public resist verbal metaphors, and what about other tropes such as hyperbole and metonymy, other languages such as Arabic, and other modalities such as images and art forms? The paper argues that the existing literature on meaning negotiation and/or human dialogic action and behavior is riddled with fundamental theoretical, methodological, and analytical flaws. The paper aims to fill in this gap and has significant implications both for conceptual metaphor theory and for (non-)deliberate language use.

Keywords: *speaker-denial, audience-resistance, multimodal discourse, deliberateness, empirical pragmatics, cross-cultural communication*

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Прагматика отторжения и неприятия: теоретические и методологические аспекты

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Аннотация
В данной статье изложена теория отторжения и неприятия с позиций аудитории и говорящего. В ней дается определение отторжения и неприятия, обсуждаются их рамки и природа. Работа основывается на материале сообщений в основных и социальных сетях на двух языках - английском и арабском. Статья опирается на социально-когнитивные теории дискурса. Главный вопрос статьи - как и почему носители арабского и английского языка отторгают и не принимают сообщения. Предыдущие исследования неприятия образного языка были посвящены преимущественно такому риторическому тропу, как метафора, и тому, что побуждает английскую политическую и медийную элиту отвергать метафорические выражения. Это поднимает важный вопрос, который редко задается: как и почему представители широкой общественности не принимают вербальные метафоры, а также другие тропы, такие как гипербола и метонимия; что происходит в других языках, например, арабском, и в других сферах, таких как изобразительное искусств. В статье показано, что имеющаяся литература, посвященная обсуждению смысла и/или диалогического действия и поведения человека содержит существенные теоретические, методологические и аналитические недостатки. Статья вносит значительный вклад в теорию концептуальной метафоры и преднамеренного или спонтанного использования языка.
Ключевые слова: *неприятие говорящего, отторжение аудиторией, мультимодальный дискурс, преднамеренность, эмпирическая прагматика, кросскультурная коммуникация*

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1. Introduction

The precise nature of what is intended, implied, suggested, hinted at, alluded to, etc., or the speaker's commitment to (or accountability for) that, may become the subject of discursive dispute and negotiation (Haugh 2008). Contrary to what is largely assumed in (neo-)Gricean and relevance-theoretic approaches to communication (Arundale 2008, Haugh 2009: 92), situations such as these may involve underlying, dynamic tension between divergent interpretive and sociocultural norms and expectations that cannot be reduced to contextual differences (Haugh 2008). The failure to perform an intended perlocutionary act is called "perlocutionary frustration" (Langton 1993). Various types of speaker denial (e.g., "Oh no, I never meant that", "I didn't say that", or "I was mistranslated") must be distinguished from those of recipient resistance (e.g., "That is wrong in various ways"). Not only have many researchers, such as Gibbs and Siman (2021), tended to conflate the two, they have also focused on one trope in isolation, namely metaphor, and on only one level of communication, namely the verbal, and imposed an Anglo-centric perspective on other languages and cultures. Specifically, Gibbs and Siman have mistakenly described the overt denial of metaphors as "cancel[ing oneself]"/"resisting one's own metaphor" (2021: 679). For these authors, apology or shame seems to be a defining feature of so-called "cancel culture" (not to be confused with the notion of "cancelation" in pragmatics). Interestingly, "cancel" or "canceled", complete with scare quotes for sanity's sake, is a word Gibbs and Siman use to mean "removed from positions of responsibility" (279). That could also be referred to as "self-criticism", but the latter term is, among other things, too narrow in that it excludes many important forms of denials, as we shall see. Finally, the literature on metaphor resistance is also commonly restricted to elite discourses, such as media texts and parliamentary debates. This narrow focus does a great disservice to scientific research. Previous research also fails to limit bias because the data it uses are generally not 'corpus data' in the sense that corpus linguists would recognize. It would also benefit greatly from the systematic application of Edda Weigand's theory of New Science, which recognizes language as dialog basedon *the sequence of action and reaction* (the Dialogic Principle proper), as outlined in Figure 1. This also means that there is a need to break from classical science to New Science (e.g., Weigand 2023, Weigand & Kecskés 2018). These gaps need to be filled.

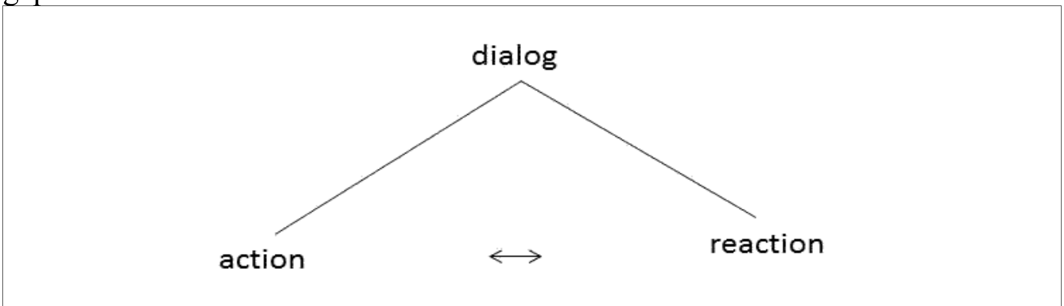

Figure 1. The Dialogic Principle proper (Weigand 2023: 37)

Above I have illustrated rather than defined "denial" and "resistance". Before proceeding to the definitions, it is important to place this paper in the context of previous research. Some studies have inquired as to the reasons why and how people reject metaphors, and preliminary responses have been offered. The motivations for rejecting a metaphor are numerous and diverse. The most frequently cited reasons by researchers continue to be irrelevance, offensiveness, oversimplification or lack of explanatory power, and political rivalry or moral non-alignment (e.g., Gibbs & Siman 2021, van Poppel 2018). It is thus important that we do not confuse the questions of "why" and "how". For Gibbs and Simon, there are two types of resistance: partial (where the same concept is kept, whereas roles and valence are switched) and complete (where the source domain is rejected altogether). Musolff (2022a), on the other hand, distinguishes between three types of metaphor rejection and/or subversion: irony (i.e., the figurative claims' implicatures are put in doubt implicitly), sarcasm (i.e., their plausibility is explicitly decried) and satire (i.e., their presumed absurdity is exhibited). In other words, there are various degrees of im-/explicitness of the dissociation between what a speaker says and how this is rejected in discourse. Ways of critiquing or opposing a speaker's metaphor or hyperbole thus range from critical "thematization" and dismissal to implicit ironical relativization and sarcastic-satirical debunking. These categories are, however, based more on speculation and intuition than analysis, as Musolff draws on quite a few examples from a corpus of English media texts. In particualr, Musolff focuses on "exaggerated figurative claims of (imminent) success" in the 'war' against COVID made by the British government in 2020 and how they are made objects of parody. In other words, he focuses on media reactions to figurative war announcements and how this might impact public trust in pandemic policy. He therefore cannot say anything about how ordinary people might react to government announcements. Similarly, one of the most recent research papers on resistance to (violence) metaphor(s) (for cancer) by Wackers and Plug (2022) analyses a few paragraphs in a couple of Op-Ed articles, limited to two clauses: one elaborating or filling in the "winning"— a realization of either the SPORTS or the WAR analogies, or of a combination of both— as "living graciously and courageously with the disease until the very end", the other, "unfair fight", involving an adjective that modifies the noun, or what Barnden (2016) has termed "elaborative correction" of metaphor.

The studies I have cited so far in this section have not only tended to focus on metaphor and the verbal mode of expression, but also to conflate things and to impose an Anglo-centric perspective on other languages and cultures. At the risk of repetition, the data used in such studies are not generally 'corpus data' in the sense that would be recognized by methodologically oriented corpus linguists, and therefore the literature fails to restrict bias. Almost none of these cognitive approaches revolves around reactions from laypeople or social media users. On the other hand, the very considerable body of work on denial and resistance also fails to recognize language as "negotiation" or as an action-reaction sequence (dialog). It had been anticipated that other researchers would fill these gaps; however this did not occur. Consequently, the necessity for a project of this kind persisted. To further advance the field of denial and resistance research, this paper addresses a multitude of methodological and theoretical concerns. In particular, it focuses on the following questions:

- What is common to denial and resistance and what distinguishes them?
- In what forms are the acts of denial and resistance realized?
- Do people resist figures of speech other than metaphor?
- How and why do they reject visual/multimodal tropes?
- Why does a theory of negotiation need to go beyond the 'speaker-hearer' dichotomy?

I will start with the definitional problem, then proceed, first, to the scope of denial and resistance, and second, to a general discussion. Section 4 lists some general conclusions.

2. Elements of a theory of speaker-denial and audience-resistance

2.1. The definitional problem

First, we need to distinguish between speaker denial and audience resistance. The literature lacks information about the illocutionary functions of both types of acts: as noted by one anonymous reviewer, denial is a type of representative act, while resistance includes a statement ('I do not agree', 'I do not intend to submit') and a demand ('I demand'). Recognizing that human beings are *dialogic*, *intentional, goal-oriented*, *persuasive*, *cultural*, and *moral* individuals (Weigand 2021) is the first step in solving the definitional problem and in developing a theory of denial and resistance. In fact, negotiation between interactants, albeit a common term used by discourse analysts, is rarely analyzed (Leech 2014). As noted by Weigand, each speech act can be either initiative or reactive, but complexities also arise. Generally, denials, blatant or subtle, explicit or disguised, are a move in a strategy of *self-defense* against explicit or implicit accusations, but also part of the strategy of face-keeping or positive self-presentation (van Dijk 1992). In the latter case, van Dijk claims, they are preemptive, that is said or done before someone else has a chance to act or attack so that their plans or actions are prevented from happening. In van Dijk's words, "they may focus on *possible* inferences of the interlocutor" (91; italics his). A reactive denial can simultaneously be an initiative if a recipient reacts to such a denial. The offense someone has admitted to committing may at the same time be excused or justified (Cody & McLaughlin 1988). Studies of denials aim to criticize, challenge or oppose such discourse. Van Dijk (1992), examining racism denials as a form of positive self-presentation, distinguishes various types of denials – disclaimers, mitigations, euphemisms, excuses, blaming the victim, and reversals. The latter may be part of a strategy of flat denial and (counter-)attack. There are also some denial strategies that, if taken at face value, do not seem to fit into any of van Dijk's categories, including instances of what I term "attribution-denial", in which speakers attempt to distance themselves from *controversial comment*s (e.g., "I was only quoting") (Boogaart, Jansen & van Leeuwen 2022, Haugh 2008). This may, however, fall into the category that van Dijk has called a "transfer move". Haugh (2008) also identifies instances where speakers claim that they were mistranslated or taken out of context, or that they were targeting a specific audience, not the wider public. In part the strategies identified here overlap with the category that van Dijk has termed "control-denial".

Within pragmatics, Grice (1989) further makes an important distinction between contextual cancellations and overt denials of implicatures and presuppositions (cf. also Horn 1972, Gazdar 1979, Leech 1983). Crucially, one can directly and overtly deny implicatures without a sense of contradiction, as in "John has three cows, in fact ten" (Levinson 1983). Boogaart, Janse, and van Leeuwen (2020) to some extent go beyond denial of implicature to explore denial of literal meaning, since the latter may also be negotiable. Thus at least two quite different senses of the term 'denial' can be found in the literature, but it was the Gricean sense that eventually became influential. Indeed, cancellation in a Gricean sense is not the same as a speaker's denial of commitment to an implicature at a later stage, in response to widespread public indignation and distrust (Boogaart, Janse & van Leeuwen 2020). In fact, the situation was first noted by van Dijk, who was ignored not only by Haugh but also by Boogaart and his colleagues. However, this idea can be traced back to the pragmaticist Geoffrey Leech (1983), who suggests that "negative sentences tend to be used in situations [...] when *s* [speaker] wants to deny some proposition which has been put forward or entertained by someone in the context (probably the addressee)" (101). For instance, a negative sentence like "Abraham Lincoln was not shot by Ivan Mazeppa" is a denial of what someone else has asserted, i.e., of the allegation that Mazeppa shot Lincoln. Deborah Tannen's book *That's Not What I Meant* was published five years before van Dijk's journal article, but her focus was on intention-denial. It is increasingly easy now to find critics who, when challenged, say "I was just asking" or "just joking" or otherwise "didn't mean anything by it", thus disclaiming (perhaps sincerely) the intent to criticize (Tannen 1986). If they admit to making critical remarks, the validity of the criticism is likely to be defended: "You were doing it wrong" or "I said it because it's true" (135).

Finally, we need to distinguish between genuine and sarcastic denials. For instance, when his people accused him of demolishing their idols, the prophet Abraham replied sarcastically: "Nay, it was the biggest of them, this one [idol], that has done it. So, ask them [the destroyed gods] [for that matter], in case they can speak" (the Qur'an 21: 62–63). He had no intention whatsoever of distancing himself from the destruction of the idols. He wanted his people to conclude that such idols could not defend themselves and therefore should not be worshipped as gods. Put another way, he indirectly provided a reason why the biggest idol could not destroy the smaller ones (they all had none of the characteristics of life), and in so doing could be understood to be accepting the accusation. Abraham confounded his people and proved these gods could do nothing: "Certainly you know these [idols] do not speak", they replied, their heads down in shame. They, however, vowed to take revenge on the man who had destroyed their gods. Abraham had thus been cast into a roaring fire as a punishment.

In contrast, resistance (or rejection, questioning, or non-acceptance) is an opposing or negative reaction to a text, talk, or discourse. Put simply, it refers to im-/explicit commentary on the limitations of certain words, phrases, or clauses (such as metaphors, metonymies, and gendered pronouns), and/or the offering of alternatives (see Lakoff & Turner 1989). Fetzer (2007) thus considers a non-acceptance as "a responsive act par excellence" (493). But this also holds true for a denial. Again, there is considerable overlap, in fact equivalence, between audience resistance and "perlocutionary frustration" (Langton 1993). The latter is a common enough fact of life: people speak, but may fail to achieve the effects that they intend; for example, a joke falls flat; an argument persuades no one, etc. In fact, there are two types of resistance: objectionable words or phrases and objectionable ideas. They differ in that if an objectionable expression is rephrased, paraphrased, or replaced by an alternative frame, the speaker may succeed to achieve the effects he/she has intended. A meta-analysis of the overall efficacy of different types of framing effects in the political domain shows that citizens may be more competent than some envision them to be (Amsalem & Zozner 2020). Hence, Druckman's (2001) main plea is for political scientists and communication scholars to focus on failed framing effects, not just successful ones. This is old news. But it is social power abuse (rather than the resistance against such domination) that is the focus of most research in critical discourse studies (CDS) (van Dijk 2021). The aim of resistance studies is not to criticize or challenge such discourse, but to be "solidary, on the one hand, [and] at the same time critical of text or talk that violates fundamental norms of a democratic society" (van Dijk 2021: 8). There are two forms of resistance — overt/direct and covert/indirect. The former is clear and unambiguous. It can be straightforwardly identified through the use of linguistic markers such as negation or a syntactically positive equivalent. Consider the following headlines: "The trouble with viewing 9/11 and the pandemic through a wartime lens" (the Washington Post) and "Reaching for military metaphors won't help Britain learn to live with COVID" (the Guardian). Both these headlines directly reject the war metaphor for the coronavirus pandemic. Indirect resistance, on the other hand, is masked by humor, irony, and sarcasm. It can only be interpreted contextually, at the discourse level. In general, "the interpretation of implicit meanings of discourse […] is constrained by sociocognitive norms that regulate plausible inferences and expectations" (van Dijk 2014: 282). Back in 2015 when I interviewed visual artist James Nazz about his intentions behind the creation of a picture that portrays the euro as a maze that is ringed in layers like an onion, he described his thought process in the following way: "I like my onions sliced in circles battered in egg with bread crumbs then fried till crispy. It's just a maze". The ironic force of this metaphorical overextension or overelaborations is signaled not only by exaggeration or excessive detail but also by the second clause. Analyses of this sort provide important lessons for linguistic and psychological accounts of metaphor understanding (cf. Musolff 2000). Specifically, they refute Grady's (1997) claims of the poverty of mappings, such as that of THEORIES ARE BUILDINGS. For him, sentences such as "?This theory has French windows" and "?The tenants of her theory are behind in their rent" are not readily interpretable, given that such salient elements and functions of buildings fail to map. My preliminary results are likely to change much. They show that overextending or overelaborating a metaphor in a funny or ironic way— overdone metaphor (in the sense of Attardo (2015) — is only one of the main forms of resistance to it. The resistance here is indirect, rather than direct.

2.2. Beyond metaphor

The literature on resistance to figurative language has typically focused on one trope in isolation, namely metaphor, rather than on the combinations of different tropes or types of nonliteral language, including irony, sarcasm, metonymy, hyperbole, and litotes (cf. Barnden 2020, Popa-Wyatt 2020). Guardian production editor Jamie Fahey wrote on 22 November 2010, in an article that resisted military metaphors: “Bombarding readers with the language of the battleground is hyperbolic, fatuous and insensitive”. The gratuitous use of martial metaphors in news stories is hyperbolic because it takes the most extreme violence possible. Ironically, the Guardian column ran under the headline “Let’s declare war on these tired military metaphors”. That is, although Fahey openly, consciously, rejected the language of the battleground, his headline used that same metaphor. A different irony within metaphor rejection is seen in the fact that negating a frame evokes the frame (Gibbs & Siman 2021, Wegner et al. 1987). Not only overstatement, but also understatement may be used to deceive the audience (Leech 1983), or to make something seem less serious than it really is, and therefore may be resisted. Consider, for example, the literal term ‘global warming’, defined by the Oxford English Dictionary as “the increase in temperature of the earth’s atmosphere that is caused by the increase of particular gases, especially carbon dioxide”. Some people, including Guardian journalists and editors, now use the term ‘global heating’ instead of ‘global warming’ to emphasize how rapid and serious this gradual increase in world temperatures now is. The nouns *warming* and *heating* connect the earth’s atmosphere to a particular region in heat space (cf. Langacker 2008). In other words, the terms form a scale (hot, warm); thus ‘global warming’ entails ‘at least warm’, but merely scalar implicates ‘not hot’; ‘global heating’ entails ‘global warming’, allowing the generalized implicatures *not cold, not warm*, and so on. In short, “the scale of heat is [...] organized so that what is hot is a special sub-case of what is warm” (Levinson 1983: 138). Interestingly, ‘greenhouse gas emissions’ is also used by the Guardian in preference to ‘carbon dioxide emissions’. The latter is not inaccurate, but the former recognizes all the atmosphere-heating gases, such as methane, nitrogen oxides, that is all members of the same category of CLIMATE-DAMAGING GAS (see Lakoff 1987). Put differently, ‘carbon emissions’ narrows the range of gases that are involved in the act of heating to carbon dioxide, whereas “gas emissions” broadens the range of climate-damaging gases. From a cognitive linguistic point of view, the former is a construal of salience (here, of focus of attention) based on a part-whole configuration (Croft & Wood 2000, Paradis 2009), or a MEMBER FOR CATEGORY metonymy in which carbon dioxide stands for gases that cause the increase in temperature of the earth’s atmosphere. By contrast, ‘gas emissions’ involves a CATEGORY FOR MEMBER OF CATEGORY metonymy in which “gas” stands for particular gases, especially carbon dioxide. This latter means that the “active zone” of the trajector/gas that is involved in the act of damaging or heating is not limited to carbon dioxide (see Langacker 2008). To sum up, “carbon emissions” *zooms in on* a salient member of the “warming gas” class, whereas "gas emissions" *zooms out from* it to code the frame element of GAS as an integral, undifferentiated whole. There is considerable overlap, but no equivalence, between metonymies and alternations within norms. The latter "generally represent differences in focus [or emphasis], e.g., rather than differences in overall clause meaning" (Hanks 2013: 174). For instance, Hanks explains that one can talk about *repairing the house*, or alternatively, with a slightly different focus (on parts of a whole), about *repairing the roof*, or you can focus on the presupposition and talk about *repairing the damage*– all with reference to the same event type. Differences of emphasis (or lexical alternations) gradually and systematically shade into difference of meaning (or semantic-type alternations).

2.3. Beyond the verbal mode

Third, denial and resistance studies need to turn to the text-image question – that is, to go beyond the habits and perspectives of verbally centered research traditions. In addition to altering its style guide to introduce terms that more accurately describe the environmental crises unfolding around the world, the Guardian has recently provided updated guidelines on which illustrations its journalists and editors should use to convey the severity of the climate and ecological emergency. The visual information may reveal aspects of meaning whose presence is simply not extractable or predictable from the verbal modality alone (Bateman 2014, Clark 2022). For instance, the lateral mapping of time is totally absent in spoken language. Monday comes before, rather than to the left of, Tuesday (Cienki 1998). Partly this is because people acquire the words and concepts "left" and "right" later than many other basic spatial terms and categories, but also because of their more error-prone use (as is evident from such expressions as "no, your *other* left") (Casasanto & Jasmin 2012). Similarly, Edwards (1997) claims that whereas a columnist who calls a governor a pimp or prostitute may be sued for libel, a political cartoonist who visually depicts that political figure as such is potentially amusing or actually funny, "for there is a simultaneous recognition of what the governor is (figuratively) and is not (literally)" (26). Using the example of 25 young people's responses to a *Daily Mail* cartoon on the subject of same-sex marriage, El Refaie (2011), however, found that several interviewees rejected the cartoon humor for religious reasons. When interviewed about his intentions behind the creation of this cartoon, the artist, Stan McMurty, was at pains to emphasize that he was just having "a laugh," not "a go at gay people" (El Refaie 2011). Some, albeit few, experimental studies thus also directly target audience reactions to denials of intended meaning (see Bonalumi et al. 2023). After all, the issue is *choosing the pertinent pieces*, rather than recording as many data as possible. To quote Weigand (2021), "[d]ata alone cannot open the complex whole" (6); they are "an open, unlimited set of empirical means" (ibid.).

2.4. Beyond the laboratory

One burning question is whether, with more data, the experimental evidence for the "psychological reality of" metaphoric framing effects will strengthen or weaken. Crucially, there is a tremendous debate going on about methodological rigor and replicability. Indeed, effects observed in the laboratory might, however, be "hothouse flowers". There is indeed a tremendous debate going on about methodological rigor and replicability. For Ioannidis (2005), "most claimed research findings are false" (0696). Symposia and journal special issues on this topic just keep coming (e.g., Sönning & Werner 2021). El Refaie (2011) admits that her research method (qualitative one-to-one interviews) has some drawbacks. By contrast, observing real-world behavior inhibits (or at least counteracts) bias and opts out of the replication debate in psychology. Effects observed outside of the laboratory in the full complexity of the real world require no special care (i.e., no perfectly controlled laboratory conditions) for them to burst into full bloom. A measure of real-world behavior has other important advantages: It allows plenty of time for reasoned reflection, and participants cannot guess the purpose of the study (e.g. Segel & Boroditsky 2011). Therefore, metarepresentational follow-ups of public discourse statements are analyzed by, among others, Sperber (2000) and Musolff (2022) as evidence of how parts of the public audience interpret those statements (see also Weizman & Fetzer 2015). The objectivity of this research can, however, be improved by corpus linguistics approaches (Baker 2012). For Baker (2006), using corpora enables researchers to place many restrictions on their cognitive biases, but cannot remove bias completely (McEnery & Hardie 2012). Their selection, screening, and interpretation of data can indeed reveal bias. But several steps could be taken to help improve matters. These include (i) writing methods sections more scrupulously, (ii) continuously cumulating meta-analysis, (iii) investing in more reliable measures and larger sample sizes, (iv) avoiding a simplifying Anglo-centric bias, and (v) reporting, rather than over-reporting, noticed exceptions alongside the overall patterns or trends (see Baker 2006, Ledgerwood 2014).

2.5. Deliberateness: implying versus inferring

Fifth, the topic of denial and resistance originates with debates in pragmatics and cognitive linguistics, specifically debates about the deliberate use of metaphor and the speaker's level of accountability to broader society (Haugh 2008). Obviously, the use of metaphors is not a pragmatic issue without taking into account the illocutionary aspect: what communicative effects are intended by the sender through the use of metaphors? For Musolff (2016), commentators cannot castigate a metaphor as inappropriate, misleading, racist, or hate-fostering without presupposing that it has been deliberately used, so the denial of deliberateness can be easily falsified. According to Gibbs and Siman (2021), however, resisting the implications of some metaphor can be a "conscious" experience, but not necessarily. It can also be automatic and unconscious. Nonetheless, Steen (2017) maintains that consciousness is not the same as awareness, attention, or deliberateness. He speculates that "[p]eople are generally aware of details of language use and discourse during production, reception and exchange", [but they] only seldom know that they are aware" (6). The difference between deliberate and non-deliberate metaphor, he claims, is that the latter does not involve the intentional use of metaphor as metaphor between speaker and hearer or addressee: when talking about argument, for instance, people "typically do not pay distinct attention to the source domain of war as a separate domain of reference" (2). For that author, "deliberate", meaning "intentional", should not be confused with "deliberative", involving or showing careful consideration or discussion. The latter is a term that has been used by Gibbs (2015), but not by Steen. In this sense, all creative metaphors, including extensions and elaborations, may be deliberate. Only in special circumstances can people become conscious (i.e., know that they are aware) of details of language use and discourse (Steen 2017). Take for example when they compose a beautiful poetic line, or when language and discourse have special properties, such as being extremely deviant, ill-formed, difficult, or humorous (his examples). This in fact echoes the opinion of many. To quote Weigand (2023), "[ha]ving intentions means that we as dialogic individuals are *goal-oriented beings*" (34; her italics). Importantly, as noted by Forceville (2019), the deliberateness hypothesis has been there since time immemorial. For example, Lakoff and Turner (1989) argue that extensions are a large part of what makes poetic metaphor much more interesting, noticeable, and more memorable than conventional metaphor. This is because of "the special, nonautomatic use to which ordinary, automatic modes of thought are put" (72; see also Hanks 2013). These are notoriously slippery terms to define, however. First of all, Gibbs' (2015) paper "Do pragmatic signals affect conventional metaphor understanding? A failed test of deliberate metaphor theory" should never have seen the light of day. In other words, both sides of the debate are barking up the wrong tree and/or confusing "inferring" (what a recipient [addressee, overhearer, or another party] does with "implicating" (what an author [speaker, writer, or artist] does). Recipients may infer deliberation and cross-domain mappings even when the metaphor is non-deliberate (cf. Musolff 2019). Similarly, the notion that by using simile the speaker wants his/her recipients to infer cross-domain mappings is a wrong hypothesis. Seemingly more plausible, then, is the distinction between fast and slow thinking, which has been explored by many psychologists over the last thirty-five years. For Kahneman (2011), the automatic processes of System 1 in the mind produce fast thinking, whereas the controlled processes of System 2 produce slow thinking. More clearly, System 1 works automatically and quickly, requiring little or no effort and no sense of voluntary control, while System 2 is "deliberate, effortful, and orderly" (Kahneman 2011: 20–21). This implies that System 1 "cannot be turned off" (25). It is through prolonged practice that mental activities become fast and automatic. System 1 thus has not just learned associations between concepts (the capital of Egypt?), but also learned skills such as reading a chess situation. But the normally automatic functions of attention and memory can be programmed by System 2. This is how System 2 can change the way System 1 works. Consider, for example, counting all occurrences of the letter *a* in this page (Kahneman 2011). Not only do System 1 and System 2 have implications for deniability or accountability, but they raise important questions about how people react to different types of metaphor. However instead of the rigid dead/alive dichotomy, I here draw on Müller's (2008) more dynamic model, in which metaphors may "oscillate between sleeping and waking, depending on the degrees of activated metaphoricity in given contexts of use" (221). In the case of preemptive denials, for instance, recipients should recognize that the speaker, writer, or picture-maker explicitly wants them as audience to focus on wanted semantic or social inferences (those that lead to a positive impression). Blocking unwanted inferences (those that are negative for the speaker [van Dijk 1984]) requires recipients to infer deliberation. A corpus can be used to verify that this is actually the case. It can empirically show, for example, that blocking, as a pragmatic signal or marker of deliberate metaphor, really has a specific communicative impact on the target audience.

2.6. Beyond the monolingual participant

Another question raised is about the bilingual, bicultural/polyglot speaker/writer or hearer/recipient. Crucially, an expression which for an old, Arabic/English bilingual star exemplifies a cliché, an idiom, or a dead metaphor would have to count for another as a literal expression. In other words, the default meaning of a word or phrase varies from person to person, or, as put by Sampson (2013), one man's metaphor is another's exploitation. This has considerable implications for the study of denial and resistance. Let me illustrate this point with an example. An Egyptian actor, Omar Sharif, told the television presenter Mahmud Saad during a phone interview in January 2008 that he "worshiped" (in Egyptian Arabic) two of his fellow actors, Adel Imam and Ahmad Zaki, and that he often prayed (that) he would be filmed standing in front of them. His intended implicature has become the subject of *post facto* discursive dispute between hundreds, if not thousands, of Egyptian social media users. The main implicatures derived by those who were offended by his "worship" comments were that "Sharif is engaged in an act of worship", that "He is a kaffir, a non-Muslim, infidel or unbeliever", that "He shows profound religious devotion and respect to Imam and Zaki", or that "He worships two human beings, not God" (implicature set I_A). By contrast, the main implicatures that were derived by Sharif's supporters were that "He has a strong feeling of love and respect for Imam and Zaki", and that "Imam and Zaki are the greatest actors Egypt or the world has ever seen" (implicature set I_B). Their comments contained words such as "unintended", "metaphorical", and "love, not worship". Sharif's advocates said his comments should not be taken literally, and that the Arabic word had a regular second meaning where "worship" was employed in the sense of 'admire', but those who were most critical of Sharif's remarks continued to claim that what was implicated was in fact I_A. Still, there seems to be some cross-linguistic confusion. Sharif, a polyglot, employed the word in an English sense, which Arabic no longer has or does indeed forbid— and he fell into what may be called a "semantic trap". In any case, such diverging interpretations may not arise in an increasingly secular West. The hyperbolic and figurative or non-literal meaning of the verb "worship" in English is "to love someone or something or admire them very much". The most common literal meaning is "to show respect for God or a god, especially by saying prayers, singing, etc. with other people in a religious building". But "Worship" (preceded by *Your*, *His*, or *Her*) is also "a title used to address or refer to a mayor, magistrate, or a person of similar high rank".

Bilinguals are claimed to "feel less" in their second language (L2) — hence the ease of discussing a sensitive topic such as sex in a foreign language (Bond & Lai 1986). This phenomenon is called "reduced emotional resonance of L2" (Toivo 2020: 2), or "Foreign-Language Effect" (e.g., McFarlane, Perez & Weissglass 2020, Miozzo et al. 2020, for the limits of this phenomenon, cf. Brouwer 2019). English/Arabic bilinguals share in two Knowledge-systems. Particularly interesting is whether when speaking they activate one or both systems. Bilingualism and multiculturalism may speak of a flexible and dynamic understanding of common ground (see Kecskés 2023). Since bilinguals always address others, it may, however, be hypothesized that they often activate the K-system they share with the recipient (that is the K-device of their mental model [van Dijk 2014]). A notable instance of this is former Egyptian foreign minister Nabil Fahmy's English description of his country's relationship with the United States of America (USA) as "a marriage", "not a one-night affair", during a 2014 interview on Washington-based National Public Radio (NPR). By conforming to the pragmalinguistic and sociopragmatic norms of the target language, Fahmy has unintentionally violated his mother tongue's system of values and beliefs: The native phrase he used, namely "a one-night affair", has sexual connotations that have earned him the Egyptian public's — the culturally conservative, socially concerned, middle and lower middle class'— strong condemnation. The salient meaning of the idiom (a brief sexual encounter lasting only for a single night) is activated automatically, and need not to be abandoned and replaced by "a play, concert, etc. that is performed for only one night in a particular place"— the less salient meaning of the phrase. Two are then especially relevant to pragmatic failure (Thomas 1983): domestication (or cultural assimilation) and alienation (or foreignization) (cf. Venuti 1995). Or, to put it more succinctly, phrases are linked with the culture or history of the language community that employs them (Kövecses 2010). The English phrase used by Fahmy was aimed predominantly at an American audience. By using that phrase, Fahmy has opted for a source frame that, albeit rejected by the radio host (now in *addressed recipient* role) as unrealistic, has resonance for the target audience, thus making every effort to leave American listeners (now in *ratified participant* role, "albeit one that cannot assume the speaking role" [Goffman 1981: 232) in peace as much as possible and move himself toward them. People in this culture will thus find the use of words such as 'one-night stand' natural. By suppressing the foreign identity of his mother culture, Fahmy has therefore failed to protect Arabic monolingual speakers (now in *unratified participant* role) and bilingual reporters or opponents (now in *eavesdropper* role?) from the ideological dominance of the Anglo-American language or culture. His failure to modify his behavior might thus be taken as evidence that he did not know or suspect he was under study. To fill the news, the notion 'is like' has been subtitled or translated by many journalists and opponents (now in *production role*) into 'is' and the entailments of 'marriage' or 'one-night stand' have been made explicit. That is, not only has the image in the source text (ST) been retained in Arabic subtitles and translations, it has also been strengthened. However, Arabic monolingual speakers (now in *ratified participant* role) have demonstrated more rejection of the simile than of metaphor, because "is like" implies "is not" (i.e., America and Egypt are not in a legal marriage, but together). The word 'marriage' is loaded with different associations, called "primings" (Hoey 2012), in English (the source culture) and Arabic (the target culture) — that is, the apparent exact equivalents are not equivalently primed — and therefore Arabic translators should have probably avoided a literal translation and opted either for a corresponding TL-simile (such as "There's a [business] partnership between the United States and Egypt") or for a paraphrase (such as 'Sure there's history between Cairo and Washington', or 'Cairo has complex long-term relations with Washington') (see also Schäffner 2004). The Arabic translation of the simile is tasteless but correct. The question now is whether misquoting someone, or changing their words, is the best way to be fair and accurate, that is, to help them get their point across clearly (Ray 2014). If so, we must not casually equate translation with treason. In other words, the only way to be faithful to conveying the intended effect to non-English speakers is, paradoxically, to be unfaithful to the semantic content of the original text (see also Yus 2010). In Danto's words (1997: 61), "the [human] translator is a betrayer precisely when translation is given over precisely to deceit", i.e., to mean something the source text was never intended to. Unlike human translators, machines cannot easily distinguish between different senses of a word such as *bank* (a river bank, a savings bank, etc.), but also have great trouble with satire, jokes, irony, wordplay, and cultural context. Turning back to Fahmy and Egypt's media, then, people are stimulated to read by bad rather than good news. Egypt's foreign ministry tried to deny that Fahmy used the MARRIAGE analogy and that there has been a mistranslation, but everything it did to make things better made them worse. Several Arabic newspapers, including *Raialyoum* and *Youm el-Saba*, have published editorials and op-ed columns criticizing the minister and/or rejecting the "marriage" metaphor. The continuing existence of diverging interpretations of what was implied by Fahmy's comments, however, indicates that this incident cannot simply be labeled as a matter of miscommunication. After all, Americans, the target audience of the metaphor, would not have a problem with the analogy between marriage and the U.S.-Egyptian relationship. Robert Siegel, *All Things Considered* host, has again seemed to resist the analogy, but for a different reason: Fahmy has a deliberately unromantic view of marriage. Note that in 2002, Senator Fred Thompson, Republican of Tennessee, on "Fox News Sunday," described United States-Saudi relations as "a marriage of convenience." The comment caused no uproar. Finally, misunderstandings (or rather discursive disputes) can have literally fatal consequences (Haugh 2008, Tannen 1992). A case in point is the 1945 assassination of a former Egyptian finance minister, Amin Osman, whose anglophilia had also led him to describe the relationship between Britain and Egypt as "a Catholic marriage."

2.7. Participant role

What appears to be of special interest to the pragmatics of denial and resistance, and to translation studies, is *participant role* (Levinson 1987), or (as Goffman [1981] prefers) issues of *footing* (see also Holt & O'Driscoll 2021). As noted by these scholars, difficulties in assigning *addressees*, *recipients* and other non-producing roles may be exploited for interactional purposes (as in the "uncovered meat" remarks, made by Sheik Taj Din al-Hilali and shifted by the Australian media from a specific audience in the Muslim community to wider society, that make for "unaccountable" and "deniable" insults [Haugh 2008]). Indeed, there are many cases where more categories of participant role are presupposed than *speaker* and *addressee* (or 'hearer'), cases where the dyadic model of verbal interaction seems inadequate. For instance, former US president Donald Trump denied on Friday, 12 January 2018, using profanity to describe people from Central America and Africa during talks with US lawmakers the day before. But Senator Dick Durbin, a Democrat who was in the meeting, contradicted Trump to local Chicago press on Friday morning. However, two immigration hard-liners, Republican Sens. David Perdue of Georgia and Tom Cotton of Arkansas, who were also in attendance said they "do not recall the President saying these comments specifically." This sort of example is obviously problematic for simple or traditional schemes. For Clark (1996), side participants and overhearers not only "help shape how speakers and addressees act toward each other", but "also represent different ways of listening and understanding" (15). There has been very little acknowledgement of this in the literature on denial and resistance.

3. General discussion

Debating or negotiating meaning typically come in pairs, such that resistance (one part of the pair) usually requires denial (the second part) in response. Resistance-denial pairs, or paired utterances like accusations and defenses, are rarely studied as interactional sequences, although the process, synchronous or asynchronous, verbal or multimodal, is well documented. To put it differently, psycholinguists and discourse analysts regularly focus either on resistance (a critical, judgmental, "face-attacking", or solidary position) or on denial (a self-defensive or face-saving move).

Thinkers from Susan Sontag to Steven Poole resisted the ubiquitous use of, for example, war metaphors when referring to illnesses such as Aids, cancer, and COVID-19. Look also at these Guardian headlines: "In praise of … the right metaphor", "Rules for writing: block that metaphor!", "'Frontline': is it misleading to apply military metaphors to medicine?", "Swarms, floods and marauders: the toxic metaphors of the migration debate", "Lay off those war metaphors, world leaders. You could be the next casualty", "What's with all the war metaphors? We have wars when politics fails," "Why we shouldn't be calling our healthcare workers 'heroes'", etc. Poole accepted and rejected the phrase "COVID frontline workers" depending on what the adjectival "frontline" meant: If this was a war against COVID-19, then the enemy was already behind our lines, and people did not have to be on the front line to become casualties; on the other hand, if "frontline" meant the melodic soloists of a jazz band, we all could agree that doctors and nurses were our star performers (2020a). He further criticized the oceanic metaphors for the pandemic (waves, surges) for instilling "a sense of inevitability and helplessness while erasing agency" (2002b, para. 9). Charlotte Higgins, the chief culture writer for the Guardian, was also critical of the language of heroism because it could be used to silence critics. Similarly, Margaret Simons, an award-winning freelance journalist and author, criticized the use of wartime metaphors to describe depression:

> People are said to fight or battle depression – which seems to me to be particularly wrong. When I think of the people I know who have been through depression, I have images of journeys through dark forests, of living with the black dog. […] Depression is a process, surely, or a journey or a state of being, more than a battle. And if it is a battle, who is the enemy? Many depressed people could do with compassion for themselves, rather than suggestions they must fight their own heads.
>
> (2015, paras 6–7)

This latter example shows that people may resist metaphors because of a preference for alternatives, but also seems to suggest that those who resist metaphors consciously compare source and target. Crucially, Simons has struggled to complete so-called "mappings" (or "correspondences") between depression and war. More specifically, she failed to find a counterpart to the frame element of "enemy"; or, to put it more accurately, it made no sense to connect "enemy" in the WAR space to "head" in the DEPRESSION scenario. That creates serious problems for the idea of "(partial) cross-domain mapping", but also goes directly against the Lakoffian-Johnsonian stance that most reason or thought is unconscious, or that all metaphor use is something we do without thinking, i.e., something we do unconsciously or automatically. But rather than speculate fretfully on what goes on in the writer's mind, we must leave this for future research. In any case, resistance cannot be taken as evidence of deliberate use on the part of speakers and writers. Put differently, we need to keep the distinction between recipient-inference and speaker-implicature.

4. Conclusion

This discussion has shown that despite the obvious link between the two notions "denial" and "resistance", they have largely been examined separately. Further, the literature needs to move not only beyond metaphor but, quite plausibly, beyond elite discourses, and to recognize the notion of dialogic action, as understood by Edda Weigand. Both kinds of approach should also be concerned with multimodal corpora of online or social media materials across languages and cultures. Mediated mass-communication is much more complex than face-to-face communication in that when a misunderstanding occurs, "the opportunities for immediate repair are usually non-existent, particularly if the communicative exchange is not live but, in one way or another, pre-recorded or already published" (Forceville 2020: 110). Still, although language users who break social norms may not immediately respond to requests for comment, most of them individually resent being condemned as, say, racists or sexists (van Djik 1992). By this, van Dijk also means that awareness of misalignment is a prerequisite for correction/repair, that repair is highly desirable when a misalignment can be potentially catastrophic with respect to achieving communicative goals, and that repair is likely to occur when its cost is considered too low relative to the potential gains from engaging in repair (Elder & Beaver 2022). Elder and Beaver's notion of "conversational repair" is, however, misleading as it implies a focus only on spoken communication (see also Clark 2022). Apologies are therefore made and recorded on the corrections and clarifications page of, for instance, the BBC's website or printed in the Guardian's Corrections and clarifications column. Commenting is also a quintessentially modern form, created by and fashioning the internet. It unites many divergent impulses around a source, showing us what participation online implies. The presence of the original author is not required, however. "Online comment", visual and verbal, is typically "reactive, short and asynchronous" (Reagle 2015: 2) – meaning that it can come seconds, hours, days, months or years of its provocation. It is social and meant to be seen by others. Newspapers and social media platforms try to curate a reasoned debate in comments but also can shut down discussion. Clearly, then, Elder and Beaver's ideas are relevant to written and spoken as well as multimodal communication. A distinction can then also be made between synchronous and asynchronous "cancellation" (Gazdar 1979), meaning that denials, suspensions, clarifications, etc. can be made within seconds, hours, days, months, or even years after the event. Pragmatics studies of denial have largely been limited to the former, that is synchronous communication.

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Euphemisms in South African English economic discourse: Socio-cultural aspects

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Abstract
South African English economic discourse remains underexplored despite its significance in shaping public perception and policy in the region. One of its critical understudied facets are euphemisms, which are heavily influenced by historical and social background and play a crucial role in moderating sensitive issues and managing communication across diverse societal norms. This study aims to fill this gap by identifying how euphemisms reflect and respond to South Africa's socio-cultural setting. The study involved compiling a corpus of approximately 500,000 words sourced from speeches, interviews, and publications by South African specialists with subsequent identification of euphemisms. As a results, 338 euphemisms were found in the corpus. Through continuous sampling, the study then identified, categorized, and quantitatively assessed the socio-cultural aspects of euphemisms across various economic discussions. According to the study results, euphemism in South African English economic discourse correspond to five main thematic groups: Economic and Racial Inequality, Corporate Governance and Ethics, Impact of Migration, Healthcare Economics, and Influence of Globalization. Each thematic group demonstrates patterns of euphemisms occurrence that reflect intentional communication efforts to address or mask sensitive socio-economic issues. The study results posit that euphemisms emerge as a frequently leveraged linguistic device moderating South African English economic discourse. They reflect an adaptive response to South Africa's socio-cultural setting where managing the multifaceted societal norms and historical sensitivities is imperative for effective communication and policy dissemination. The study argues for closer examination of the linguistic composition of South African English economic discourse. The findings contribute to the fields of sociolinguistics and intercultural communication as they expose how euphemisms function as a tool for managing complex socio-economic processes.
Keywords: *euphemism, South African English, economic discourse, socio-cultural analysis, political correctness*

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Эвфемизмы в южноафриканском варианте английского языка: социокультурные аспекты

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Аннотация
Экономический дискурс южноафриканского варианта английского языка остается недостаточно изученным, несмотря на его значимость в формировании общественного восприятия и политики в регионе. Одним из критически важных, но малоизученных, его компонентов являются эвфемизмы, которые в значительной степени подвержены влиянию исторических и социальных предпосылок и играют важную роль в модерировании деликатных вопросов и управлении коммуникацией в рамках различных общественных норм. Целью исследования является восполнение данного пробела путем выявления того, как эвфемизмы отражают социокультурный контекст Южной Африки и обуславливаются им. Авторы скомпилировали корпус текстов объемом около 500.000 слов, источником которого выступили публичные речи, интервью и публикации южноафриканских экономистов, и выявили 338 эвфемизмов. С использованием сплошной выборки в исследовании впоследствии были идентифицированы, категорированы и подвергнуты количественной оценке социокультурные аспекты эвфемизмов в различных экономических дискуссиях. Согласно результатам исследования, эвфемизмы в южноафриканском варианте английского языка соотносятся с пятью основными тематическими группами: экономическое и расовое неравенство, корпоративное управление и этика, влияние миграции, экономика здравоохранения и влияние глобализации. Каждая тематическая группа отличается закономерностями функционирования эвфемизмов, которые отражают намеренные коммуникативные действия, направленные на обсуждение или маскировку чувствительных социально-экономических проблем. Результаты исследования подтверждают, что эвфемизмы выступают в качестве часто используемого лингвистического средства, модерирующего экономический дискурс южноафриканского варианта английского языка. Они являются инструментом адаптивного ответа на социокультурный контекст Южной Африки, где речевое регулирование многообразных социальных норм и исторически чувствительных аспектов является необходимым условием обеспечения эффективной коммуникации и формулирования управленческих решений. Исследование подчеркивает необходимость более детального изучения лингвистического состава экономического дискурса южноафриканского варианта английского языка. Результаты исследования вносят вклад в области социолингвистики и межкультурной коммуникации, раскрывая особенности функционирования эвфемизмов как инструмента управления сложными социоэкономическими процессами.

Ключевые слова: *эвфемизм, южноафриканский вариант английского языка, экономический дискурс, социокультурный анализ, политическая корректность*

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1. Introduction

This study explores euphemisms registered in South African English (SAE) economic discourse by examining how these linguistic tools are employed to construct communication in the socio-cultural setting of today's South African society. Among various linguistic phenomena, euphemisms in economic discourse are particularly notable for their capacity to conform communication to cultural and social norms. This is especially relevant in South Africa, where the economy is characterized by a blend of advanced industrial sectors and extensive informal markets, strongly influenced by the country's multilingualism and the pervasive legacy of its historical divisions. Euphemisms play a significant role in understanding communication strategies and social dynamics, particularly in the South African context, where managing diverse societal norms and historical sensitivities is crucial for effective communication and policy dissemination. Hence, we argue that a focus on SAE as a national variety of English may yield important observations exposing this complex socio-economic environment. As a bridge among the country's eleven official languages, SAE enables communication across linguistic barriers and transmits the cultural and social norms that are integral to economic discourse.

Although the linguistic composition of South African English has been a focus of researchers' attention (Rossouw & Naudé 2008, Deumert & Mabandla 2017, Bamgboṣe 2019, among others), the role of euphemisms within SAE economic discourse has not been thoroughly examined. Studies such as those by Ndhlovu and Botha (2017), Epoge (2013) or Burns et al. (2024) have explored general language use and euphemisms in business and political contexts, but there remains a lack of specific data on how euphemisms function in economic discussions influenced by South Africa's unique socio-cultural background. The gap is particularly notable in the absence of detailed analysis on how these euphemisms affect public perception and policy formulation.

In light of the above, the study seeks to fill this gap and aims to identify and analyze the socio-cultural aspects of euphemisms used by South African economists in their professional public exchanges and consider how exactly euphemisms are employed in the coverage of economic issues against the backdrop of South Africa's socio-cultural background. Specifically, the study aims to address the following research questions:

1. What are the most common euphemisms used in SAE economic discourse?
2. How do these euphemisms reflect South Africa's socio-cultural setting?
3. What is the impact of euphemisms on the perception and communication of economic issues?

Importantly, euphemisms as language tools stand out for their ability to subtly influence perceptions and behaviors, which is why investigating how euphemisms are employed by economists can help identify the socio-cultural mechanisms that guide the choice of these linguistic strategies (Malyuga & Rimmer 2021). The expected findings will outline the practical implications, aiding economists and communication specialists in developing strategies that are effective within their socio-cultural frameworks. Furthermore, this research is anticipated to contribute observations essential to the fields of intercultural communication, sociolinguistics, and linguistic pragmatics, putting a focus on the role of language in professional settings shaped by socio-cultural influences. The novelty of this study thus lies in its comprehensive consideration of the socio-cultural aspects of euphemisms in a relatively understudied context of SAE economic discourse, intended to contribute to the fields of sociolinguistics and intercultural communication by exposing how euphemisms function as tools for managing complex socio-economic realities in South Africa.

2. Literature review

2.1. The socio-cultural dimension of euphemisms

Euphemism as a concept is deeply entrenched in both linguistic theory and sociolinguistic practice, serving as a bridge between language use and the socio-cultural contexts in which it operates. Euphemisms replace words or expressions that are socially stigmatized or deemed inappropriate, avoiding language that might be considered forbidden, indecent, or unacceptable by prevailing societal moral norms, or simply crude and tactless (Malyuga 2023, Malyuga & McCarthy 2021). This definition points to the socio-cultural determinism of euphemisms, illustrating that they carry an additional social weight. The emergence of euphemisms is influenced by the surrounding social conditions, which are in turn shaped by cultural norms and values within a society. Extralinguistic factors such as the context of the speech, national psychology, and established aesthetic and normative values are also of paramount importance in the formation of euphemisms (Chernyavskaya 2023, Sibul et al. 2019, Akopova 2023).

In economic discourse, euphemisms are generally employed for several specific purposes: (1) as a "psychological defense mechanism" to mitigate the negative perception of certain economic events, utilizing words with broad semantics (Lebedeva & Ponomarenko 2023); (2) as a form of information censorship, often stemming from a reluctance to use certain terms or expressions (Grishechko 2024); (3) to manipulate the recipient's perception of information, persuading them of the validity of the speaker's statements, aligning them with the speaker's viewpoint, and cloaking unpleasant facts with neutral connotations (Akopova 2016); and (4) to adhere to social norms, ensuring politeness and tactfulness, thus fostering effective and conflict-free communication (Nakajima et al. 2023).

The socio-cultural approach to studying euphemisms is thus grounded in examining the role of euphemisms within specific cultural and social settings. According to this perspective, euphemisms are not just linguistic phenomena but also social instruments that reflect and reinforce cultural values and taboos (Petrosyan & Grishechko 2019). Exploring euphemisms through a socio-cultural lens enables a deeper comprehension of which subjects and issues are deemed inappropriate or taboo within a society. This approach helps identify the specific words and expressions that are employed to address these sensitive topics, as well as the pragmatic principles that govern the euphemisation process.

2.2. Previous studies on SAE economic discourse

SAE economic discourse is deeply interlaced with the country's socio-political history and its current multilingual and multicultural makeup. The literature on this subject spans several disciplines, including economics, sociology, and linguistics.

The historical context of South Africa has a profound impact on its economic discourse. The end of apartheid in 1994 marked a significant shift in economic policies and practices as it moved towards more inclusive economic strategies aimed at redressing past inequalities. Economic discourse has thus been affected by efforts to promote Black Economic Empowerment (BEE) and address disparities in wealth and opportunity. Scholars like Nattrass and Seekings (2005) have explored how these policies are discussed in economic terms, analyzing the euphemisms and coded language often leveraged to address sensitive issues related to race and economic inequality.

South Africa's linguistic scene is notably diverse, with eleven official languages that reflect its cultural heterogeneity. This multilingualism is bound to affect the nature of SAE economic discourse. Deumert and Mabandla (2017) discuss the implications of language choice in business and government communication and note that English often serves as the lingua franca in formal economic exchanges, despite not being the first language for the majority of South Africans. This scenario – where meanings can vary significantly across different linguistic contexts due to the dominance of a non-native lingua franca – complicates the communication process, including the use of euphemisms. Given this pronounced linguistic complexity, euphemisms in SAE economic discourse may be employed not only to soften or obscure harsh realities but also to manage the meanings and interpretations that arise in a multilingual context.

Corporate governance in South Africa has been a critical area of focus, especially post-apartheid, with significant literature examining how companies address ethical issues and social responsibility. Rossouw and Naudé (2008) investigate how corporate governance reforms post-1994 have influenced business practices and discourse. According to Ackers and Eccles (2015), the King Reports on corporate governance have also been instrumental in shaping the language and practices around corporate ethics, with special attention paid to transparency, accountability, and sustainability.

The discourse surrounding economic policies in South Africa is heavily influenced by ongoing debates about growth, development, and redistribution. Bamgboṣe (2019) examines the rhetoric used in discussing economic policies like the National Development Plan (NDP) and how these discussions reflect social expectations and political pressures. The NDP, a strategic initiative introduced in 2012, outlines a vision for eliminating poverty and reducing inequality by 2030 through inclusive economic growth, quality education, health care, and improved infrastructure. The NDP emphasizes sustainable development and social equity, making it a crucial document in understanding the current economic discourse. The language used in these policy discussions often incorporates rhetorical tools that reflect the tensions and compromises inherent in a society striving for both growth and equity (Grishechko 2023).

The language used in South African economic discussions about inequality is heavily influenced by political sensitivities and efforts to adhere to politically correct standards. For example, Mudau (2024) explores how terms like “previously disadvantaged” and “emerging middle class” are employed to deflect complex social sensitivities associated with discussing economic disparities. Such language is consistent with the ongoing struggles to address the realities of inequality without exacerbating social divisions.

The literature review thus points to the richness of SAE economic discourse and reveals an array of studies focused on its various aspects.

2.3. Existing research on euphemisms in SAE economic discourse

In South Africa, economic reforms have often been articulated through a vocabulary that reflects and constructs public perception and policy implementation. Hence, scholarly efforts had to be made to explain how euphemisms are employed in the discourse surrounding these reforms, particularly focusing on how they mediate the public’s understanding of potentially contentious economic changes.

Scholars (e.g. Ndhlovu & Botha 2017) have noted that post-apartheid economic policy discussions often use euphemisms to soften the impact of neoliberal policies and make debates on privatization and labor market flexibility more palatable. This strategy is evident in terms like “restructuring” instead of “downsizing” and “cost efficiency” instead of “cuts.” Ndhlovu and Botha (2017) argue that such euphemisms can lead to more favorable public responses to policies that might otherwise provoke resistance. Policymakers use softened language to increase acceptance of necessary but unpopular reforms, framing economic adjustments in a less threatening manner to maintain social stability during economic transitions (Eslami et al. 2023). The authors argue that using euphemisms raises concerns about transparency and accountability in governance. As euphemisms mask harsh realities, they can obscure the true impact of policies on individuals and communities, which may lead to a disconnect between government narratives and actual experiences. This gap can undermine trust in public institutions and leaders. Additionally, euphemisms reinforce societal norms about acceptable discourse as they influence attitudes toward change and reform and affect perceptions of economic resilience or vulnerability. The study concludes that euphemisms must be balanced with transparency and genuine dialogue to keep the public truly informed and engaged.

The debate on land redistribution in South Africa often uses euphemisms to temper the discussion's emotional and political intensity. Koot et al. (2019) note that terms like "fairness" and "equity" are employed to engage stakeholders without causing discord. Such language moderates conversations around land reform, a proposed solution to historical injustices, encouraging consensus among varied groups, including those potentially negatively affected by reforms. Yet, these euphemisms, while promoting civility and inclusiveness, may mask the need for urgent, substantial changes to correct deep-rooted inequalities. Therefore, they risk reducing the impact of transformative policies. The authors believe that while moderating discourse is useful, it is important to ensure that significant issues are thoroughly acknowledged and addressed.

In discussions of SAE's economy during downturns, euphemisms such as "economic adjustment" or "fiscal realignment" are often used instead of the more dire term "crisis," as Epoge (2013) notes. These can be instrumental in calming markets and preventing panic, thereby maintaining a semblance of stability despite underlying economic issues. Although they are effective in short-term crisis management, they also can become a threat to transparency, potentially keeping the public uninformed about the real economic conditions. Epoge (2013) argues that while these euphemisms can temporarily ease market tensions, they need to be paired with transparent communication to encourage long-term trust the government and the people.

When it comes to economic sanctions and trade negotiations, euphemisms are employed in government and corporate communications to strike a careful balance. According to Burns et al. (2024), phrases such as "strategic partnerships" and "protective tariffs" serve to conceal the aggressive nature of trade protectionism and the underlying geopolitical objectives. These terms are deliberately chosen to "hide" the true intent and reasoning behind the actions being taken. This strategy helps present actions favorably, mitigating criticism from domestic and international stakeholders. Euphemisms smooth over the complexities of international trade as they frame aggressive measures as protective or strategic to create a cooperative image and reduce perceptions of conflict. This influences how policies are perceived internationally and domestically, often seen as necessary for national security rather than hostile acts. Burns et al. (2024) also posit that such linguistic choices impact diplomatic relations by softening rhetoric, maintaining diplomacy during contentious actions.

While literature review paints a vivid picture of the role that euphemisms play in constructing the narrative around economic policies and reforms in South Africa, notable gaps remain in the existing research, particularly regarding the systematic analysis of how and which of these euphemisms most prominently reflect the South African socio-cultural background. There is a marked absence of structured data on which socio-cultural aspects are most markedly reflected in the use of economic euphemisms in SAE, and this research gap points to the need for an empirical study that can statistically examine the influence and prevalence of specific socio-cultural factors in the use of euphemisms within SAE economic discourse.

3. Materials and methods

To construct a representative corpus of SAE economic discourse, we employed purposive sampling to select texts that provided a broad overview of the economic issues. The authors compiled a corpus of approximately 500,000 words with a total of 338 euphemisms identified. The corpus was drawn from various sources, including speeches and interviews (public addresses and interviews with prominent South African economists at forums such as economic summits and university lectures) and publications (opinion pieces, editorials, and articles from major South African newspapers and online news portals, chosen for their focus on significant economic issues and influence on public economic discourse).

The selection was guided by several specific criteria aimed at maximizing relevance to South African economic discourse and the prevalence of euphemisms, including relevance to key economic topics (policy impacts, market trends, socio-economic growth), influence of speaker or publication (speeches and quotes from esteemed economists and authoritative media), and diversity of perspectives (the corpus was built with a diverse range of sources, including government, private sector, and academic perspectives).

The initial statistical analysis identified the most frequently occurring euphemisms related to socio-cultural themes. This involved identifying euphemisms through a process of manual coding, whereby each instance of euphemistic language was tagged and categorized into thematic groups based on the socio-economic context they addressed. The frequency of occurrence of euphemisms belonging to different categories was calculated to determine the prominence of the themes within the corpus. Following the identification of prevalent themes, a detailed analysis was undertaken on the most frequently observed topics. This phase involved examining how euphemisms were employed to address these topics. The analysis aimed to interpret the socio-cultural aspects of these euphemisms, considering how they contribute to constructing economic discourse and the implications for intercultural communication in South African setting.

The study recognizes potential limitations such as the interpretative nature of analyzing euphemisms and the possible incompleteness of the corpus. While efforts were made to compile a comprehensive dataset, the selected speeches and quotes may not encompass all economic discussions, or the full range of euphemistic language employed across all sectors of the economy. To mitigate these limitations, efforts were made to include a variety of sources, from academic lectures to business magazines, ensuring a broad spectrum of economic discussions is represented. The sampling criteria were also periodically reviewed and adjusted in response to preliminary analysis results, which helped in identifying and including underrepresented themes or sectors.

4. Study results

The quantitative analysis of the corpus revealed five prevalent thematic groups where euphemisms are prominently registered in SAE economic discourse, namely (1) Economic and Racial Inequality, (2) Corporate Governance and Ethics, (3) Impact of Migration, (4) Healthcare Economics, and (5) Influence of Globalization. Each thematic group has shown varying levels of prevalence reflecting distinct socio-cultural aspects within the South African context (Figure 1).

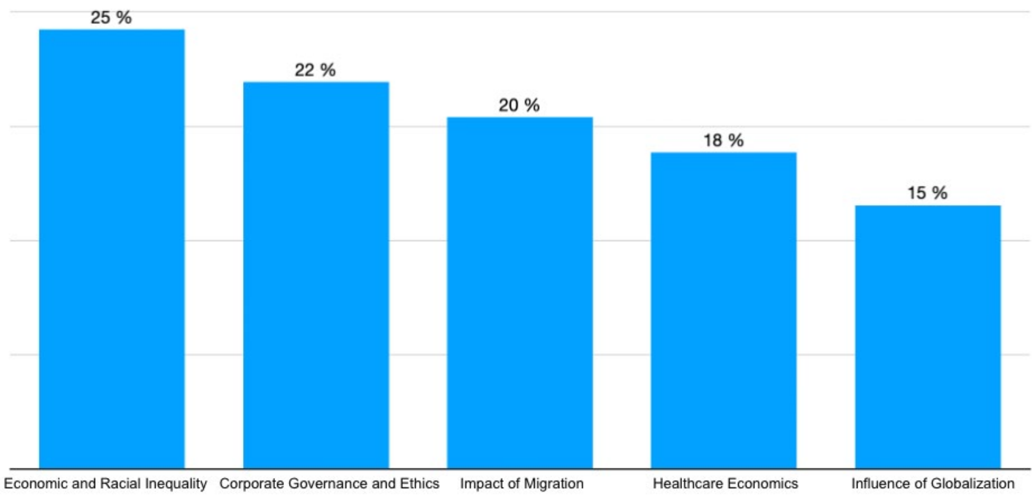

Figure 1. Statistical distribution of the most frequent socio-cultural thematic groups of euphemisms registered in SAE economic discourse

The distribution of euphemisms across various sectors of SAE economic discourse reveals a purposeful deployment aligned with prevalent socio-economic challenges and priorities. Euphemisms addressing Economic and Racial Inequality are most common, comprising 25% of instances (250 occurrences, n = 83), attesting to the significant focus on rectifying historical disparities. Corporate Governance and Ethics follow closely at 22% (220 occurrences, n = 75), which indicates a strong emphasis on ethical business practices in post-apartheid South Africa. The Impact of Migration and Healthcare Economics also show substantial representation at 20% (200 occurrences, n = 68) and 18% (180 occurrences, n = 59) respectively, bringing to the fore the social and economic implications of migration and healthcare policy. The Influence of Globalization, though less frequent at 15% (150 occurrences, n = 53), demonstrates how global economic interactions affect local economic narratives. This distribution illustrates the prominent place of euphemisms in SAE economic discourse, as they serve as tools for both communication and cultural adaptation against the complex South African socio-economic background.

5. Discussion

5.1. Economic and Racial Inequality thematic group

In the corpus examined, euphemisms related to economic inequality have been registered in discussions surrounding policies aimed at rectifying the historical disparities in South Africa. These linguistic choices are not merely stylistic but are essential in moderating politically sensitive and socially charged atmosphere of economic reform. They serve to frame economic initiatives in a manner that is palatable to a diverse populace, hence proving productive for smoother public and political engagement. Table 1 below outlines some of the examples found in this group followed by the analysis of their socio-cultural aspects in the South African context.

Table 1. **Examples of euphemisms registered in the Economic and Racial Inequality thematic group**

Euphemisms	Socio-cultural aspects in the South African context
Previously disadvantaged	The euphemism occurred in the corpus to avoid directly mentioning racial groups that were marginalized under apartheid. Its purpose was to shift the focus from race to a state of being, implying a past condition that policies are now attempting to amend. The euphemism has been found productive for framing policy discussions in a non-divisive manner, creating a sense of historical acknowledgment and ongoing correction without invoking racial tensions directly.
Emerging middle class	In the corpus, the euphemism was employed to describe the socioeconomic ascent of individuals from lower economic strata to gloss over the continuing struggles that many South Africans face despite economic advances. It was wielded to promote a narrative of progress and economic mobility, which can both inspire hope and obscure the stagnation and regression experienced by segments of the population not rising with the economic tide.
Economic empowerment	Employed in lieu of direct references to racial quotas or affirmative action, this euphemism helped frame policies in positive, inclusive terms. It suggested enhancement and capacity-building, diverting attention from the racial undertones and potential controversy around preferential policies. In the corpus, the euphemism was leveraged by policymakers to advocate for necessary reforms while minimizing backlash.
Growth through redistribution	In the corpus, the occurrence of this euphemism was associated with the description of economic strategies intended to decrease wealth disparities. By avoiding direct mention of the potential negative impacts on wealthier individuals or sectors, the term “redistribution” was softened via “growth through”, which connotes positive development and mutual benefit, rather than loss.
Broad-Based Black Economic Empowerment (B-BBEE)	Rather than explicitly stating racial targets, this euphemism encompasses a broader, more inclusive approach to empowerment. It implies a collective uplift of black South Africans but has been critiqued for its vague application and the slow pace of actual economic equality it has brought about.

Euphemisms	Socio-cultural aspects in the South African context
Transformation	The euphemism was registered in the corpus when referring to the overhaul of societal structures and institutions to be more representative of the demographic makeup of South Africa. While it suggests progressive change, it was exploited to mask the slow progress and persistent inequalities in various sectors, from education to employment.
Fiscal realignment	The euphemism was employed in the corpus to describe budget cuts or reallocations that disproportionately affect underprivileged communities. It helped soften the impact of the term "cuts" to suggest a thoughtful, necessary adjustment rather than austerity. Employing the euphemism, policymakers presented these changes as part of broader economic strategies aimed at stabilizing the national economy, rather than reductions that could hinder service delivery to already struggling populations.
Land redistribution	The euphemism occurred in discussions about the sensitive and controversial matter of land ownership in South Africa, a remnant of apartheid, during which the white minority held most of the land. "Redistribution" is used instead of "confiscation" or "repossession". This choice of language portrays the policy as a fair and just attempt to address historical wrongs without inflaming racial tensions. The euphemism helped maintain a balance between redressing past inequalities and promoting unity.
Affordable access	When discussing pricing policies for crucial services such as electricity, water, and education, the term "affordable access" was employed as a euphemism. This phrase addressed the issue of delivering these services to economically diverse populations. Though it suggested fairness and social justice, it also served to conceal the shortcomings in both the availability and quality of services offered to lower-income communities. In the corpus, the euphemism was employed to quell discontent regarding the rising cost of living without making substantial changes to pricing structures.
Skills development	While "skills development" is ostensibly a positive and empowering concept, in the context of economic inequality, it was registered as a euphemism for programs aimed at addressing the employment gap between different racial and economic groups without tackling the systemic barriers that perpetuate these disparities. Used in this vein, it shifted the focus to the individual's need to adapt and upgrade, potentially diverting attention from the need for structural changes in the education and labor markets.

The prevalence of these euphemisms, constituting 25% of the corpus, points to their purposeful incorporation to maintain social harmony and political correctness. Their frequent occurrence reflects the ongoing sensitivity around racial and economic issues in SAE economic discourse and accentuates the role of language in constructing the narrative of economic reform.

5.2. Corporate Governance and Ethics thematic group

In the thematic group of Corporate Governance and Ethics, the study has identified euphemisms that play a significant role in moderating discussions around sensitive corporate practices and ethical considerations in South Africa. These euphemisms serve to manage the complex sphere of post-apartheid corporate responsibility and governance, often masking the harsh realities of corporate misconduct while promoting an image of integrity and responsibility. These linguistic strategies testify to a fine line between transparency and the preservation of corporate reputation, which is critical for maintaining investor confidence and regulatory compliance. Below, Table 2 presents the key euphemisms found in this group, followed by an analysis of their socio-cultural aspects in SAE economic discourse.

Table 2. **Examples of euphemisms registered in the Corporate Governance and Ethics thematic group**

Euphemisms	Socio-cultural aspects in the South African context
Strategic misalignment	The term "strategic misalignment" was used in the situation of diplomatically addressing failures without directly implicating leadership skills or ethical decision-making. This euphemism diluted the perception of mismanagement, reflecting a cultural avoidance of direct confrontation in corporate environments. This is particularly prevalent in the South African context where maintaining corporate image is imperative for investor confidence.
Creative accounting	The euphemism was applied to practices bordering on the unethical, recasting potentially fraudulent activities as innovative financial management. The euphemism registered in the corpus reflected a broader socio-cultural tendency to reframe contentious practices in a positive light, which is significant in a country grappling with corruption and striving to boost transparency in business practices.
Optimizing operational efficiency	This euphemism was employed in discussions about cost-cutting measures that result in job losses, discovered through our analysis. It focused on the positive aspects of efficiency rather than the socioeconomic impact of reduced employment, which is a sensitive issue in South Africa with its high unemployment rates. The euphemism served to soften the impact of such measures in corporate communications, aligning with societal norms that favor stability and gradual change.
Corporate rightsizing	"Corporate rightsizing" appeared in the corpus as a euphemism for workforce reductions. It was presented positively, suggesting improvements in structural efficiency rather than focusing on job losses. The euphemism downplays the social turmoil linked to job cuts to fit the stories of business sustainability and growth during times of economic change.
Enhanced executive compensation	This euphemism was used to justify high executive pay in the corpus, bringing to light the need to attract talent while downplaying the stark wage disparities this creates. In a country with significant income inequality, such as South Africa, this euphemism helps manage public and stakeholder perceptions by focusing on competitiveness and organizational success instead of exacerbating tensions over economic disparities.

The analysis of these euphemisms, which collectively constitute 22% of the thematic instances in our corpus, indicates a tactical employment designed to uphold social harmony and adhere to norms of political correctness within the economic sphere. Their frequent application reveals the persistent sensitivities around corporate governance and ethical issues and lays an emphasis on the role of language in constructing perceptions in corporate ethics. This examination has specified the linguistic strategies harnessed to address corporate governance issues in South Africa's socio-cultural setting.

5.3. Impact of Migration thematic group

In addressing the theme of migration, the study has identified specific euphemisms employed in SAE economic discourse to discuss the impacts of both internal and cross-border migration. These linguistic choices are not arbitrary and are crafted to address sensitive aspects of migration, balancing the tensions between economic necessity and societal integration. These euphemisms bear testimony to a careful approach to discussing the contributions and challenges posed by migrants, in a country where migration dynamics are closely tied to economic opportunities and social cohesion. Table 3 presents the key euphemisms extracted from the corpus.

Table 3. **Examples of euphemisms registered in the Impact of Migration thematic group**

Euphemisms	Socio-cultural aspects in the South African context
Labor flexibility	The euphemism surfaced in discussions on migration-related employment policies, masking the precarious nature of migrant labor, particularly the employment of migrants in sectors characterized by instability and low wages. In SAE economic discourse, "labor flexibility" positively framed the economic adaptation to migrant workforces, minimizing the focus on the often-exploitative conditions, aligning with national narratives that promote economic resilience and adaptability.
Cultural exchange	This euphemism was employed to describe the movement of people across borders, emphasizing the mutual benefits of cultural diversity rather than the challenges of integration and resource allocation. In a South African context, where xenophobia has been a recurrent issue, framing migration as a "cultural exchange" helps mitigate potential social tensions by putting emphasis on positive interactions and contributions rather than competition for scarce resources.
Workforce diversification	This euphemism was employed to discuss the inclusion of migrants in the workforce and suggested a strategic enhancement of the labor pool, which, as revealed by the corpus, served to obscure the socio-economic pressures and occasional community resistance to migrant workers. In SAE economic discourse, "workforce diversification" has been found to align with policies aimed at social integration while deflecting from the complexities and frictions involved.
Population mobility	As a substitute to "migration" or "immigration", "population mobility" was found in the corpus to diffuse the sometimes-negative connotations associated with migration. It provided a neutral or even positive spin on the movement of people, pertinent in contexts where migration is seen as a threat to job security for locals. In SAE economic discourse, this euphemism was found to soften public discourse, framing migration as a normal and beneficial part of global dynamics.
Economic integration	This euphemism was registered in the corpus in contexts related to the economic assimilation of migrants into local economies. The study revealed its application as a way to focus on the economic potential of migrants rather than the challenges or costs of integration. In South Africa, where economic inequality and joblessness are major concerns, the term "economic integration" is used to frame migration as advantageous to the national economy. This helps encourage acceptance and backing for migration policies, presenting them in a positive light.

The analysis based on the corpus data has illustrated the specific euphemisms used and specified their applications in the socio-economic debates surrounding migration in South Africa. These euphemisms reflect the effort to balance economic benefits with social challenges, illustrating the role of language in forming policy discourse in areas critical to national development and social harmony.

5.4. Healthcare Economics thematic group

The theme of Healthcare Economics has revealed how euphemisms are employed in SAE economic discourse to address the issues surrounding healthcare financing, access, and policy changes. These linguistic choices managed the discussions that are tied to the well-being of the populace and are highly sensitive due to the potential life-or-death consequences. These euphemisms serve to moderate the impact of policy shifts and funding changes on public perception, particularly in a country grappling with significant health disparities and ongoing public health challenges. Table 4 below offers critical assessment of the key euphemisms of this thematic group identified in the corpus.

Table 4. **Examples of euphemisms registered in the Healthcare Economics thematic group**

Euphemisms	Socio-cultural aspects in the South African context
Resource reallocation	The euphemism occurred to describe the redirection of healthcare funding. It appeared in policy discussions where budget cuts were reframed as strategic adjustments. In SAE economic discourse, "resource reallocation" was employed to downplay reductions in healthcare spending, which could be controversial given the country's high burden of diseases like HIV/AIDS and tuberculosis. This framing helped to mitigate public concern over potential service degradation.
Service optimization	Found in discussions about restructuring healthcare services, this euphemism referred to efforts to improve efficiency but could also entail service reduction or facility closures. In South Africa, where healthcare access is a significant concern, the phrase "service optimization" implies enhancements and advancements. However, this term can obscure the potential drawbacks, particularly the negative effects on healthcare availability in rural or underserved regions.
Fiscal prudence in healthcare	In the corpus, the euphemism justified stringent budgeting measures within the healthcare sector. It portrayed budget cuts as responsible financial stewardship, which, as revealed by the study, served to align public understanding with the narrative of necessary austerity for long-term sustainability. The euphemism is particularly potent in South Africa, where fiscal constraints are often cited as reasons for limited healthcare funding.
Patient contribution enhancement	Instead of directly mentioning increases in patient fees, this euphemism was employed to frame additional costs to patients as enhancements or contributions to healthcare services. This term helps soften the blow of rising healthcare costs, promoting them as part of collective efforts to maintain quality healthcare services in the face of economic challenges.
Healthcare access leveling	The euphemism appeared in discussions about healthcare equity, leveraged to describe policies aimed at reducing the gap in healthcare access between different socio-economic groups. In the corpus, it was employed to promote a narrative of fairness and equity, while potentially masking the complexities involved in actually achieving this goal in diverse and economically disparate communities across South Africa.

The exploration of these euphemisms through the study's analysis has demonstrated their employment in SAE economic discourse and has exposed their outstanding role in mediating the potentially divisive impacts of healthcare policy and funding decisions. In South Africa, where healthcare is a critical issue interconnected with socio-economic conditions, these euphemisms were effective in managing the tenuous equilibrium between fiscal responsibility and the need to provide adequate health services.

5.5. Influence of Globalization thematic group

The analysis of euphemisms related to the Influence of Globalization in the corpus has demonstrated how such linguistic strategies are adopted to manage discussions surrounding global economic integration and its effects on South African economic policies and practices. These euphemisms framed international economic challenges and opportunities in ways that were palatable to a local audience, potentially masking the difficulties and adjustments required by globalization. Table 5 below provides key examples identified in the corpus, along with the analysis of their socio-cultural aspects in the South African context.

Table 5. **Examples of euphemisms registered in the Influence of Globalization thematic group**

Euphemisms	Socio-cultural aspects in the South African context
Market adjustment	The euphemism surfaced in discussions about the impact of global market fluctuations on the South African economy. It was employed to describe layoffs or downsizing without directly attributing these actions to external global pressures. The study found that using the term "market adjustment" was a common way to ease public fears about job security. It framed economic changes as natural responses to global trends and steered the conversation away from any domestic policy failures.
Strategic partnerships	Wielded to refer to foreign investments or trade agreements that may be controversial, this euphemism helped to posit such arrangements in a positive light. It glossed over the potential for economic dependency or uneven benefits. In South Africa, where foreign economic influence is a sensitive issue, "strategic partnerships" were presented as mutually beneficial, diverting attention from any sovereignty concerns or economic imbalances that might arise.
Fiscal realignment	The euphemism appeared in contexts where economic policies were adjusted to align with global economic trends, often involving austerity measures or budget cuts. In the SAE economic discourse, "fiscal realignment" was framed as a proactive and prudent measure, softening the perception of these adjustments as responses to external pressures or as concessions in international negotiations.
Competitiveness enhancement	Used in reference to regulatory or policy changes aimed at improving the global market position of South African industries, this euphemism masked the potential downsides, such as increased pressure on local businesses and workers. It was portrayed as an initiative for growth, rather than a reaction to global competitive threats. Our analysis indicates that this framing is key to maintaining support for policies that may have challenging domestic impacts.

Euphemisms	Socio-cultural aspects in the South African context
Trade adjustment	The euphemism surfaced in the context of discussions revolving around the adaptation of trade policies in response to global economic conditions. It was leveraged to describe measures that protect local industries from foreign competition, which might otherwise be viewed as protectionism. "Trade adjustment" was presented as a necessary step for economic stability with a focus on resilience. At the same time, any negative implications for free trade and international relations were being downplayed.

These euphemisms, identified through the study's analysis, are a clear evidence of how language is used to construct public and political discourse around globalization in South Africa. They emerge as tools that contextualize global economic trends within the national economic narrative and cushion the impact of these trends on public perception. As policymakers frame international economic challenges in this vein, they can align global dynamics with local expectations and values, calling attention to adaptability and strategic foresight in the face of global change.

6. Critical observations and implications

The primary aim of this study was to analyze the socio-cultural aspects of euphemisms in SAE economic discourse. The research has identified that euphemisms in SAE economic discourse are prominently categorized into five thematic groups: Economic and Racial Inequality, Corporate Governance and Ethics, Impact of Migration, Healthcare Economics, and Influence of Globalization. These findings support the hypothesis that euphemisms serve critical communicative roles reflective of South Africa's unique socio-cultural background and mitigating negative reactions to economic realities. The prevalence of these euphemisms testifies to their productive power to moderate discussions on sensitive issues and support smoother communication in a multilingual and multicultural context.

The findings of this study align with existing literature on the socio-cultural dimensions of euphemisms, particularly in how they align speech with social and cultural expectations to soften potentially sensitive content. Previous studies have postulated that euphemisms serve as psychological defense mechanisms, tools for information censorship, and means of manipulating perception, all of which were evident in our analysis of SAE economic discourse. For instance, the frequent use of terms like "previously disadvantaged" and "emerging middle class" in discussing economic inequality echoes Lebedeva and Ponomarenko's (2023) findings on the socio-cultural basis of euphemistic language.

The findings of this study on the socio-cultural aspects of euphemisms in SAE economic discourse align with and expand upon Mudau's (2024) research on political euphemisms in Tshivenḓa. Mudau's (2024) work, which examines how political euphemisms are deployed to moderate harsh topics and make conversations more acceptable, provides a framework for comprehending the capacity of euphemistic framing in economic discourse. The author's analysis of political euphemisms in Tshivenḓa reveals that these expressions manage face-threatening acts and help maintain social harmony. Similarly, the present study on SAE economic discourse demonstrates that euphemisms serve to moderate discussions on sensitive socio-economic issues, such as economic inequality, corporate governance, migration, healthcare, and globalization, by framing them in less confrontational terms. For instance, Mudau's (2024) discussion of euphemisms like "vhathu vha sa koni" *(indigent people)* and "vhathu vha miholo ya fhasi*" (low-income earners)* parallels the use of terms like "labor flexibility" and "cultural exchange" in SAE economic discourse. Both sets of euphemisms serve to cushion the impact of discussing challenges posed by migration to facilitate more palatable and less divisive public discourse.

Mudau (2024) identifies several linguistic strategies used to form political euphemisms, including understatement, compounding, and circumlocution. These strategies are also evident in the formation of economic euphemisms in SAE. For example, the use of "fiscal realignment" to describe budget cuts or "corporate rightsizing" for layoffs mirrors the understatement and circumlocution strategies observed in Tshivenḓa political euphemisms. These techniques are put in place to offset the negative connotations of economic measures and maintain a positive public image.

Both studies put a focus on the importance of politeness and pragmatic considerations in the use of euphemisms. Mudau's (2024) application of politeness theory illustrates how political euphemisms are wielded to avoid direct confrontation and preserve the dignity of the interlocutors. In SAE economic discourse, euphemisms similarly function to traverse socio-cultural sensitivities and promote effective communication. For example, terms like "service optimization" and "economic empowerment" are embraced to present potentially contentious policies in a more acceptable light, aligning with societal expectations of politeness and respect.

Our study's exploration of euphemisms within the Healthcare Economics thematic group in SAE economic discourse finds notable parallels with the findings of Batibo and Kopi's (2008) research on sex-related euphemisms in Setswana, particularly in the context of the HIV/AIDS pandemic. Batibo and Kopi's (2008) study posits that euphemisms are extensively leveraged to "dodge" sensitive and often stigmatized topics surrounding sexual health and diseases, including HIV/AIDS, to mitigate embarrassment and maintain social decorum, which is critical in public health communication. Similarly, our analysis identified that euphemisms within the Healthcare Economics thematic group in SAE economic discourse function to scale down the presentation of healthcare issues, such as budget cuts and resource allocation, making them more palatable to the public. For instance, terms like "patient contribution enhancement" and "healthcare access leveling" are incorporated into the discourse to describe cuts and efficiency measures in the healthcare sector without triggering public alarm or negative backlash. This aligns with Batibo and Kopi's (2008) observation that HIV euphemisms in Setswana serve to lessen the harshness of the discourse surrounding the disease, bringing about more open and less stigmatized communication. Both studies discuss the role of euphemisms as essential tools for managing public perception and communication in sensitive areas. In the case of our study, the use of healthcare-related euphemisms in SAE economic discourse exposes the importance of framing economic decisions in a manner that maintains public trust and minimizes social unrest. This intentional use of language brings attention to a broader cultural need to handle sensitive topics with care and tact, mirroring the linguistic adaptations observed in Setswana to address the socio-cultural aspects of health and disease.

The study's findings on the socio-cultural aspects of euphemisms in SAE economic discourse, particularly within the thematic group of Corporate Governance and Ethics, can be contextualized against Polzenhagen and Wolf's (2021) research on culture-specific conceptualizations of corruption in African English. Their analysis explains how cultural models and conceptual metaphors in African English are employed to euphemize and, thereby, obscure the illicit nature of corrupt practices. These metaphors often involve culturally familiar and less confrontational terms, echoing deeply embedded cultural practices like gift-giving and negotiating. In the context of Corporate Governance and Ethics, our study found that euphemisms such as "corporate restructuring" and "ethical realignment" can frame potentially negative corporate behaviors, such as layoffs and compliance failures, in a more positive light. This mirrors the use of euphemistic language in the conceptualization of corruption in African English, where terms like "gift-giving" and "favors" are used to disguise bribery and favoritism. Both studies thus expose the functional load of euphemisms as mitigators of the negative connotations associated with these practices, making them more socially acceptable and less likely to provoke public outrage.

Furthermore, Polzenhagen and Wolf (2021) discuss cultural models, such as the kinship-based community model, in shaping the understanding and communication of corruption. This model, which involves reciprocal duties and nurturing within a community, can be seen in how corporate euphemisms in SAE economic discourse are framed. Terms like "corporate citizenship" and "stakeholder engagement" suggest a sense of communal responsibility and ethical behavior, even when underlying actions may contradict these ideals. This cultural framing aligns with African cultural practices that prioritize community cohesion and mutual support, thus ensuring that corporate actions are perceived as being in line with societal values and expectations.

The study by Beaugrande and Williams' (2002) analyzes the South African Corpus of English to interpret the language's role in negotiating social realities, particularly in the evolving discourse of democracy in post-apartheid South Africa. The authors argue that public discourse in South Africa is marked by contested terms that serve different ideological purposes, with "democracy" being a prime example of a term with multiple, often conflicting, meanings. This perspective aligns with our study's findings that euphemisms in SAE economic discourse similarly reflect the complex socio-political backdrop of South Africa. Just as "democracy" can signify various incompatible ideals, euphemisms in economic discourse serve to mediate sensitive socio-economic realities. For instance, terms like "economic empowerment" and "fiscal realignment" in SAE frame economic policies in ways that are consistent with common societal values of progress and stability, while softening the impact of potentially contentious measures. Thus, a smoother public discourse is being created, much like the diverse interpretations of "democracy" help manage ideological tensions in the public sphere.

Furthermore, Beaugrande and Williams (2002) argue that language should be seen as a constantly evolving entity shaped by social practices and interactions. Our study echoes this by illustrating how euphemisms in SAE economic discourse are not static but adapt to the changing socio-economic and political context. The employment of euphemisms reflects ongoing negotiations of meaning and power, serving as tools for maintaining social cohesion and managing public perception.

The findings of our study on euphemistic language use in SAE economic discourse align with the patterns of discursive strategies discussed in Ndhlovu's (2019) research on South Africa's social transformation policies. Ndhlovu (2019) focuses on the neoliberal foundations and raciolinguistic ideologies present in policies like Broad-Based Black Economic Empowerment (B-BBEE) and land reform. Our study similarly reveals that euphemisms in SAE economic discourse often mask underlying socio-economic inequalities and reflect a neoliberal agenda that prioritizes market-led economic rationalism over substantive social transformation. For instance, Ndhlovu's (2019) analysis shows how the language of B-BBEE and land reform is laden with neoliberal jargon that enforces economic empowerment within a market framework, while neglecting the cultural and social dimensions vital to genuine empowerment. Our findings show that euphemisms like "economic empowerment" and "market access" often mask structural inequalities under a guise of progress. This aligns the discourse with a global neoliberal paradigm that Ndhlovu (2019) criticizes for neglecting the realities of marginalized South African communities.

Ndhlovu (2019) emphasizes the neglect of marginalized black South Africans by neoliberal policies. This concern aligns with our study's observation of a mismatch between economic terminology and actual experiences. Collectively, both works urge the adoption of policies that are true to the diverse socio-cultural background of South Africa.

Our study corroborates Mabela et al.'s (2020) analysis of South African political rhetoric, as it illustrates how politicians use language to influence public opinion, often with the aid of euphemisms and selective phrasing to smooth over divisive issues. We noted comparable language patterns in addressing themes such as Economic and Racial Inequality and Migration. Terms like "previously disadvantaged" and "emerging markets" temper the discussion of sharp socio-economic contrasts. This mirrors Mabela et al.'s findings on how leaders choose their language to put a positive spin on their agendas, as demonstrated by Jacob Zuma's speeches, which frequently emphasize unity and progress while understating broader challenges.

Furthermore, our thematic group on the Influence of Globalization shows how terms like “global competitiveness” and “market alignment” are used to frame economic policies within a favorable paradigm, subtly endorsing market-led growth strategies. This reflects the discursive strategies identified by Mabela et al. (2020), where language is crafted to resonate with both national and global audiences, promoting an image of progress and alignment with global standards. This strategic use of language not only influences public perception but also aligns with the political leaders’ need to maintain power and support, as discussed in Mabela et al.’s (2020) research.

Thus, this study echoes existing research on the intentional use of euphemisms in language to manage public perception and navigate sensitive socio-political issues. However, it adds a unique dimension by focusing specifically on SAE economic discourse. By statistically categorizing the most prominent thematic groups – Economic and Racial Inequality, Corporate Governance and Ethics, Impact of Migration, Healthcare Economics, and Influence of Globalization – this research exposes the prevalence and intentional use of euphemistic language within these themes. Our findings reinforce the established understanding of euphemisms as critical tools for mitigating the impact of harsh economic realities and provide an empirical analysis that expands the discourse on how language shapes economic narratives in a culturally diverse and politically complex society like South Africa. Future research should explore the use of euphemisms in other aspects of SAE economic discourse, such as environmental policy and education. Investigating how euphemisms function in different socio-economic contexts within South Africa could be instrumental in interpreting their role in public discourse. Additionally, comparative studies between South African English and other national varieties of English could reveal broader patterns and cultural specificities in the use of euphemistic language. Further examination of the ethical implications of euphemisms in economic discourse is also warranted, balancing the need for effective communication with transparency and accountability.

7. Conclusion

This study filled a crucial gap in understanding how euphemisms in South African English economic discourse reflect and shape South Africa’s socio-cultural setting. The study demonstrated that euphemisms are frequently used in South African economic discussions to cushion sensitive topics influenced by socio-cultural factors. Key themes where euphemisms are prevalent include economic and racial inequality, corporate governance, migration, healthcare, and globalization. In the context of these themes, euphemisms helped moderate discussions and tailor communication strategies within a multicultural framework. The findings exposed the roles and impacts of euphemisms in South African English economic discourse and can be useful in the development of communication practices that align with South Africa’s cultural norms and support effective policy-making and public engagement. Future research should expand on these observations and apply similar linguistic analyses in other contexts to expand the knowledge of global economic discourse.

For policymakers, economists, and communication experts in South Africa and similar multicultural societies, these findings have several implications, as they can help create more effective communication strategies that respect socio-cultural contexts, reduce miscommunications and conflicts, and move towards the adoption of transparent yet culturally sensitive discourse strategies.

Additionally, the study contributes to sociolinguistics and intercultural communication as it demonstrates how euphemisms manage complex socio-economic realities. Special emphasis is put on the importance of language in shaping economic perceptions and outcomes, affecting societal well-being. This research opens avenues for further exploration of how language reflects and forms socio-economic policies in different regions and economic contexts. It also invites discussion on the ethical implications of using euphemisms in economic discourse, balancing transparency with sensitivity – an essential consideration for economists, policymakers, and communicators worldwide.

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Compound nouns as linguistic framing devices in Arabic news headlines in the context of the Israel-Gaza conflict

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Abstract
Compound nouns, whether metaphorical or otherwise, are compact and image-evoking linguistic structures widely used in news headlines. However, a review of the relevant literature shows that they have not been examined in the context of news headlines in Arabic media. Hence, this study aims to identify the role of metaphoric and catchy noun compounds as powerful framing devices in Arabic news headlines, specifically within the context of the Israel-Gaza conflict. Drawing on Entman's (1993) Framing Theory we analysed the corpus, comprising 350 news article headlines sourced from Arabic news agencies and identified compounds using Altakhaineh's (2019) criteria for compoundhood. The overall number of collected compounds amounted to 231 (196 endocentric and 35 exocentric). The study reveals a purposive use of both endocentric and, on occasions, exocentric noun compounds as catchy expressions and metaphors, showing how they influence the narrative surrounding the target conflict. The deliberate preference for endocentric compounds over exocentric ones in Arabic news headlines reinforces the importance of clarity and immediate comprehension in framing devices to ensure effective communication. Through the identification and analysis of ten frames, we argue that the use of compounds as framing devices in Arabic media coverage of the Israel-Gaza conflict reflects a distinctive perspective, constructing a reality that markedly diverges from the narrative often depicted in some Western media. This study contributes to the understanding of Arab media framing, emphasizing the role of compounds in creating compelling, compact, memorable, and emotionally charged representations of current events.
Keywords: *media discourse analysis, noun compounds, framing, news headlines, metaphor, Arabic*

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Составные существительные как средства языкового фрейминга в арабских новостных заголовках (в контексте военного конфликта в секторе Газа)

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Аннотация
Составные существительные, будь то метафорические или иные, являются компактными и образными языковыми структурами, широко используемыми в новостных заголовках. Однако, как показывает обзор соответствующей литературы, они не рассматривались в контексте новостных заголовков в арабских СМИ. Цель данного исследования – определить роль метафорических и выразительных составных существительных как важных фреймовых средств, используемых в арабских новостных заголовках, в частности, в контексте военного конфликта между Израилем и Газой. Опираясь на теорию фрейминга Энтмана (Entman 1993), мы проанализировали корпус, состоящий из 350 заголовков новостных статей, взятых из арабских новостных агентств, и выявили составные существительные на основе критериев, разработанных А. Алтахинэ (Altakhaineh 2019). Всего было выявлено 231 составных существительных (196 эндоцентрических и 35 экзоцентрических). Исследование показывает целенаправленное использование как эндоцентрических составных существительных, так и, в отдельных случаях, экзоцентрических, в качестве броских выражений и метафор и демонстрирует, как они влияют на нарратив, связанный с военным конфиликтом. Намеренное предпочтение эндоцентрических сложных слов экзоцентрическим в арабских новостных заголовках подтверждает важность ясности и незамедлительного понимания фреймов для обеспечения эффективной коммуникации. Выявив и рассмотрев десять фреймов, мы утверждаем, что использование составных существительных в качестве фреймов в арабских СМИ, освещающих конфликт между Израилем и Газой, создает особую информационную картину, которая заметно отличается от нарративов некоторых западных СМИ. Данное исследование вносит вклад в понимание фрейминга в арабских СМИ, подчеркивая роль составных существительных в создании убедительных, компактных, запоминающихся и эмоционально заряженных описаний текущих событий.
Ключевые слова: *анализ медиадискурса, составные существительные, фрейминг, метафора, новостные заголовки, арабский язык*

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1. Introduction

Headlines perform several functions at once even with their institutional conventions and spatial restrictions. They introduce the topic reported in the news article, attract the audience’s attention to it and thus generate their interest in it, highlight the focus of the article, and finally indicate the attitude of the news outlet towards it (Morley 1998, Molek-Kozakowska 2014). The latter function is associated with the endeavours of the outlets to frame issues in certain ways using selected linguistic, stylistic and rhetorical devices (Molek-Kozakowska 2014). In other words, given the limited space they have and the density of that item of information in the press, news headline writers are forced to employ terms or language structures which may be regarded as linguistically compact and attention-getting (Herrera Soler 2008). It is exactly in this part of the report where immense efforts are exerted to structure news in way that allows for prioritising, reordering and highlighting the events reported (Herrera Soler 2008). In this paper, we demonstrate how compounds are deployed by news headline writers in Arab media press as framing devices to construct certain realities. In linguistics, a compound is a lexical unit created by combining two or more elements. Numerous definitions have been proposed for compounds since compound elements in certain languages may not exist as independent words, and there is often ambiguity in distinguishing compounds from other linguistic units like phrases and derived words (see Booij 2007, Lieber & Štekauer 2012). In this study, we will use the definition of compounds proposed by Plag (2003: 135), then we will modify it based on Altakhaineh (2019) who analysed Arabic compounds and proposed a distinction between Arabic compounds and phrases. Plag (2003: 135) stated that "a compound is a word that consists of two elements, the first of which is either a root, a word or a phrase, the second of which is either a root or a word."

In this study, we aim to explore noun compounds which specifically refer to a compound in which both constituent words are nouns (Plag 2003). This is because it has been argued that compounds express complex ideas in a compact, word-like form compared to expressing the same idea with a longer phrase (Adams 2001, Benczes 2010). Based on preliminary analysis of Arabic news headlines in our study, we found that noun compounds in Arabic headlines frequently condense essential key concepts of news stories, enabling succinct yet powerful communication (see Bauer 2020). [1] Compounds can either be endocentric (semantically headed) or exocentric (semantically headless) (see Booij 2007: 81). They can also be metaphor-based (see Benczes 2010, Zibin 2018) which makes them semantically and lexically compact and able to evoke rich images and thus capture readers' attention. In this regard, Gibbs (1994: 124–125) posits that "metaphors allow people to communicate complex configurations of information that better capture the rich, continuous nature of experience than does literal discourse alone" (Gibbs 1994: 125).

[1] Note that there is a debate on whether exocentric compounds can also be based on metaphor similarly to endocentric compounds. A bahuvrihi-compound which is a form of exocentric compound that refers to the person who possesses the entity described by the compound, e.g. *blockhead*, has been argued to be based on metaphor. Bauer et al. (2013) propose that bahuvrihis are exocentric and often meant metaphorically or metonymically. This study will not dwell on whether exocentric or endocentric compounds can be metaphor based or not.

While previous research (e.g. Benczes & Ságvári 2022, Nerlich & Koteyko 2009) has investigated metaphorical compounds as framing devices in specific contexts such as migration in Hungarian and climate change in English (UK), the current study seeks to extend this line of inquiry by focusing specifically on noun compounds in Arabic news headlines in the context of Israel-Gaza conflict, which is characterized by its high level of complexity and its strong political implications that are deeply rooted in history and culture. The ongoing conflict between Israel and Palestinian militant groups, provide a new context to analyze how noun compounds could be carefully deployed as framing devices in Arabic news headlines to construct a reality that could be different from that constructed in some Western media outlets. This conflict has been ongoing since 1948, but the study focuses on the events that started on October 7, 2023 which is deeply connected to the historical roots of the Israeli-Palestinian confrontation. Thus, it may offer an opportunity to examine the role of language in shaping public discourse and constructing different realities. Furthermore, the analysis of noun compounds in Arabic news headlines introduces a cross-cultural aspect, presenting data from Arabic. Hence, the aims of this study are to examine how metaphoric and catchy noun compounds in news headlines in Arab media can be used as framing devices to present a narrative about Israeli-Gaza conflict that is different from the one found in some Western media outlets in light of Framing Theory (Entman 1993, 2007). In particular, the study seeks to provide answers to the following research questions:

1) To what extent are metaphoric and catchy noun compounds in news headlines in Arab media used as framing devices to present a specific narrative about the Israel-Gaza conflict?

2) What are the main frames found in the collected noun compounds in news headlines in selected Arab media?

3) What are the implications of using endocentric and exocentric noun compounds in news headlines as framing devices?

2. Background

2.1. Arabic compounds

Prior to defining compounds in Arabic, an important distinction should be made between two constructs that are similarly structured but are semantically different. In Arabic, a structure called *Idˤa:fah*, known as a Synthetic Genitive Construction (SGC) or Construct State (CS), consists of two types of structure, compounds and phrases. The construction generally consists of two nouns or, in some cases, an adjective and a noun, with a left-hand constituent taking the nominative, accusative or genitive case, depending on the syntactic function of the whole construct in the sentence under consideration, while the right-hand constituent always takes the genitive case (Altakhaineh 2019). Regarding the definiteness of the construct, Fassi Fehri (2012: 156) shows that the left element, which is the head of the compound (Altakhaineh 2019), is always indefinite, while the right one can be found as definite or indefinite. Consider the following examples:

(1) *xa:tam-u ʔal-fata:t-i* (Phrase)
ring-NOM DEF-girl-GEN
'The girl's ring'

(2) *kursijj-u ʔal-xaʃab-i* (Compound)
chair-NOM DEF-wood-GEN
'The wooden chair'

Example (1) is a phrase in which the relationship between the two nouns is possessive, whereas example (2) consists of a compound in which the right constituent classifies or modifies the left one. In a recent study that systematically examines the structure of Arabic compounds, Altakhaineh (2019) argues that referentiality and adjacency are considered as the most reliable criteria for distinguishing compounds from phrases in Arabic and possibly across other languages. The former refers to the inseparability of the constituents of the compounds where no element can interfere between the two (see Lieber & Štekauer 2012: 11–12), while the latter refers to picking out entities in the physical world. That is, the right-hand constituent of compounds is normally non-referential (see *ʔalxaʃabi* 'the wood' in example (2) which refers to no specific wood but to the material itself). Conversely, the right-hand constituent in phrases is always referential (*ʔalfatati* 'the girl' in example 2 refers to a specific girl). Thus, despite being structurally similar, the two types of SGCs are not semantically similar. Hence, based on criteria of compoundhood suggested in the literature (see Lieber & Štekauer 2012), Altakhaineh (2019) modified Plag's definition stating that a compound as a complex word consists of at least two adjacent components, where the non-head element typically does not refer to something specific. Each component can be a word, a combining form, or a phrase, with the entire compound being a blend of these elements. This is the definition we adopt to identify compounds in this study.

The relevant literature (Fabb 1988: 66–67, Booij 2007: 81) discusses various types of compounds. The types mentioned here are primarily endocentric or semantically headed compounds, e.g. a *bookstore*, which is type of shop. These compounds have a semantic head, that is the right-hand element *store*. Thus, the compound denotes a hyponym of its head. The other type is called exocentric, which is semantically headless. These compounds have no semantic head and thus do not denote a hyponym of their head, e.g. *egghead* is not a type of a head. Arabic compounds can also be endocentric (*ʕasˁi:ru ʔattuffa:ħi* 'apple juice') or exocentric (*ʃaʕar ʔalbana:t* lit. girl's hair 'candy floss'), yet the head of Arabic endocentric compounds is the left-hand element rather than the right one like English. Arabic compounds can also be metaphor and/or metonymy-based (see Altakhaineh 2022).

Since this study analyses news headlines in the press media, the variety of Arabic studied in this paper is Modern Standard Arabic. This variety of Arabic, referred to as *fusˁħa:,* is the only formal variety of Arabic usually found in news broadcasts, newspapers, official correspondences, sermons, among others. The spoken varieties of Arabic rely on the geographical areas of the speakers, e.g. Jordanian Arabic, Syrian Arabic, Egyptian Arabic, etc. These spoken dialects are the ones which are nativized by Arabic-speaking children, while MSA has no speech community (Zibin 2019).

2.2. Theoretical framework

Entman defined framing as the act of emphasizing a particular aspect of reality in communication text. Framing has its origin in the way journalists present news to enhance understanding. Frames capture the essence of a problem, describe the nature of a situation and suggest methods of analysis (see Berinsky & Kinder 2006). Entman (1993: 53) argues that 'salience' can be defined as "making a piece of information more noticeable, meaningful, or memorable to audiences". Thus, "an increase in salience enhances the probability that receivers will perceive the information, discern meaning and thus process it, and store it in memory" (Entman 1993: 53).

News media significantly influences public perceptions through initial framing (Lee & Basnyat 2013). Media frames are described as central organizing ideas or storylines that give meaning to unfolding events; they suggest the essence of controversies and the core issues (Gamson & Modigliani 1989). In communication research, Framing Theory, also known as news framing theory or Media Framing Theory, posits that people's perceptions are likely to be shaped when media messages are presented within specific frames (see Şenocak 2017, Larina et al. 2020). Frames, according to De Vreese (2005), focus on highlighting the importance of various elements of a topic, while D'Angelo (2019) defines frames as individuals' attempts to persuade using language and paralinguistic messages that describe, identify, and analyse an issue's characteristics and structures.

While many studies presented one-sided frames, i.e. from one perspective, other studies present dual frames or counter frames (Anderson 2018). The former refers to the simultaneous presences of two different frames within a certain narrative or discourse (Anderson 2018). Such frames may provide different perspectives or emphasize different aspects of the same issue. However, they may not necessarily contradict one another. The latter, namely, counter frames, are those that specifically contradict the original frame and are presented at a later date than the original one (Chong & Druckman 2013). According to Anderson (2018), counter frames offer important insights into the concept of negotiated meaning in the presence of competing messages; thus, political science researchers have examined counter-frames within the context of competition in the political field. The current study will also explore counter frames in the context of the Israel-Gaza conflict.

Entman (1993) proposed studying and identifying frames in news stories by analysing particular keywords, stock phrases, stereotyped metaphors, information sources, and sentences that form thematically reinforcing clusters of facts or judgments. A deductive approach to news framing analysis aims to determine which components in a news story constitute a frame. Framing devices, as defined by Gamson and Modigliani (1989), summarize information and create a “media package” of a problem. They distinguish between framing devices that suggest how to think about the issue and reasoning devices that justify what should be done about it. The five framing devices proposed by Gamson and Modigliani include metaphors, exemplars (historical examples), catchphrases/expressions, depictions, and visual images (e.g., icons).

Our study utilizes Entman's framing theory by employing its key concepts and analytical framework to examine noun compounds in Arabic news headlines. Our investigation focuses on the role of these compounds as framing devices, which potentially influence how the audience perceives and interprets the Israel-Gaza conflict. Building upon Entman's focus on the significance of salience in framing (1993), we investigate how noun compounds amplify the prominence of particular elements of the war in news discourse, thereby constructing different narratives of the war. Our aim is to enhance understanding of how language, particularly noun compounds, influences media portrayals and public perspectives on war by illustrating the function of noun compounds as framing tools.

2.3. Studies on the language of news headlines

In their endeavour to capture the attention of readers, journalists invest significant effort in formulating their news headlines. If a headline fails to capture the interest of the reader, it may result in the story being overlooked, which in turn could lead to a decline in activity on the news page and a reduction in potential commercial profit (Blom & Hansen 2015). Consequently, journalists utilise a variety of techniques to ensure that their headlines are both attention-grabbing and memorable. Some use sensationalism (see Molek-Kozakowska 2013), others employ narrative and stylistic devices (see Schaffer 1995, Ifantidou 2009), some writers centre on provoking content, while others use linguistic and figurative devices, such as metaphors (Herrera Soler 2008, Nerlich & Koteyko 2009, Marcoci 2014, Robert 2020, Zibin 2020, Benczes & Ságvári 2022). A review of the relevant literature indicates that compounds, whether metaphoric or otherwise, as linguistic devices have not been examined in the context of news headlines in Arabic. This is despite the compact nature of such compounds and their image-evoking characteristics, which make them a potentially useful linguistic structure to be employed in news headlines. Hence, this paper examines the use of noun compounds in news headlines in Arab press media, with particular focus on their potential as framing devices. This section presents a review of some studies on the various devices and styles employed by writers in news headlines. Benczes and Ságvári (2022) argue that the use of metaphorical language, known as figurative framing, is particularly powerful in conveying intellectual ideas and influencing public sentiment on a given matter. As the issue of migration has been a subject of intense controversy in the modern Hungarian media, the process of framing begins with the choice of terminology that journalists use to describe individuals who have fled their home countries: bevándorló "immigrant", migráns "migrant", or menekült "refugee". Benczes and Ságvári (2022) suggest that the associations that arise depend on the label used, which in turn is based on distinct metaphorical conceptualizations. Thus, they conducted an analysis of metaphorical compounds using the keywords found in a media corpus consisting of around 15 million words. The results of the study show that all three keywords primarily elicit negative frames and evaluations that are based on commonly used metaphorical concepts found in international literature, such as FLOOD, OBJECT, BUSINESS, WAR, and CRIME. However, the distribution of these metaphors varies depending on two factors: a) the specific keyword chosen, and b) the political agenda of the media source.

Despite extensive research on news framing and the linguistic aspects of headlines, there is a notable research gap in the literature concerning the role of noun compounds in framing the Arabic media discourse. This study aims to fill this gap by applying Entman's framing theory to the analysis of the compounds employed in Arabic news headlines. Entman's theoretical framework provides a systematic approach to understanding how media shapes public perception through framing. By focusing on noun compounds, this study aims to elucidate the manner in which Arabic compounds are utilized as framing devices in the context of Israeli-Gaza conflict. This will provide insight into the distinctive linguistic features employed to convey meaning, accentuate specific aspects of the conflict, and potentially influence public opinion. 3. Data and methods

3. Data and methods

3.1. Data collection

A pilot analysis of Arabic news headlines was conducted to identify potential compound candidates. This analysis enabled the identification of potential data sources and keywords that can be used to find the target compounds. The main Arabic keywords that we used were: حرب غزة 'Gaza War', حرب اسرائيل و غزة 'Israel and Gaza War', إبادة 'genocide', مذابح 'slaughter', أسلحة اسرائيل 'Israeli weapons', مجاعة في غزة'famine in Gaza' and related terms. The compounds were manually collected from Arabic newspapers and websites we have earlier identified in our pilot search, namely:الجزيرة (Aljazzera), ديوان(Diwan), الغد (Al-Ghad), الراي (Al-Rai), and الحرية (Al-Hurriyah), القدس (Al-Quds), كتائب (Kataeb), القدس العربي (Al-Quds Al-Arabi), العربي (Alaraby), (Al-Ayyam) الأيام, infoplus, Skynews Arabia, الحدث (AlHadath) and others. The compounds were extracted from a total of 350 news article headlines spanning the timeline from October 7, 2023, to December 26, 2023, and the overall number of collected compounds amounted to 231 (196 endocentric and 35 exocentric).

3.2. Data analysis

We conducted a type-based analysis of compounds and the type of metaphor they contain, (see Kövecses et al. 2019). This issue of frequency of occurrence was not considered in our study due to the small size of the corpus. Type-based analysis offers several advantages over token-based analysis in the context of studying noun compounds in a small corpus of Arabic news headlines (see Maalej & Zibin 2024). By analysing each compound, we identified the type of noun compound used (endocentric vs. exocentric) based on Booij (2007: 81), decided whether it can be categorised as catchy (evoking emotions, calling for action, or containing accusatory language that may capture the reader's attention), and identified the metaphor it encompasses (see Abed & Rathwan 2024).

The identification of noun compounds was conducted in accordance with Altakhaineh's (2019) criteria of compoundhood (see section 2.2). This criteria-based approach of compoundhood aimed to ensure a thorough analysis of the compounds under investigation, which contributes to the reliability of the findings in this study. The identification of metaphors underlying the compounds was done in line with Metaphor Identification Procedure (MIP) (Pragglejaz 2007) as follows:

(3) عملية "**طوفان الأقصى**" تكبد إسرائيل خسائر مليونية بقطاع الطاقة أسبوعيا
(Aljazzera Oct 2023)
ʕamalijjat ***tˤu:fan*** *ʔa**lʔaqsˤa*** *tukabbid ʔisra:ʔi:l xasa:ʔir milju:nejjah biqitˤa:ʕ ʔatˤtˤa:qah ʔisbu:ʕijjan*
Operation "**Al-Aqsa Flood**" Costs Israel Millions in Energy Sector Weekly.

Firstly, we identified the type of compound; *طوفان الأقصى* 'Al-Aqsa flood' is an exocentric compound. In this compound, *flood* is the noun that describes the event or situation, while Al-Aqsa specifies the context of the flood. However, the compound as a whole does not explicitly state the category of the flood or provide the main concept. Instead, it relies on the understanding of the context or the event itself. Therefore, Al-Aqsa flood is an exocentric compound.

Subsequently, the following methodology was employed in order to ascertain the underlying metaphors.

1) Textual analysis: The compound *طوفان الأقصى* 'Al-Aqsa flood' departs from its literal definition of a flood and refers instead to a noteworthy event or happening connected to Al-Aqsa Mosque;

2) Contextual understanding: Considering the historical and theological importance of Al-Aqsa Mosque, the metaphor potentially symbolizes the united effort and mobilization made to protect the mosque from perceived dangers or assaults;

3) Domain mapping: The target domain, AL-AQSA FLOOD, is symbolically coupled with the source domain, POWERFUL HUMAN FORCE MOBILIZED TO PROTECT AL-AQSA, implying an unstoppable human force connected to events concerning

the mosque. This symbolic representation emphasizes the scale and significance of the defensive measures implemented in response to perceived dangers to Al-Aqsa;

4) Linguistic analysis: The term *طوفان* 'flood' is chosen to suggest imagery of a powerful and uncontrollable rush of humans, while *الأقصى* 'Al-Aqsa' identifies the aims of the flood, emphasizing its relationship to the mosque;

5) Interpretation: The compound "*طوفان الأقصى*" 'Al-Aqsa flood' can be seen as representing a united and powerful reaction to protect Al-Aqsa Mosque from potential dangers or assaults. The term طوفان 'flood' indicates the collective strength of Hamas fighters who are dedicated to protecting the mosque. FLOOD when connected to humans in other types of discourse has mainly negative connotations, especially in migration discourse (see Zibin 2020), while in this context, it has positive connotations.

We identified the frames used in the compounds based on Entman's framing theory (1993) as they are the overarching themes that determine the manner in which the conflict is portrayed in noun compounds from the perspective of Arab news websites. There are two main methods for identifying frames: deductive and inductive. The former involves drawing conclusions based on existing theories or principles, which means that researchers analyze discourse with pre-established frames in mind (Corbu et al. 2017, Kushneruk 2024). Conversely, in the inductive approach, researchers derive frames from patterns that emerge in the raw data (Kushneruk 2024). In this study, the authors employed a deductive method, beginning with a broad list of "frame dimensions" (Boydstun et al. 2019) and progressing to a specific interpretation of what is expressed in noun compounds found in Arab news headlines. This perspective will demonstrate that Arab news headline journalists use varying types of frames to create a particular narrative (Ogneva, Stepanova & Chikovani 2022, Kushneruk 2024).

The predominant type of frames identified were problem frames, which portray the war as a crisis or challenge. In contrast, diagnostic frames, which were less prevalent, typically elucidate the underlying causes of the war. Our analysis of the frame elements involved recognizing and analyzing specific words – verbs, compounds, adjectives and others – that are employed to communicate the frame. Subsequently, we concentrated on noun compounds with a view to identify recurrent patterns that serve to reinforce the narrative structure, in our case the Arabic narrative as reported in Arabic news headlines. We then undertook an analysis of the potential impact of the frame in question. This entailed an investigation into how the frame in question might be employed to construct a reality that could affect the perception of the conflict. The influence of certain frames on individuals' perception of the war, their attribution of responsibility, and their perception of essential actions cannot be discounted. Furthermore, we considered any emotional appeals (see Ozymenko & Larina 2021) or moral judgments that are subtly incorporated into the frames through catchy words or expressions (those that evoke emotions, call for action or contain condemning language catching the audience's attention). In addition, we considered the source of news and assessed the frames consistency. It should be noted that the Arab news media that we examined were relatively uniform in their narrative despite being owned by different Arab countries, with the exception of some news communication channels that did not include one frame in particular (see the following section), i.e. the positive depiction of Hamas fighters (e.g. Sky news Arabia which is owned by the British media and telecommunications conglomerate Sky Group). Although the media outlets in question presented their coverage from the perspectives of Gazans, some discrepancies were identified, suggesting the possibility of divergent viewpoints or ulterior motives. Finally, we examined the counter-frames presented by Arab outlets, which offer an alternative on the Israeli narrative, which is widely accepted in the West.

4. Results

Starting with endocentric compounds and moving on to exocentric compounds, the study of noun compounds is purposefully structured. The order and the data are determined by the thematic importance that has been identified in the data. The frame analysis revealed that the chosen illustrative compounds emphasize 10 main frames: 1) the disproportionate number of losses (genocide) experienced by civilians in Gaza 2) Israel being the aggressor and Gazans being the victims, 3) the severe humanitarian condition in Gaza caused by Israel, 4) the difficult nature of the fighting and the treacherous terrain of Gaza favouring Hamas, 5) the tension about who will prevail in the conflict, Israel or Hamas, 6) the financial (and other) losses incurred by Israel (see example 4), 7) the destructive power of Israeli weapons, 8) the lack of international support to Gaza compared to Israel, 9) the inconsistency in the Israeli media narrative; and 10) the positive depiction of Hamas combatants. The selection of the following examples for discussion was based on the above frames. The analysis attempts to achieve an understanding of how noun compounds are employed to frame and depict the conflict in Arabic news headlines by concentrating on these specific issues.

4.1. Endocentric noun compounds

(4) مشاهد تفطر القلوب.. **شبح الجوع** يخيّم على نازحي غزة
(AlHadath, Dec, 2023)
*maʃa:hid taftˁir ʔalqulu:b... **ʃabaħ ʔadʒu:ʕ** juxajjim ʕala na:ziħi: ɣazzah*
Scenes that Break Hearts... **The Hunger Ghost** Looms over the Displaced in Gaza.

In example (4), *شبح الجوع* ‘the hunger ghost’ reflects the third frame ‘the severe humanitarian condition in Gaza caused by Israel’. This is an endocentric compound noun. As explained, endocentric compounds are ones where one element (the head) determines the category of the compound as a whole. Here, *شبح* ‘ghost’ is the head, and *الجوع* ‘hunger’ specifies the type of ghost. The compound *شبح الجوع* ‘the hunger ghost’ contains the metaphor HUNGER IS A GHOST which highlights the intense pain and hopelessness endured by Gazans impacted by starvation. The compound acts as a framing device by evoking a powerful image. The word *شبح* ‘ghost’ carries connotations of something eerie, ghostly, or menacing, while *الجوع* ‘hunger’ emphasizes the specific threat being highlighted. Since the beginning of the conflict on October 7, 2023, Israel has cut off water, electricity, and fuel supplies in the Gaza Strip. Additionally, it has prevented Egypt from allowing humanitarian aid to enter Gaza through the Rafah crossing. The metaphor HUNGER IS A GHOST is a framing technique that emphasizes the seriousness and urgency of the issue of hunger faced by displaced people in Gaza. It can be observed how the metaphoric compound frames the situation it as a dire one that demands urgent international attention and intervention. The description of this ghost has sadly become realistic after having people, especially children, dying because of hunger in Gaza as a result of the war.

(5) صحف عالمية: معلومات الاحتلال مغلوطة وحذر غربي من مصطلح **"إبادة غزة"**
(Aljazeera Dec, 2023)
sˤuħuf ʕa:lamijjah: maʕlu:ma:t ʔalʔiħtila:l maɣlu:tˤah wa ħaðar ɣarbi: min musˤtˤalaħ ***ʔiba:dat ɣazzah***
International Newspapers: The Occupation Information is Misleading, and Western Warning against the Term ‘**Gaza Genocide’.**

In (5), the term *إبادة غزة* ‘Gaza genocide’ is an endocentric compound formed by combining two elements: *إبادة* ‘genocide’ and *غزة* ‘Gaza’. Within the headline, *إبادة غزة* reflects frame 9 ‘the potential inconsistency of the Israeli media narrative’ and also functions as a counter-frame to the narrative disseminated by many Western media platforms concerning the state of affairs in Gaza. The compound undermines the narrative presented by Western sources regarding events in Gaza, as it portrays the situation as one characterized by excessive violence and killing by Israeli occupation forces. The news shows that even though these international newspapers report misleading Israeli stories, the West is still not convinced that what is happening in Gaza can be called ‘genocide’.

(6) 40يوماً على العدوان الإسرائيلي على غزة.. أرقام مفزعة **لعذابات المدنيين** وصور مشرقة **لصمود القسّاميين** ورفاقهم في وجه **آلة الموت**
(Infoplus, November 2023)
40yawman ʔala ʔalʕidwa:n ʔalʔisra:ʔi:li: ʕala ɣazzah .. ʔarqa:m mufziʕah ***liʕaða:ba:t*** *ʔa****lmadanijjn*** *wa sˤuwar mufriqah* ***lisˤumu:d ʔalqassa:mijji:n*** *wa rifa:qihim fi: wadʒh* ***ʔa:lat*** *ʔa****lmawt***
40 Days into the Israeli Aggression on Gaza... Alarming Figures for the **Civilians Punishments/suffering** and Bright Images of **the Qassamis Resilience** and Their Comrades in the Face of **The Death Machine.**

In example (6), three key endocentric compounds are employed: *عذابات المدنيين* ‘civilians’ punishments/suffering’, *صمود القساميين* ‘Qassamis Resilience’, and *آلة الموت* ‘the death machine’ serve as powerful framing devices. They reflect three frames respectively: the third ‘the severe humanitarian condition in Gaza caused by

Israel', the tenth 'the positive depiction of Hamas combatants' and the seventh 'the destructive power of Israeli weapons'. The first compound frames the civilian experience during the war. The use of *عذابات* 'punishments' conveys the idea that Israel is torturing civilians and/or punishing them for what Hamas did on 7th October by its continuous attacks and bombings. The metaphorical use of *آلة الموت* 'the death machine' characterizes the deadly force of Israel weaponry, i.e. MACHINE (WEAPONRY) IS DEATH. In this metaphor, *آلة الموت* is a symbolic representation of the military power and war apparatus used by the Israeli forces. The term *آلة* 'machine' implies a mechanized, inhumane, systematic nature, heightening the portrayal of the war as an overwhelming and perilous force. This compound contributes to framing the war as not only a series of events but as a powerful and indiscriminate force, killing civilians and combatants indiscriminately. The first compound can be regarded as catchy, while the third one is a metaphor.

The second endocentric compound *صمود القساميين* 'Qassamis Resilience' in this context serves as a framing device that portrays individuals affiliated with Al-Qassam Brigades (the military wing of the Palestinian organization Hamas) as fighters for their rights, contrasting with their characterization as terrorists. This framing choice emphasizes the human aspect of their resistance and frames their actions within the context of rights and self-determination. The contrasting narrative in some Western media outlets (e.g. ABC news, The Guardian, Fox News and others) which often employs terms like *terrorists* (ABC News 2024), highlights the divergent perspectives on the same events, showcasing the role of language in constructing different realities.

(7) **"وحل غزة"**: معركة عنيدة وضارية وثمنها باهظ
(Al-Ayyam, December, 2023)
waħl ɣazzah: *maʕrakah ʕani:dah wa dˤa:rijah wa θamanuha: ba:hiðˤ*
"**The Gaza Sludge**": A Stubborn and Harsh Battle with a Steep Price

In example (7), the endocentric compound *وحل غزة* 'the Gaza sludge' can be used as a framing device by employing a metaphorical expression to depict the challenging and difficult circumstances faced in Gaza. The compound reflects the fourth frame 'the difficult nature of the fighting and the treacherous terrain of Gaza favouring Hamas'. The depiction is somewhat accurate since the bombing has destroyed the infrastructure including streets and when it rains the roads turn all muddy and difficult to navigate. In this context, the term *وحل* 'muddy/sludge' goes beyond its literal meaning to symbolize a situation fraught with complexities and difficulties. The use of *وحل* metaphorically characterizes the state of Gaza as navigating through mud, making it difficult for Israeli troops to find Hamas fighters among all the rubble and mud. This compound is used to reflect the difficult situation faced by Israeli soldiers in Gaza; they have entered into Gaza to find their prisoners and kill/imprison the ones responsible, but they faced a treacherous, muddy terrain and paid a heavy price for their attempt, i.e. many Israeli soldiers were either killed or injured in their street fight with Hamas.

(8) تحليل: انتقال إسرائيل لمرحلة ثالثة من المعارك قد يشكل بداية **انحسار الحرب**
(Al-Quds, December, 2023)
taħli:l: ʔintiqa:l ʔisra:ʔi:l limarħala θa:liθah min ʔalmaʕa:rik qad juʃakkil bida:jat ***ʔinħisa:r ʔalħarb***
Analysis: Israel's Transition to a Third Stage of Battles Might Mark the Beginning of **War Receding.**

In example (8), a metaphor underlies the endocentric compound *إنحسار الحرب*, framing it as receding or diminishing. The compound reflects the fifth frame 'the tension about who will prevail in the war, Israel or Hamas'. In this metaphorical sense, *انحسار* 'recede' from WATER could be used to symbolize the gradual withdrawal or diminishing of a war, with Gaza being depicted as a container that is full of WAR [water], i.e. WATER RECEDING FROM GAZA IS WAR ENDING IN GAZA. Just as water recedes or retreats, the term might be employed to describe a situation where hostilities decrease, tensions ease, or a war subsides. WATER, could have been used since water is, in fact, an element in this war. Israel was planning to flood the tunnels used by Hamas with seawater (The Guardian 24 Dec, 2023) to either force them out or neutralize them. However, so far this plan has not been executed and it is implied that Israel may end up agreeing to Hamas terms. These terms include stopping the war on Gaza and freeing all Palestinian prisoners from Israeli jails. In return, Hamas will release all Israeli prisoners and stop their attacks on Israeli settlements. The use of this compound in this context suggests that Israel may not be prevailing in the war, prompting the consideration of a gradual withdrawal from Gaza.

(9) **دعشنة" حماس** و"قطع رؤوس الأطفال".. اختلاق وتشويه سقط في فخهما العم سام
(Aljazzera Oct 2023)
daʕʃanat ħamas *wa qatˁʕ ruʔu:s ʔalʔatˁfa:l ...ʔixtila:q wa taʃwi:h saqatˁa fi: faxxihima: ʔalʕam sa:m*
Hamas Dae'shification and "Beheading Children"… Fabrication and Distortion, a Trap which Uncle Sam Fell into.

In example (9), *حماس دعشنة* 'Hamas Dae'shification' is an endocentric compound employed as a counter-frame to the tenth frame 'the positive depiction of Hamas combatants'. The term "*دعشنة*" is derived from *داعش* 'Daesh', the Arabic abbreviation for the Islamic State of Iraq and Syria (ISIS), a well-known terrorist organization known for its extreme brutality and fanaticism. The title implies that Israel's efforts to equate Hamas with ISIS (by employing *دعشنة*) and attribute abhorrent actions such as killing children to them have been unsuccessful especially when these claims were believed by the US administration referred to as Uncle Sam. The use of the framing strategy in *دعشنة* implies that Israel's propaganda endeavours to demonize Hamas have had an unintended consequence, since Hamas did not, in fact, commit the alleged atrocities. This exacerbates the irony of

Israel's efforts to undermine Hamas by highlighting the embellishment and misrepresentation in its narrative.

The analysis of the endocentric noun compounds which were much more frequent than exocentric ones: they frame the war as one which mainly affects Gazans civilians, depict Israel as the aggressor, demonstrates the invasion of Gaza might not be in favour of Israel, frames Hamas is a positive light and gives a prediction to the end of the war in favour of Hamas.

(10) **مؤامرة الصمت**: فيما تتحدّث إسرائيل علنًا عن ارتكاب التطهير العرقي بحق الفلسطينيين في غزة، تلوذ الدول الغربية بالسكوت.
(Diwan, Nov, 2023)
muʔa:marat ʔasˤsˤamt: *fi:ma tataħaddaθ ʔisra:ʔi:l ʕalanan ʕan ʔirtika:b ʔattatˤhi:r ʔalʕirqijj biħaqq ʔalfilasti:nijjn fi: ɣazzah talu:ð ʔadduwal ʔalɣarbijjah bissuku:t*
Silence Conspiracy: While Israel openly talks about committing ethnic cleansing against Palestinians in Gaza, Western countries remain silent.

In example (10), the endocentric compound *مؤامرة الصمت* 'silence conspiracy' reflects the first frame 'the disproportionate number of losses (genocide) experienced by civilians in Gaza ' and the eighth frame 'the lack of international support to Gaza compared to Israel'. It contains a catchy expression which conveys the idea that the silence, i.e. inaction, of Western countries regarding the ethnic cleansing in Gaza functions is like a conspiracy. What this compound suggests is a deliberate collusion among these countries to ignore or downplay the situation, despite the severity of the actions being openly discussed by Israel. This framing may influence the audience to critically evaluate the responsibility of Western countries concerning the war in Gaza. The following section presents two examples of exocentric compounds.

4.2. Exocentric noun compounds

In addition to example (3), the following are examples of exocentric compounds:

(11) **قلب الطاولة**.. إليكم رد سفير فلسطين في بريطانيا على مغالطاتهم
(Alaraby Oct, 2023)
qalb ʔatˤtˤa:wilah...*ʔilajkum radd safi:r filastˤi:n ʕala muɣa:latˤa:tihim*
'**Table turning'**...here is the response of the Palestinian Ambassador in Britain to their Fallacies

In example (11), *قلب الطاولة* table turning' reflect the ninth frame and also functions as a counter-frame showing a Palestinian official's response to the Western narrative. It shows that the Palestinian ambassador in Britain has responded assertively to the arguments or misconceptions presented by his opponents. He stated that "the obsession with condemning the victims, blaming them, and condemning those under occupation and colonialism, as well as condemning the besieged throughout all these years, is morally repugnant", according to the article. The headline contains an exocentric compound, where the compound does not have a head or main element that determines its grammatical category. Here, *قلب* 'turning' is a noun and *الطاولة* 'table' acts as an object. Together, they form a compound that functions as a single unit to convey the idea of turning the table, without one element being subordinate to the other. The compound *قلب الطاولة* 'table turning' serves as a narrative technique to portray a reversal of roles or situations, generally suggesting that the Palestinian ambassador or the Palestinian side, commonly perceived as the weaker party or victims, has achieved dominance or assumed control over the storyline, i.e. TABLE TURNING IS REVERSING A SITUATION. It affirms the notion that the power dynamics are not as unbalanced as they may appear, and that Palestinians are actively involved in contesting and altering the narrative to emphasize Israel's position as the instigator. Let us consider another example.

(12) الحرب على غزة تتوحش وتدخل مرحلة "**عض الأصابع**".. وإسرائيل عالقة بين الأهداف المعلنة العالية والمكاسب المنخفضة
(Al-Quds Al-Arabi, Nov, 2023)
*ʔalħarb ʕala ɣazzah tatawaħħaʃ wa tadxul marħalat **ʕadˤdˤ ʔalʔasˤa:biʕ** wa ʔisra:ʔi:l ʕa:liqah bajna ʔalʔahda:f ʔalmuʕlanah ʔalʕa:lijah wa ʔalmaka:sib ʔalmunxafidˤah*
The war on Gaza intensifies and enters the **'finger-biting'** stage... Israel is caught between high declared objectives and low gains.

As discussed before, framing involves careful selection and highlighting of certain aspects of the issue to shape perceptions and influence public opinion. In this example, *عض الأصابع* is an exocentric compound used metaphorically as a framing device to describe a particular stage in the war on Gaza; it reflects the fifth frame 'the tension about who will prevail in the war, Israel or Hamas'. The metaphor conveys a sense of frustration, tension, or difficulty faced by one of the parties involved (Israel), i.e. BITING ONE'S FINGERS IS BEING ANXIOUS. Using the image of biting one's fingers, the framing suggests a situation where actions or decisions have become challenging, and there may be a sense of anxiety or anticipation. The choice of the metaphor *عض الأصابع* involves selecting a specific aspect or image to represent the current stage of the war. The metaphor emphasizes the idea that the war has reached a critical or problematic stage, where either Israel or Palestinian fighters have to give up and agree to the other's terms. Yet, it seems that the compound is implying that Israel is the one biting its fingers as it is trapped between their high declared objectives and low gains. Using this metaphor, certain aspects of the war are excluded or de-emphasized in favor of highlighting the challenges faced by Israel who is intensifying their aggressive attacks on civilians to make up for its failure against Hamas fighters. It shapes the narrative around the war by focusing on Israel's difficult situation since it did not achieve what it promised its people at the beginning of the conflict, i.e. eradicating Hamas and freeing all prisoners.

5. Discussion

The analysis indicates that each headline employs deliberate choices of metaphoric and catchy compounds with the objective to construct a specific narrative and convey impactful meanings. This aligns with the tenets of Entman's Framing Theory (1993). Our findings demonstrate a consistent and deliberate use of noun compounds to capture attention and influence the discourse surrounding the conflict, providing support for the Palestinian side and portraying Israel as the aggressor and potential loser of the war. The selected headlines incorporated ten impactful and emotionally charged terms, carefully chosen to convey urgency, provoke specific emotions, and emphasize crucial aspects of the events.

The deployment of counter-frames is a salient feature of the discourse surrounding the contentious issues such as the situation in Gaza. Firstly, it was demonstrated how the use of counter-frames seeks to challenge and contest dominant narratives disseminated by mainstream sources, particularly Western media outlets, which may be inclined to minimize or rationalize specific behaviors. The deployment of counter-frames as been demonstrated to challenge complacency and stimulate critical thinking by presenting alternative viewpoints and questioning existing narratives. In addition to challenging the veracity of prevailing Western and Israeli narratives, counter-frames serve as calls to action, garnering support for oppressed Gazans and amplifying their voices on the global stage. The dual role of compounds as both metaphors and catchy expressions contributes to their effectiveness in capturing readers' attention. This observation is consistent with the view that compounds can be either metaphor-based or creative, a perspective emphasized by Benczes (2006, 2010). This dual nature of compounds makes them both semantically and lexically compact (Bauer 2020), enabling the evocation of rich images and resonating with readers on an emotional level. The choice of specific metaphors that underlie the compounds, such as *عض الأصابع* 'finger-biting', illustrate the creative nature of linguistic choices in news framing. The selection of these metaphors was not arbitrary; rather they were chosen with care to convey the vivid meanings associated with the war. Furthermore, the investigation of compounds in news headlines corroborates studies conducted by Herrera Soler (2008), Blom and Hansen (2015), Molek-Kozakowska (2013), Schaffer (1995), Ifantidou (2009), Marcoci (2014), and Robert (2020). These studies collectively emphasize the significant role of linguistic devices in influencing the formation of news headlines via capturing readers' attention and influencing public discourse.

In conclusion, this study contributes to the understanding of media framing in the Arab world, it demonstrating the role of compounds as powerful linguistic tools in influencing public opinion. The use of metaphoric compounds as framing devices in the coverage of the Israeli-Gaza conflict within Arabic media serves as a distinctive perspective, presenting a reality that markedly diverges from the narrative often depicted in some Western media. In the Arab context, Israel is commonly framed as the aggressor rather than the victim. This is because it is perceived as the occupier who forced Palestinians out of their lands in 1948 and gave these lands to their own people. The carefully chosen compounds in Arabic news headlines play a pivotal role in shaping this alternative reality by emphasizing the actions and policies of the Israeli forces. Terms such as *عدوان إسرائيلي* 'Israeli aggression' and *آلة الموت* 'machine of death' evoke a sense of Israeli dominance and military might. This framing reinforces the perception of Israel as the primary force responsible for the aggression, fostering a narrative where Palestinians, particularly those who live in Gaza, are portrayed as victims of external force. Such linguistic framing diverges starkly from the narratives often prevalent in some Western media, which highlights the influence of linguistic choices in shaping distinct perspectives on the Israel-Gaza conflict. It can be seen that the use of metaphors that underlie the compounds plays a crucial communicative role by offering readers an alternative perspective on the conflict. Within the context of the Israel-Gaza war, metaphors serve to alter perspectives deliberately (see Steen 2017). Writers, aim to shift the reader's viewpoint on the subject at hand, as noted by scholars such as Charteris-Black (2011), Steen (2017), and Mujagić (2022). The analysis also demonstrates that metaphorical expressions often reflect and reinforce the cultural and ideological perspectives of the discourse's producers. There is power in using certain expressions and manipulating language for persuasive purposes (Sun et al. 2021, Steen 2017, Zibin & Solopova 2024). The underlying metaphors of the noun compounds that are used to construct a reality where MACHINE (WEAPONRY) IS DEATH, demonstrating how the events were seen from the perspective of Gazans in Arab media, e.g. HUNGER IS A GHOST. In the context of the Israel-Gaza conflict, the analysis of metaphoric compounds as framing devices may have revealed how language is wielded to shape perceptions, reveal power imbalances, and make predictions about the end of the conflict, e.g. WATER RECEDING FROM GAZA IS WAR ENDING IN GAZA.

The choice between endocentric and exocentric noun compounds in news headlines as framing devices carries implications for communication and audience comprehension. Endocentric noun compounds, where one element modifies the other, can enhance clarity and precision in conveying the main message. In the context of news headlines, this linguistic structure aids create succinct and straightforward framing devices, which ensures that the audience quickly grasps the intended meaning. Conversely, exocentric compounds, while creatively combining elements (see Altakhaineh 2022), may introduce ambiguity and require a more sophisticated understanding from the readers (cf. Benczes 2006). The creative potential of exocentric noun compounds allows for expressive and innovative language use, but it also risks potential misinterpretation. In the context of news reporting, where immediacy and clarity are essential, endocentric compounds may be more effective in constructing framing devices that efficiently convey the essence of the story without affecting comprehension. The balance between creativity and clarity in linguistic choices reflects the role of language in shaping public perception through news headlines.

6. Conclusion

This study has examined Arabic news headlines pertaining to the Israeli-Gaza conflict, elucidating the strategic use of noun compounds as powerful framing devices. Each headline was shown to be carefully created to evoke specific emotions, shape public perceptions, and convey impactful meanings. This aligns with Entman's Framing Theory (1993). The findings of this study emphasize the creative and deliberate choices made by journalists to capture the attention of readers and influence the narrative surrounding a historical war scenario. Ten frames were identified mainly depicting Israel as the aggressor and Gazans as the victims. Israel, which has proclaimed the right to defend itself after the attacks on 7th October, is depicted through noun compounds as the aggressor killing civilians and combatants without discrimination. This includes the refusal to give them their basic rights including water, food, electricity and fuel. The reality presented in these headlines portrays Israel as a war criminal, while depicting Palestinians as the victims. This narrative contrasts with the perspective often presented in some Western media news in which Israel is the victim and has the right to defend itself. The study revealed a consistent pattern in the use of noun compounds as both catchy expressions and metaphors, which highlights their multifaceted role in shaping the discourse. The analysis has identified the mechanics of media framing in the Arab world, providing a clear perspective on how language, specifically metaphoric noun compounds, can shape public discourse. As media continues to play a crucial role in shaping public opinion, it was argued that the deliberate preference for endocentric noun compounds over exocentric ones in the Arabic news headlines reinforces the importance of clarity and immediate comprehension in framing devices, ensuring effective communication in the context of war scenarios.

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Glocalized voices in *Assault Police*: A model of communing affiliation and affective positioning

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Abstract
The study aims to explore the affiliation strategies and semiotic resources employed in digital feminist activism by *Assault Police* (*AP*) within Egypt's *#MeToo* movement to construct the identity of sexual-violence victims/survivors (SVVSs). Using Martin and White's appraisal and Zappavigna's communing affiliation frameworks, the study investigates how affective positioning is discursively constructed, multimodally materialized and ambiently performed in digital discourses to combat sexual-violence. A qualitative analysis of 104 digital narratives on sexual-violence, encompassing cases of rape, sexual-assault and gender-based violence, reveals how *AP* fosters a sense of shared values and emotional and moral stances within digital feminist spaces. The results demonstrate how *AP* constructs the social semiotic identity of Egyptian SVVSs through the utilization of affective-discursive strategies that combine evaluative language, visual cues, digital elements and cultural references as affective instruments to (re)shape and negotiate value- and-feeling-centered affiliations. *AP* employs a range of evaluative couplings to position SVVS as a credible, subject worthy of empathy and support/justice. This affective stance challenges the gendered semiotic identities and inequalities that pervade the Egyptian context. Additionally, *AP* facilitates the formation of affiliative bonds of belonging or exclusion around SVVSs through the use of emotional appeals, moral evaluations, affective repetitions, coherent designs, colour schemes, community-centered hashtags and cultural symbols. This study contributes to the field of non-Western digital discourse analysis by offering a model of affect and affiliation from a multimodal perspective that focuses on the distinctive dynamics of Egypt's feminist landscape and advocates for the inclusion of Arab women's voices in the global discourse on sexual violence.
Keywords: *digital discourse, affective positioning, communing affiliation, semiotic identity, sexual-violence, social media technologies*

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Глокализованные голоса полиции по борьбе с насилием: модель объединяющей аффилиации и аффективного позиционирования

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Аннотация
Данное исследование посвящено изучению стратегий аффилиации и семиотических ресурсов, используемых в цифровом феминистском дискурсе полицией по борьбе с насилием в рамках египетского движения #MeToo для создания идентичности жертв, переживших сексуальное насилие. Используя систему оценки Дж. Мартина и П. Уайта (Martin & White 2005) и концепцию объединяющей аффилиации М. Заппавиньи (Zappavigna 2011, 2014 и др.), авторы исследования демонстрируют, как эмоциональное позиционирование дискурсивно конструируется, мультимодально материализуется и контекстно реализуется в цифровых дискурсах для борьбы с сексуальным насилием. Основываясь на анализе 104 публикаций о сексуальном насилии, исследование показывает, как полиция по борьбе с насилием способствует формированию общности чувств и ценностей, а также эмоциональных и моральных позиций в цифровом феминистском пространстве; как она конструирует социальную семиотическую идентичность египетских жертв насилия, используя аффективно-дискурсивные стратегии, сочетающие оценочный язык, визуальные сигналы, цифровые элементы и культурные отсылки в качестве эмоциональных инструментов для формирования и согласования отношений, ориентированных на ценности и чувства. В частности, используются различные комбинации оценочных связей, чтобы позиционировать жертв насилия как субъектов, заслуживающих доверия, сочувствия, поддержки и справедливого отношения. Эта эмоциональная позиция бросает вызов гендерной семиотической идентичности и неравенству, которые преобладают в египетском контексте. Кроме того, полиция по борьбе с насилием способствует формированию и укреплению ассоциативных связей принадлежности или отчуждения в среде жертв насилия посредством использования эмоциональных призывов, моральных оценок, эмоциональных повторов, цветовых схем, хэштегов и культурных символов. Данное исследование вносит вклад в область анализа не-западного цифрового дискурса, предлагая модель аффекта и аффилированности с мультимодальной точки зрения, которая фокусируется на уникальной динамике феминистского ландшафта Египта и выступает за включение голосов арабских женщин в глобальный дискуссионный дискурс о сексуальном насилии.

Ключевые слова: *цифровой дискурс, аффективное позиционирование, коммуникативная принадлежность, семиотическая идентичность, сексуальное насилие, технологии социальных медиа*

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1. Introduction

Sexuality is a power-laden domain shaped by institutions like media, which exert authority over its meaning/interpretation. Sexual-violence against women is especially pervasive in societies with deeply-entrenched cultural norms, social attitudes, gender inequality, and permissive legal systems (Loney-Howes 2019), where many cases go unreported, due to societal stigma (Marzouk &Vanderveen 2022). Building on third-wave feminism's embrace of technology, the fourth-wave leverages digital platforms for activism, emphasizing consciousness-raising and challenging systemic inequalities (Blevins 2018). This consciousness-raising involves expressing feelings, sharing lived experiences and reinforcing others' stories as part of feminist identity performance (Gleeson & Turner 2019:54). By fostering discussions online, feminists empower interactants to advocate against sexual-violence and gender-based oppression in personal/public spheres (Loney-Howes et al. 2021). 'Breaking the silence' and 'speaking-out' are key anti-rape strategies that educate society about the personal and social consequences of sexual-violence (Alcoff 2018). Loney-Howes (2018) argues that to foster social change, speaking-out must challenge the political, legal, and sociocultural barriers that limit public awareness, enabling more survivor voices to be heard on social media. The *#MeToo* movement, a hallmark of the fourth wave, originated in the global North in 2006 to support survivors, especially women of colour, addressing issues of harassment, assault, and power dynamics across different contexts.

Rooted in the anti-rape movement of second-wave feminism (1970s–1990s), *#MeToo* emerged in October 2017 as a global survivor-centric movement that combats sexual-violence and supports those affected by harassment and abuse (Brittain 2023, Loney-Howes 2019). Ghazal (2021) argues that *#MeToo* has empowered millions by sharing narratives of sexual abuse, using empathy and solidarity to advocate for meaningful social, cultural and institutional change. Fileborn and Loney-Howes (2019) define sexual-violence as "an incredibly polarizing subject," with survivors often facing skepticism and blame (p.1). This lack of support in the face of pervasive 'rape culture[1]' prompted the rise of *#MeToo* to fill a much-required lacuna to address sexual-violence (Loney-Howes 2018, Fileborn & Loney-Howes 2019). Founded by activist Tarana Burke and propelled to global prominence by actress Alyssa Milano's viral tweet[2], *#MeToo* connects

[1] Refers to social, cultural and political processes that condone violence against women but also blame victim-survivors *if* and *when* violence is perpetrated against them.
[2] 'If all women who have been sexually harassed wrote "me too" as a status, we might give people a sense of the magnitude of the problem.'

survivors and fosters solidarity, turning personal trauma into a political movement (Ringrose & Mendes 2018).

As a digital, networked phenomenon, *#MeToo* facilitates widespread participation and connectivity, challenging societal norms and structures that sustain silence around sexual-violence on national and international scales (Ringrose & Mendes 2018). In its first year, the movement held over 200 high-profile men accountable for allegations of sexual misconduct, shifting the conversation from individual blame to systemic power dynamics (Fileborn & Loney-Howes 2019). This movement emphasizes a call for accountability, challenging power dynamics that enable misconduct and advocating justice for survivors. *#MeToo* has since driven cultural and legislative change worldwide, bringing critical attention to issues of consent, sexual-violence and accountability (Ringrose & Mendes 2018).

Social media platforms, including Instagram*, have become important spaces for consciousness-raising (Keller et al. 2018), enabling women to build social and political networks/positions to drive social action and political change. Gleeson and Turner (2019) suggest that hashtags, such as #AnaKaman, #BeenRapedNeverReported, #WhyWomenDon'tReport and #YesAllWomen have become contemporary consciousness-raising practices that are searchable, quantifiable and contagious (Zappavigna & Martin 2018). These hashtags offer recognition, solidarity and a voice to individuals who have experienced sexual-violence, particularly addressing victim-blaming (Ringrose & Mendes 2018).

#MeToo is a complex phenomenon that involves "multiple causes, discourses, articulations and ways of responding" to contemporary sexuality-related issues and interpersonal relations (Cover 2019: 301). Engrained in digital media's 'call-out' culture, it provides a platform for victim-actors to articulate their grievances and explore what constitutes violations of personal spaces and dignity. *#MeToo* broadens resistance to sexism and patriarchy, engaging individuals previously disengaged from feminism (Mendes et al. 2019: 237). Through sharing personal experiences, *#MeToo* sheds light on sexism in online/offline spaces, uniting diverse voices, often marginalized, into a community (Keller et al. 2018).

Engaging in political discourse through social media, particularly when sharing personal experiences, carries the risks of taking stances on social issues (Bilá & Ivanova 2020, Zappavigna 2019). While it provides an opportunity to build ambient affiliations with other SVVS, it also exposes them to public scrutiny (Alcoff 2018). *#MeToo* has been criticized for its association with 'cancel culture,' though founder Burke maintains its goal is to address pain, not vilify individuals. Scholars (e.g. Haire et al. 2019 have critiqued *#MeToo*'s potential for political/personal exploitation. Others (Alcoff 2018, Mendes et al. 2019) highlight concerns about intersectionality, noting that *#MeToo*'s support often favors white women with social capital.

* It is recognized as an extremist organization and is banned in the territory of the Russian Federation.

The global perspective of *#MeToo*, which focuses on empowering victims/survivors and fostering international collaboration through practice-sharing, has led to concrete actions regarding speaking-out and showing solidarity (Fileborn & Loney-Howes 2019). Technology's 'demotic turn' has democratized public discourse, enabling ordinary people to challenge/reinforce dominant ideologies (Bou-Franch & Blitvich 2014: 229, Bilá & Ivanova 2020, Eslami et al. 2023), highlighting the significance of investigating digital practices. However, much of *#MeToo*'s disruptive potentials/limits has not been fully examined, particularly regarding who can "speak and be heard, what constitutes sexual-violence, whose experiences are included and perceived as worthy of redress" (Fileborn & Loney-Howes 2019: 5). Additionally, the marginalization of women based on ethnicity, class, sexuality and/or colour is often disregarded in regions such as the global South, particularly in Egypt (Ryan 2019).

Given the lack of research focusing on Arab women's voices (with exceptions, Keller et al. 2018, Ghazal 2021), this study examines *#MeToo*'s affective-positioning and digital discourse, focusing on the economy of digital speaking-out, affiliation-building and consciousness-raising as represented in *Assault Police* (*AP*). It offers to fill the gap of understanding how linguistic strategies and multimodal resources—such as language choice, affective stance, visual imagery and intertextual references—mediate the complex interplay between global feminist discourse and local cultural values, shaping a unique form of glocalized feminist activism in Egyptian *AP*. Despite the growth of digital feminist activism scholarship and identity construction in Western contexts (Leontovich 2017, Mendes, Ringrose & Keller 2018, Eslami et al. 2023), there has been little exploration of how affective positioning and communal affiliation are linguistically and multimodally constructed within digital feminist activism in non-Western contexts. There are few studies, if any, that examine Arabs' semiotic identity and how Arab feminist initiatives like Egypt's *AP* navigate the intersection of global and local discourses in the global South.

The current study analyzes how these multimodal resources mediate the relationship between global feminist ideals of *MeToo* and local socio-cultural values, thus constructing a form of glocalized digital activism (Roudometof 2016). It offers empirical data from the Middle East, given the alarming statistics on sexual-violence against women in Egypt (cf. Thomson Reuters Foundation 2017, UN Women reports). This study employs a Systemic Functional Linguistics (SFL) approach to analyze digital posts from July 2020 to December 2023, investigating how various affiliation strategies establish and negotiate value-and-feeling-centered community bonds. By examining *AP* posts, this study aims to examine how linguistic and multimodal resources construct and communicate affective positioning and communal affiliation in digital feminist activism, particularly in contexts shaped by both local (Egyptian) and global (glocal) influences. It should contribute to a deeper understanding of social semiosis and shed light on the glocal understanding of *#MeToo*. Methodologically, it expands the analytic powers of the communing affiliation model.

In doing so, the following research questions are investigated:

1. How does *AP* affectively-discursively construct and enact the social semiotic identity of the Egyptian female SVVSs in their posts?

– What affectual tools does *AP* draw upon to encode and perform the semiotic identity of Egyptian SVVSs?

2. How does *AP* interactively forge social bonds and ambient networks of communing affiliation in their posts?

– What affectual tools does *AP* draw upon to forge a communion of feelings-and-values around sexual-violence in Egypt?

2. Theoretical framework

Discourse, as social meaning-making, involves the semiotic, discursive and affective resources (e.g., Alba-Juez & Larina 2018, Mackenzie & Alba-Juez 2019, Ponton 2016, Zappettini et al. 2021). Wetherell (2012) emphasizes how discourse amplifies affect, making it influential and facilitating its spread. Drawing on a feminist perspective that rejects the binary division between emotional/rational and ideational/material (Wetherell 2012, Ahmed 2014), this study views affect and emotions as intertwined, challenging the gendered binary-logic that frames affect as mobile, impersonal and masculinized, while emotions are seen as contained, feminized, and personal (Ahäll 2018). As Westberg (2021) suggests, affect is relational, shaping shared experiences and actively constructing collective identities and connections through discourse.

This study adopts a feminist social semiotic approach to examine the Egyptian perspective on *#MeToo* regarding sexual-violence as a means for understanding how people construct and interpret ideological positions and attitudinal stances on social media within a non-Western context. By integrating social semiotics with feminism in this digital context, this study examines how people deploy linguistic strategies and resources to navigate their experiences and negotiate their relationships. Jones (2020: 19) argues that interactants express their social positions through the acts of 'seeing' and 'being seen.' Drawing on social semiotics (Hodge & Kress 1988) and systemic functional linguistics (SFL) (Halliday 1978), language, among other modes, serves as a (dynamic) social semiotic resource for creating meaning in specific contexts. Halliday and Matthiessen (2014: 19–31) explain that these resources are shaped by their relations and potentials in representing, interacting and organizing communication. Language negotiates feelings, values and knowledge, aligning participants into communities within cultures and social groups (cf. Martin 2010, Etaywe & Zappavigna 2023). Comprehending the shared, contested, or negotiated nature of these elements in interactions is crucial for interpreting the formation and negotiation of social alignments (Etaywe & Zappavigna 2023), which in turn shapes individuals (semiotic) identities (Martin 2010). Evaluations reflect participants' opinions and values, aiding in organizing discourse and maintaining relationships (Halliday & Matthiessen 2014, Martin 2017).

Grounded in SFL, this study utilizes Zappavigna's 'communing affiliation' and coupling as its analytical framework. According to Knight (2010), affiliation is defined as the discursive negotiation of communal identity within discourse. Knight's affiliation model (2010) is based on 'communal identification,' a social semiotic process, where interactants form social bonds by coupling attitudinal and ideational resources (p.43). Interactants mobilize semiotic resources to *affiliate* with others, negotiate communal identities, and construe degrees of the shared-self (Knight 2010: 217). Knight's model outlines three bonding strategies: (1) *communing* (shared bonds), (2) *laughing* (bonding through humor) and (3) *condemning* (rejecting potential bonds). While Knight's (2010, 2013) model focuses on 'dialogic affiliation' in direct interactions, Zappavigna's 'communing model' extends this to 'ambient affiliation' in social media (Zappavigna 2011, 2014, 2018, Zappavigna & Martin 2018, Etaywe & Zappavign 2023). In digital domains, ambient affiliation investigates *bonding* through *value-sharing* and *identity-aligning*, which is characterized by multiparty, overlapping, temporally ambiguous, and sometimes incomplete interactions (Zappavigna 201: 801, 2019).

Digital discourse analysis explores how multimodal resources enact identities, activities and ideologies in the digital world (Ponton 2016, Salama 2023). Ambient affiliation has been applied to various topics, such as motherhood, celebrity and YouTube medical consultations (Zappavigna 2014, Makki & Zappavigna 2022, Wang & Luo 2023). Zappavigna's communing affiliation framework (Zappavigna 2018, Zappavigna & Martin 2018) explains how values are positioned as socially alignable through CONVOKING, FINESSING and PROMOTING a coupling without direct dialogue. CONVOKING musters a community around a coupling (MARSHALING), while FINESSING positions it in relation to other couplings/stances/values, EMBELLISHING *vs*. DISTILLING the range of perspectives. PROMOTING emphasizes interpersonal coupling through resources that modify its degree/scope (FOSTERING *vs*. MODULATING).

Following Zappavigna (2011, 2018, 2021), this study focuses on affective positioning in digital narratives of sexual-violence, exploring how victim-survivor identities and connections are created through ambient interactions. Ambient affiliation allows participants to negotiate feelings, values and knowledge without spatial/temporal constraints, fostering emotional and value-centered affiliations (Zappavigna, 2011). Online posts enact a specific identity that resonates with others' experiences, allowing them to rally around common emotions, stances and/or knowledge (Zappavigna 2011, Leontovich 2017, Eslami et al. 2023). This fosters the potential to cultivate value-and-feeling-centered affiliations and community bonds (Martin 2017).

To investigate the realization of affiliations, this study applies linguistic evaluative coupling as an SFL construct (cf. Halliday 1978). Coupling, as introduced by Martin (2000) and extended by Zappavigna (2011), examines textual relations involving the temporal relation of *with* to create social semiotic units of bonds (cf. Stenglin 2008). Martin (2000) defines couplings as the fusion of "ideational meanings and appraisal" (p.164), which Martin et al. (2013) expanded to include meanings along a cline of instantiations across strata, metafunctions and modalities (p.469). These couplings blend experiential meanings and appraisal to construct communal identities (Knight 2010). Evaluative coupling has been used as an analytical unit in various contexts, from casual conversation (Knight 2013) to social media (Zappavigna 2018), providing a framework for identifying linguistic resources that forge and negotiate social semiotic bonds.

The ideational component represents sequences of 'activities, the people and things involved in them, and their associated places and qualities,' evoking cultural attitudes (Knight 2013). Within the interpersonal metafunction, appraisal evaluates feelings and values expressed in *AP*'s posts, serving as a resource for negotiating solidarity and fostering affiliation. Appraisal helps align audiences with specific feelings and values (Martin 2004). Aligning with and bonding around specific feelings-and value-positions is a complex process that involves a range of shared feelings, leading to diverse communities with distinct memberships, from universal communality to specific alignments (Martin 2004). Drawing on appraisal, the ATTITUDE system categorizes expressions of empathy/emotion (AFFECT), ethical assessment (JUDGEMENT) and evaluation based on preferences/aesthetics (APPRECIATION) (Martin 2004: 329, Martin & White 2005: 42).

Informed by a sociocultural perspective, this study views identity as a 'fluid and evolving,' indexed through diverse semiotic resources (Hafner 2015:98). Identity is understood as a dynamic, continuous performance of being a certain kind of person, in a given context (Eslami et al. 2023, Leontovich 2017). To examine how victim-survivor identity is co-constructed and framed, positioning theory (Davies & Harré 1990) is used as an interpretive lens. Davies and Harré (1990) explains positioning as:

> the discursive process whereby selves are located in conversations as observably and subjectively coherent participants in jointly produced story lines. There can be interactive positioning in which what one person says positions another. And there can be reflexive positioning in which one positions oneself.

In this sense, interactants "make available a range of subject positions for themselves and their conversational partners and these positions are understood according to cultural 'storylines'" (Hafner 2015:100). These positions are negotiable, allowing interactants to either accept them to build a shared narrative or challenge them by introducing alternative narratives.

3. Methodology and methods

As globalization blurs traditional boundaries between regions and cultural groups (e.g., Bilá & Ivanova 2020), issues like sexual-violence have gained transnational attention. In Egypt, the *#MeToo* movement, embodied by the verified Instagram* platform *AP* with 310K followers (@assaultpolice 2023), plays a key role in addressing sexual-violence and amplifying survivors' voices (Marzouk & Vanderveen 2022). While *AP* shares similar mediums and goals with the broader *MeToo* movement, it is deeply rooted in Egypt's unique history of activism against sexual-harassment that includes initiatives like Harassmap and #AnaKaman (Hunt 2020).

Launched in July 2020 during Ahmed Bassam Zaki[3]'s sexual-assault case, *AP* focuses on raising awareness about rape culture, providing educational resources and guiding survivors toward therapy and legal help. Founded by Nadine Ashraf,[4] *AP* challenges the normalization of sexual-violence in Egypt, framing these issues beyond 'uncomfortable situations' and sparking cultural shifts (Khairat 20 September 2020). Many Egyptian women have endured behaviours falling within the spectrum of sexual-violence, making *AP*'s advocacy critical (Marzouk & Vanderveen 2022). *AP*'s impact extends beyond social media, influencing families, educational institutions, and government policies, leading to tangible changes and legal amendments. Leveraging digital feminist practices, *AP* fosters knowledge-sharing, builds supportive communities, and empowers resistance against oppression, aligning with collective struggles (Mendes et al. 2019).

This study adopts a qualitative approach to analyze *AP*'s content using systemic functional discourse analysis, exploring how posts within the Egyptian *#MeToo* stream forge digital alignments. This study focuses on how *AP* shares victims'/survivors' experiences (104 Posts+16 highlight stories) to raise awareness and drive cultural change. Posts were selected based on their prominence, recurrence and impact on interactants, who are conceptualized as socially-bound semiotic agents, shaping social networks and identities. Most of the posts feature digital images, narratives, and design centered on sexual-violence, using content and design to inform and evoke emotional responses.

The analysis combines appraisal and coupling to understand the ideological and affective/evaluative positioning associated with sexual-violence as presented in *AP*. The data includes textual (narratives and hashtags) and visual (images and design) elements, all analyzed as multimodal utterances. After obtaining informed consents from the official page owner/manager, two applied linguistics researchers coded the data in multiple rounds to ensure validity and reliability. The analysis follows a four-step model: identifying communicative patterns (couplings of attitude+ideation), determining multimodal realizations, examining how these couplings shape victims'/survivors' identities and positionality, and reflecting on Egyptian digital feminism.

[3] A college student who was accused of being a sexual predator of women.
[4] A 25-year philosophy graduate who sparked Egypt's *#MeToo* by creating *AP* in 2017.

4. Findings and analysis

This study explores the semiotic resources at the discourse semantic stratum, aiming to uncover the interpersonal phenomena at the contextual level. The data involves 104 posts, covering eight cases, including individual, gang and marital rape; sexual-assault; gender-based violence; and raising awareness about sexual-violence. Table 1 illustrates ABZ case and awareness posts make up the majority (70/104) and have received the highest engagement (likes/comments). Due to space constraints, the analysis focuses on these two cases.

Table 1. **AP's cases and posts**

Topics/cases	# Posts	Likes	Comments	Reach
***ABZ**	30	473, 851	14,753	Highest
Fairmont	10	379,140	2,961	High
***Raise Awareness**	40	1,042,043,347	15,426	Highest
Bassant	7	225,770	5,075	Average
Women Soccer	4	285,692	3,597	Average
Tik Tok Girls	2	14,719	899	Lowest
Cases of sexual assault	8	239,965	6,881	Average
Marital Rape	4	434,822	3,051	High
Total	105	1,044096306	52,643	

N.B. Post(s)=P(s)

Figure 1 illustrates how *AP* uses (30Ps) about ABZ (an alleged 'serial rapist') to establish (12Ps), maintain (10Ps) and promote (8Ps) communal feelings, enacting social alignment and forging social bonds. *AP* mobilizes a community against sexual-violence by encouraging ABZ's victims/survivors ('150 more sexual harassment allegations') to come forward and hold him accountable. Twelve posts frame the case and express evaluative attitudes [JUDGEMENT*:* Propriety: immoral +APPRECIATION: triggers an aversive Reaction], detailing ABZ's background, crimes, and how he blackmailed his victims without consequences. The posts (P1+P6+P11-13+P15+P22-26+P28) establish ABZ's case, muster a community around anti-sexual predation, motivate more victims/survivors to speak-out through assuring anonymity and security, sharing testimonies, warning against silence (allowing punishment escape, abuse others), and celebrating the movement's international recognition. Through ABZ's case, *AP* CONVOKES a community that supports victims/survivors and condemns all sexual-violence forms, including verbal/physical harassment and public masturbation that occur in enabling spaces/bodies (Fig.1).

Figure 2 displays how *AP* uses semiotic resources in P1 to CONVOKE an ambient community against sexual predation. Through coupling, *AP* portrays ABZ as 'A SEXUAL PREDATOR' with [(-ve)JUDGEMENT: Propriety=immoral +([(-ve)Normality=perverted +(-ve)APPRECIATION: Reaction=aversive impact]. ABZ 'harassed underage, 50 girls were shocked...had uncomfortable experiences...blackmailed victims...faced NO consequences.' By inscribing ABZ as ‘a sexual predator,’ P1 CONVOKES a community/network against ABZ and assigns him clear responsibility for inflicting serious damage to many victims, using *active verbs* and *modulating strong adjectives* to highlight the severity and range of his actions. P1 employs interrogative words like ‘who’, ‘how’ to challenge society’s complacency towards sexual-violence, promoting collective action to gather evidence against him. It heteroglossically positions ABZ’s immoral propriety as a condemnation, juxtaposing it with society’s normalized complacency. To maintain FINESS, P1 deploys contractive resources to emphasize unity (‘Together, we can gather large database of evidence’) and contrast it with societal failures (‘evidence mysteriously disappeared’). It PROMOTES the intensity, severity, extent and proximity of ABZ’s actions through numerical references and impactful language, fostering social bonds and urging condemnation.

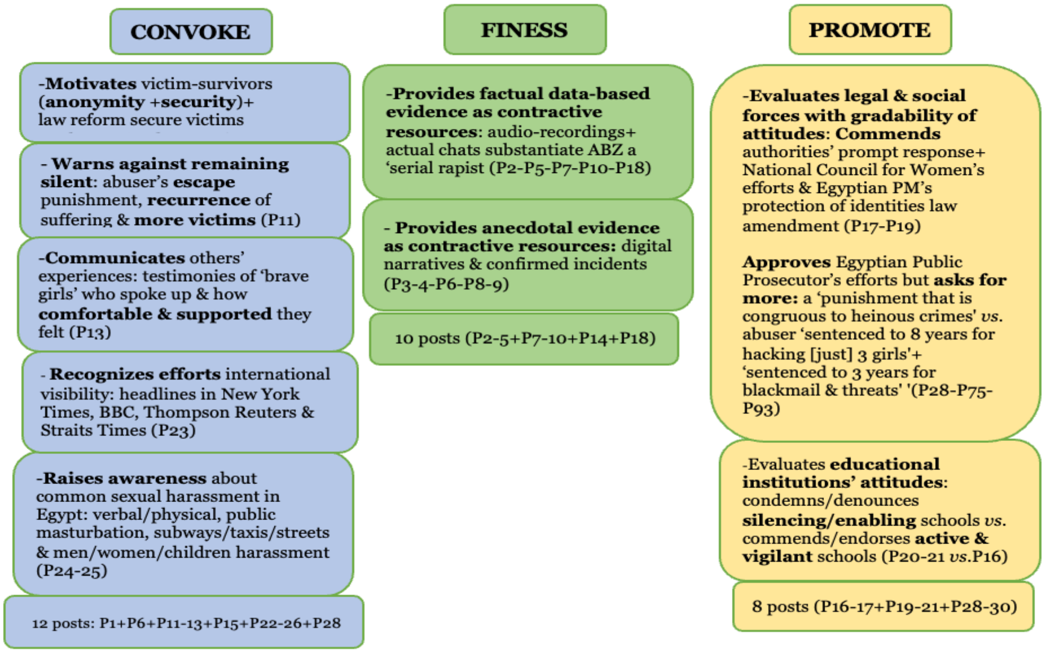


Figure 1. Communing Affiliation in ABZ’s case (Abuser-focused posts)

Visually, P1 constructs ABZ as a looming threat with a confrontational gaze, signaling urgency to CONVOKE am ambient community primed to eliminate this encroaching threat. A low-angle close-up with a downward demand gaze, neutrally tightened lips and upward chin constructs his insolent, intimidating, and hostile demeanor, rallying opposition. His image, placed at the bottom-right corner, establishes him (story anchor: ideation) as an urgent and attention-worthy threat (FINESS). The use of bold font-face, large font-size, and capitalization further emphasizes the intensity, extent, and gravity of his actions, while centralizing his name and colour choices (blue for alleged *vs*. red for conviction) guide the narrative (PROMOTE).

Figure 2. ABZ's P1

Figure 3 illustrates how P11 rallies a community of willing-to-testify victims/survivors ready to 'ACT WITH LAWYERS AGAINST' the predator (CONVOKE). The post couples bravery and tenacity with willingness to testify to specify the attributes of this community using attitudinal elaboration [(+ve)JUDGEMENT: Tenacity=brave=willing-to-testify], emphasizing collective action and unity. P11 encourages victims to connect via email (reportabz@gmail.com), assuring anonymity and security. It fosters inclusion and unity by using inclusive language and modality like 'we,' modal verbs, adverbs and phrases such as 'We HAVE to all take action together,' prompting urgency, necessity and a united stand. P11 invokes FINESS to instil immediate action by positioning the coupling of [(-ve)JUDGEMENT: Tenacity=cowardly= not willing-to-testify]. It uses a fronted adverb of time ('NOW IS THE TIME TO COME FORWARD') to create an urgency for immediate action to prevent the predator from harming future victims. P11 uses attitudinal projection as a contractive resource to create an obligation for immediate action by warning against inaction ('WE HAVE TO STOP HIM FROM DOING THIS TO OTHER GIRLS IN THE FUTURE'). It reassures those willing-to-testify by offering support and anonymity, while warning of the consequences of inaction using a reversed if-structure ('they WILL let him go free *if* women don't start coming forward') and ('DO NOT EMAIL *IF* YOU ARE NOT WILLING TO COME FORWARD AND TESTIFY').

P11 CONVOKES a well-knitted community by symbolizing unity with an image of hand-holding arms in a circular shape, which represents unity (firm-gripping hands), diversity (multicolour arms), and strength (encircling 'STRONGER TOGETHER' as a cry motto CAPSED). Typographical enhancements and conditional statements further PROMOTE solidarity, urgency of action, and adherence to the guidelines through the use of CAPS, imperatives with polarity, and conditional structures (if-then-else).

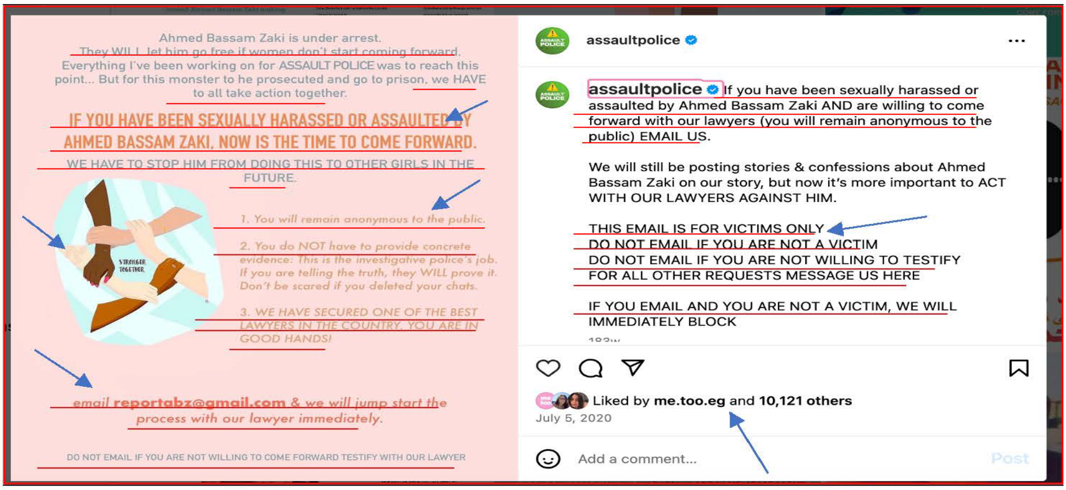


Figure 3. ABZ's P11

Figure 4 illustrates how P22 uses [(-ve)JUDGEMENT: Veracity=manipulative +(-ve) APPRECIATION: Reaction/social valuation=insufficient efficaciousness] to rally an ambient community around the ongoing pursuit of justice against ABZ's predatory actions (CONVOKE). While acknowledging ABZ's confession as progress, it emphasizes the need for continued action. The post encourages victims/survivors to come forward, highlighting support and empowerment while conveying demand for action and urgency through contractive resources and imperatives like '*not* too late to come forward' and 'come forward' (FINESS). P22 uses a question-answer structure to discuss the significance of coming forward and emphasize the importance of speaking out. It contrasts ABZ's limited confession ('threatening & blackmailing') with the more serious accusations from ('MORE THAN') 10 victims. It amplifies support through quantifiable measures ('160,000 people') and ensures constancy of protection (consistency of process/FOCUS) and robustness of empowerment (intensity/strength of process/FORCE) as in ('we'll be with you every step,' 'law amended,' 'we're making history' (PROMOTE).

P22 motivates interactants with the slogan 'the fight is NOT OVER,' reinforcing the ongoing struggle. Building on the *fight* motif, it CONVOKES a network using attitudinal elaboration through [(+ve) JUDGEMENT: Tenacity=brave=coming forward]. The prominent *MeToo* logo in the bottom-left corner symbolizes unwavering support (established as Given) and solidarity, whereas the email address in the bottom-right corner invites further action, suggesting a new avenue for potential action (FINESS). P22 uses typographical strategies to emphasize key elements: a large, **bold**, sans-serif font for the central fight motif to evoke a spirit of resistance; an *italicized* decorative-serif font of small letters to encourage the urgency of action; and formal monospaced medium-sized SMALL CAPS to convey the limited gains achieved. A small, *italicized* decorative-serif font renders the email invitation in the bottom-left corner friendly and open (PROMOTE).

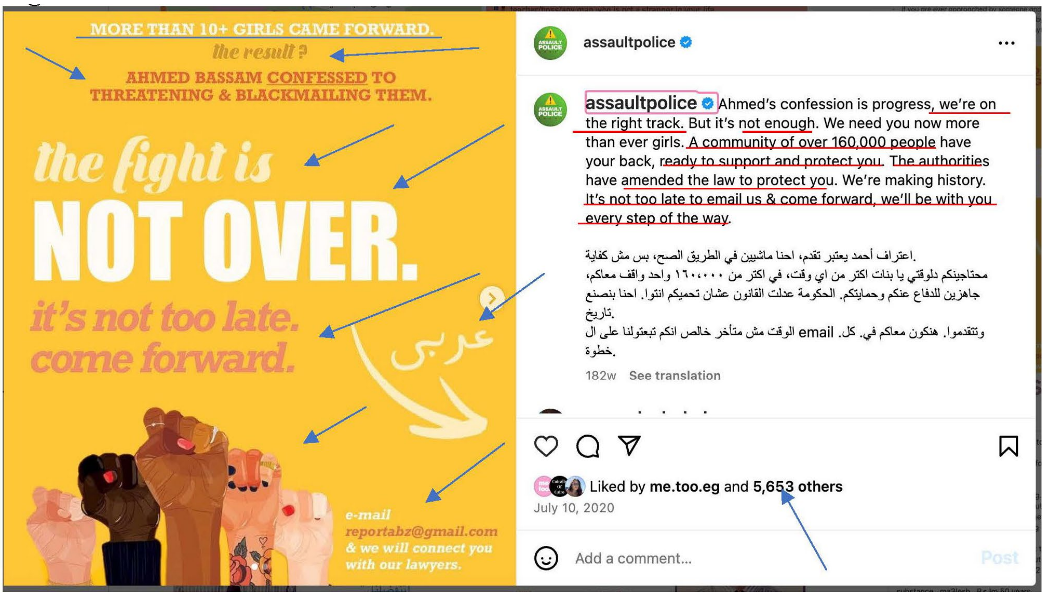


Figure 4. ABZ's P22

AP FINESSES its community-building efforts through ten additional posts (P2-5+P7-10+P14+P18), offering varied perspectives on sexual-violence while maintaining ABZ's image as a 'serial rapist.' These posts compare condemnation and resentment with societal complacency and acquiescence, drawing on a mix of factual and anecdotal evidence (audio recordings, chat transcripts, digital narratives and testimonies) to position ABZ as a perpetrator, constructing a compelling argument through truth-functional semantics. The ten posts underscore the victims'/survivors' credibility, promoting positive support and empowerment for them using [(+ve)APPRECIATION: Reaction=Social-valuation, (+ve)JUDGEMENT: Veracity], while simultaneously denouncing ABZ's actions [(-ve)JUDGEMENT: Propriety]. The evidence includes various media and experience attributes that involve (non-)Egyptian victims/survivors of different age groups (minors, adults) and contexts (social media, parties, educational institutions).

Figure 5 illustrates how P2 CONVOKES a community against ABZ's predatory behaviour, focusing on his blackmailing of victims. P2 emphasizes the ethical violations and negative impact of ABZ's actions through explicit condemnations [(-ve)APPRECIATION: Reaction +(-ve)JUDGEMENT: Propriety=immoral], evoking disgust and outrage. The post quantifies ABZ's recidivism and stresses the importantance of the issue (PROMOTE), reinforcing ABZ's determination to reoffend [(-ve)JUDGEMENT: Tenacity=recidivism] with high-evidentiality recordings to counter any skepticism about victim testimony (FINESS). P2 engages with interactants through the imperative 'Swipe,' emphasizing the possibility of re-offending, as in ('one of his victims').

Figure 5. ABZ's P2

P2 establishes ABZ as an offender, ascribing criminality to his name and actions through the use of red to signify the severity of his offenses (CONVOKE). The prominent configuration of headlines and recordings emphasizes the gravity of the situation and counters potential skepticism (PROMOTE). The centralized large-sized recording icon (offense-tracking record) instils the evidence prominence, occupying substantial space of the frame *vs*. potential allegations of false victims to realize FINESS, distilling possible perspectives.

Figure 6 showcases P5, which provides compelling factual evidence—a victim-survivor's harrowing testimony of rape. P5 forges an ambient community (CONVOKE) to condemn ABZ's actions using [(-ve)JUDGEMENT: Propriety=immoral=rape +(-ve)APPRECIATION: Social-valuation=unfavorable effects+ Reaction=shock=disgust]. It emphasizes the victim's suffering and uses passive verbs and modulated strong adjectives to evoke negative JUDGEMENT and APPRECIATION. While assigning rape responsibility to ABZ, it attributes intensified suffrage and physical debilitation to victims/survivors ('he raped me...I suffered...cracked my lower bones...couldn't walk'), which intensifies the social disapproval toward ABZ. P5 highlights the extensive impact of ABZ's actions, fostering a collective response through comparative quantifiers. It underscores the scale, severity and widespread nature of ABZ's offenses, PROMOTING the quantity ('more than 100 girls provided evidence...MORE RAPE VICTIMS...'), intensity ('serial predator...well educated...connected, yet none stopped him...to turn into PREDATOR...RAPIST...') and extent (spatial distribution 'online or real-life...IN prestigious institutions') of ABZ's offenses.

P5 deploys hashtags (#abz # زكي_بسام_احمد_المتحرش) to mobilize opposition against ABZ (CONVOKE) and situates the survivor's testimony for scrutiny. It urges victims/survivors to speak out to prevent others from becoming 'predators' or 'rapists.' By featuring ABZ's image in the center with unsettling expressions (an offer gaze and a sarcastic smile) alongside the survivor's testimony in the bottom-right corner[5] (factual contractive resources of Attribution—*new information* for

[5] Follows the Western conventions of left-right (given/new).

consideration), P5 fosters diverse perspectives on ABZ's crimes (FINESS). Typographical enhancements, such as large **bold** CAPS and image-size adjustments PROMOTE the gravity of the situation, juxtaposing ABZ's large-image with the victims'/survivors' medium-size chatboxes.

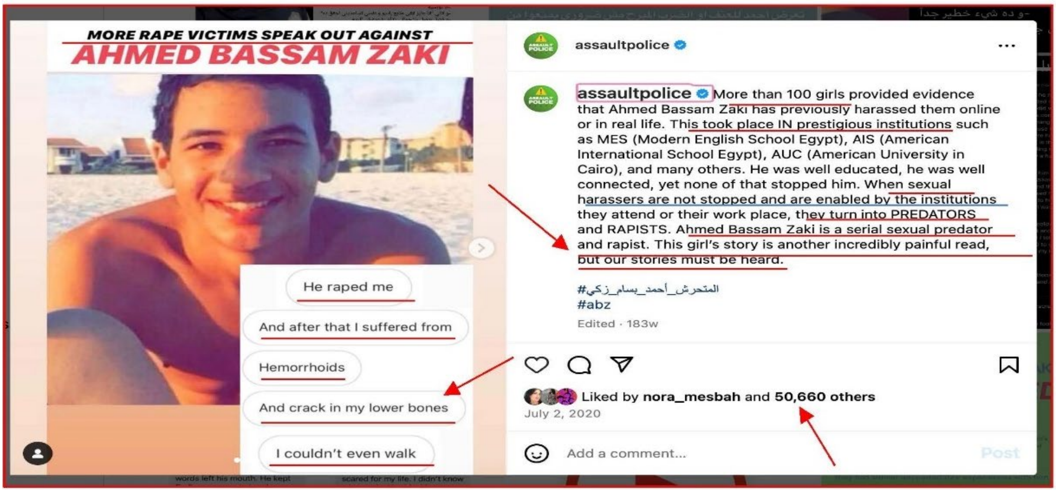


Figure 6. ABZ's P5

Figure 7 illustrates how P3 introduces the '7th confirmed sexual-assault victim' as credible evidence, attributing [(+ve)JUDGEMENT: Veracity=truthfulness] to the author-victim, emphasizing the growing community of survivors. It describes the narrative as 'chilling' and 'painful to read' to ascribe atrocity to ABZ [(-ve)JUDGEMENT: Propriety=immoral] and resilience yet distress to victims/survivors [(+ve)JUDGEMENT: Tenacity=distressed]. P3 CONVOKES an ambient community of victims-survivors ready to share their stories and promises justice to those who speak-out, emphasizing bravery and certainty through using a coupling of [(+ve)JUDGEMENT: Tenacity= victims/survivors who 'submit their stories']. P3 uses attitudinal elaboration and enhancement strategies to FINESS the victims'/survivors' position by emphasizing their exceptional bravery (adverb +adjective) and reaffirming their commitment to justice 'WILL get justice' (modal with high certainty). P3 highlights dedication to justice by using CAPS in 'WILL'(PROMOTE).

P3 positions ABZ as a dangerous offender, employing red, centralized top-position headlines to elicit aversion towards him and empathy towards survivors using [(-ve)APPRECIATION: Reaction=aversion *vs.* (+ve)APPRECIATION: Reaction=empathy to survivors] (CONVOKE). The vertical layout compresses distressing details, prompting interactants to share the author's intersubjective stance on inspecting—evaluating this evidence (FINESS). The narrative's columnar structure indicates the compression of the experience's distressful details, intensifying their impact (amount, extent) and PROMOTING empathy (proximal threat).

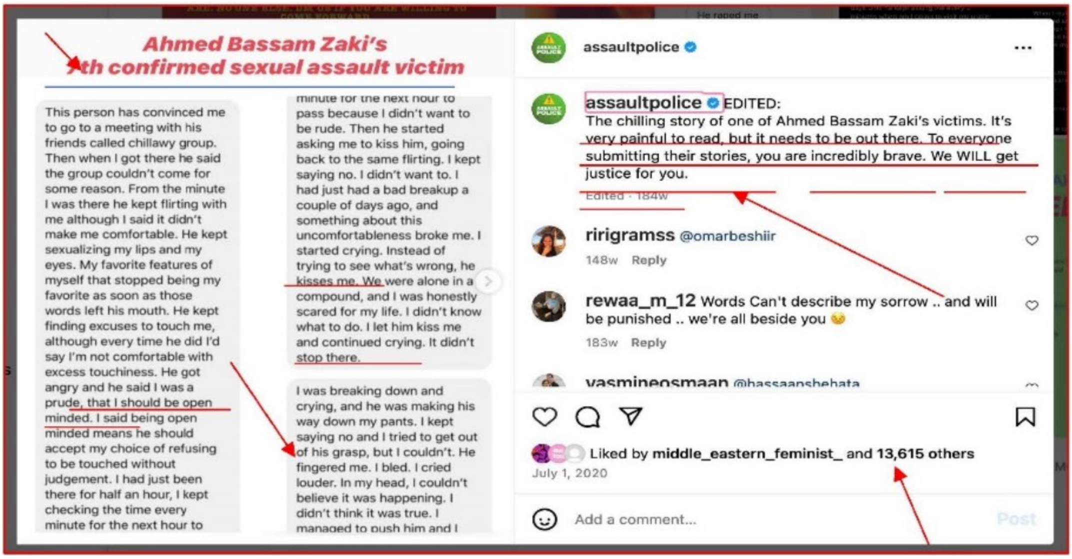


Figure 7. ABZ's P3

In posts P16-17, P19-21, and P27-30, *AP* contrasts the responses of legal, social, and educational forces/institutions to sexual-violence, ranging from enablers to supporters of survivors. It highlights a spectrum of accountability, from complacency to vigilance, assigning negative judgement to enablers and positive reinforcement to those who support survivors. *AP* PROMOTES the urgency of addressing sexual-violence by focusing on its severity and impact, distinguishing between true-victims (speak-out *vs.* silenced), false-victims (examined—revoked) and (alleged *vs.* confirmed) harassers. It shows how responses range from proactive action to reluctance or inaction across institutions, advocacy groups, and bystanders (wo/men).

In figure 8, P20 condemns educational institutions that enable sexual-harassment, labeling them as unethical and apathetic using [+(-ve)JUDGEMENT: Propriety=unethical=apathetic +(-ve)APPRECIATION: Reaction/impact] (CONVOKE). P20 portrays these *enabling* institutions as dismissive, 'silencing victims', while emphasizing the vulnerability and emotional susceptibility to 'young girls' and 'concerned boys' who 'united' against them, prompting interactants to align with potential student-victims. It couples an isomorphic structure with counterproductive outcomes of 'we presented... *vs.* 'we were met...', juxtaposing these institutions' negligence with the victims' efforts and plight. Using strong/diminutive adjectives and adverbs such as ('*huge* role, *little* urgency, *ultimately brushed off*'), P20 PROMOTES the severity and extent of the institutions' negligence, highlighting how this large number **'20 or 30'** of vulnerable 'young girls' and 'concerned boys' 'united' with evidence, only to be 'ignored.' P20 uses interrogative structures with 'how' as a contractive resource ('*how* educational institutions enabled harassment...*how* ABZ got away...?') to challenge the institutions' role in enabling ABZ's predatory behaviour, fostering a collective rejection of such an *enabling* role (FINESS).

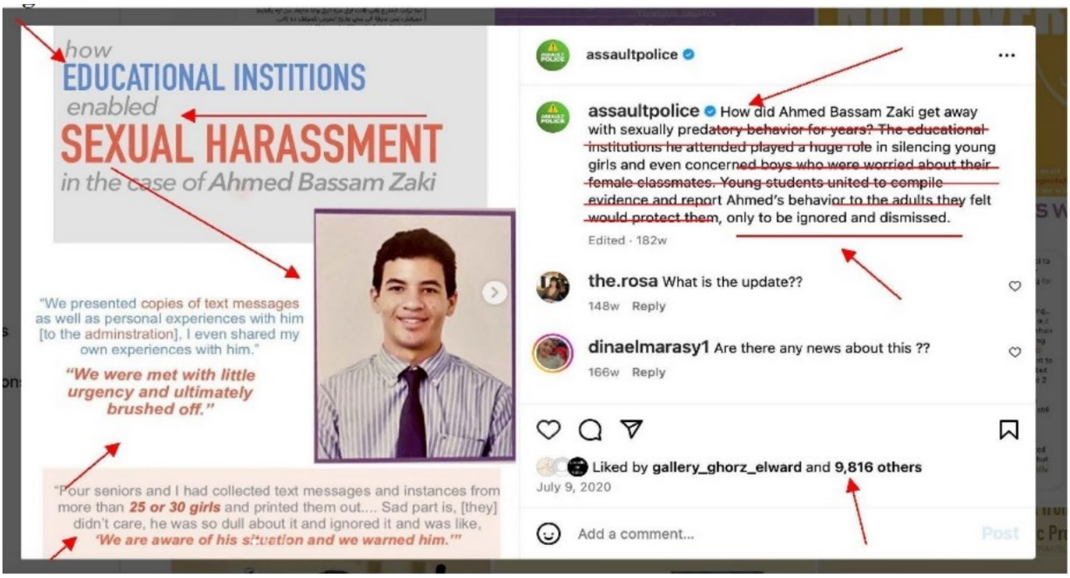


Figure 8. ABZ's P20

P20 mobilizes an ambient community against 'educational institutions *enabling* sexual-harassment' by highlighting their facilitative role (CONVOKE). It deploys identical font-style, CAPS, and placement to align these institutions with the harasser, while varying font-sizes and colours (medium-blue for institutions, large-red for harassment) indicate their connection to the predation crimes using consonant—dissonant designs. By juxtaposing ABZ's smiling image with the students' efforts, P20 prompts interactants to reflect on the institutions' complicity (FINESS). Typographical enhancement like boldface, italics and quotation marks PROMOTE the disappointment of student-victims and the apathetic institutional response through [(-ve)APPRECIATION: Reaction: Quality=affectual response].

Figure 9 illustrates how P16 forges a coalition of responsive institutions that oppose 'sexual-misconduct,' portraying them as ethical and commendable [(+ve)JUDGEMENT: Propriety=ethical +(+ve)APPRECIATION: Social-valuation=responsive] (CONVOKE). It uses powerful language (intensified adverbs +strong adjectives) to ascribe positive social-sanction and appreciation to their swift actions in expelling ABZ and conducting thorough investigations, encouraging others to follow this model. P16 highlights the EU Business School's response as exemplary to set the standard. By discussing a case with presumably false allegations, navigates the complexities of evidence and underscores the unwavering determination of these institutions to combat sexual-harassment, hinging on evidence's veracity—falsehood (FINESS). It uses concession and continuity adverbs ('nevertheless, still') to PROMOTE the institutions' tenacity to block sexual-harassment.

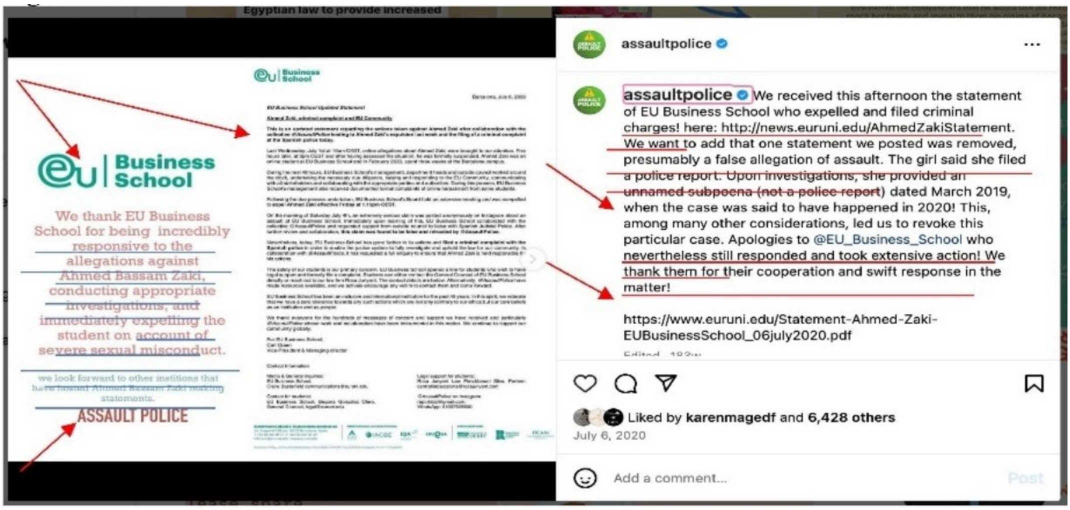


Figure 9. ABZ's P16

The EU Business School's statement is configured on the left side for evaluation and alignment, while a gratitude note and the school's commendable actions are positioned on the right side to showcase it as a celebrated model for emulatation (CONVOKE). P16 uses green for the school's title/logo and red for the harassment issue to underscore the importance of swift, ethical responses in handling sexual-harassment (FINESS). It PROMOTES the gratitude note to emphasize its intended affectual-impact, displaying it prominantly in a large sans-serif font to make it legible and relatable. Conversely, the densely-compacted small serif font conveys meticulousness and formality in the statement letter.

Figure 10. ABZ's P30

Figure 10 displays P30's formal announcement of ABZ's sentence for sexual-assault, which aims to rally support around this credible verdict using [(+ve)JUDGEMENT: Veracity=credible= ABZ's sentence +[(-ve)APPRECIATION:

Social-valuation=efficaciousness] (CONVOKE). The announcement strategy encourages more victims/survivors to come forward to ensure a crime-proportionate sentence, expressing concern over the sentence's adequacy in proportion to the crimes' frequency and severity (FINESS). By emphasizing the limited number of confirmed victims in a salient position (at the end of the statement), P30 suggests more testimonies are needed to achieve proportional justice (PROMOTE).

P30 CONVOKES a community's memory of ABZ's crimes through visual coherence, using his image from P2 in the background of the sentence announcement to encourage reflection on the adequacy of the punishment. The green text, with intensified CAPS and **boldface**, PROMOTES optimism about the impact of victims'/survivors' speaking-out. However, ABZ's defiant image (cf.P2) serves as a stark reminder of the ongoing threat posed by harassers, including ABZ, urging victims/survivors to come forward to prevent further harm.

Figure 11 illustrates how *AP* deploys 40 posts to establish (14Ps), maintain (12Ps), and promote (14Ps) communion feelings to combat sexual-violence. It forges social bonds around speaking-out, seeking/receiving support, and addressing cultural issues that sustain violence and enable harassers. *AP* creates a safe space where victims/survivors can confidently share their experiences, valuing them as credible and deserving support rather than blame, while simultaneously holding harassers accountable through the use of [(+ve)JUDGEMENT: Veracity=credible +(+ve)APPRECIATION: Social-valuation/worthiness= attention-worthy]. It unites people across various demographics—age, gender, social class and language—to believe in, support and empower victims/survivors, aiming to educate and change cultural attitudes that perpetuate sexual-violence (warding off illiteracy, manipulation and mis/disinformation, enhancing victims/survivors' personal repertoire with adequate/relevant knowledge vs. the normalizing cultural reservoir).

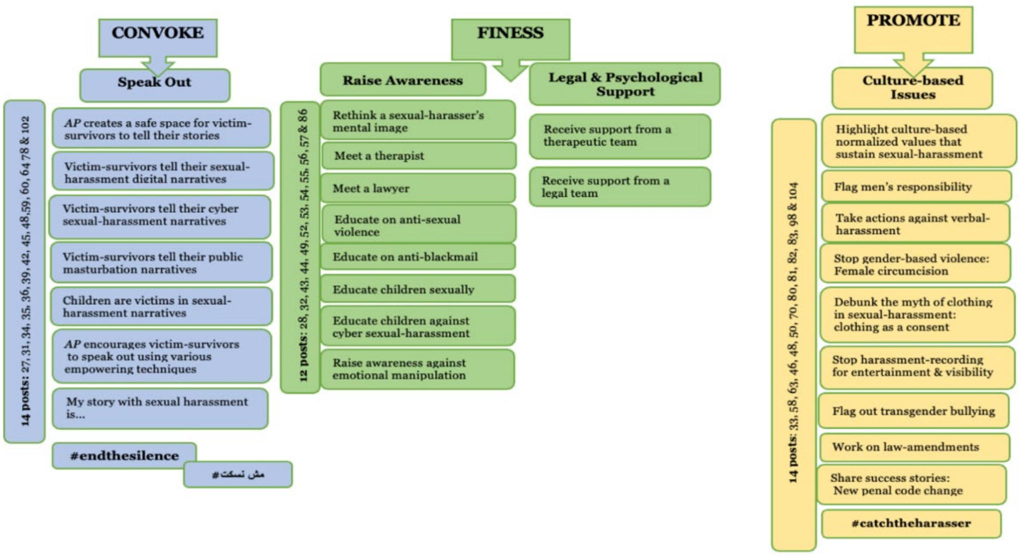


Figure 11. Communing affiliation in Raising Awareness (Abused-centered posts)

Figure 12 displays six digital narratives from victims of different genders, ages and backgrounds, highlighting the severity and frequency of harassment. P31 CONVOKES this diverse community, offering a safe space for victims to share their stories and counter the myth that harassment is limited to specific genders or attire using [(+ve)APPRECIATION: Social-valuation=victims/survivors narrate their stories safely]. P31 refutes the myth that seductive clothing triggers harassment and restricts it to young women, highlighting that anyone can be a victim through repeated structures like ("I am + different gender/age/background/ social class/experience," "I was harassed/raped..." and "I still feel..."). These narratives adopt an anti-blaming stance (FINESSES) to create continuity and coherence among diverse experiences. Slide A states, 'I am *a boy*, *6 times*, from *childhood*;*'* B says, 'I am a man...got *raped*...*touched many times* in *subways*;' C highlights, 'I *still remember* the *ugly details*;' D mentions, 'I am *a young girl*, *didn't understand*, *never got justice served;'* E recounts, '*my mother sealed my lips* ...;' F narrates, 'I *wear nikab*, he sneaked with his hands ... I *was speechless*...' The narratives use descriptive language, including adjectives (integers, many, ugly, worst, young, speechless, shock) and adverb adjuncts of time and manner (until, still, even, hard), to foreground the severity, frequency and commonality of these incidents, fostering empathy and challenging victim-blaming (PROMOTE). They foreground the assault's severity, multiplicity and duration using typographical enhancement (red lines) to mark certain key phrases.

Caption "Tell your stories. ART BY NADA ELIAN stories @nadaelian" N.B. All photos have underlines in red as posts' original enhancement.

Through digital visuals, P31 portrays six victims-narrators. Slides A and B exemplify male-victims of different ages and experiences: a young schoolboy harassed repeatedly, and an adult male who was verbally abused and raped at twelve. Slides C and D feature female-victims from diverse social backgrounds and harassment-experiences: a schoolgirl harassed and beaten, and a woman as assaulted at seven. Slides E and F display modest women, one of whom was silenced by her mother after being harassed. To CONVOKE a supportive community of credible victims/survivors, most slides use close, eye-level frontal-shots with a demand gaze, while slide B uses an oblique offer-gaze to show empowerment through self-retaliation, suggesting an exemplary model. The visuals engage interactants by negotiating traditional reactions (support/protect *v*s. blame/shame) and offering victims/survivors with relatable depictions as contractive resources (FINESS). P31 intensifies awareness of assault severity, extent and distribution by using red underlines to emphasize specific lexical items that highlight the frequency, age and reaction of victims and society, such as helplessness, shock, fear, silencing, and lack of compassion (PROMOTE).

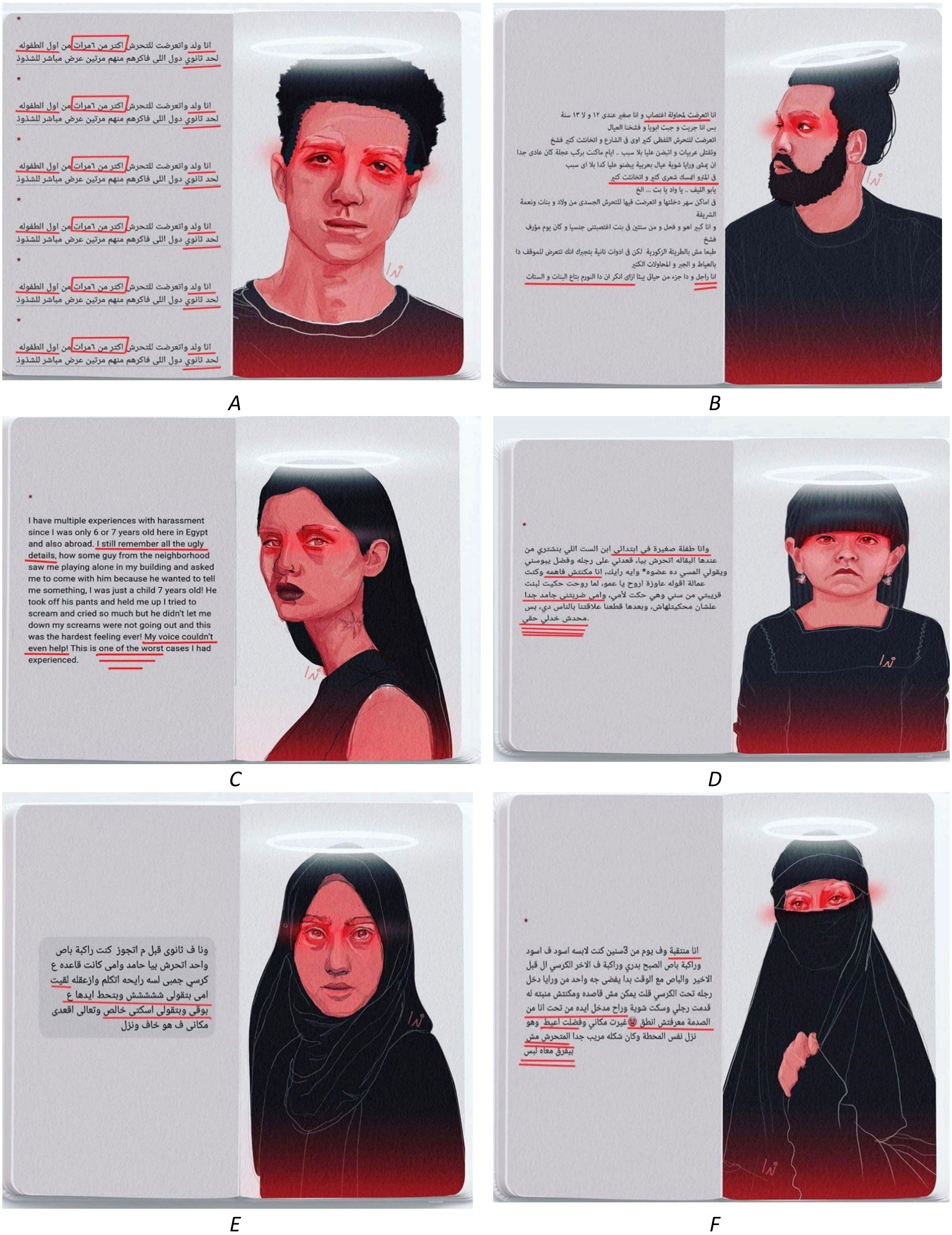


Figure 12. Speak-out P31

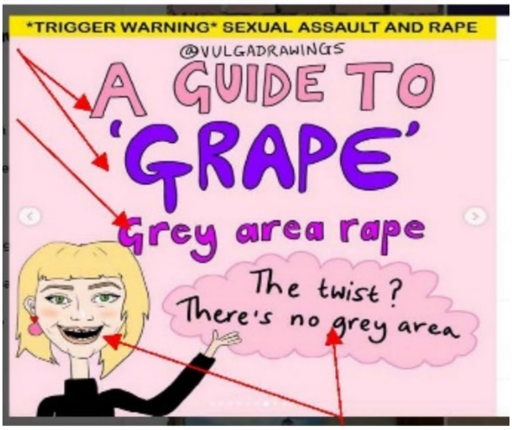
Figure 13 illustrates how P36 explicitly CONVOKES an ambient community to break the silence that enables sexual-harassers, emphasizing the power of speaking-out through [(+ve)APPRECIATION: Social-valuation=exposing harassers]. To commune an affiliation around speaking-out, it uses attitudinal elaboration strategies (conjunction 'when') to specify and condition that 'our voices are louder' only when 'we speak together' (CONVOKE). It promotes collective action through inclusive language ('our,' 'us,' 'we') and encourages immediate story sharing, using imperatives and hashtags to establish demand and urgency. Directly addressing victims/survivors using second person, P36 asserts the importance of their voices to combat sexual-violence, stating ('our voices...louder...together...your story matters') using [+ve Social-valuation] to ward off silence (FINESS). It emphasizes the intensity, urgency, extent, and distribution of sexual-violence by employing adverbs of time+ adjectives, as in ('it's *finally* a *nationwide* concern'). It employs the exclamation mark sign (!) after 'TO SPEAK OUT!' to PROMOTE urgency and action.

Figure 13. Speak-out P36

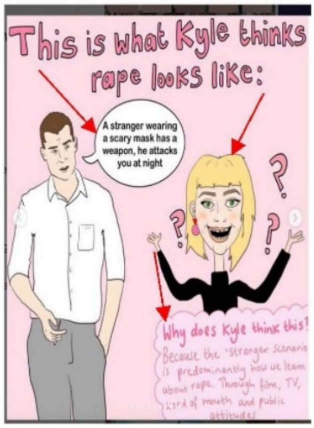
Through emotive language and visual design, P36 highlights the urgency and intensity of sexual-violence issues, urging communal action. It encourages sharing stories via #hashtags to break the silence (CONVOKE). The visual configuration of SEXUAL VIOLENCE' and '#endthesilence' at the opposite ends of the frame symbolizes the dichotomy between *silence* and *speaking-out* (upframe *vs.* downframe), featuring them with the same colour and font-size (FINESS). P36 strategically uses hashtags and visual design to underscore the importance of communal action and position speaking-out as essential, urgent and impactful. Red framing establishes the critical nature of the situation, prompting action from victims/survivors (PROMOTE).

Figure 14 presents how P44 challenges misconceptions about rape and sexual-harassment. It musters a community misinformed and disinformed about sexual-harassers, consent and victims' responsibility using [(-ve)JUDGEMENT: Veracity=inaccurate=widespread mis/disinformation about sexual-harassment], rallying for re-education while rejecting misguided attitudes (CONVOKES) while rejecting unreasoned attitudes (FINESS). Slides B/E use interrogative punctuation and contrasting scenarios to offer new perspectives on rape/rapists, misconceived consent and responsibility.

A



B



C

D

E

Figure 14. Raise Awareness P44

For example, Slide D employs statistical data and contrast-coordinating conjunctions to highlight prevalent misconceptions of abusers, consent and responsibility, suggesting an exigent need for rectification of understanding, feeling, and thus acting/doing (FINESS). Slides C/D/E employ a question-answer structure ('Why?—Because...,' 'What makes people think?—What if ...") to juxtapose old beliefs with evidence-backed insights. Slide B introduces the term 'GRAPE' (portmanteau) to foster cultural shift (FINESS), while Slide E uses repetitive phrases 'What if I/We' to expose societal biases that blame victims (PROMOTE).

P44 uses graphical elements to CONVOKE a mis/disinformed ambient community who misses 'the twist' with a positive attitude. Slides B/C showcase cartoonish characters, such as Kyle, who are warmly depicted through smiles, opens arms and close-frontal shots, inviting interactants to reconsider perspectives through proximity, relatability and engagement (cf. slides A/B/C). Speech bubbles, dialogue-structure and vibrant, fancy font-faces and colours invoke dialogism and friendliness, encouraging new understandings while rejecting outdated beliefs (FINESS). Arrows and geometric shapes in Slides C/D reinforce new perspectives and relationships, contrasting with the depiction of longstanding misconceptions. P44 deploys different colours (shades of purple-pink), font-type, -face, and-size to foreground the long-standing misconceptions, making them salient and thus amendable. While conclusive findings are represented in black to characterize their veracity and stability, debatable propositions are depicted in pink to signify their potential for change (PROMOTE).

Figure 15 illustrates how P86 advocates for children's sexual education to prevent violence, focusing on parents eager to learn and educate their children. It CONVOKES an ambient community focused on bridging the gap in sexual literacy, highlighting Egyptian parents' [(-ve)JUDGEMENT: Capacity=lack of sexual-literacy +(+ve)Tenacity=determination to pursue/provide +(+ve)APPRECIATION: Social-valuation=efficaciousness=protectiveness]. Through imperative language and contrasting beliefs, P86 urges parents to take an active role in their children's sexual education. Slides A—D use nine imperative verbs and structures to convey directive force of advice, such as ('educate..., be, give, talk, encourage, don't blame, believe, reassure and have basic conversations'), to instil a sense of obligation and urgency and reposition parents ideologically. It couples positive sexual education as protective with avoidance as inappropriate through [(+ve)APPRECIATION: Social-valuation=useful=protective] *vs*. [+(-ve)APPRECIATION: Social-valuation=inappropriate]. Slide E debunks the misconception that sexual education encourages deviance. Instead, it presents sexual education as essential health knowledge, refuting the misconception that it encourages deviance through [(-ve)JUDGEMENT: Normality=challenging cultural norms]. In doing so, it employs mitigating phrases like ('just gives the opportunity to reinforce important health-based knowledg*e*') (FINESS). Slides A—D use clauses of reason, purpose and explanation along with conjunctions and conditional-structures to instil new beliefs and attitudes. To realize this, it uses a mix of adjectives (‘primary educator, healthy boundaries, uncomfortable, physical touching) and adverbs (‘constantly learning, safely, accurately complain’) that extend, elaborate, or specify and emphasize the extent, continuity and urgency of ideational and evaluative meanings, reinforcing the importance of age-appropriate education. The use of **boldface** emphasizes parental responsibility for reforming sexual education practices, advocating for age-sensitive learning (PROMOTE).

Figure 15. Raise Awareness P 86

Slides E-F employ vibrant orange and symbolic imagery to evoke warning, protection and healing, urging parents to embrace sexual education for themselves and their children (CONVOKE). Slide E configures a hand-holding a flower on the post's right-corner to signify new life/beginnings, in contrast to the lack of prior sexual education (FINESS). Slide F juxtaposes green leaves on an orange background to instil hope in children's safety, highlighting the causal link between education and protection through white bold text, suggesting the method's efficacy.

Figure 16 demonstrates how P50 engages men in preventing sexual-harassment through [(+ve)JUDGEMENT: Tenacity=resolute= men can prevent harassment +(+ve)APPRECIATION: Social-valuation=efficaciousness]. To CONVOKE this ambient community, slides A and E employ gender-inclusive language (pronouns: 'we, you, everyone'), adjectives ('all') and directives (suggestions: using if-structure +directive) to foster men's active involvement in combating harassment. Slide E uses vocative expressions to call upon ('everyman'), emphasizing collective responsibility for ending harassment in Egypt. Slides B—D use a combination of if-structures and directives in various harassment scenarios to reframe men's attitudes towards harassment, encouraging a transition from passive to proactive stances (FINESS). Slide E uses a mix of modals and adverbs to PROMOTE the coupling [(+ve)APPRECIATION: Social-valuation=efficaciousness= men's actions to stop sexual-harassment]. It emphasizes the urgency and intensity of their responsibility using obligation modals 'need'+ 'you/your help' intensified with proximity ('right now', 99% of *kinswomen*), extent—distribution ('99%...everyday...in public space') and amplified with degree ('you can...listen to men more'). Slide A stresses the societal impact of harassment, challenging the notion that it is solely a women's issue through [(+ve)JUDGEMENT: Capacity=power/ability + (+ve)APPRECIATION: Social-valuation=acceptable], while rejecting [+(-ve)APPRECIATION: Reaction=value/indifferent=a women's issue]. It uses the conjunctive adverb ('however') to prompt a shift in attitudes and, potentially, actions (FINESS). Slide A uses strong language (adjectives and adverbs) to PROMOTE men's degree of inclusion ('all men, all aware'), level of responsibility ('actively interfere...') and extent of impact ('deeply affects').

Slide A uses hashtags (#catchtheharasser #اقفش_ متحرش) and colour contrast to marshal an ambient community of men who are willing to take collective action against harassment (CONVOKE). Slide A creates brightness and contrast by juxtaposing a red-white foreground against a navy-blue background, symbolizing danger and caution in red against power and authority in navy-blue, thereby encouraging immediate response. The Arabic and English mix reflects inclusivity and the strategic negotiation of diverse perspectives (FINESS). The white hashtag #اقفش¬_متحرش PROMOTES collective anti-harassment efforts, while the red text on a navy-blue background emphasizes men's role in prevention, evoking the authority of collective power. Slides B-D introduce a new anti-harassment approach, contrasting preventive-actions in (white) with harassment situations in (red). Slide E reinforces urgency through cautionary red, which serves as a warning, signaling the need for men to intervene and end bystander culture.

Figure 16. Culture-based issues P50

Figure 17 demonstrates how P80 CONVOKES an ambient community against circumcision medicine, highlighting the immorality of the practice, even when doctors perform it, using [(-ve)JUDGEMENT: Propriety=immoral=distortive=circumcision medicine]. An imperative tone urges collective action via an electronic petition, condemning the distortion of genitalia through circumcision and using a contextual link to prompt participation in the cause. The adjunct comment adverb ('unfortunately') and the concessive subordinate clause ('although') emphasize the practice's negative impact (FINESS). P80 asserts that circumcision, whether performed by doctors or not, is distortive and immoral using coupling FINESS [(-ve)JUDGEMENT: Propriety], and the conjunctive 'unlike.' P80 uses a contextual link, 'SIGN', to direct interactants to engage with and commit to the cause on another page (PROMOTE).

Figure 17. Culture-based issues P80

P80 uses an electronic petition as a community-building tool against circumcision medicine, symbolized by green to evoke renewal after discrimination (CONVOKE). A whole-part visual structure features female doctors negatively evaluating circumcision using yellow colour to inspire change (PROMOTE). A digital female-doctor character (Carrier) holds a sign denouncing medical circumcision (Possessive attributes), encouraging viewers to align with the cause and sign the petition to challenge misconceptions about its validity (FINESS).

5. Discussion

The study explored how cultural norms and power dynamics in the global South shape the portrayal of sexual-violence victims and perpetrators, offering a glocalized understanding of combating sexual-violence within digital feminist spaces (cf. Roudometof, 2016). The findings demonstrated how Egyptian digital posts mobilize communities against sexual-violence by employing affective strategies and semiotic resources to build solidarity and drive legal and institutional reforms (cf. Marzouk & Vanderveen 2021, Ringrose et al. 2018, Ryan 2019). While still being relevant to Egypt, this research highlighted how the local reception of *#MeToo* used evaluative couplings to negotiate interactive self-positioning (cf. Hafner 2015, Leontovich 2017, Eslami et al. 2023) and situate Egyptian SVVSs in a wider context of feminist activism.

Focusing on the under-researched area of Middle Eastern digital feminist activism, the study deconstructs how evaluative couplings create, sustain and negotiate value-and-feeling-centered community bonds around SVVSs. These ambient affiliations are forged in relation to evaluation, sharing, seeking support and negotiating stances (cf. Wang & Luo 2023). The results showed that *AP* employed emotional appeals combined with moral evaluations to construct the victims' semiotic identity as credible, morally deserving empathy, and demanding justice, thereby challenging the victim-blaming narratives prevalent in gendered discourses and aligning survivors with values of truth and justice (cf. Loney-Howes

2018). This is achieved by emphasizing victims' emotional distress, framing the pursuit of justice as moral, countering the stigmatization of victims, reframing victim-blaming narrative, condemning gendered injustice and calling for collective action/support for victims. These strategies created a shared affective positioning of solidarity, justice, and equality justice by consistently reframing shared emotions of pain, anger and hope. *AP* uses a multimodal approach to solidify the audience's affective engagement, crafting a digital space where individuals feel emotionally and morally aligned with SVVSs (cf. Zappettini et al. 2021). It leverages linguistic features (inclusive/exclusive evaluative language, structural organization, coherence/cohesion), visual cues (photographs, graphics, videos), design elements (colour schemes, text/visual spatial configuration, affective repetition, hashtags) and cultural references (individual/collective stigmatized disclosures of lived experiences) as affectual tools that construct, restructure, and negotiate value-and-feeling-centered affiliations and community bonds, a power technology to create collective social change (cf. Zappettini et al. 2021). Finally, *AP* situates the Egyptian SVVSs in both local and global feminist contexts, positioning their activism within the broader scope of the global *#MeToo* movement while maintaining focus on culturally relevant issues and symbols.

Using appraisal and communing affiliation frameworks, the study revealed how *AP's* posts combine ideation with JUDGEMENT and APPRECIATION to create evaluative couplings that evoke empathy and solidarity while encoding and enacting victims'/survivors' semiotic identity (Zappavigna 2014, 2018). *AP* defines sexual-violence in the context of sexual-literacy, challenging normalized sociocultural norms/values to encourage speaking-out. It CONVOKES an ambient community where victims/survivors can speak-out, receive emotional, legal and psychological support, and are well-informed of verbal/physical sexual-violence. This reflects a broader attempt to shift societal attitudes toward sexual-violence and mobilize collective action against it. To foster community bonds, it leverages semiotic tools—digital imagery, design elements, blending of Arabic and English, code-switching, and colour-coded visuals. However, *AP* tends to adopt Western traditions to frame victims'/survivors' experiences, using strategies such as code-switching to neutralize sensitivity and circumvent cultural restrictions, alongside globally-aware visual designs and left-side orientation to embrace modernity (cf. Marzouk & Vanderveen 2021).

AP positions SVVSs as credible, worthy and deserving of support, challenging the prevalent culture of victim-blaming and shame (cf. Zappettini et al. 2021). It promotes a discourse of empowerment and education, seeking to dismantle the enabling structures that perpetuate sexual-violence within Egyptian society (cf. using English expressions and Westcentric design to discuss taboos to neutralize sensitivity, circumvent cultural/religious restrictions, embrace modernity). Using FINESS, *AP* establishes how victims/survivors should act/speak-out rather than stay silent, how societies should react (provide support rather than *blame*) toward victims/survivors, and how social institutions should take actions to ('educate, reform and inhibit/dismiss rather than enable and empower') sexual-violence perpetrators.

AP characterizes a site of engagement that PROMOTES speaking-out by emphasizing survivors' anonymity and safety to impede recurrence. It negatively appraises cultural-based normalized values by raising awareness against emotional manipulation, sexual-blackmail and cyberharassment. It uses strong language (adjectives and adverbs), interrogatives and directive structures to urge legal/social institutions to adopt proactive measures against sexual-violence.

While the study focused on a single Instagram page, the findings are representative of Egypt's broader digital anti-sexual violence landscape. Future research could explore other digital platforms for feminist activism in other non-Western contexts. It could employ quantitative data analysis with a larger sample size and expand on non-verbal dimensions to gain deeper insights into how vulnerable communities (re)establish and enact social identities and practices within varying power dynamics.

6. Conclusions

The study addresses the gap in understanding how linguistic strategies—such as language choice, affective stance, visual imagery and semiotic design—mediate the complex interplay between global feminist discourse and local cultural values, shaping a distinct form of glocalized feminist activism in *AP*. It contributes to identity construction and attitudinal research by expanding the analytic powers of the communing affiliation while opening new avenues for semiotic identity construction and construal. It broadens the representation of victims to include diverse ages, genders, classes and social backgrounds, while depicting perpetrators as those exploiting societal, cultural, or institutional gaps through power, influence, or anonymity.

This study aimed to discuss how *AP*'s affective-discursive affiliation strategies foster communities around sexual-violence victims/survivors in digital spaces. It examined how affective positioning, mediated and enacted through digital media, shapes vulnerable online communities. The affordances of digital technologies, such as visibility and connectivity, play a critical role in facilitating collective social change in feminist activism. The findings have critical implications for combating sexual-violence in vulnerable non-Western communities through affective positioning strategies and semiotic resources. They highlight how digital tools like visuals, graphics, videos, narratives of lived experiences/evaluations and design elements such as colour schemes, coherence/cohesion, texts/visuals balance/structure in spaces and hashtags function as affectual tools to negotiate identities, promote solidarity, foster community and resist gendered norms in non-Western settings.

The local Egyptian *#MeToo* challenges gendered semiotic identities and inequalities in digital environments, examining the ambient force of affective positioning through the lens of networked-bonding affiliations. It demonstrates resistance against gendered norms and stereotypes and the harness of online spaces to promote feminist activism by facilitating empathy and solidarity. This study emphasizes the importance of bringing Arab women's voices into global conversations on *#MeToo*, challenging criticisms of the movement's limited inclusivity, featuring digital narratives of various genders, ages and social backgrounds, social classes and experiences including humble/privileged and modest/free victims/survivors. Ultimately, this research reshapes our understanding of the linguistic strategies used around the conversation of combating sexual-violence and driving social change in Egypt.

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Research article / Научная статья

Frittering away the day: Creating an inventory of metaphorical collocations in English

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Abstract
Collocations, words that habitually go together, such as "to book a meeting", represent a peculiar linguistic phenomenon that has resulted in numerous studies by linguists and applied linguists, especially those in search of the mechanisms of words forming a companionship and of the effective techniques of teaching and learning collocations in another language. Recently, a new avenue of research has emerged with the aim of exploring metaphorical collocations viewed as "a type of a collocation in which the collocate is used figuratively and the base literally" (Patekar 2022), such as "a big day". There are a number of challenges when it comes to identifying and analyzing metaphorical collocations. Hence, the aim of this paper is to outline the steps and issues in creating an inventory of metaphorical collocations in English. Using a corpus-driven approach, collocations with the noun "day" as the base were extracted automatically, and metaphorical collocations were identified and analyzed manually. The results highlight the challenges in identifying and analyzing metaphorical collocations and outline the steps in creating an inventory of metaphorical collocations. Furthermore, distinguishing collocations from free combinations on the one hand and idioms on the other remains an ongoing challenge in linguistics, which also applies to metaphorical collocations. This has several implications. Firstly, without a better corpus analysis tool, research is bound to rely on manual analysis with all its drawbacks. Secondly, creating an inventory has proven to be the first step in shedding light on metaphorical collocations. Thirdly, an inventory based on the most frequent nouns across different languages is the foundation for further cross-linguistic study of metaphorical collocations.
Keywords: *metaphors, metaphorical collocations, corpus research, Sketch Engine, English*

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Frittering away the day: создание инвентаря метафорических коллокаций в английском языке

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Аннотация
Коллокации – слова, которые привычно сочетаются друг с другом, например, *to book a meeting*, – представляют собой своеобразное языковое явление, ставшее предметом многочисленных исследований лингвистов, особенно тех, кто исследует механизмы образования слов-компаньонов и эффективные методы обучения и изучения коллокаций в другом языке. В последнее время появилось новое направление исследований, целью которого является изучение метафорических коллокаций, рассматриваемых как «тип коллокации, в которой коллокат используется образно, а основа – буквально» (Patekar 2022), например *a big day*. Выявление и анализ метафорических коллокаций сопряжено с рядом трудностей. Поэтому цель данной статьи – описать шаги по созданию списка метафорических коллокаций в английском языке и выделить связанные с этим проблемы. Используя корпусный подход, коллокации с существительным *day* в качестве основы были извлечены автоматически, а метафорические коллокации были выявлены и проанализированы вручную. Полученные результаты свидетельствуют о трудностях, возникающих при выявлении и анализе метафорических коллокаций, и описывают этапы создания реестра метафорических коллокаций. Они показывают, что отграничение коллокаций от свободных сочетаний, с одной стороны, и идиом – с другой, остается постоянной проблемой в лингвистике, которая затрагивает и метафорические коллокации. Отсюда вытекает несколько выводов. Во-первых, без более совершенного инструмента для анализа корпуса исследователи будут вынуждены полагаться на ручной анализ со всеми его недостатками. Во-вторых, создание инвентаря оказалось первым шагом в исследовании метафорических словосочетаний. В-третьих, инвентарь, основанный на наиболее частотных существительных в разных языках, является основой для дальнейшего кросс-лингвистического исследования метафорических коллокаций.
Ключевые слова: *метафоры, метафорические коллокации, корпусные исследования, Sketch Engine, английский язык*

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1. Introduction

Collocations are a vast field of interest within linguistics and applied linguistics. Thus, it is understandable that there are a variety of perspectives on this linguistic phenomenon, from what a collocation is to how collocations should be taught. Nevertheless, two approaches to the interpretation of collocations have crystallized: the frequency-based and the phraseological approach. The frequency-based approach, originating from Firth’s (1957) understanding of what makes a collocation, is based on the frequency of co-occurrence as an indicator of what a collocation is. This statistical perspective is taken up in corpus research and is the basis of how, for example, the online tool Sketch Engine (used in this research) recognizes collocations. On the other hand, there is the phraseological approach, espoused by, for example, Hausmann (1984) and Nesselhauf (2004). Within this approach, a collocation is understood to be a specific type of a syntagmatic relationship between the semantically autonomous base and the collocate, the base being the one that determines the meaning of the collocate (Hausmann 1984; Stojić 2012). This study relies on the frequency-based approach for the automatic extraction of collocations and on the phraseological approach for the manual identification of metaphorical collocations. According to the frequency-based approach, *a few days* would be a collocation (in Sketch Engine, *few* + *day* is the most frequent collocation with the noun *day* as the base in the English Web 2020 corpus). Yet, there is nothing inherently specific in this combination, the components of which are quite semantically transparent individually and as a whole, to be considered a collocation from a phraseological standpoint, so it would be referred to as a free combination rather than a collocation within the latter approach. However, *a big day* would be considered a collocation because the meaning of the whole transcends the meaning of the base and the collocate, standing for a day of significance in one's life (note that *the big day* is the day of the wedding). Considering that the focus of this paper are metaphorical collocations, *a big day* is also a good example of a metaphorical collocation, that is, "a type of a collocation in which the collocate is used figuratively and the base literally" (Patekar 2022). A day is clearly not physically big; rather, *big* is used figuratively. If to these two examples, *a few days* and *a big day*, we add *the big day*, a synonym or a specific term for a wedding day, it is clear that numerous challenges can arise in identifying collocations, differentiating them from free combinations on one end and idioms on the other, and narrowing down metaphorical collocations when creating an inventory of such collocations. Furthermore, notice the difference between *a big day* and *a black sheep* where the day is in fact a day, but the sheep is a person, or between *to reach a verdict* and *to break a heart*, where an actual verdict is involved but not an actual heart. These obvious differences imply that special terms are indeed needed for different linguistic phenomena, in particular because the clarity in terminology helps in researching such phenomena. Hence, it would be unjust to use "metaphorical collocations" as an umbrella term for any kind of syntagmatic relationship where metaphorical meaning is involved. *To break a heart* and *a black sheep* are metaphorical expressions, whereas *to reach a verdict* and *a big day* are metaphorical collocations.

Diverse perspectives are not a feature of collocations alone, but metaphors as well. As Kalinin and Ignatenko (2024: 167) rightly recognized, this diversity "has led to dispersion of research in the field of metaphor", which adds to the challenge of researching metaphorical collocations. Yet, for the purpose of this study, it is sufficient to differentiate between a metaphor, which refers to how a conceptual domain is understood in relation to another, and a metaphorical expression, which is the realization of the conceptual metaphor (Lakoff & Johnson 1999, 2003). Likewise, it is important to understand that "metaphors influence … how people perceive certain issues across different forms of discourse" (Zibin & Solopova 2024: 9). Thus, this study is grounded in the theory of conceptual metaphor as formulated by Lakoff and Johnson (2003), which posits that our understanding and use of language are fundamentally shaped by metaphorical thinking. By applying this theoretical framework, I explore how everyday expressions channel broader conceptual mappings, such as TIME IS MONEY or TIME IS SPACE, which are illustrated through the various metaphorical collocations with "day", the noun selected for the case study in this paper. For instance, metaphorical collocations such as *a long day* or *to waste the day* not only reflect routine linguistic patterns but also reveal deeper cognitive processes that frame time as a quantifiable and expendable commodity. This approach allows us to systematically analyze how metaphorical meanings are constructed within linguistic practices, providing insights into the semantic networks that underpin language use.

Hence, the aim of this paper is to outline the steps and issues in creating an inventory of metaphorical collocations in English. Using a corpus-driven approach, collocations with the noun "day" as the base were extracted automatically, and metaphorical collocations were identified and analyzed manually to answer the following research questions:

RQ1. What are the main challenges in identifying metaphorical collocations in English using Sketch Engine?

RQ2. How can a systematic approach be developed for creating a reliable inventory of metaphorical collocations in English?

These efforts are a part of a larger project *Metaphorical Collocations – Syntagmatic Word Combinations between Semantics and Pragmatics* that explores metaphorical collections in Croatian, German, English, and Italian.

2. Literature review

While the term "metaphorical collocations" occasionally appears in the work of researchers writing in English (e.g., Dai, Wu & Xu 2019, Hori 2004, Onal 2020, Phillip 2011), in a meta-analysis of that work, Patekar (2022) found that different authors often use the term without specifying what it encompasses, and that they do not always mean the same thing when they refer to such collocations, which leads to the term being (mis)used for linguistic phenomena such as idioms or metaphorical expressions. This means there is currently uncertainty regarding the term among researchers writing in English. Fortunately, this uncertainty has been resolved by authors writing in German, such as Reder (2006) and Volungevičienė (2008). Based on their work, I understand a metaphorical collocation to be "a type of a collocation in which the collocate is used figuratively and the base literally" (Patekar 2022). This definition gives metaphorical meaning to the collocation and in turn distinguishes it from a metaphorical expression in which neither component is used literally. Volungevičienė (2008) believes that metaphorical collocations are based on dead metaphors, that is, those that are no longer perceived as metaphors due to undergoing lexicalization and becoming a part of conventional knowledge (Stojić & Košuta 2021).

Although it is often understood that collocational relations are of arbitrary nature, that is, that there is no pattern that could help a language learner predict which words will go together, it is possible that metaphorization can be identified as an underlying mechanism of metaphorical collocation formation (Stojić & Košuta 2022). Extralinguistic reality is lexicalized in different ways in different languages, but possibly with the aid of the same mechanisms of metaphorization. To illustrate, let me use the example of the noun *day* as the base. In English, the expression *to brighten (up) one's day* means to make the experience of one's day better. In Croatian, the expression is *uljepšati dan* literally means, 'to make the day prettier', but in essence it means 'to make the day better'. Thus, while the two languages lexicalize the idea of making the experience of one's day better using different linguistic means, the underlying mechanism is treating *day* as an object whose appearance can be changed, which indeed is a mechanism of metaphorization (TIME IS A CHANGER, explained further below).

Seeing that metaphorical collocations are a new avenue of research, it is understandable that there are not many publications that specifically address the phenomenon. However, Stojić and Košuta (2022), team members on the aforementioned project, have noted their observations regarding the creation of an inventory of metaphorical collocations in the Croatian language, specifically working on the noun "godina" (Engl. *year*). According to Stojić and Košuta (2022), creating an inventory of metaphorical collocations is the first step in analyzing metaphorical collocations. The aim of such analysis is to shed light on the patterns of collocational formation and thus clarify the mechanisms of words forming relations. Ultimately, the goal is to establish the theory of metaphorical collocations.

Stojić and Košuta (2022) recognized certain limitations of Sketch Engine's tool Word Sketch in extracting collocations based on their experience. Firstly, they established that creating an inventory of metaphorical collocations is the key step in analyzing patterns of collocation formation. Secondly, initial collocational profiles generated by Sketch Engine's Word Sketch in most cases required a thorough examination from the semantic and pragmatic aspect considering frequently miscategorized items. Thirdly, they found that out of 21 grammatical relations (the meaning of "grammatical relation" will be discussed in the next section) that Sketch Engine's Word Sketch feature provided for the noun "godina", only nine relations were relevant for lexical collocations; the other categories were grammatical collocations or other combinations that do not show a particular pattern of collocation formation. Fourthly, the most productive combinations of metaphorical collocations were those where an adjective or a verb is the collocator and a noun is the base, and there were six such grammatical relations in Sketch Engine.

Brkić Bakarić, Načinović Prskalo, and Popović (2022), the first two authors being team members on the project, have described the technical challenges of potentially automatically detecting metaphorical collocations. Like Stojić and Košuta (2022), they highlight the arduous task of manually sifting through hundreds of collocations per noun in Sketch Engine to isolate metaphorical from other collocations, and they conclude that little if anything can be done to ameliorate this based on the current input, that is, current findings related to metaphorical collocations. Be that as it may, a preliminary analysis of metaphorical collocations across three languages – Croatian, German, and English – has shown that "the most productive grammatical relations and combinations of parts of speech with respect to metaphorical collocations are combinations of an adjective in the function of a collocate + a noun in the function of the base and a verb in the function of the collocate + a noun in the function of the base" (Načinović Prskalo & Brkić Bakarić 2022: 106). Specifically, in German, the most productive grammatical relations are "modifiers of X", "verbs with X as subject", "verbs with X as accusative object", and "nouns with X as genitive object". In Croatian, the most productive grammatical relations in view of metaphorical collocations are "like what" (i.e., "modifiers of X"), "two nouns, one in genitive", "accusative", "subject of", "participle", and "be like what".

Considering that the focus of this paper is a description of the process of creating an inventory of metaphorical collocations in English where the noun "day" as the base is used as a central example, it is not amiss in this part of the paper to delve into the exploration of the conceptual metaphor of TIME. This is important as "day" is a segment of time, and one might expect most metaphors that motivate metaphorical collocations with the noun "day" to be indeed metaphors of time.

Time is one of the few subjects that can only be expressed metaphorically (Rigotti 1986), or rather, it is "a natural kind of experience that is understood almost entirely in metaphorical terms" (Lakoff & Johnson 2003: 118). Kövecses (2010: 26) observed that time is "a notoriously difficult concept to understand", noting that the primary metaphor to understand time is TIME IS AN OBJECT THAT MOVES. In addition, time is one of the most common target domains, along with emotion, desire, thought, society, communication, etc. Interestingly, if "we go back to the origins of the terms we use to designate the phenomena of time, we find only spatial etymologies or, at most, time/space ones" (Rigotti 1986: 157). Indeed, spatial expressions for notions of time have been "attested in many of the world's languages" (Radden 2011: 1).

In the Master Metaphor List compiled first by Lakoff, Espenson, and Goldberg in 1989 and Lakoff, Espenson, and Schwartz in 1991, we find the following metaphors of time:

TIME IS SOMETHING MOVING TOWARD YOU (e.g., "When Tuesday comes…")
TIME IS A LANDSCAPE WE MOVE THROUGH (e.g., "He didn't make it to Tuesday.")
TIME IS MONEY (e.g., "The diversion should buy him some time.")
TIME IS A RESOURCE (e.g., "Don't waste time.")

TIME IS A CONTAINER (e.g., “We’re well into the century.”)
TIME IS A PURSUER (e.g., “Time will catch up with him.”)
TIME IS A CHANGER (e.g., “Time had not been kind to him.”)

However, Pérez Hernández (2001: 68) notes that “the number of metaphors underlying the concept of time is actually bigger than that included in the aforementioned index” and that it is possible to “distinguish four general time metaphors” and “establish a hierarchy of dependency of other more specific instances”. These four general time metaphors are:

TIME IS SPACE
TIME IS AN OBJECT
TIME IS A CONTAINER
TIME IS A FORCE

Thus, TIME IS A LOCATION, TIME IS A PATH, TIME IS A LANDSCAPE, etc., are part of the metaphor TIME IS SPACE. TIME IS MONEY, TIME IS A COMMODITY, TIME IS A MOVING OBJECT COMING TOWARDS YOU, etc., are part of the metaphor TIME IS AN OBJECT. TIME IS A FORCE includes TIME IS A CHANGER and TIME IS A HEALER.

One final note regarding metaphors of time is that time is frequently personified in literature. Personification “permits us to use knowledge about ourselves to comprehend other aspects of the world” (Kövecses 2010: 56). Thus, time is perceived as an external event that has agency and can affect people and their lives. TIME IS A CHANGER is an example of personification.

3. Data and methodology

The aim of this paper is to outline the steps and issues in creating an inventory of metaphorical collocations in English. I was guided by the following research questions:

RQ1. What are the main challenges in identifying metaphorical collocations in English using Sketch Engine?

RQ2. How can a systematic approach be developed for creating a reliable inventory of metaphorical collocations in English?

Answers to these questions were obtained through the following steps. The project team used the Sketch Engine tool to extract collocations from the corpora of project languages. Specifically, for the English language, the corpus English Web 2020 (enTenTen20) was used. The corpus consists of more than 43 billion tokens (more than 36.5 billion words) and was compiled from texts from the internet. Using Sketch Engine allows researchers to access authentic data and employ the corpus-driven approach to validate their hypotheses. However, it needs to be noted that Sketch Engine’s collocation extraction is based on computational linguistics, that is, the frequency approach to collocations whereby words that frequently co-occur are identified as collocations. To identify a collocation, Sketch Engine relies on the *LogDice* measure (explained below). Therefore, it is important to analyze the data provided by the aforementioned tool in line with the described phraseological approach, which involves examining the semantic nature of the relation of two words. Understandably, such an analysis is time- and energy-consuming, so the project team opted to focus on the most frequent nouns across the four languages. The most frequent nouns were identified using Sketch Engine's option Wordlist for each language and respective corpus and then cleaned (e.g., from proper nouns) and coordinated to get a consolidated list that includes 59 nouns. To illustrate, the ten most frequent nouns in English are: *time*, *year*, *people*, ***day***, *way*, *system*, *world*, *service*, *part*, *state*. The following step included analyzing the collocational profiles of the most frequent nouns and engaging in a semantic analysis to identify metaphorical collocations. The semantic analysis involved examining each collocation to establish whether there is a transfer of meaning at the level of the collocator that is based on a metaphoric process. In case of uncertainty, the collocation was discussed within the project team to reach a decision on its status of a metaphorical collocation. This procedure resulted in an inventory of metaphorical collocations, and this paper further delineates how such procedure was carried out for the fourth most frequent noun in the English language, the noun "day". Considering that this study is a part of wider project efforts and taking into account that other team members have analyzed other most frequent nouns in the other three project languages (Croatian, German, and Italian), I opted for the noun "day" for the project team to benefit from insights into metaphorical collocations with a variety of most frequent nouns across four languages (as opposed to team members analyzing the same noun in-depth across four languages, which is a step to be undertaken at the contrastive analysis stage of the project that is to follow).

4. Results

Upon choosing the noun "day" for the case study, I used Word Sketch, a feature of Sketch Engine that enables the extraction of collocations based on grammatical relations. Each grammatical relation is represented by a column in Word Sketch (Figure 1), with collocations within the column listed according to frequency and a measure called *LogDice*. Frequency refers to how many times a collocate appears in the corpus, whereas *LogDice* is a typicality score that indicates the strength of a collocation. Thus, the higher the score, the stronger the collocation. On the other hand, a low score indicates that those collocational components enter combinations with many other words (Sketch Engine, n.d.). Each column represents a pattern obtained from the corpus, where each category is a different morphosyntactic structure, such as "nouns modified by X" or "verbs with particle up and X as object". Each collocate within the category is provided with a few words of context, and the full context can be seen by expanding a particular collocation to see its concordances (Figure 2).

Specifically, for the noun *day*, there are 28 grammatical relations and more than 9 600 collocations within those categories. These grammatical relations, along with examples of collocations within the categories, are given in the table below for quick reference. At first glance, one can notice the faults in categorizing certain co-occurrences as collocations or as belonging to a particular category.

Figure 1. Grammatical relations represented in columns in Sketch Engine's tool Word Sketch

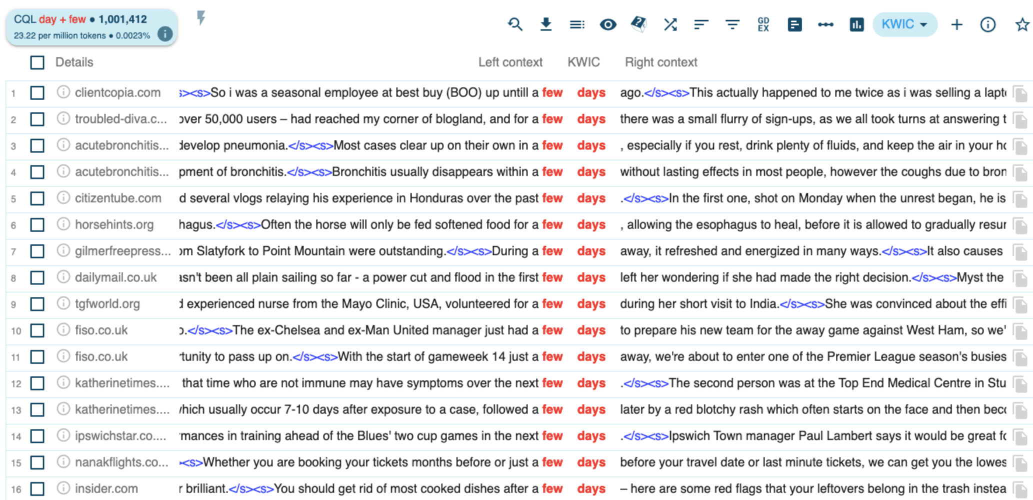

Figure 2. Expanding a collocation into concordances provides more context

Table 1. **Grammatical relations for the noun "day" in Sketch Engine and accompanying examples of collocations categorized under each relation**

No.	Relation	Examples of collocations
1	modifiers of "day"	*a few days, sunny day, business days*
2	nouns modified by "day"	*day trip, day job, all day Sunday*
3	verbs with "day" as object	*spend the day, the coming days, day filled*
4	verbs with "day" as subject	*day starts, days notice, day sitting*

No.	Relation	Examples of collocations
5	"day" and/or …	*day and night, days or weeks, in this day and age*
6	prepositional phrases	*day of, for day, on day*
7	adjective predicates of "day"	*days past, days old, day was hot*
8	"day" is a …	*day was Sunday, day is today, day is something*
9	day's …	*days' notice, day's work, day's reading*
10	possessors of "day"	*Valentine's Day, a summer's day, parents' day*
11	pronominal possessors of "day"	*my day, our day, your day*
12	… is a "day"	*tomorrow is another day, Monday is the day, period is 30 days*
13	verbs with particle "up" and "day" as object	*wake up one day, wrap up the day, dress up day*
14	verbs with particle "out" and "day" as object	*go out every day, started out the day, wait out the day*
15	verbs with particle "off" and "day" as object	*round off the day, crossing off the days, left off the day before*
16	verbs with particle "down" and "day" as object	*sitting down all day, wind down the day, feeling down these days*
17	verbs with particle "around" and "day" as object	*sit around all day, take around a day, work around the day*
18	verbs with particle "away" and "day" as object	*whiling away the day, went away the next day, wish away the days*
19	verbs with particle "aside" and "day" as object	*set aside a day*
20	verbs with particle "over" and "day" as object	*reminisce over the days, come over one day, take over one day*
21	verbs with particle "open" and "day" as object	*remain open*
22	verbs with particle "on" and "day" as object	*died on the 14th day, rise on the third day, happened on that day*
23	verbs with particle "unto" and "day" as object	*continue unto this day*
24	verbs with particle "apart" and "day" as object	*set apart a day, fall apart the day*
25	verbs with particle "through" and "day" as object	*going through day by day*
26	verbs with particle "along" and "day" as object	*went along one day*
27	verbs with particle "upon" and "day" as object	*reflect upon your day*
28	usage patterns	*it is a day to remember*

Although there is variation in the type of grammatical relations across not only different languages but words within a single language as well (for example, the eighth most frequent noun in English, "service", has 23 grammatical relations in contrast to "day" that has 28), these relations do provide a framework for contrastive analysis where similarities are present. Therefore, the study relies on Sketch Engine's grammatical relations to systemize findings.

5. Discussion

5.1. Extracting collocations

Seeing that there are quite a few grammatical relations and for each there are numerous collocations, I shall go in depth with several of them to illustrate the difficulties researchers face when creating an inventory of (metaphorical) collocations.

For the most part, (1) "modifiers of 'day'" include adjectives as modifiers, such as *a few days*, *a sunny day*, or *a fun day*. However, the category also includes nouns as modifiers, such as *business days*, *wedding day*, or *feast day*. (2) "nouns modified by 'day'" include some well-known combinations, such as *day trip*, *day job*, *day care*, *day traders*, but also a number of miscategorized items such as *day today* ("we enjoyed a spring-like *day today*"), *day yesterday*, *all day Sunday*. In either case, "day" is not in the role of a base, so this category will be excluded from further analysis. (3) "verbs with 'day' as object" indeed include verbs, such as *spend the day* and *live each day*, but collocates such as "coming" in *the coming days* and "passing" in *each passing day* are not verbs; they are verbal adjectives or present participles whose grammatical role is quite different from verbs. Furthermore, examples such as *live each day* highlight the problem of the frequency approach in identifying collocations. There is hardly anything specific about the relation between *live* and *day* to call it a collocation from a semantic point of view. It is doubtful whether a learner would store it as such in their mental lexicon (Stojić & Košuta 2017). Yet, because of statistically high co-occurrence, it is considered a collocation within the frequency-based approach. In addition, there are a number of miscategorized items, such as *day filled* where "day" is the subject, not an object of the sentence, e.g., "The rest of the *day* was *filled* with lots more fun." In the category (4) "verbs with 'day' as subject", we find combinations such as *day starts* and *day seems* as well as miscategorized *days notice* where "notice" is actually a noun and there is an apostrophe missing on "days" or "spent the whole *day sitting* in a room" where "day" is not the subject of "sitting". Further examples of miscategorized items are *day dreaming*, e.g., "have spent most of my time cleaning, *day dreaming*, playing with a new phone", *day reading*, e.g. "I've spent most of my *day reading* this story", etc. The most frequent occurrences of verbs with "day" as subject are *follow*, *pass*, *come*, *start*, *go*, etc. The category (5) "'day' and/or …" contains expressions such as *day and night*, *days or weeks*, *in this day and age*, *a day and a half*, etc., as well as a number of miscategorized items, e.g., *day, people*: "These *days*, many *people* are not afraid…". As such, this category is not relevant for our collocational research and will be excluded from further analysis. The following category, labeled (6) "prepositional phrases", includes any preposition next to the word "day", e.g., *day of*, *for day*, *on day*, *day at*, *day behind*, etc., and will likewise be excluded from analysis. (7) "adjective predicates of 'day'" include expressions such as *days past*, *days old*, *days early*, *days pregnant*, *days worth of*, but also *day was warm*, *day was hot*, *day is enough*, *days are busy*, etc. This category will be excluded from further analysis. The category (8) "'day' is a …" refers to structures such as *day was Sunday* ("Mother's *Day* was last *Sunday*"), *day was a great success*, *day is today*, *day is something* ("filming that *day* is *something* she won't forget") and a number of examples as the last one where the connection between the noun "day" and another word is tangential or non-existent. Hence, the category will be excluded from this study. The category (9) "day's …" includes possessives of "day", for example, *days' notice*, *day's work*, *day's reading*, *day's hike*, etc. and is not relevant to the present research. The same is with the following category, (10) "possessors of 'day'", where one can find *Valentine's Day* (and many other holidays), *a summer's day*, *parents' day*, *Ladies' Day*, etc. (11) "pronominal possessors of 'day'" is a category that includes possessive pronouns: *my day*, *our day*, *your day*, etc. It is clearly not relevant for further analysis. The category (12) "… is a 'day'" features structures such as *tomorrow is another day*, *Monday is the day*, *period is 30 days*, *park is open every day*, etc., which are difficult to perceive as collocations even with the most liberal interpretation of what makes a collocation. Therefore, this category will be excluded as well.

Word Sketch's "verbs with particle X and 'day' as object" (13–27), which could be considered phrasal verbs, encompass 15 categories, some of which appear to be quite fruitful collocation-wise. However, in a number of instances, "day" is not an object of the phrasal verb, e.g., *hang out one day*, *cropped up every day*, *went down that day* in contrast to collocations where *day* is actually an object, such as *wrap up the day*, *plan out your day*, or *kick off the day*. These categories will be dealt with in more detail in the next section considering the wealth of metaphorical collocations found within them. The category (28) "usage patterns" encompasses the structure "it's 'day' to…" and will be excluded from this study as it is irrelevant.

To conclude this section on collocation extraction, while Sketch Engine is an immensely helpful tool for researchers to work with corpora and, in particular, collocations, researchers are still required to thoroughly check the results as false items appear. This is because Sketch Engine in good part relies on automatic tagging. In addition, I noted in the analysis that Sketch Engine extracts the most frequent collocations across all grammatical relations up to a certain degree. This is to say that any combination of words that is not as frequent does not show up in the list of co-occurrences, which means some linguistically valuable combinations of words might not be included in the results.

5.2. Creating an inventory of metaphorical collocations

Following the extraction of collocations with the noun "day", and excluding Sketch Engine's grammatical relations that are not relevant to the study at hand, I proceeded with an in-depth analysis of collocations within the following categories: (1) "modifiers of 'day'", (3) "verbs with 'day' as object", (4) "verbs with 'day' as subject", and (13–27) "verbs with particle X and 'day' as object".

Several patterns emerged upon a closer look at collocations within the category (1) "modifiers of 'day'". Expectedly, a number of modifiers are adjectives and nouns referring to weather and seasons: *sunny*, *rainy*, *windy*, *cloudy*, *hot*, *warm*, *cold*, *clear*, *winter*, *summer*, *spring*, etc. Similarly, many nouns in combination with "day" are terms such as *wedding day*, *business day*, *school day*, *election day*, *working day*, *sick day*, etc. Yet the category of most interest in this case are potential metaphorical collocations. Thus, we find adjectives describing the noun "day" as *long*, *short*, *whole*, *full*, *good*, *bad*, *sad*, *fun*, *happy*, *old*, *busy*, *great*, *perfect*, *beautiful*, *wonderful*, *lovely*, etc. "Day" is hence understood as a container with the properties of "whole" or "full", an object that can be "short", "long", or even "big". The underlying metaphors are TIME IS A CONTAINER and TIME IS AN OBJECT. Furthermore, "day" can be personified, bearing the qualities of "good", "bad", "beautiful", etc., as well as showing emotions "happy", "sad", and so on. There are other interesting collocations, namely, *field day*, *dark days*, *glory days*. A *field day* may refer to a day spent outdoors, and "a time of extraordinary pleasure or opportunity" (Merriam-Webster n.d.)., as in "the media is still having a *field day* with the incident". Since in the latter sense "day" is not an actual day, this would be considered an idiom rather than a metaphorical collocation. Similarly, *dark days* can indeed be dark because of the lack of sunlight, or they may refer to "times of extreme misfortune or difficulty" (Farlex Dictionary of Idioms n.d.), as in "As in the *dark days* of fascism, some collaborate with the enemy". *Glory days*, on the other hand, refer to a period of time one was very successful (Cambridge Dictionary n.d.). Both *dark days* and *glory days* are interesting to discuss further. To distinguish metaphorical collocations from idioms, we adhere to the definition that the collocate is used figuratively and the base literally. Is the base "days" in the two items used figuratively or literally? While clearly "days" in *dark* or *glory days* refer to a period of time, one can ponder whether a period could in fact be understood as a string of days, in which case "days" are used literally, and the items are thus metaphorical collocations.

In view of (3) "verbs with 'day' as object", evidently certain collocations are motivated by the metaphor TIME IS MONEY and TIME IS A RESOURCE: *spend a day*, *save a day*, *waste a day*, *lose a day*. Note the difference between *save a day* in "The itinerary here is conservative and you may *save a day* near the beginning" and *save the day* in "Only girl power can *save the day*"; the latter is an idiom that means "to make a bad situation end successfully" (Merriam-Webster n.d.). There are other metaphorical collocations such as *make one's day* and *brighten one's day* that essentially refer to improving one's day by making them feel better, thus motivated by the metaphor TIME IS A CHANGER. In certain cases, "day" is treated as an object or a container: *observe the day*, *mark the day*, *fill the day*. Other collocations, on the other hand, are idioms, such as, *one's days are numbered*, *carry the day*, *win the day*. It appears that this category of collocations is fruitful when it comes to metaphorical collocations. Similarly, (4) "verbs with 'day' as subject" abound with metaphorical collocations because expressions with "day" are motivated by the metaphor TIME IS A MOVING OBJECT: a day *approaches*, *arrives*, *comes*, *starts*, *goes*, *follows*, *passes*, *progresses*, *continues*, *elapses*.

Finally, phrasal verbs with "day" as object are a very productive category of metaphorical collocations. They are quite evocative and clearly involve figurative meaning. Table 2 provides a wealth of examples.

Table 2. **Examples of metaphorical collocations in the category "verbs with particle X and 'day' as object"**

No.	Verbs with particle __ and "day" as object	Phrasal verbs that form metaphorical collocations with "day"
1	up	*brighten up, wrap up, finish up, break up, fill up, sum up, light(en) up, liven up, use up, mess up, wind up, cheer up, warm up, spice up, fuck up, eat up, free up, screw up, perk up, add up, split up, round up, mix up, soak up, take up, save up, burn up, rack up*
2	out	*live out, start out, close out, plan out, round out, finish out, see out, wait out, block out, map out, bat out, eke out, count out, wash out, drag out, carve out, mark out, cross out, stretch out, balance out, win out, top out, schedule out, grind out, sort out, fill out, pick out, single out*
3	off	*start off, round off, cap off, top off, finish off, kick off, put off, mark off, count off, cross off, take off, tick off, end off, check off, block off, stave off, wash off, write off, close off, sleep off, lead off, shave off, blow off, burn off, shake off, throw off, trade off, push off, knock off, scratch off, cut off, shrug off, tear off, polish off, ward off, fight off, fend off, live off*
4	down	*count down, wind down, mark down, cut down, cool down, tick down, note down, set down, nail down, live down, jot down, knock down*
5	around	---
6	away	*w(h)ile away, laze away, waste away, sleep away, idle away, sin away, fritter away, wish away, dream away, melt away, soak away, tick away, wash away, whittle away, relax away, lounge away, pine away, drink away, doze away, snooze away, play away, wear away, chase away, wipe away, clear away*
7	aside	*set aside, put aside*
8	over	*go over, take over*
9	open	---
10	on	---
11	unto	---
12	apart	*set apart*
13	through	*go through*
14	along	*go along*
15	upon	*reflect upon*

Such an abundance of metaphorical collocations with phrasal verbs is to be expected because many phrasal verbs are motivated by conceptual metaphors (De Macedo Valerio 1998, Porto Requejo & Pena Díaz 2008, Yasuda 2010). In this study, the most productive phrasal verbs are those with the particles *up*, *out*, *off*, and *away*, while there are some where no metaphorical collocation with the noun "day" appear, such as *around*, *open*, *on*, *unto*.

With particle "up" it is difficult to find a pattern that would reveal a single motivating conceptual metaphor. A number of phrasal verbs refer to improving one's experience of a day, e.g., *brighten up*, *light up*, *lighten up*, *liven up*, *cheer up*, *warm up*, *perk up*, *spice up*, or, on the other hand, making one's experience worse, e.g., *mess up*, *fuck up*, *screw up*. With the potential to make a change, this would be the metaphor TIME IS A CHANGER. Yet, we could also ponder grouping *warm up*, *spice up*, with *eat up*, *soak up*, and *mix up* into the metaphor TIME IS A SUBSTANCE that can be manipulated in these ways, as a dish would. Phrasal verbs such as *add up*, *split up*, *round up*, *rack up* are evocative of the TIME IS MONEY metaphor. Evidently, phrasal verbs with the particle "up" in combination with the noun "day" as a base are motivated by several conceptual metaphors. The case is the same with the particle "out". For example, *see out the day* is personification, as you would see out a guest from your home. Other phrasal verbs, on the other hand, treat "day" as an object: *wash out*, *carve out*, *stretch out*, *balance out*, *pick out*. TIME IS AN OBJECT appears to be a common – yet certainly not the only – theme with phrasal verbs with the particle "off": *kick off*, *take off*, *wash off*, *blow off*, *burn off*, *push off*, *scratch off*, etc. Personification can be recognized in *ward off*, *fight off*, *fend off* as if "day" is an enemy whose attack needs to be stopped.

In view of verbs with the particle "down", one can notice a pattern whereby "day" is something you *mark down*, *note down*, *set down*, *jot down* in the context of organizing one's time. A particularly interesting collocation is "wind down the day" as in "We returned to our B&B, where we *wound down our day* on Paula's 2nd floor porch, enjoying the wonderful breeze…". This seems to be a combination of the two meanings of "to wind down": "1) to draw gradually toward an end, 2) relax, unwind" (Merriam-Webster n.d.). Thus, "to wind down the day" is to finish one's day by relaxing.

The general pattern when it comes to phrasal verbs with the particle "away" and the noun "day" is that it describes a period of time when a person is being inactive or unproductive (and often enjoys it): *w(h)ile away*, *laze away*, *waste away*, *sleep away*, *idle away*, *fritter away*, *dream away*, *melt away*, *soak away*, *wash away*, *whittle away*, *relax away*, *lounge away*, *pine away*, *drink away*, *doze away*, *snooze away*, *play away*, *wear away*. For example, "to fritter" means "to spend or waste bit by bit, on trifles, or without commensurate return – usually used with *away*" and "to break into small fragments" (Merriam-Webster n.d.), so in "to fritter away the day", the "day" is something that one uses up irrationally. The underlying metaphor TIME IS AN OBJECT is found in other (but not all) examples above: *waste away*, *melt away*, *soak away*, *wash away*, *whittle away*, *drink away*, *wear away*.

Other phrasal verbs in Table 2 are not as productive, and since the examples are quite self-evident, I shall not go into details regarding those.

At this point it is worth noting that any calculation of the share of metaphorical collocations in the total number of all collocations is a futile endeavor for three reasons. Firstly, Sketch Engine is a tool that extracts collocations based on the frequency of co-occurrence of words – it functions on the frequency-based as opposed to the phraseological approach to the understanding of collocations. Researchers working with metaphorical collocations take the latter approach.

Secondly, as has been shown in several instances above, items are frequently miscategorized into grammatical relations they do not in fact belong to. This means that the ranking according to frequency or *LogDice* measure is not entirely correct because the false items are a part of that list. Thirdly, it is not only that items are often miscategorized, but when an item is expanded into its concordances, one can see that not all examples are actually right for the item at hand. For example, there are 1076 occurrences of break up + day, which places that combination 11th in the ranking within the category "verbs with particle 'up' and 'day' as object" based on the frequency and the *LogDice* score of 7.7 (the two measures are generally, but not always, proportional). Yet, when we expand the item, listed as "break" and exemplified with the fragment "break up the day", and dive into more than a thousand occurrences in context, we find the following, among many, examples:

(1) Katie and I *broke up* a few *days* ago.
(2) The council *broke up* that *day*, its results amounting to nothing.
(3) The resort offers a wide range of daily activities to *break up* your *day*.

Clearly, the sense of "to break up" is different in all three cases, and in the first two, "day" is not an object of "break up". Thus, it is only the third example that fits the category of "verbs with particle 'up' and 'day' as object". Hence, any attempt to determine the share of metaphorical collocations, with the aim of distinguishing less from more productive grammatical relations, would first require manually cleaning concordances, recalculating frequency and *LogDice*, and cleaning the items from categories accordingly. This is not a realistic goal considering the size of the corpus and the number of occurrences that sometimes reach hundreds of thousands or even a million per collocation.

To conclude, here are the steps involved in creating an inventory of metaphorical collocations in English:

1) Selecting a collocation-extraction tool and a representative corpus of the English language.
2) Using the tool to extract collocations for a specific word.
3) Engaging in the first round of manual analysis of the results to exclude irrelevant categories (e.g., certain grammatical relations in Sketch Engine).
4) Engaging in the second round of manual analysis of the results to identify metaphorical collocations.
5) Identifying the motivating metaphor behind the metaphorical collocation.
6) Finalizing the inventory.

Therefore, an inventory consists of a list of metaphorical collocations organized into grammatical relations and within those categories ranked according to the *LogDice* measure (both this measure and frequency are indicated in the inventory). Next to each metaphorical collocation is a sentence or sentences that show it used in context (from the corpus used). The next column is a note on the motivating metaphor of the metaphorical collocation, and the last column is for any additional notes. This is to be done for each of the 59 most frequent nouns across four languages of the project (English, Croatian, German, and Italian). Upon completing intralanguage analysis based on the inventory, a contrastive analysis of the inventories is expected to result in additional relevant findings.

In developing the inventory, I have found that Sketch Engine, a widely used collocation extraction tool, has its shortcomings. It relies on a statistical, frequency-based, approach to collocations and often miscategorizes items. In addition, identifying and extracting metaphorical collocations as a subtype of collocations is currently not possible with any tool. This means that researchers need to manually sift through vast numbers of collocations and concordances, which is neither feasible nor sustainable. Furthermore, in several instances, I have come across the age-old stumbling block of discerning collocations from free combinations on one end and idioms on the other end, a perennial issue in linguistics. Finally, any corpus analysis is bound by the limitations of the corpus, as Selmistraitis and Bolkova (2020) have wisely observed in their study on smell-related metaphorical collocations. Despite these challenges, I find metaphorical collocations to be a fascinating linguistic phenomenon that merits the attention of the wider research community.

Conclusion

This study was driven by two research questions:

RQ1. What are the main challenges in identifying metaphorical collocations in English using Sketch Engine?

RQ2. How can a systematic approach be developed for creating a reliable inventory of metaphorical collocations in English?

In view of the first question, identifying metaphorical collocations in English using Sketch Engine presents several challenges. Firstly, the tool primarily relies on a frequency-based approach to extract collocations, which often results in the inclusion of free combinations and idiomatic expressions that are not collocations. Secondly, the automatic tagging and categorization of collocations is occasionally inaccurate, leading to certain miscategorized items. This in turn requires extensive manual filtering and analysis, which is time-consuming and prone to human error. The tool, understandably, lacks the capability to automatically detect figurative meanings, which is crucial for identifying metaphorical collocations. As a result, researchers must manually sift through vast amounts of data to distinguish metaphorical collocations, making the process labor-intensive and inefficient.

Regarding the second question, creating a reliable inventory of metaphorical collocations in English involves a systematic approach that addresses the limitations of current tools. The process begins with selecting an appropriate collocation extraction tool and a representative corpus. Researchers then conduct an initial manual filtering to exclude irrelevant grammatical relations. This is followed by a detailed manual analysis to identify metaphorical collocations. Each identified metaphorical collocation is then noted, along with example sentences and notes on the conceptual metaphor behind the metaphorical collocation.

This study has several implications. Firstly, it is evident that without an improved corpus analysis tool, researchers are bound to manually analyze a vast amount of data to gain insights into the formation and nature of metaphorical collocations. With advancements in large language models and generative artificial intelligence, perhaps more could be done to automatically recognize figurative meaning, which would make automatic extraction of metaphorical collocations feasible. I hope this study may be of help to computational linguists. Secondly, creating an inventory of metaphorical collocations has been identified as the first step in understanding how metaphorical collocations are formed, laying the groundwork for further research into the processes involved in the formation of metaphorical collocations. Finally, comparable inventories based on the most frequent nouns across different languages are seen as the foundation of further cross-linguistic investigation of metaphorical collocations that may ultimately lead to a theory of this linguistic phenomenon.

Seeing that manual extraction and analysis of metaphorical collocations is neither feasible nor sustainable, researchers will possibly need to limit themselves. Although limiting themselves to 59 most frequent nouns across four languages is certainly a step in the right direction, researchers will have to impose limits within these nouns as well. One way is to set a *LogDice* or frequency score below which the results would not be taken into considerations. Thus, researchers could look for patterns in, for example, the first twenty or thirty items within each category. While this approach would certainly result in linguistically valuable findings being left out, it might be the only feasible option. Another option is to choose a category that has shown to be very productive across the four languages, for example, modifier + noun, and focus on analyzing the collocations within that category alone, without imposing any limitations to frequency. Lastly, there is some hope that by thoroughly analyzing the first few most frequent nouns across the four languages researchers might identify a pattern that would help the computational linguists in the project team to devise a method of automatically extracting metaphorical collocations. Yet, based on the efforts thus far (Brkić Bakarić, Načinović Prskalo & Matetić 2023), this will likely not be accomplished in the near future.

To conclude, by investigating the challenges and steps involved in identifying and analyzing metaphorical collocations and creating an inventory of metaphorical collocations, this study has laid the foundations for further research of this peculiar linguistic phenomenon.

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Academic English melting pot: Reconsidering the use of lexical bundles in academic writing

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Abstract
Numerous research studies addressing the differences in the use of lexical bundles in academic English by L1 and L2 writers interpret these differences as a deficiency or deviation that L2 writers need to eliminate. In this paper, we argue that this “deviant” use is not essentially the product of insufficient knowledge of English and/or Anglophone norms of academic writing but rather a transfer of the academic conventions of non-native speakers, rooted in their local culture. To confirm this hypothesis, we reviewed some previous studies and analyzed the use of lexical bundles in dissertations and research papers written in English by graduate and post-graduate students from Russia and Cameroon. The Russian corpus (38 texts of 576,186 words) was compiled from publicly available papers and dissertations written by bachelor’s and master’s students at the Higher School of Economics; the Cameroonian corpus (21 papers of 680,146 words) was compiled from papers contributed by students and teachers of the University of Yaoundé I. Using content analysis, corpus analysis, and the comparative method, we found that the most significant differences in the use of lexical bundles were connected with the peculiarities of the Russian and Cameroonian academic writing styles and cultural norms. Our study, therefore, reinforces the need to consider a more inclusive and culturally sensitive approach to the use of lexical bundles by L2 academic writers and take into account their diverse linguistic and cultural backgrounds. It will expand our knowledge of the linguistic features of different varieties of English and provide a deeper understanding of academic traditions in different languages and cultures.
Keywords: *lexical bundles, academic English, world Englishes, cross-cultural variation, translanguaging, corpus analysis*

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Плавильный котел академического английского: использование лексических связок в академическом письме

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Аннотация
Большинство исследователей, анализирующих использование лексических связок в академическом письме носителями и неносителями английского языка, интерпретируют выявленные отличия как отклонения, связанные с интерференцией и (или) недостаточным знанием норм академического письма. Цель данной статьи – показать, что по крайней мере часть выявляемых отличий обусловлена не недостаточными знаниями, а влиянием коммуникативных норм родной для неносителей английского языка культуры. В статье проанализирован ряд предыдущих исследований и проведен анализ использования лексических связок в диссертационных и выпускных квалификационных работах на английском языке студентов и аспирантов из России и Камеруна. Корпус российских примеров был отобран из находящихся в открытом доступе работ магистрантов Высшей школы экономики; корпус камерунских примеров – из работ, предоставленных студентами и преподавателями университета Yaoundé I. Всего было проанализировано 59 текстов: 38 работ российских студентов (576 186 слов) и 21 работа студентов и аспирантов из Камеруна (680 146 слов). Использовались методы контент-анализа, корпусного анализа и сравнительно-сопоставительный метод. Выявлено, что наиболее значимые отличия в использовании лексических связок обусловлены особенностями академического стиля и коммуникативной культуры авторов текстов. С опорой на полученные данные обосновывается целесообразность трактовки культурно обусловленных отличий в использовании лексических связок не как недостатка, а как проявления транслингвальных компетенций пищущих. Такой подход позволит расширить представления о лингвистических особенностях различных вариантов английского языка и обеспечит более глубокое понимание академических традиций в различных языках и культурах.
Ключевые слова: *лексические связки, академический английский, контактная вариантология английского языка, кросс-культурное варьирование, транслингвизм, корпусный анализ*

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1. Introduction

Writing for academic purposes requires not only mastering disciplinary knowledge and following established academic writing conventions but also making some special efforts and commitments. One of these commitments is to engage in the global dissemination of knowledge, which is now an essential part of academic success for both young scientists and experienced researchers. English is the main language through which academic knowledge is communicated to a wider audience (Flowerdew 2014). It has become the so-called lingua franca of academia, prompting researchers whose L1 is not English to strive for a somewhat “native-like” competence in English or even “worry about the correctness of their language” (Hyland & Jiang 2022: 554).

The key role of English in the global transmission of knowledge contributed to the emergence of numerous studies focusing on what constitutes acceptable and “proper” L2 academic English. These studies have mostly been dominated by Western-centric views, with a distinct emphasis on native English-speaking writers and their norms of academic English. Due to this Western-centric perspective, such studies may have failed to fully capture the diversity and complexity of L2 English writing in various cultural and linguistic contexts and, therefore, imposed a form of hegemony of L1 academic writing conventions on non-native speakers of English. As argued by McKinley (2022), the main reason for the dominance of this Western-led perspective is the reluctance to take risks and pursue diverse aspects of L2 writing and instead rely on well-founded theories and research questions, which somehow limit the research potential in L2 writing.

An aspect of academic English that has received considerable research attention and for which L2 students and researchers have been mostly criticized is the use of recurrent multi-word units commonly referred to as lexical bundles. Lexical bundles are sequences of three or more words or “extended collocations which appear more repeatedly than expected by chance” (Hyland & Jiang 2018: 383) and include such structures as *it was found that*, *in the case of*, *may be due to, as can be seen, with respect to the, it is possible that, on the other hand, etc.* These multi-word expressions are important for academic writing because students and scholars are expected to be precise and concise in communicating their ideas (Salazar 2010), and lexical bundles serve as “the building blocks of discourse” and valuable indicators of fluent linguistic production (Biber 2009, Hyland 2008a).

Undoubtedly, as previous studies have shown, lexical bundles lie at the heart of efficient academic exchanges, and adequate use of such structures is a sign of good mastery of academic English. However, most of these studies tend to portray L2 academic writers as deficient or deviant in their use of lexical bundles (e.g., Chen & Baker 2010), whereas they may simply comply with deeply rooted norms of their own languages and cultures, which certainly differ from those of native English speakers. If we agree that English is, for the time being, the main language of academic research, it seems appropriate to consider a more inclusive and culturally sensitive approach to the use of lexical bundles by L2 academic writers and take into account their diverse linguistic and cultural backgrounds.

In this paper, we present an argument that L2 academic writers' "deficient" use of lexical bundles does not always result from their inadequate mastery of English but may reflect the communicative conventions of local culture, which differ from Anglo-American norms. This is not to say that we must overlook good and intelligible English, but rather be more tolerant towards L2 writers' linguistic and cultural identities transferred to their academic writing in English. Since writers with different language backgrounds all bring something different to the act of academic writing, we propose to revise the existing approach to lexical bundles research by making it less prescriptive. We suggest shifting the focus from how L2 writers should write to how they actually write and what it tells us about different academic styles and cultures.

2. Overview of previous research

As important indicators of fluent linguistic production (Hyland 2008a), lexical bundles appear to significantly shape the meaning and coherence of academic texts (Richter et al. 2022), guiding writers and readers through the content and linking ideas (Hyland & Jiang 2022). Lexical bundles are identified using corpus analysis software that retrieves them in accordance with predetermined frequency and distribution criteria (Biber 2006), which may vary between ten and twenty times per million words (Biber et al. 1999, Conrad 2004) or 10% of the texts (Hyland 2008) and occur in at least three to five different texts to guard against idiosyncratic uses (Biber & Barbieri 2007). Conventionally, lexical bundles in academic discourse have been classified into structural and functional types, as proposed by Biber et al. (1999) and Hyland (2008a), respectively (see Tables 1 and 2).

Table 1. **Structural classification of lexical bundles (Biber et al. 1999: 1014–1024)**

Structure	Examples
Noun phrase + of	*the end of the, the nature of the, the beginning of the,*
Other noun phrases	*the fact that the, one of the most, the extent to which*
Prepositional phrase + of	*at the end of, as a result of, on the basis of, in the context*
Other prepositional phrases	*on the other hand, at the same time, in the present study*
the Passive + prep phrase fragment	*is shown in figure, is based on the, is defined as the*
Anticipatory it + verb/adj	*it is important to, it is possible that, it was found that*
Be + noun/adjectival phrase	*is the same as, is a matter of, is due to the, be the result of*
Others	*as shown in figure, is likely to be, as well as the*

Table 2. **Functional Classification of lexical bundles (Hyland 2008a: 13–14)**

Research-oriented: Help writers structure their activities and experiences of the real world
Location: *at the beginning of, in the present study* **Procedure:** *the use of the, the role of the, the purpose of the, the operation of the* **Quantification:** *the magnitude of the, the wide range of, one of the most* **Description:** *the structure of the, the size of the, the surface of the* **Topic:** *the currency board system*
Text-oriented: Concerned with the organization of the text and its meaning as a message or argument
Transition signals: *on the other hand, in addition to the, in contrast to the* **Resultative signals**: *as a result of, it was found that, these results suggest that* **Structuring signals**: *in the present study, in the next section, as shown in figure* **Framing signals**: *in the case of, with respect to the, on the basis of, in the presence of*
Participant-oriented: Focus on the writer or reader of the text
Stance features: *are likely to be, may be due to, it is possible that* **Engagement features:** *it should be noted that, as can be seen*

Several studies employed a lexical bundle approach to explore variation across academic disciplines and genres. Biber et al. (2004), for example, compared lexical bundles in four academic genres, including conversations, university textbooks, university classroom teachings, and published research articles, and revealed systematic differences. Hyland (2008a) conducted research on lexical bundles in articles, doctoral dissertations, and master's theses, in four disciplines: biology, electrical engineering, applied linguistics, and business studies. In his 3.5-million-word corpus, he found that lexical bundles not only play an essential role in academic discourse but also vary considerably across disciplines in terms of frequency and preferred uses.

Cortes (2004) examined lexical bundles in a corpus of over two million words from two academic disciplines. She studied published articles in history and biology to identify the most frequent four-word bundles, which she referred to as "target bundles," and examined how these bundles are used by history and biology students. The study revealed that students rarely used target bundles in academic writing, and the bundles they used did not coincide with those used by professionals. The author concluded that for effective use of lexical bundles, students should immerse themselves in reading academic texts. Richter et al. (2022) explored the use of lexical bundles in the discussion sections of quantitative, qualitative, and mixed-methods research articles published in ten highly rated international journals in the field of applied linguistics. Their findings indicate that "different methodological paradigms are characterized by different functional uses of lexical bundles," which "constrain writers' language preferences" (p. 625).

Many researchers examined lexical bundles from a language development perspective, focusing on L2 academic writers or comparing L1 and L2 writers and learners (Pan et al. 2015). For example, Chen and Baker (2010) compared the use of lexical bundles by Chinese EFL learners and undergraduate and professional native speakers of English in order to identify possible issues in second language learning. Their analysis showed that professional native speakers' writing exhibited a wider range of bundles, whereas Chinese EFL students' texts had a smaller range. In addition, lexical bundles that had high frequency in professional native speakers' texts, such as *in the context of*, were underused by Chinese professionals and undergraduates. Chen and Baker also found that Chinese students tend to overuse certain bundles (for example, *all over the world*), which are rarely used by native speakers. Adel and Erman (2012) compared lexical bundles in native and non-native writing in a series of essays by Swedish and English undergraduate students of linguistics. Their study reported that English students used a larger number of lexical bundles, which were also more diverse than those used by Swedish students. At the functional level, the authors noted that native speakers rarely used discourse-organizing or text-oriented bundles and employed more stance- or participant-oriented bundles than non-native students did. Salazar (2010) studied lexical bundles with verbs in a corpus of medical research articles. The corpus contained Philippine journal articles and articles from the British Medical Journal. Quantitative analysis showed that Philippine researchers used fewer verbal bundles. The study also uncovered other structural and functional differences between British and Filipino writers.

A large part of the literature focusing on the differences in the use of lexical bundles by L1 and L2 writers tends to overlook the reasons behind those differences. Studies that address this aspect and link the use of lexical bundles to the linguistic and cultural background of L2 writers still describe them as faulty. For instance, Wei and Lei (2011) found that Chinese students (advanced EFL learners) tended to overuse lexical bundles containing passive structures and underuse participant-oriented bundles. The researchers linked it to students' preference for impersonality in academic writing. This preference can be explained by the influence of classical Chinese (Wenyan 文言) on the rhetorical conventions of Chinese academic discourse. Although the authors indicated that the differences may be rooted in the norms of the Chinese language and culture, they interpreted them as the result of students' insufficient exposure to readings and conscious learning of target bundles. In other words, they viewed the differences as a deficiency that needed to be corrected.

A similar interpretation was offered by Alamari (2020), who used a "move-bundle approach" to compare the use of lexical bundles in research articles published in Saudi and international journals and explained the identified differences by the "cultural traits concerning the communication of knowledge" (p. 14). For instance, he argued that while "indicating the gap" in the introduction, the Saudi authors tend to "avoid direct criticism of the work of others" since they believe that criticism is "inappropriate or less acceptable" and "may engender negative attitudes from other researchers" (ibid.). Alternatively, Saudi authors would state that the subject is understudied or "provide other justifications to convince the readers" (p. 15). This "cultural trait" may explain (a) why participant-oriented bundles are much less frequent in the Introduction sections of Saudi papers

(8% of the Saudi corpus compared to 23% in the "international" corpus) and (b) why research-oriented bundles are used twice as much by Saudi authors compared to authors in international journals (56% vs. 27%). Alamari interpreted these dissimilarities as insufficient awareness or exposure of Saudi writers to international academic (i.e., Anglo-American) conventions that they should follow.

One of the few papers that directly links the use of lexical bundles to literacy traditions and intellectual style is the article by Olga Dontcheva-Navratilova (2012). The purpose of her study was to compare how Czech and German students use lexical bundles to indicate authorial presence in English academic writing and reveal to what extent they have adapted their writing style to Anglo-American academic discourse conventions. The author provides a comprehensive description of cross-cultural differences between Anglo-American and Central European academic styles (p. 9–11) and points out that "unlike in the Anglo-American tradition, the focus of Central European academic writing is on conceptual and terminological clarity rather than persuasion and discourse organization, and, thus, authorial presence tends to be backgrounded" (p. 10). Yet, her conclusion suggests that an approximation of the variety and frequency of interpersonal bundles to Anglo-American standards is necessary for non-native writers to be socialized into the global academic discourse community.

These interpretations reflect the widespread ideology of English as a monocentric language with the "native speaker" as a point of reference. Even though this approach is still influential in lexical bundles research, there appears to be a gradual shift from the idea that L2 writers' use of lexical bundles is deficient. A new approach is emerging in the World Englishes paradigm and is supported by the ideology of English as a polycentric language, which needs to be more inclusive. In line with this new approach, Hyland and Jiang (2022) have put forward the idea of academic discourse as a melting pot of Englishes, where "different varieties are constantly in contact so that the ever-increasing participation of EAL[1] authors in global publishing will, very likely, slowly enlarge the variety of bundles we see in professional texts" (p. 569).

Our goal in this paper is, therefore, to justify a more inclusive approach to lexical bundles research that will take into account the status of English as a polycentric language and the growing interest in the linguistic features of its varieties. To support our argument, we will address the use of lexical bundles in English by Russian and Cameroonian students – two settings of non-native academic writing that, to the best of our knowledge, have not been the subject of investigation. Russia has a strong academic writing tradition, whose discourse patterns are likely to be transposed into the English texts. In Cameroon, English is used as the second and official language, one of the two languages of education[2], and its use in academia is likely to be influenced by the local communication norms and habits. Therefore, both settings seem promising for exploring cross-cultural variation in lexical bundles use, which so far remains underexplored.

[1] EAL – English as additional language

[2] The other language is French. In Cameroon, local languages are not used in education.

3. Data and methods

Two corpora form the basis of our analysis: the Russian corpus (RusC), which includes 19 bachelor and 19 master's theses written in English, totaling 576,186 words, and the Cameroonian corpus (CamC), which includes 8 postgraduate and 13 master's dissertations[3] written in English, totaling 680,146 words (see Table 3). These academic genres were selected because they represent the main research genres in the academic context (Hyland 2008a). The Russian corpus was compiled from the website of the Higher School of Economics, where full texts are published with students' consent and are publicly available. As no such platform was available in Cameroon, for the Cameroonian corpus, we collected the texts individually from students at the University of Yaoundé I and from some lecturers who generously provided them to be used in this study. All title pages, tables of content, direct quotations, bibliographical data, and appendices were manually excluded from the texts.

Table 3. **Word and text distribution in the Russian and the Cameroonian corpora**

	Genre	No. of texts	No. of words	Total
RusC	Bachelor theses	19	291,948	576,186
	Master's thesis	19	284,948	
CamC	Post-graduate dissertations	8	159,223	680,146
	Master's dissertations	13	537,133	
Total		59	1,256,332	1,256,332

As stated earlier, there are two criteria for lexical bundle identification: the frequency of occurrence criterion and the dispersion criterion. Frequency of occurrence is the first and most important aspect of lexical bundle identification; it is also largely based on the type of corpora. As explained by Biber et al. (1999), lexical bundles are more frequent in spoken discourse than in written discourse. Consequently, the minimum frequency of occurrence is 40 times per million words in spoken discourse, whereas in written discourse, the minimum frequency varies from ten (Biber et al. 1999) to twenty (Hyland 2008a, Cortes 2004), or twenty-five times (Chen & Baker 2010) per million words. Since there seems to be no agreement on the frequency of occurrence, we decided to select lexical bundles that occurred at least 20 times per million words, following Hyland (2008a) and Cortes (2004).

The second criterion was dispersion, that is, the number of texts in which these four-word sequences had to occur to be regarded as a lexical bundle. Setting the dispersion criterion was, as Biber et al. (1999) had noted, to exclude lexical bundles that may be characteristic of individual writing styles. We decided to follow Cortes'

[3] In Cameroon, a dissertation is typically written as part of the requirements for a master's degree, whereas a thesis is reserved for PhD candidates. A postgraduate dissertation, however, differs slightly. It is usually completed by students pursuing additional training after earning a bachelor's degree. If they seek a master's degree, they must then write a master's dissertation.

(2004) conservative stand and included in our corpus only those lexical bundles that appeared in at least five different texts or more.

Antconc 4.0.10, a freely available corpus analysis software, was used to automatically extract all four-word bundles using the N-gram function. However, not all four-word sequences were incorporated into the list of lexical bundles; we excluded topic- and context-dependent ones and combined overlapping bundles (Navarro & Martinez 2019, Chen & Baker 2010). Since our corpus contained texts from different disciplines, it seemed necessary to exclude discipline-specific bundles that could impede the comparability of our results. Therefore, such bundles as, for instance, *of the Russian Federation* (RusC) and *the teaching and learning* (CamC) were manually excluded. Moreover, section titles such as *Review of related literature* (CamC) and overlapping bundles were also excluded. The exclusion of overlapping bundles involved joining such bundles, as *it can be concluded* and *can be concluded that*, where a sequence *can be concluded that* was actually a part of a longer bundle (*it can be concluded that*), and when checked in the concordance line, was preceded by *it* and thus inflated the results. Therefore, such bundles were combined into *it can be concluded + (that)*. The final list of bundles included all four-word sequences that appeared at least 20 times in five different texts. These bundles were then classified and analyzed according to structural and functional criteria.

4. Results

In the Russian and the Cameroonian corpora, we identified 63 and 74 (types) four-world bundles, respectively, after manual exclusion of content- and topic-dependent bundles, of which 2361 (RusC) and 2717 (CamC) were unique occurrences (tokens). However, since the two corpora were slightly different in size, we applied a normalized frequency of 100,000 times per million words to the tokens in order to obtain a comparable size. We found some noticeable differences in the kinds of lexical bundles used by Russian and Cameroonian students, even though there are some shared bundles in both sub-corpora (see Table 4).

It is noteworthy that the two most conspicuous differences in the use of lexical bundles by Russian and Cameroonian students are linked to the specifics of the local language and culture. As for the structural features, research findings indicate that Russian students used more lexical bundles with *of*-fragments than Cameroonian students did (46.03% *vs*. 33,78%). All in all, 27 such bundles were identified in RusC: 11 noun phrase + *of*-phrase fragment (e.g., *the analysis of the, a wide range of, the majority of the, the development of the, the meaning of the, the nature of the, a part of the, the results of the, (at) + the end of the, the role of the, the purpose of this*) and 18 prepositional phrases with *of* (*in the context of, with the help of, for the development of, as a part of, in the form of , in the development of , in the process of , in the course of , at the beginning of + (the) , for the sake of , in the field of , in the case of , for the purpose of , as one of the, by the end of , on the basis of + (the) , as a result of, from the perspective of*). Apparently, the higher share of such bundles in the Russian corpus reflects a characteristic feature of Russian academic discourse, where strings of nouns in the genitive case are very frequent (Vladimirova 2010: 23). *Of*-phrases are the most common way of representing such strings in English (Dobrynina 2019).

Table 4. **The list of 40 most common lexical bundles in the Russsian and the Cameroonian corpora**

RusC	Freq.	CamC	Freq.
At the same time + (the)	***145***	**As a result of +(the)**	**106**
One of the most	*93*	**Is one of the**	93
As well as the	*89*	**The fact that the**	80
It is important to + (note)	*83*	**As well as the**	**79**
Is one of the	*76*	**On the other hand**	76
In the context of + (the)	*62*	**In the course of + (the)**	**73**
(due) + to the fact that	*61*	**It is important to**	63
The analysis of the	*57*	At the end of + (the)	57
It is possible to	*55*	At the level of	52
On the basis of + (the)	*54*	In the same light	50
The results of the	*54*	Is made up of	50
The fact that the	*53*	**To the fact that**	50
On the other hand	*52*	In the sense that	47
In the process of	*50*	**One of the most**	47
As one of the	*42*	**To be able to**	47
For the development of	*42*	The use of the	46
It is necessary to	*40*	In a bid to	45
In the case of	*38*	Is the fact that	43
One of the main	*38*	**At the same time**	42
(at)+the end of the	*38*	The rest of the	42
In the form of	*36*	Is based on the	40
It can be concluded + (that)	*36*	Of the fact that	38
By the fact that	*35*	The nature of the	37
A part of the	*34*	The role of the	36
It is crucial to	*34*	For the purpose of	35
With the help of	*34*	The extent to which	35
As a result of	*33*	The fact that it	35
To be able to	*31*	Through the use of	35
We can see that	*31*	To find out if	35
In the course of	*30*	**In the process of**	34
In the field of	*30*	It should be noted (that)	34
It was decided to	*30*	The fact that they	34
As a part of	*29*	**In the case of**	33
Despite the fact that	*29*	In relation to the	32
In other words, the	*29*	On the fact that	32
It impossible to	*29*	That there is a	32
When it comes to	*29*	To the extent that	32
In the context of + (the)	*28*	Should be able to	31
The majority of the	*27*	**In the form of**	29
From the perspective of	*26*	In the table below	29

Another notable difference is a higher percentage of *Anticipatory it + verb/adjective* bundles in RusC than in CamC (11, 11% vs. 5,4%) and their higher frequency: six out of seven bundles of this type are among the 40 most frequent RusC bundles (their total frequency is 277), whereas in CamC there are only four bundles of this type, and only two of them are among the 40 most frequent ones, with a total frequency of 97 (see Table 4). The low share of *Anticipatory it + verb/adjective* bundles in CamC may be connected with their functionality: they convey stance and engagement and, as such, are avoided by Cameroonian students for cultural reasons, which we will explain below.

Since in Cameroon local languages are not used in academia and all education is conducted either in English or in French, the structural analysis of lexical bundles in CamC has not revealed any specific local preferences. Yet, Cameroonian conventions of academic English (both oral and written) are influenced by the norms of local communication culture, and our study has revealed some traces of this influence. Thus, although both Russian and Cameroonian students show a heavy reliance on research-oriented bundles, which account for over 42% of the bundles in the CamC and about 34% in the RusC (see Figure 1), the share of text-oriented bundles is relatively higher in the CamC than in the RusC (36,98% and 25,39%, respectively). Unlike Russian students, Cameroonian students use fewer participant-oriented bundles, which convey the writer's attitude, judgment, belief or evaluation (*e.g., it should be noted + (that), it is clear that, it is important to, should be able to, etc.)* and more text-oriented bundles, which are concerned with text organization and its meaning as a message or argument *(e.g., on the one hand, in the sense that, at the same time, in relation to the, as far as the , in the same light, of the opinion that, when it comes to, in line with the, is based on the, in the face of , has to do with , in the domain of)*. Apparently, for Cameroonian students, it is more important to focus on the actual text, facts, or results of the study than to engage with the readers and highlight the authorial presence by conveying their personal opinion, evaluation, or judgement. This can be explained by the influence of Cameroonian culture, where the norms of social interaction are always governed by deference, which constrains direct criticism or public questioning of authority, manifesting a culture-specific understanding of (im)politeness (Larina & Ponton 2022). For Cameroonian students, therefore, these cultural values mean that even in academic research, where critical thinking is usually encouraged, criticizing more advanced researchers may not only result in stained relations but also in negative evaluation of peers. As a result, Cameroonian students tend to avoid challenging prevailing views and minimize the authorial presence in the text, focusing on how to convey their findings without critical appraisal of previous studies. It differs from Russia, as in Russian academic culture, despite the tendency to diminish the authorial presence in the text (Boginskaya 2022), the critical analysis of previous research is acceptable, hence a wider range and higher percentage of participant-oriented bundles (33,33% in RusC *vs*. 19,17% in CamC).

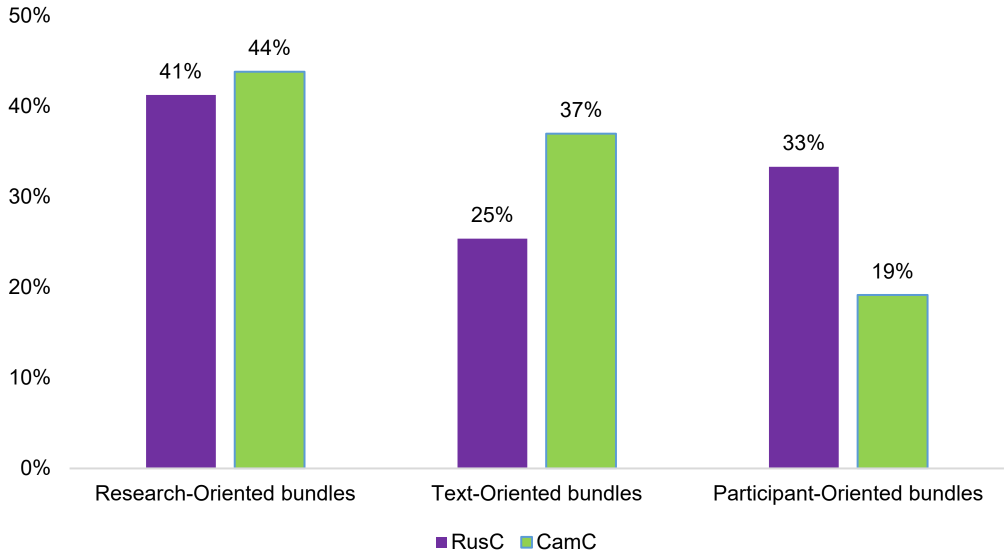

Figure 1. Functional Distribution of lexical bundles in Russian and Cameroonian corpora

5. Discussion

As indicated above, the use of lexical bundles by L2 English writers portrays some distinct traces of the local linguistic and cultural influence that significantly differ from Anglo-American usages. This influence is somewhat similar to interference from the language of the original in case of translations, "which — by their very nature — are produced under different constraints than native texts" (Grabowski, 2018: 405). The findings of our study presented in the previous section provided instances of such influence and showed that non-native learners and writers tend to accommodate their local communication norms to the use of lexical bundles. The limited use of participant-oriented bundles by Cameroonian students, that we mentioned above, aligns with broader aspects of academic writing in Cameroon, where there is a noticeable absence of engagement and interactional features. As noted by Nkemleke (2014), who analyzed the structure and citation practice in articles published by Cameroonian authors in local journals, more than 80% of research articles' introductions tend to avoid critical analysis of previous research (p. 197) and the most frequent verbs in citations are "points" and "reports", which "do not indicate writer's evaluation of the content of the proposition of knowledge claim" (p. 192).

Since there was no previous research on the use of lexical bundles in Russian and Cameroonian academic writing, to support our observations and enhance the understanding of "how and why language users make the choices they do when they speak/write" (Hyland, 2011: 106), we turned to the ethnographic study of Chinese scholars who interviewed Chinese postgraduate and graduate students "to probe possible reasons for their use of the typical sentence initial bundles identified in the self-built Chinese Masters and PhD thesis corpora" (Li et al. 2019: 37). It is noteworthy that, according to this study, Chinese students also seem to be "highly conscious of their identity as student researchers and apprentice writers. They appeared more comfortable expressing their attitudes towards their own research rather than influencing the evaluations of their readers." (p. 46). For instance, the preference for the verb "to find" (instead of "to note") in the sentence "*It is interesting to find that there is wide networking coordination within the DMO in Zhu Jiayu and other stakeholders*" was explained by cultural appropriateness and respect for the readers':

> (1) *I do not want to replace 'find' with 'note' and I am not comfortable to use 'note'. If my reader agrees with me and finds this interesting, it is interesting to them; otherwise, it is not. I am not willing to forcefully involve my readers and require them to pay attention to this point. Instead, I want to tell them that this is my finding. I think my readers should have their freedom. If they think this is an interesting finding, they will note this point. If they do not think so, then they do not share the same opinion with me* (p. 46).

The reluctance to use the word "interesting" was interpreted as striving for objectivity and the unwillingness to impose the author's opinion on the reader:

> (2) *I rarely use 'interesting' in my writing. This word expresses my own feeling. Academic writing should be neutral…* (p. 47).

Similarly, avoiding the pronoun "I" was explained by the desire not to "flaunt one's self":

> (3) *Strictly speaking, I should use 'the researcher' here. Academic writing should be objective and scientific, so I try not to use first person pronouns* (Ibid.).

Notwithstanding the clear ethno-cultural and ethno-linguistic roots of the above differences, the authors of the article linked them, among other things, to "a lack of rhetorical confidence" and "misunderstanding of the rhetorical conventions" of the foreign language in which the respondents were writing (i.e., English). The authors provided recommendations "for raising students' awareness of the common sentence starters in postgraduate academic writing" (p. 37), which included: "(1) raising students' awareness of the discrepancies between L1 and L2 bundles; (2) emphasizing bundle noticing in academic reading and writing; (3) increasing students' confidence as writers; (4) familiarizing Chinese students with rhetorical conventions of academic English" (ibid.).

Regardless of the pedagogical value of such recommendations, this approach raises a number of questions: Do L2 students and researchers need to have an Anglophone mentality to be effective academic writers? Is it necessary for them to fully detach themselves from their linguistic and cultural background? How can we find the golden mean between developing foreign language competence and retaining learners' cultural identity?

Some answers to these questions are provided in the works by Nabuyuki Hino (2018, 2021), who criticizes the traditional approach, which implies that non-native speakers should conform to native speaker norms. According to Hino, “with the dominance of native speakerism, Japanese learners of English have been taught to think and behave like Americans, where the criterion for good English has also been intelligibility to native speakers” (Hino 2021: 536). Comparing the native speaker rules to “linguistic mind-control,” he claims that “the imposition of native speaker models deprives non-native speakers of the freedom of representing their cultural values” (531), which results in a “lack of diversity other than Anglo-American norms” (p. 532). He believes that users of English “must be liberated from native speaker norms in order to be allowed to fully represent their original identities” (p. 536). Referring to the seminal work of Smith and Nelson (1985), he suggests redesigning models for speaking and writing “to enhance global intelligibility, comprehensibility, and interpretability, reaching beyond the Inner Circle listeners and readers” (ibid.). As a theoretical foundation for seeking solutions to the problems of native-speakerism, Hino proposes three major paradigms, namely, WE (World Englishes), ELF (English as a Lingua Franca), and EIL (English as an International Language), and presents two methods of teaching English as an International Language: IPTEIL (Integrated Practice in Teaching English as an International Language) and CELFIL (Content and English as a Lingua Franca Integrated Learning), where “the former exposes learners to the linguacultural diversity of WE and the latter engages students in the interactional dynamism of ELF” (p. 540).

The approach discussed above aligns with Levisen’s critique of the imposition of Anglo-centric linguistic frameworks on a global scale. Levisen argues that while his critique is not anti-English or anti-Anglo, it opposes the “eticization” of Anglo emics and the dominance of Anglo-English as a global metalanguage. He stresses that such Anglocentrism can lead to a conceptual monopoly and, in some cases, conceptual colonialism (Levisen 2024: 216). This reinforces our argument that the study of lexical bundles must move beyond the Anglocentric approach and instead reflect the diverse linguistic realities of L2 writers.

Another methodological alternative to the traditional perspective on lexical bundles research is the approach based on the theory of translingualism. According to this theory, “for multilinguals, languages are not discreet and separated but form an integrated system” or “a repertoire that is accessed for their communicative purposes” (Canagarajah, 2011: 1). Similarly, the linguistic competence of multilinguals “doesn’t consist of separate competencies for each language, but a multicompetence that functions symbiotically for the different languages in one’s repertoire” (ibid.). Therefore, cultural predilections for particular types of bundles can be viewed not as “a lack of familiarity with the common ways published writers create cohesive texts” (Hyland & Jiang 2022: 559) but as a manifestation of the translingual competences of EAL writers.

Both approaches emphasize the need to accommodate the diverse linguistic backgrounds of non-native speakers and foster authentic self-expression. The relevance of these approaches is supported by the studies that have found considerable variations in the use of lexical bundles not only among native and non-native speakers but also among writers with different first languages (Hyland & Jiang 2022) and different groups of native speakers, for instance, scholars in the humanities and natural sciences (Cortes 2004, Hyland 2008a) or reviewers in the fields of AI, engineering, and business (Kashiha 2023). These variations demonstrate that students and researchers follow the conventions of their particular academic disciplines and communities of practice. It justifies the culture-specific use of lexical bundles by L2 writers, provided that they do not violate the intelligibility (to both native and non-native speakers), style/register appropriateness, and other basic rules of academic writing. The proposed approaches will expand the boundaries of lexical bundles research by including cross-cultural variation in the scope of study and providing diversity beyond Anglo-American norms.

6. Conclusion

The main purpose of this investigation was to argue for a more inclusive approach to lexical bundles research, making it less prescriptive and more descriptive. Though our own investigation of lexical bundle use was limited in scope, our findings have shown that, in agreement with the results reported by previous studies, the linguistic and cultural backgrounds of writers with different L1s certainly contribute to the differences in the formulaic patterns of academic writing. One of the most prominent differences is a conscious effort by non-native authors to stress their research, its method, and procedures, focusing on the topic of the study rather than its presentation and engagement with readers.

Our study also confirmed that the L1 background of the writers influences their choice of bundles, including preferences for different structural and functional patterns. Although for Cameroonian students, whose texts we studied, English was the only language used in the academic setting, their choice of lexical bundles, especially participant-oriented bundles, differs considerably from that of native speakers of English. Moreover, due to cultural constraints, Cameroonian students used fewer participant-oriented bundles than even Russian students did. As for the Russian students, their use of lexical bundles reflects a characteristic feature of the Russian academic style, i.e., frequent use of strings of nouns in the genitive case. In other words, it is the native language and local culture that give a person cognitive potential with culturally appropriate connotations and models of argumentation necessary for accurate representation of complex meanings.

With this in mind, we argue for a shift of focus in the research on lexical bundles in academic English to make it more sensitive to the linguistic and cultural identities of L2 writers. We draw attention to the fact that some researchers (e.g., Hyland & Jiang 2022) have already started pointing out: what previous studies usually viewed as a deficiency or deviation can be a manifestation of cultural peculiarities or local traditions of academic discourse. We believe that looking at lexical bundles in L2 writing from a "post-native-speakerist" standpoint is a promising venue for research: it will expand our knowledge of the linguistic features of different varieties of English and provide a more nuanced understanding of the existing variation in academic discourse conventions across languages and cultures. Further studies on lexical bundles use may concentrate on how academic English gets appropriated and adapted by L2 writers and how cross-cultural variation affects international academic norms.

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Informality in academic English texts by Arabic and British scholars: A corpus study

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Abstract

There has long been a widespread belief that academic writing has to maintain a high degree of formality and impersonality. Despite this, it has been observed that there is a general tendency to use informal style in academic writing by writers from different disciplines. This informality manifests itself in the use of various linguistic devices that were previously observed only in spoken discourse or in informal communication. The aim of the study is to identify common informal features in English academic writing used by Arabic and British scholars and compare the level of informality used in English academic writing by representatives of the two lingua-cultures. The study adopts the corpus linguistics method. The one-million-word Arab Scholar Written English Corpus (ASAWEC) was compiled and analysed for informality features. The results were then compared to the British Academic Written English (BAWE) corpus. We focused on the use of informal features, such as broad references, initial conjunctions, first-person singular, second person pronouns, final preposition, listing expressions, split infinitive, and contractions. The results revealed a significant difference in the use of informality features in favour of the native speakers. The findings showed that Arabic scholars tend to use broad references and initial conjunctions, however, they rarely use contractions and split infinitives. Contrary to this, British scholars used the whole spectrum of informality features. The findings can provide insightful implications for researchers, journal editors and peer reviewers to account for informality levels in academic writing in different linguacultures. They may also be used in teaching English academic writing.

Keywords: *academic English, academic writing, informality features, corpus linguistics, Arabic English , British English*

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Неформальность в академическом английском в текстах арабских и британских ученых: корпусное исследование

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Аннотация
Долгое время существовало распространенное мнение, что академическое письмо должно поддерживать высокий уровень формальности и безличности. Несмотря на это, было замечено, что существует универсальная тенденция к использованию неформального стиля в академическом письме авторами, представляющими различные научные дисциплины. Неформальность проявляется в использовании ряда языковых средств, которые ранее встречались только в разговорной речи или в неформальном общении. Цель данного исследования – выявить общие черты неформальности, используемые арабскими и британскими учеными в академическом английском, и сравнить уровень неформальности, допускаемый в английском академическом письме представителями двух лингвокультур. В исследовании использован метод корпусной лингвистики. Был составлен и проанализирован на предмет выявления неформальных черт корпус арабского письменного английского (ASAWEC) объемом в один миллион слов. Далее результаты сравнивались с корпусом британского академического письменного английского (BAWE). Мы исследовали использование таких неформальных черт, как широкая отсылка, начальные союзы, местоимения первого лица единственного числа, местоимения второго лица, конечный предлог, перечислительные выражения, расщепленный инфинитив и сокращения. Наши результаты показали значительную разницу в использовании черт неформальности в пользу носителей английского языка. Они показали, что арабские ученые склонны использовать широкую отсылку и начальные союзы, но они редко используют сокращения и расщепленные инфинитивы, в то время как британские ученые используют весь спектр показателей неформальности. Полученные результаты могут быть полезными для исследователей академического дискурса, редакторов журналов и рецензентов, которые должны учитывать уровень неформальности в академическом письме, допускаемый представителями различных лингвокультур, также они могут использоваться при обучении английскому академическому письму.
Ключевые слова: академический английский, академическое письмо, черты неформальности, корпусная лингвистика, арабский английский, британский английский

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1. Introduction

Academic writing is traditionally described as formal and impersonal (Matsuda & Nuri 2020). Nonetheless, it has recently been observed that informality is gradually becoming a feature of academic writing along with formality (Boginskaya 2023, Hyland & Jiang 2019, Praminath et al. 2018, Adel 2008, Chang & Swales 1999). Several researchers (e.g., Yang & Pan 2023, Leedahm 2015, Mair

1998) have recorded the occurrence of informal features in academic writing in different disciplines. This tendency is described as a "part of a contemporary zeitgeist" by Hyland and Jiang (2019: 217).

Written English communication is considered a key to knowledge circulation. The English Language, therefore, has dominated the world of academia as scholars across the world widely adopt it in almost all disciplines (Mastuda & Nouri 2020, Chang & Swales 1999). In order to be recognised, academics, both native and non-native, are required to publish their research in the English language. As a result, the ability to write in an appropriate academic style has become a fundamental skill for writers in all fields. Scholars for whom English is a non-native language are aware of the significant influence that academic writing in English exerts on their domestic academic culture (Chang & Swales 1999) and they believe that following strict academic writing conventions can also mark them as members of this specific discourse community (Richter, Gaskaree & Mirazi 2022) and help them in getting published internationally (Fendri & Mounir 2022).

Previous studies (Hyland & Jiang 2017, 2019, Chang & Swales 1999) have examined the use of informal features used in selected disciplines, including applied linguistics. The aforementioned studies conducted a comparative analysis of informal features across disciplines of interest. Nevertheless, there has been a paucity of scholarship devoted to the examination of informal features in published academic articles on English language studies authored by non-native and native scholars. The researchers believe that this situation is unfortunate as it has been found that academic writing is more challenging to EFL writers than to native academics because the former's "mental schemata are constrained by their limited mastery of the foreign language's formal and pragmatic features" (Fendri & Mounir 2022: 58). As informality is more influential in creating engagement with the readers and hence fostering communication, it is therefore believed that using a balanced informality in academic writing promotes communication. Therefore, the objective of this study is to examine the characteristics of informal language employed by Arab scholars in the context of published academic writing in English. The level of this employment is determined by recognising potential differences in this use from that of native speakers' use, and identifying the most and least frequent informal features as they occur in Arab Scholars Academic Written English Corpus (ASAWEC) and British Academic Written English (BAWE). It is anticipated that the outcome of this undertaking will furnish valuable insights into the rhetorical approaches adopted by Arab scholars in their respective fields, thereby offering a foundation for the advancement of academic writing among Arab scholars.

Accordingly, the current study is sought to answer the following questions:

1. What are the informality features used by Arab scholars in their English publications?

2. What are the most and least common informal features in ASAWEC and BAWE?

of the interactional impact of their words on their readers. Furthermore, it embraces the utilisation of specific linguistic features that are not only identifiable, but are also countable (Hyland & Jiang 2019).

Informality is an attempt to facilitate two elements. The first one is a specific bond between the author and the readers who share a similar context. This could facilitate communication, ensure understanding and make the information more accessible. The second is to create a common ground of familiarity (Hyland & Jiang 2019). In this respect, familiarity forms common ground for both writers and readers. It is worth noting that appropriate criteria of conciseness need to be guaranteed, implying that researchers avoid an inclination toward informality.

Hyland (2005) defines informality as the use of language associated with everyday communication. It shows how authors establish reciprocal relationships with readers. It appears difficult to isolate it from formality necessary for academic writing. Heyllighen and Dewaele (1999) distinguish between formal and informal styles. The former is associated with detachment, precision and rigour. The latter is characterised by flexibility, directness, implicitness, involvement, and information. In the same vein, Hyland and Jiang (2017) suggest that formality, on the one hand, subsides dependence on the context and vague phrases in the text. In addition, it avoids ambiguity and misunderstanding. On the other hand, informality refutes formality in writing to achieve a friendlier and more acceptable person, to create a shared point of view and to ensure interaction with readers. Therefore, informality facilitates interaction through writers' use of some linguistic devices. However, the utilisation of these features should be approached with care, as informality is typically associated with the writer's subjectivity and personality, which "may clash with the objectivity of academic writing" (Fendri & Mounir 2022: 53).

2.2. Approaches to identifying informality features

Features of informal language may be identified by the occurrence of specific linguistic items, such as first-person pronouns (I and We) and unattended anaphoric pronouns (this, these) among others (Hyland & Jiang 2019). There are three main approaches to detecting them: Multidimensional corpus analysis, Ambiguity avoidance and Style guides (see Figure 1).

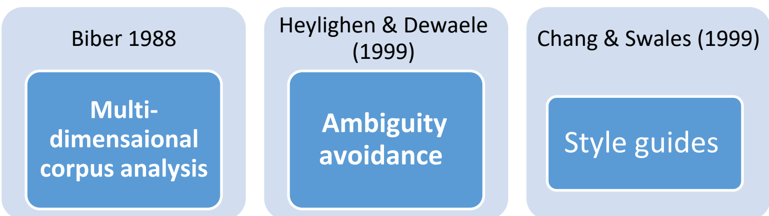

Figure 1. Informality features identification approaches

3. Is there any statistical difference in the use of informal features between Arab scholars and native speakers' academic written English?

It is considered important to answer these questions not only because they address the research gap in Arab academic writing, but also because they facilitate for a deeper understanding of academic writing among Arab scholars, which is of significance for several reasons. Firstly, there is a high increase in publications by Arab scholars, largely driven by the necessity for promotion and academic recognition. This has led to a culture of publish-or-perish, whereby scholars are compelled to publish their work in order to advance their careers. This increase in publications has highlighted the necessity for research-based insights to inform the development of training programs designed to enhance scientific publishing. Secondly, these scholars in question are primarily university professors who are also involved in teaching research-related activities, particularly in the case of the present study. It can be reasonably assumed that an improvement in the writing skills and knowledge of these scholar will have a positive impact on their students. Finally, an analysis of the style employed by Arab scholars in comparison to that of native speakers can yield insights into the influence of cultural differences in writing styles. Thus, the present study concentrates on the employment of informality features by Arab scholars and their comparison with those of British scholars'. The study adopts Chang and Swale's framework of informality features. In accordance with the corpus linguistics method, the analysis is conducted on two corpora: EFL corpus and a native corpus. The following sections present, a review of the relevant literature, the methodology, the results, a discussion of these results, and a conclusion.

2. Literature review

This section provides a review of the literature on informality features in academic writing and the approaches to identifying them. It also summarises some previous research on the use of informality elements in English language studies research.

2.1. Informality in academic writing

Informality in writing has been the focus of researchers for a considerably long time. Hyland and Jiang (2019), citing Gilbert and Mulkay (1984), describe informality as full of debates, hypothetical perceptions, cognitive devotion, and societal nepotism. Informality is believed to be a departure from a conventional objective academic posture. Informality, then, is the expression of private meaning, which implies a reciprocal relationship with the audience, a willingness to discuss claims and a favourable attitude towards subjectivity. In this respect, the use of informality features resembles the employment of *reader-oriented hedges*. Hyland (1996, cited in Boginskaya 2022) believes that these hedges not only facilitate the connection between the writer and the reader but also ensure that writers are aware

The first approach to identifying informality features is Biber's (1988) multidimensional corpus analysis. This model employs both quantitative and qualitative comparisons of various language registers (spoken and written). This distinction between oral and literate discourse helps clarify the concept of formality in communication, particularly in informal interactions. This method analysed the co-occurrence of 67 linguistic features, resulting in seven functional dimensions that predict register differences. The first dimension is *Interactivity/ informative expressions*. Positive values signal high interactivity, while negative values propose strong information transmission. The second dimension is *narrative/non-narrative* concern. This is identified by positive values reflecting narrative texts (e.g., novels), whereas negative values indicate non-narrative discourse. The third one is *clear and context-dependent reference*. In this dimension, positive values show low dependence on context, while negative values indicate high dependence. The fourth dimension involves *explicit persuasive representation* in which positive values reveal a high degree of persuasion, while negative values signify low persuasion. The fifth dimension is *information abstract/non-abstract style*. In this dimension, positive values feature an abstract, formal style, while negative values indicate a non-abstract style. The next dimension is *fineness of immediate information organization* which distinguishes between real-time and non-real-time information transmission. The last dimension is *academic model expression*. Each dimension is composed of language features with complementary positive and negative loads, serving opposite communicative functions. This approach, known as multi-feature/multi-dimensional analysis (MFA/MDA), is widely used in corpus research to study register variation.

The second approach to informal feature detection was proposed by Heyligehn and Dewaele (1999) and it involves identifying features which contribute to text conciseness and context independence. by means of two methods. The first is listing vocabulary that has the specifying function and its reference is determined by its context in one group (formal). The second is itemizing features that presume an understanding of context in another group (informal). Heyligehn and Dewaele (1999) developed a formula to assess informality in an academic text. According to this formula, nouns, adjectives, prepositions, and articles of greater frequencies are features of formal text. In contrast, the prevalence of verbs, pronouns, and interjections contributes to making a text informal.

The third approach is based on a review of style manuals or guides (Hyland & Jiang 2019, Bennett 2009, Chang & Swales 1999). Bennett (2009) assessed style guides and identified that they contained constant reference to objectivity and formality that is attained through the comprehensive use of 'Latinate vocabulary' and detached structures. After surveying 40 style guides to formality, Chang and Swales (1999) noted persistent mentioning of first-person pronouns, wh-questions, listing expressions, and contractions as features of informality. Hyland and Jiang's (2019) survey of some sites of university language centres found corresponding suggestions to refrain from using these features.

Chang and Swales (1999) identify ten features of informality that are widely adopted in research. Subsequently, Hyland and Jiang (2017, 2019) modified this list by adding second-person singular instead of sentence fragments, which according to them, almost rarely appear in academic writing due to thorough review processes in journals. The final list includes: the first- person pronouns, anaphoric pronouns - broad references, split infinitives, starting a sentence with a conjunction or a conjunctive adverb, listing expressions (*and so on*, *etc*., *and so forth*), prepositions at the end of sentences, run-on sentences, sentence fragments, contractions, direct questions, and exclamations.

2.3. Previous studies

Several studies, such as Yang and Pan (2023), Hyland and Jiang (2017, 2019), Chang and Swales (1999), have been devoted to identifying informality features in academic writing. Most of these studies compared the use of informality features across disciplines. Yang and Pan (2023) found general compatibility between published advice and actual practice concerning the use of informal elements. They also noted the frequent use of informal linguistic features despite the style manuals recommendation against their use. Additionally, the study found variation in the use of informality features between linguistics and physics implying that academic writing is not consistent and may vary based on the discipline. Few other studies examined the use of informality features in studies focusing on English language studies. Following is a summary of some of these studies.

Tocalo et al. (2022) intended to analyse informality in Filipino ESL scholars' academic writing. The study adopted articles amounting to 1,000,000 words as its materials. These articles were published in 7 eminent local and international journals during 2010–2020. The study reported an increase in the use of informality features during that period. The most common informal features were unattended anaphoric pronouns and sentence-initial conjunctions/conjunctive adverbs. In addition, the study demonstrated that the least utilised features were the first-person pronouns and sentence-final prepositions.

Ebrahimi and Fakheri (2019) scrutinised informality occurrence in 50 applied linguistics published articles in two local Iranian journals published in 2014–2015. The study concluded that the most frequent informal features were unattended anaphoric pronouns and sentence-initial conjunctions, while the least occurring ones were exclamations and contractions.

Alipour and Nooreddinmoosa (2018) investigated the employment of informal features in applied linguistics research produced by Iranians and native speakers. The study examined 200 published research articles in 6 journals (3 Iranians and 3 British) published during 2012–2017. The Iranian corpus consisted of 692.046 words, while the British contained 910.740 words. The study found that informality occurred more frequently in British scholars' writings than in the Iranians'. The study identified no significant difference between the Iranian and British corpora in the utilisation of informality. Additionally, the most frequent informal features appeared to be initial conjunctions, while the least common one were exclamation marks in both corpora.

Praminatih et al. (2018) analysed undergraduates' theses abstracts written by Indonesian EFL students to examine the use of informal language in 1992, 1996, 2000, 2004, 2008, 2012 and 2016. A total of 114 abstracts were subjected to analysis. The study concluded that some informal features, including sentence-initial conjunctions/conjunctive adverbs, sentence-final prepositions, contractions, and direct questions existed in the 114 abstracts. Moreover, the research revealed a decrease in the use of informality over time.

Sholihah (2018) attempted to discover the elements of informality in general and the most common ones in thesis proposals by EFL students. The data were elicited from 15 thesis proposals of English Teacher Education Department in Uin Sunan Ampel Surabaya. The study reported the use of nine informality features in the proposals. These features were unattended anaphoric pronouns, first-person pronouns, construction, initial conjunctions and conjunctive adverbs, sentence fragments, listing expressions, direct questions, adverbs in initial or final position, and second-person pronouns. In addition, the most common features of informality were initial conjunctions and conjunctive adverbs, first-person pronouns and unattended anaphoric pronouns.

Considering these studies, it can be suggested that informality features are commonly used in published English language studies. Only one study (Alipour & Nooreddinmoosa, 2018) compared the use of informality features by native and non-native speakers and found that the British corpus employed more informality features than the Iranian one. Unattended anaphoric pronouns emerged as the most common feature in two studies (Tocalo et al. 2022, Ebrahimi & Fakheri 2019).

It is also worth noting the limitations of these studies. For example, Tocalo et al. (2022) investigated a corpus of approximately 1.000.000 words drawn from articles published in 7 Filipino and international journals. The researchers neither disclosed further details about their materials nor did they provide more information about the journals. In addition, the number of the examined words is relatively small. Ebrahimi and Fakheri (2019) investigated 50 applied linguistic published research articles in two Iranian journals during 2014–2015. The number of articles was quite undersized. Alipour and Nooreddinmoosa (2018) investigated a British corpus of 910.740 words and an Iranian corpus of 692.046 words, which is considerably less than the British one by more than 300.000 words. Praminatih et al. (2018) confided their focus on undergraduate theses abstracts in 2016 that may not provide sufficient context for investigating informality features due to abstract restricted format. Thus, the constraints in all these studies may cause some shortcomings in their results.

3. Materials and methods

The present study adopted the corpus linguistic method as proposed by Biber et al. (2007) according to which the most appropriate way to analyse discourse organisation is using a bottom-up approach. Both quantitative and qualitative techniques were implemented in the study as well as a comparative analysis with the previously used frameworks

3.1. Corpora

Two corpora were used in the study: Arab Scholar Academic Written English Corpus (ASAWEC) and an extracted sub-corpus from the British Academic Written English (BAWE) corpus.

3.1.1. ASAWEC

ASAWEC was compiled from research articles published by Arab scholars in renowned English language journals. The sources of the corpus files are detailed in Table 1 below.

Table 1. **Details of ASAWEC sources**

Journal	Article	Date of Pub.
Arab Journal of Applied Linguistics	11	2020–2022
Arab World English Journal	36	2021–2022
International Journal of Arabic-English Studies	35	2019–2022
Jordan Journal of Modern Languages and Literatures	36	2019–2022
Journal of Research in Language & Translation	8	2020–2022
Saudi Journal of Language Studies	19	2021–2022
Umm Al-Qura University Journal of Language and Literature	8	2019–2022
Total	**153**	

The chosen research articles focused mainly on applied linguistics, translation, and literature. The number of files selected from each journal was based on different criteria, such as frequency of publication and the online availability of the published issues.

3.1.2. BAWE

For reference purposes, the researchers used a mini corpus extracted from BAWE[1]. Overall, 177 files were extracted from the corpus based on specific criteria to meet compatibility requirements with the main corpus. These criteria were believed to raise the compatibility levels between the two corpora. Nevertheless, minor variations between the two corpora existed, as evident in Table 2.

[1] BAWE was developed at the Universities of Warwick, Reading and Oxford Brookes, under the directorship of Hilary Nesi and Sheena Gardner (formerly of the Centre for Applied Linguistics [previously called CELTE], Warwick), Paul Thompson (Department of Applied Linguistics, Reading) and Paul Wickens (Westminster Institute of Education, Oxford Brookes), with funding from the ESRC (RES-000-23-0800). Source: The University of Warwick. https://warwick.ac.uk/fac/soc/al/research/collections/bawe/how_to_cite_bawe/, accessed 15th January. 2023.

Table 2. **Characteristics of ASAWEC and BAWE corpora used in the study**

Corpus	Files	Average File length	Tokens	Types	TTR*
ASAWEC	153	6563	1004155	45974	0.046
BAWE	177	5705	1004081	44968	0.045

**Note. TTR= Type-Token ratio*

The major variation between the two corpora is represented by the difference in the numbers of the incorporated files. This variation is due to the length of BAWE files, which are shorter than those from ASAWEC. Also, a lower TTR in the BAWE suggests a higher lexical richness of the ASAWEC, possibly due to the writers' use of advanced topics and levels of education.

3.2. Informality features framework

The present study adopted Chang and Swales' (1999) framework, which was adapted from Hyland and Jiang (2017, 2019) for informality features. This framework has been used in numerous studies and has proven accurate and structured to determine linguistic devices that imply informality in academic writing. Chang and Swales (1999) built their list of informality features based on the frequency of mentioning of the features in manuals and handbooks on academic writing. They provide a list of ten most referred features along with the number of references that mention them. For the present study, the researchers used an adapted version of the eight elements, as shown in Figure 2. Two elements - direct questions and exclamations - were excluded from the list because they were referred to by style manuals and handbooks only twice (Chang & Swales 1999: 148). In addition, one informality feature - direct questions - was challenging to investigate as most of the texts include direct questions that are required by the genre itself, i.e. research questions, surveys and interviews. Consequently, it was difficult to identify whether these questions were reflective of the writing style of the writer or not.

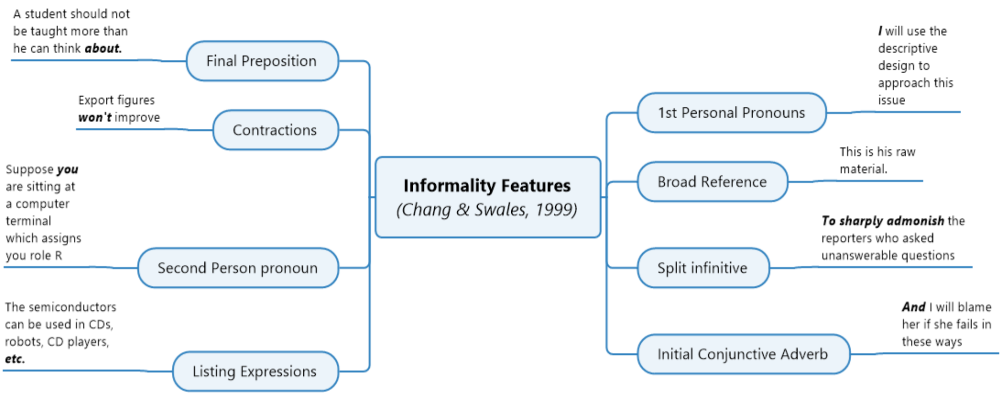

Figure 2. The adapted framework of informality features

Note. Adapted from: Chang & Swales (1999) and Hyland & Jiang (2017, 2019). Informal elements in English academic writing: Threats or opportunities for advanced non-native speakers? (p. 148).

We made this selection because, according to Hyland and Jiang (2019), the list is consistent with what is regarded as informal language. Additionally, the use of informal features entails communication and personal interaction with readers. Another reason is that the list caters to beginner researchers' anxiety about employing these informal features. Moreover, some of these items represent the conflict between linguistic forms and present writing applications. Finally, the list of informal items is widely adopted in informality research (e.g., Kuhi et al. 2020, Lee et al. 2019).

3.3. Procedures

The main corpus of the study, ASAWEC, was built following the steps and techniques of corpus building suggested by pioneer corpus linguists (Atkins et al. 1992, McEnery & Hardie 2012, Poole 2018, Tognini-Bonelli 2001). Initially, the journals were selected to meet the criterion of high academic standards. The selected journals are published by renowned Arab universities, and the scholars who published there are Arabs. Further validation of the identity of the authors was nevertheless conducted using the authors' full names, email addresses, and personal and academic websites. The articles which were authored or co-authored by non-Arab researchers were excluded. In this stage, a total of 185 PDF files were downloaded.

In the second stage, all the files were converted to *text* format and cleaned. The researchers used AntConcFileConverter[2] and EmEditor Professional[3] software at this stage. Using the Regular Expression feature, all the noise data in the files were deleted. Elements such as Arabic characters, formatting and mathematical symbols, clichés, journal titles and bibliographical information were deleted. Furthermore, the references and appendices section of all the articles were removed. Ultimately, 153 files were selected and indexed in the corpus folder. The corpus files were then tagged using the POS tagging feature and re-uploaded to #LancsBox[4] software for the analysis stage.

Regarding the BAWE sub-corpus, the researchers used the documentation file of the corpus and then sorted the files according to specific criteria. Each time a criterion was applied, the number of the selected file was reduced. Finally, 177 files were chosen from the filtered corpus to match the number of ASAWEC tokens. Figure 3 explains the process of criterion application and file selection. The process started with identifying the target language, L1 English language. Then, we focused on the disciplines covered by the collected articles. Three disciplines which were arts, humanities, and sociology were included. We then had to choose the genres to

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[2] Anthony, L. 2017. AntFileConverter (version 1.2.1) [Computer Software]. Waseda University. http://www.antlab.sci.waseda.ac.jp/

[3] Emurasoft, Inc. 2019. EmEditor Professional (Version 19.3.2) [Computer Software]. Filepuma. https://www.fi lepuma.com/download/emeditor_professional_64bit_19.3.2-23779/

[4] Brezina, V., Weill-Tessier, P., & McEnery, A. 2020. #LancsBox v. 6.0 [software]. Available at: http://corpora.lancs.ac.uk/lancsbox.

be studied, which included research reports, essays, proposals, and case-studies. The students who produced these genres belonged to two grades, distinction and merit, and they were in levels three and four in undergraduates, but some postgraduates were also included. These filters produced 177 files to be included in our analysis. It is worth noting that these filters originated from the Excel file downloaded from BAWE.

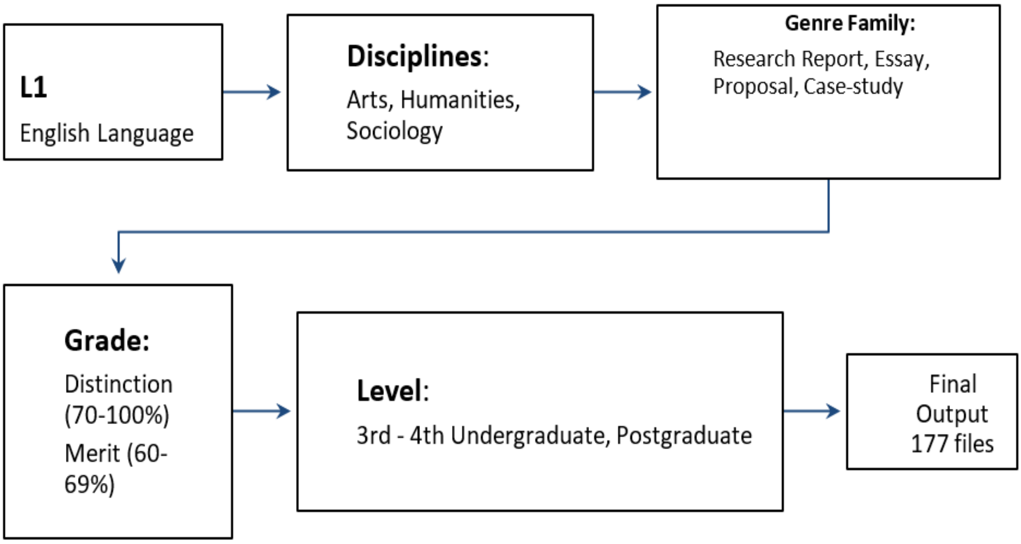

Figure 3. The process of selecting BAWE files

The two corpora were then uploaded to the corpus linguistic software #LancsBox for quantitative analysis.

3.4. Data analysis

The two corpora were analyzed using the Key Word in Context (KWIC) tool of the #LancsBox software. Each item of the eight informal academic writing features was explored using simple search, smart search, or RegEX search. For example, since complex structures such as split infinitives and contractions are predefined in the software, the researchers searched for them using the predefined search terms SPLIT INFINITIVE and CONTRACTION in the two corpora and generated the statistical significance of the differences from the software directly. See Figure 4 for an example of a smart search.

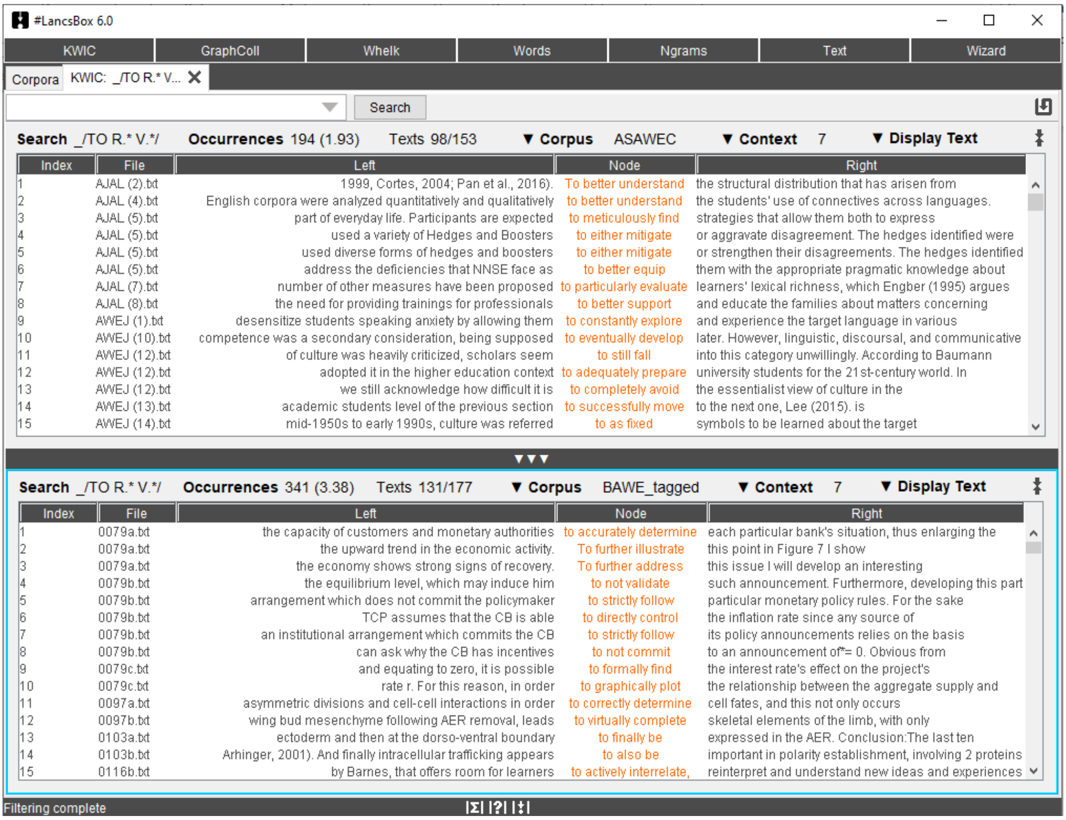

Figure 4. Smart search for the split infinitive

For search terms that require determining position, extra features like letter case and punctuation were used which we applied through the RegEX feature. For example, the search term /However/ is used to determine the occurrence of the conjunctive adverb *however* in the initial position, while the search term /in\. /p was used to determine the occurrence of the preposition *in* at the end of a sentence. For other items that include single or compound lexical units, a simple search was applied.

After generating the frequency of occurrence of each item in the two corpora, the Welch Two Samples T-test was conducted to specify the statistical significance of the difference between the two groups. The results of the quantitative analysis are presented in the forthcoming section.

4. Results

The study results are presented in three parts. First, the Arab scholars' use of informality features is presented. Second, a comparison between Arab scholars and native English academic writers is reported. Finally, the statistical significance of the difference between the two groups of academic writers is shown.

4.1. Arab scholars' use of informality features

Using quantitative analysis of ASAWEC we found that Arab scholars used the informality features identified by Chang and Swales (1999) as follows.

Table 3. **Informality features used by Arab scholars (sorted by relative frequency per 10k)**

Feature	Relative frequency*	Range * %
Broad References	28.59	100
Initial conjunctions	25.31	38.3
First-person pronouns	12.85	73
Second-person pronouns	6.35	64.05
Final prepositions	2.4	7.68
Listing expressions	1.97	21.79
Split infinitives	1.94	64.05
Contractions	1.87	26.14

**Note*. Frequency per 10,000 tokens.
* Range: Occurrence of an informality feature across analysed files

The most frequently used informality features by Arab scholars are broad references, initial conjunctive adverbs and conjunctions, and first-person pronouns, respectively. Table 4 displays a few examples of these features from ASAWEC.

Table 4. **Examples of Arab scholars' use of informality features (top used features)**

Feature	Example	Source (File)
Broad references	*"… stance towards content and towards readers (hearers).* ***This*** *has resulted in various classifications of organisational.."*	AJAL (11)
Initial conjunction	*"Arabic counterparts of their mother tongue words.* ***And*** *that they often literally translate from Arabic"*	AWEJ (7)
Personal Pronouns	*"****We*** *extracted all the features and examined all the occurrences…"*	IJAES (27)

It is also noted that broad reference, the most common informality feature in ASAWEC, is present in all the sample files. On the other hand, contractions, split infinitives, and listing expressions were the least used features in the corpus and unsystematically distributed across the corpus files.

4.2. Arab scholars' versus native speakers' use of informality features

When comparing the native language speakers' corpus BAWE with ASAWEC, we found that all the informality features were used in BAWE but not in ASAWEC. However, it is interesting that the top three informality features, i.e., broad reference, initial conjunctions, and personal pronouns, are identical across the two corpora. A slight difference is spotted in that initial conjunctions were the most used feature by the native speakers rather than broad reference. Figure 5 illustrates these differences.

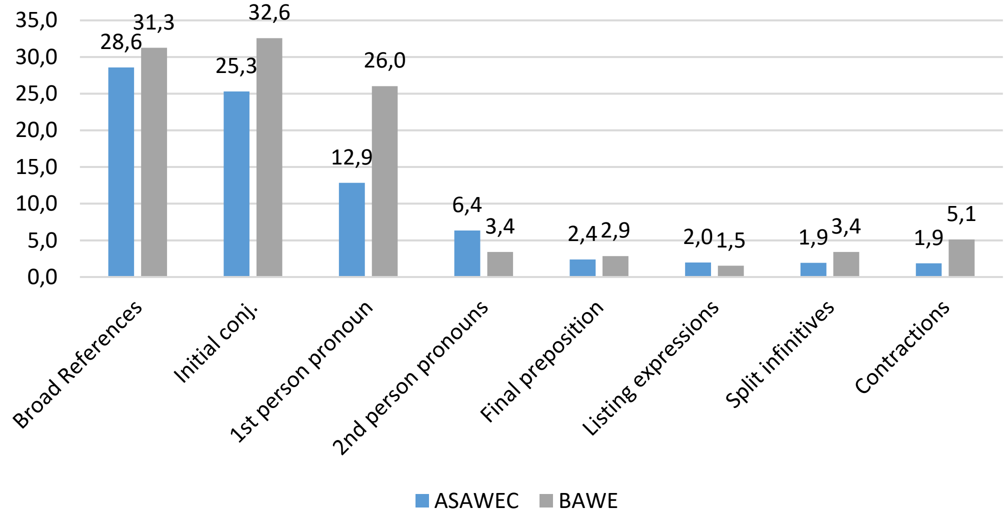

Figure 5. Informality features used in ASAWEC and BAWE (according to relative frequency per 10k)

The results also showed a minor difference in the least used features. Listing expressions and split infinitives are scarcely used by native speakers with relative frequencies of 1.5 and 3.4, respectively, while a considerable use of contractions amounted to 5.1 is spotted. Table 5 reports some examples of the use of these features in BAWE.

Table 5. **Examples of native speaker use of informality features (least used features)**

Feature	Example	Source (File)
Listing expressions	*"acting according to his desires or beliefs* ***etc.*** *"*	**0407**
Split infinitive	***" for learners to actively construct meaning from the text"***	**0116b**
Contractions	*".. but if the flow of information* ***hasn't*** *improved then the objective* ***hasn't*** *been met"*	**0193d**

A detailed comparison of the use of informality features in terms of relative frequency and range is presented in the Appendix.

4.3. Significance of the difference

Table 6 reports the significance of the differences in the use of informality features by Arabs and native academic writers.

The differences between Arabs' and natives' use of informality features were statistically significant in most of the studied features, initial references $P = 0.006$, first- person singular $P = 0.014$, second-person pronouns $P = 0.003$, split infinitive $P < 0.001$, and contractions $P < 0.001$. However, it seems that both groups use broad references, final prepositions, and listing expressions at approximately similar levels.

Table 6. **Statistical significance of the differences**

Feature	T-value	P-value	Significance
Broad References	303.92	0.34	No
Initial conjunction	297.26	0.006	Yes
First-person pronoun	299.86	0.014	Yes
Second-person pronouns	208.72	0.003	Yes
Final preposition	308.22	0.571	No
Listing expressions	258.76	0.147	No
Split infinitives	290.35	< 0.001	Yes
Contractions	316.54	< 0.001	Yes

5. Discussion

The analysis of the data revealed that Arab scholars used several informal features. Primarily, broad references or unattended references amounted to 28.59% of the total use of informal features. Broad references, such as *this, these, that* and *those*, are deemed informal as they regularly occur in various conversational situations. Strauss (1993) and Swales (2005) have shown that broad references appeared in 40% of the spoken language and 46% of dissertation discussions, respectively. In our study, broad reference was found in all the files implying that this feature is highly preferred by Arab scholars. Hyland and Jiang (2019) suggested that research style manuals recommended avoiding the use of broad references. However, Swales and Feak (2012) explain that the employment of broad references, such as ‘this’, serves sweeping from one sentence to another in texts. Thus, it appears that Arab scholars tend to facilitate the flow of information in their texts by applying this feature. The occurrence of broad references in ASAWEC accords with Swales and Feak’s (2012) proposition that use of broad references in academic writing indicates the writers’ position as experienced, skilful, and impressive. The result is compatible with the results by Tocalo et al. (2022), Sholihah (2018) and Ebrahimi & Fakheri (2019) who found that the corpora they studied commonly used unattended references.

Initial conjunctive adverbs and conjunctions are seen as informal since they represent features of spoken discourse, revealing incomplete sentences and unintentional speech (Hyland & Jiang 2019). This informality aspect is responsible for 25.31% of the total informal features in ASAWEC. This result implies enhanced rhetorical perception of Arab scholars related to cases of stylistic assortment accuracy. Moreover, the finding demonstrates that employment of initial conjunctive adverbs and conjunctions acts as an achievement of writing techniques illustrating a move in academic writing. Our finding accords with that of Tocalo et al. (2022), Ebrahimi et al. (2019), Alipour & Nooreddinmoos (2018) and Sholihah (2018). They independently reported that initial conjunctions and conjunctive adverbs were frequently used in their corpora.

The third most common informal feature in ASAWEC is personal pronouns amounting to 12.85% of the total features as presented in Table 3. This result is enhanced by the high dispersion of use, that is73%, which means that personal pronouns appear in 112 out of 153 files. Hyland & Jiang (2019) state that first-person pronouns outline informality as their use denotes a more common tendency in all written genres. In academic writing, non-native English speakers may use personal pronouns for reasons related to their language background. According to Hyland and Jiang (2019), employment of first-person pronouns to recognise authors does not imply personal power. This implies that personal pronouns' use in this context is not about confirming authority or dominance, but rather about acknowledging the contributions of others. This perspective may help to understand and interpret the use of personal pronouns in academic writing by non-native English speakers. Correspondingly, the results reveal Arab scholars' self-awareness as linguists. Hyland (2001) emphasises that the employment of *I* builds a voice and influential personality in academic research. Arab scholars' use of the first-person pronouns, therefore, signals their inclination toward showing their personality in their texts. This finding contradicts other research results. Tocalo et al. (2022), Pramintih et al. (2018) did not find the use of the first-person pronouns; rather, Tocalo et al. (2022) found that the first-person pronouns were the least used informality features.

Regarding the dispersion of informality features across the ASAWEC, it is noted that the frequency of applying informality features by Arab scholars is not always related to the distribution of that use. For example, while split infinitive is one of the least frequent features in the corpus, with only two hits per 10000 tokens, they are nevertheless the third used by the authors, i.e., they appeared in 98 out of 153 files which represent 64 % of the whole corpus. This indicates that while a considerable number of the authors used such a feature, the authors rarely repeat a feature once or twice in the same article.

The current study identified a difference in the number of informality features used by Arab scholars and native speakers. Overall, informality items appear more in BAWE corpus than in ASAWEC. It is noted that the most common features in both corpora are the same. Nevertheless, the two corpora are slightly different in the least used features. This result indicates that the ASAWEC corpus underuses informality features that may be attributed to several reasons. The first one is the difficulty created by the gradual use of informal features in academic writing for students and inexperienced writers, especially those who write in English as a foreign language (Hyland & Jiang 2019). Chang and Swales (1999) propose that when EFL students learn the regulations of formal academic writing, this acts as a burden by itself which was further made complex by allowing the mixing formal and informal language. The second reason of ASAWEC's underuse of informality features is the influence of the authors' field and the perception of readers. This is because applied linguistics quality of academic writing tends to be less informal due to the attention they pay to their readers' expectations (Hyland & Jiang 2019). The third reason is that journal reviewers require less use of informal features. Whenever they find some of the informal aspects, they demand them to be reviewed. Another reason related to some of the informality features, such as sentence-initial conjunctions and conjunctive adverbs, and broad references is that they are closely related to lexical bundles, and they are nearly idioms. Adel and Emran (2012) argued that these lexical bundles are liable to occur in native speakers' discourse more frequently than in non-natives'. Relating to the context of this study, Sanosi (2022) also found that native speaker writers outscored Arab scholars in using lexical bundles. The fourth reason refers to the non-native speakers' following of rules laid out by style manuals and author guides. They are more worried about the accurate formation of the language in their texts (Alipour & Nooreddinmoosa 2018). Although this worry is beneficial in that it assists in producing accurate discourse, it could be a drawback in the sense that it denotes that Arab scholars do not cope with the new inclinations of research. Updated EPA courses play a role in the diminishing use of informality features. Most EAP courses follow conventional instructional materials and methods. They need to cope with the latest trends in the field (Alipour & Nooreddinmoosa 2018). This result is compatible with that by Alipour and Nooreddingmoosa (2018). They reported that informality features appeared more frequently in the British scholars' corpus than in the non-native one.

It is worth mentioning, however, that the difference in employing informality features between the two corpora does not apply all features. Although significant difference occurs in 63 % of the studied articles, the two groups seem to use broad references, final prepositions, and listing expressions to approximately parallel extents, i.e., with no statistically significant difference. Considering that the investigated articles of ASAWEC have already been reviewed for writing mechanics, among other requirements for publication, it is envisaged that significant use of informal features might be adjusted by reviewers prior to publication. This observation should be acknowledged as a potential limitation of this study. Nevertheless, the data is still believed to be reflective of the reality of the use of informal features by Arab scholars since these review processes normally focus on specific features and cannot entirely change the authors' style. Based on this observation, future research should study the writing production of the scholar *as it is* or before the submission. Although this method is less convenient and may be difficult to apply on a wide range, it is more representative of scholars' employment of informality features in their academic writing.

It is mentioned that journal reviewers may not be in favour of use of informal features while the Chief Editors might recommend to their reviewers the use of informality aspects. Notwithstanding, we need to consider what was noted by Chang and Swales (1999) that foreign writers of English find it difficult to adopt informality in their writing. This may hinder the general movement of applying informality features in academic writing which is noted to be gradually dominating academic writing. This gradual increase in informality features' use is motivated by changes in the ways authors seek to assert unity with their audience. Another reason is the increase of impersonality representation as a rhetorical option in academic writing (Hyland & Jiang 2019). This is generally linked to changes in rhetorical practices that support authors' attempts to make their ideas clear to the audience. Thus, the use of informality features does not only imply that authors are adopting the latest developments in academic writing, but it also indicates that they are adopting the changes in rhetorical practice. This is supported by Boginskaya's (2023) suggestion that academic language tends to be more impersonal because it is an outcome of "the social interaction between the writer and the reader" (p. 143).

6. Conclusions

Due to the increase in informality features use in scholarly writing, they have become an issue of interest to researchers (Boginskaya 2023). This study investigated informal aspects of academic writing as used by Arabic and British scholars. The results demonstrated a significant difference in informality aspects used in ASAWEC and BAWE. Results have shown that ASAWEC used most frequently broad references, initial conjunctive adverbs and conjunctions, and the first-person pronouns. Additionally, the most common informality features in both corpora are similar: broad references, initial conjunctive adverbs and conjunctions, and the first-person pronouns. Again, the two corpora are identical in the least regular informal features which were final prepositions, listing expressions, and split infinitives.

These results call for academic writing course revision in Arab universities to adapt to the latest trends in academic writing, which is the adoption of informality features in academic writing that has started to replace formality (Hyland & Jiang 2019, Praminath et al. 2018, Adel 2008).

This study is not without limitations that entail some future research recommendations. First, it studied a variety of areas in the English language, such as applied linguistics and literature. Further research is needed to investigate informality features in only one area in the English language. Second, the study selected published articles in local Arab journals. Including research published by Arab scholars in journals outside the Arab region may provide more insights into the topic. Third, the present study did not cater for style manuals and guides in Arab universities. Further research is strongly recommended to investigate these manuals to see if they reflect with the recent developments in the field of academic writing and whether they have an impact on scholars' writing.

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Appendix

Informality features in ASAWEC and BAWE

Feature	ASAWEC		BAWE	
	Rel. Freq*	Range %	Frequency	Range %
Broad References	28.59	153	31.27	176
Initial conjunctions	25.31	38.30	32.58	35.34
First-person pronouns	16.02	73.20	26.03	59.60
Second-person pronouns	6.35	64.05	3.41	36.36
Final prepositions	2.40	7.68	2.86	7.17
Listing expressions	1.97	21.79	1.54	11.93
Split infinitives	1.94	64.05	3.43	75
Contractions	1.87	26.14	5.13	58.52

* Relative frequency per 10,000 words.

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Research article / Научная статья

The concept of Native Speaker in English and Russian academic discourse

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Abstract
In contrast to the requirements for scientific accuracy, terms, particularly in the humanities, often reflect the specific socio-cultural context of their use and seemingly equivalent terms can have significant conceptual differences within multilingual scholarly and professional communities. One such term is *native speaker*, which is crucial to the English Language Teaching (ELT) academic discourse. The main objective of this study is to explore the structure and meaning of the concept underlying the term *native speaker* and its dynamic functioning in discourse to identify differences in their understanding. The material consisted of English and Russian-language research articles on ELT from 1970 to 2020. The study was conducted using a linguosynergetic approach, which considers discourse as a self-developing and self-organizing, nonlinear, open and unstable system. The methodology included three stages. First, the authors conducted an axiomatic analysis of the contexts in which the term *native speaker* is used. Then, they modeled the concept in different synchronous slices. Finally, they compared the data obtained. The results showed that the differences concern not only the periphery of the concepts, but also their very core. In Russian ELT discourse, the concept retains a relatively stable structure. This reflects the role of the native speaker in the educational process, as a learning model and a preferred teacher. In English ELT discourse, the term *native speaker* has acquired a negative connotation, and conceptually, it acts as an opponent to the term *non-native speaker*, forming a dual concept with it. The conclusions can serve as a basis for further comparative studies on interlanguage terminological systems in the humanities field.
Keywords: *discourse analysis, ELT discourse, native speaker, concept, linguosynergetic approach, comparative terminology*

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Концепты *native speaker* и *носитель языка* в английском и русском лингводидактическом научном дискурсе

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Аннотация
Вопреки требованиям научной точности, зачастую термины, в особенности гуманитарных наук, хранят на себе печать конкретного социокультурного контекста и внешне эквивалентные термины могут иметь серьезные концептуальные различия в разноязычных научных и профессиональных сообществах. К таким терминам относятся *native speaker* и *носитель языка*, являющиеся ключевыми для лингводидактического научного дискурса. Цель представленного исследования – изучить структуру, содержание концептов, стоящих за терминами *native speaker* и *носитель языка*, и особенности их функционирования в лингводидактическом научном дискурсе в двух языках для выявления скрытых различий их понимания. Материалом послужили англоязычные и русскоязычные научные статьи с 1970 по 2020 гг. Исследование было осуществлено в рамках лингвосинергетического подхода, который рассматривает дискурс как саморазвивающуюся, самоорганизующуюся, нелинейную, открытую, неустойчивую систему, что позволило выявить скрытые элементы системы и проанализировать динамику изменений. Методология исследования включала три этапа: (1) аксиоматический анализ контекстов употребления термина, (2) моделирование концепта на разных синхронных срезах и (3) сопоставительный анализ полученных данных. В результате были выявлены значительные отличия в структуре и содержании концептов *native speaker* и *носитель языка*, затрагивающие не только периферию, но и само ядро. В русскоязычном лингводидактическом научном дискурсе концепт сохраняет относительно стабильную структуру, отражая роль носителя языка в образовательном процессе в качестве модели обучения и предпочтительного преподавателя. В англоязычном дискурсе термин *native speaker* обрел негативную коннотацию и концептуально выступает антагонистом термина *non-native speaker*, образуя с ним дуальный концепт. Полученные выводы могут послужить основой для последующих сопоставительных исследований в области межъязыковых терминологических систем гуманитарных наук.
Ключевые слова: *дискурсивный анализ, лингводидактический дискурс, носитель языка, концепт, лингвосинергетический подход, сопоставительное терминоведение*

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1. Введение

Лингводидактика – это область научного знания, которая обусловлена социокультурными факторами. Как наука, выполняющая социальный заказ определенного общества, она не может не зависеть от ценностей, лежащих в основе общественных отношений, и их изменения. Данный факт может вызывать трудности в межкультурной профессиональной коммуникации.

Находясь в рамках лингводидактического дискурса своего языка, профессиональное и научное сообщество имеет склонность экстраполировать существующую лингводидактическую модель и логико-понятийную схему отношений между ключевыми терминами на иноязычный дискурс, так как научный терминологический аппарат считается лишенным двусмысленности. Несмотря на некоторые общие черты в описании процесса преподавания иностранных языков в русскоязычном и англоязычном лингводидактическом дискурсе, различия между структурами этих двух дисциплин все же существуют. Эти различия становятся особенно заметны при анализе специфических терминов и концептов, используемых в научном дискурсе, за которыми стоят различные теоретические подходы и практические решения. Терминосистемы гуманитарных наук испытывают на себе влияние внешней среды (Ловцевич 2009). Язык и понятия, используемые в данных науках, складываются под воздействием социокультурных факторов. Формирование лингводидактических терминов происходит путем включения в них оттенков значений, социальных норм, исторических контекстов и других аспектов, специфичных для определенного общества.

Термины *носитель языка* и *native speaker* являются ключевыми категориями лингводидактики. Как свидетельствует дефиниционный анализ, данные термины имеют различное содержание, закрепленное в лексикографических источниках (Ловцевич, Гич 2018). Безусловно, оба термина имеют общее семантическое ядро, что позволяет использовать их эквивалентно в разных языках в межкультурной научной и профессиональной коммуникации. В значениях обоих терминов ядерными являются следующие признаки: владение языком с детства, высокий уровень языковой компетенции и высокий уровень развития речевых умений. Анализ англоязычных и русскоязычных словарей выявляет некоторые различия в понимании термина *носитель языка*. В русскоязычной традиции *носитель языка* ассоциируется с принадлежностью к определенному народу, социокультурной и языковой общности (Азимов, Щукин 2009, Жеребило 2016). Англоязычные источники, напротив, подчеркивают неоднозначность этого понятия, указывая на противоречивость критериев, определяющих принадлежность к носителям языка. Помимо этого, поднимается вопрос о роли носителей языка в обучении английскому как иностранному, а также проблематика билингвизма (Richards & Schmidt 2013, Thornbury 2006). Необходимо отметить, что в 2000-х годах в социолингвистике, в особенности в такой области как контактная вариантология английского языка (World Englishes Paradigm), термины *носитель языка* и *native speaker* заслужили достаточное внимание, например, в работах Б. Качру, С. Канагараджа, З.Г. Прошиной. Рост числа пользователей английского языка привел к накоплению вариаций в его структуре и размыванию нормы, что подняло вопрос о том, кто может считаться носителем английского языка в современном мире. В современных исследованиях английского языка наблюдается изменение восприятия понятия *native speaker*/*носитель* *языка*. Исследователи все чаще отходят от традиционного определения, где носителем считался человек, родившийся в англоязычной стране, и фокусируются на том, как эффективно человек владеет региональным вариантом английского языка (Rose et al. 2021).

Однако в рамках контактной вариантологии английского языка данные термины не рассматриваются как системообразующие концепты лингводидактического дискурса. Также ранее не проводились исследованиятого, как эти термины представляются участниками научного лингводидактического дискурса, и не рассматривались особенности их употребления в научных текстах. То есть, не проводился анализ структуры и содержания концептов, стоящих за терминами, как и не изучалась динамика изменений, происходящих с ними. Мы полагаем, что структура и содержание данных концептов могут отражать трансформационные процессы, происходящие в области преподавания английского языка, а также социокультурные особенности контекста преподавания в определенный период времени. Цель нашего исследования – выявить смыслы, скрытые за формальным совпадением смыслового ядра терминов *native speaker* и *носитель языка* и описать особенности их функционирования в англоязычном и русскоязычном лингводидактическом научном дискурсе.

2. Теоретическая основа исследования

В рамках данного исследования применялся дискурс-анализ. Одна из ключевых задач заключалась в выборе подхода, позволяющего рассмотреть концепты NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА в качестве системообразующих элементов научного лингводидактического дискурса, а также изучить их функционирование в динамике.

В современной лингвистике исследование дискурса является одним из самых востребованных направлений. Семантика и прагматика дискурса, функционирование различных языковых единиц в дискурсе находятся в центре внимания лингвистов конца XX и начала XXI веков (Ponton & Larina 2017). Такое внимание исследователей привело к многообразию трактовок термина *дискурс* и подходов к его анализу.

Широко применяемыми подходами к исследованию дискурса являются критический дискурс-анализ (Critical Discourse Analysis) (VanDijk 2015), анализ прагматики дискурса (Alba-Juez 2016) и когнитивный дискурс-анализ (Cognitive Discourse Analysis) (Tenbrink 2015). Эти подходы позволяют изучить контексты употребления термина и рассматривают дискурс с функциональной точки зрения, но не дают рассмотреть развитие концепта в динамике. В связи с этим, мы обратились к более молодому лингвосинергетическому подходу, который представляет дискурс как динамическую систему, где все элементы взаимосвязаны и оказывают влияние на развитие данной системы.

Лингвосинергетика — это междисциплинарное направление, основанное на принципах общей синергетики и рассматривающее язык как динамическую, открытую, самоорганизующуюся и саморазвивающуюся нелинейную систему (Борбодько 2011). Для нашей работы принципиально важно остановиться на лингвосинергетической трактовке понятий *дискурс* и *концепт*, а также дать определения основным терминам данного подхода. Подробное раскрытие теоретических основ позволит в дальнейшем определить процедуру исследования и описать применяемые методы.

Обращение к теоретическим работам в данной области позволило выделить 5 постулатов:

1. Дискурс – это сложная, саморазвивающаяся, динамическая система. Дискурс является сложной системой, так как он многокомпонентен. Компонентами дискурса являются участники дискурса, хронотоп, цели, ценности, стратегии, материал, разновидности и жанры, прецедентные тексты и дискурсивные формулы (Карасик 2000). Несмотря на то, что дискурс не может сам порождать тексты, он является саморазвивающейся системой, так как ни один участник дискурса не может сознательно управлять его развитием. Это развитие происходит с течением времени, то есть оно динамично.

2. Основными принципами самоорганизации подобных систем являются гомеостатичность (способность к саморегуляции), иерархичность, открытость, неустойчивость, наблюдаемость, нелинейность, эмерджентность (способность проявлять новые свойства как система) (Буданов 2010). Гомеостаз определяется В.Г. Будановым как поддержание программы функционирования системы в определенных рамках, позволяющих следовать к конкретной цели, то есть дискурс – это не просто хаотичный набор текстов, он объединен общей идеей или целью. Дискурс является фрактально организованной иерархической структурой. Открытость дискурса характеризуется непрерывным процессом порождения участниками дискурса нового материала в изменяющемся социокультурном контексте. Новые элементы могут вывести дискурс из равновесного состояния и изменить направление его развития, но именно неустойчивость является гарантом развития системы. Результат взаимодействия всех элементов дискурса может быть наблюдаем и интерпретируем, но ни участники дискурса, ни внешний наблюдатель не могут предсказать направление развития дискурса, что говорит о его нелинейности. Эмерджентность – это возникновение в системе новых качеств, которые отсутствуют у её составных частей, взятых по отдельности.

3. Каждый конкретный ***дискурс*** основывается на концептах, которые представляют собой ***аттрактор или центр притяжения***, состоящий из «имени» концепта и идущих от него аксиоматических, т.е. ценностных связей к другим таким центрам. Концепты, имеющие большее количество связей, являются более значимыми для дискурса и называются ***системообразующими***, концепты с меньшим количеством связей именуются ***локальными***

(Мамонова 2013). Структурно дискурс является ***фракталом*** и характеризуется самоподобием и самодостаточностью, следовательно, все уровни иерархии формируются по одним и тем же принципам (Плотникова 2011). Мельчайшие уровни ***аксиома***[1] (единичная связь между двумя аттракторами) и ***концепт*** также являются дискурсами, но свернутыми, их дискурсивная часть имплицитна и не проявлена в тексте, но разворачивается в сознании как автора, так и читателя и имеет потенциал к внешней развертке.

4. Дискурс обладает субъектно-объектными свойствами. Как объект дискурс является продуктом деятельности человека, он не может порождать себя сам, однако как субъект дискурс накладывает ограничение на продуцента. Текст, несоответствующий цели, ценностям, жанру и иным заданным параметрам конкретного дискурса, не может стать элементом этого дискурса.

5. Дискурс совершает волнообразное развитие от старого порядка к новому порядку через хаос. Подобные системы стремятся к равновесию и симметрии, поэтому единичные колебания не могут привести к серьезной перестройке и смене ценностной базы, но если такие колебания становятся массовыми, то это приведет систему к точке бифуркации – точке ветвления, выбора пути дальнейшего развития. Князева Е.Н. и Курдюмов С.П. описывают 3 режима эволюции систем подобного типа: режим стабильности и гармонизации, режим разрушения и распада и режим роста и развития (Князева, Курдюмов 1994). Так как все уровни иерархии дискурса взаимосвязаны, мы можем наблюдать данные процессы в изменении аксиоматики и структуры и содержании системообразующих концептов.

С позиции лингвосинергетики, лингводидактические исследования представляют собой прикладной научный дискурс, который непосредственно взаимодействует с внешней средой (Bernstein 2009). Лингводидактика, как и любой другой научный дискурс, является динамичной, самоорганизующейся системой с нелинейной структурой. Она открыта для новых идей, нестабильна и имеет единую цель – определить наиболее эффективные методы обучения и овладения иностранным языком. Концепты НОСИТЕЛЬ ЯЗЫКА и NATIVE SPEAKER – это системообразующие концепты русскоязычного и англоязычного лингводидактического научного дискурса, структурно представляющие собой свернутый в форму фрактала дискурс об «имени» концепта.

[1] В зависимости от их функциональности, аксиомы можно разделить на два типа. Первый тип, базовые аксиомы, представляет собой устойчивые языковые конструкции, такие как пословицы, поговорки, загадки и крылатые фразы. Второй тип, оперативные аксиомы, формируется в рамках конкретного дискурса и не всегда становится частью общепринятого языка. Они отражают ценностные связи, которые не являются общеизвестными фактами, но воспринимаются участниками данного дискурса как истинными и не требующими доказательств (Борботько 2011).

3. Материал и методология исследования

Материалом исследования является неаннотированный корпус научных лингводидактических статей (за период 1970–2020 гг.), отобранных методом сплошной выборки с помощью поисковой системы Google Scholar по ключевым словам «носитель языка» и «native speaker». В результате корпус представлен 188 научными статьями: 108 англоязычных и 80 русскоязычных статей. Анализируемые тексты представляют собой англоязычный лингводидактический научный дискурс за последние 50 лет и русскоязычный лингводидактический дискурс за последние 40 лет[2].

Процедура исследования состоит из трех этапов:

1) контексто-аксиоматический анализ с целью выявления наиболее частотных аксиоматических связей с «именем» концептов;

2) фрактальное моделирование англоязычного и русскоязычного концептов на разных синхронических срезах для анализа динамики изменения содержания концептов;

3) сопоставительный анализ выявленного содержания концептов и их функционирования в дискурсе.

Коротко остановимся на каждом из этапов. Контексто-аксиоматический анализ позволяет описать характер связей внутри конкретного дискурса. Аксиомы составляют ценностную базу дискурса, определяющую главенствующую научную парадигму, но они являются скрытым пластом информации. Ни один дискурс не имеет явный список оперативных аксиом, записанных конкретными формулировками, поэтому для выявления ценностной базы дискурса необходим контекстуальный анализ. Совокупность наиболее частотных и, следовательно, значимых аксиоматических связей явилась содержанием концептов NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА.

Хотя научный стиль требует от автора обобщенно-отвлеченный характера изложения, аксиомы, как правило, имеют определенные маркеры, сигнализирующие об их наличии в тексте. В русском языке это такие слова и речевые конструкции как «считается», «есть основания полагать», «очевидно», «бесспорно», «необходимо», «как известно», «многие ученые», «все», «всегда», «никогда» и т. п., модальные глаголы «должен», «следует», экспрессивная и оценочная лексика, указывающие на аксиоматичность высказывания. Например, в научной статье автор подчеркивает необходимость систематического контроля качества знаний и обязательного участия в нем носителей изучаемых иностранных языков (Готлиб 2009: 122). Это выражается через употребление аттрактора «носитель языка», аттрактора «контроль», связанного с оценкой и тестированием, и слова «обязательно» как маркера аксиоматической связи этих двух аттракторов. Из этого следует, что автор считает участие носителя языка в процессе оценки ценным. Поскольку оценивание,

[2] Разное количество статей и разные временные границы обусловлены объемом дискурса в разных языках и доступностью материалов

как правило, проводит преподаватель, участие преподавателя-носителя языка становится важным для эффективного обучения иностранным языкам. Таким образом, носитель языка в роли преподавателя является ценностью.

Интересно отметить, что категоричность высказывания авторов, отражающая их личное отношение к проблеме, также указывает на существование аксиоматической связи, подчеркивая важность носителя языка в процессе обучения. Так, авторы в научном тексте выражают свое мнение о том, что обучение иностранному языку без взаимодействия с носителем языка, естественное или искусственно организованное, лишено смысла (Демкин, Гульбинская 2001: 128). Здесь можно выделить наличие двух аксиоматических связей. Во-первых, участие носителя языка в образовательном процессе, предполагающее его роль преподавателя, является ключевым фактором. Отсутствие носителя обесценивает процесс обучения, в то время как его присутствие делает его ценным. Во-вторых, носитель языка рассматривается как целевой собеседник, без которого обучение становится «бессмысленным», подразумевая, что изучение языка осуществляется для общения с носителем.

В англоязычных статьях аксиоматические связи выделяются по такому же принципу. Например, авторы подчеркивают высокую коммуникативную компетенцию всех носителей языка, употребляя слова «all» и «obviously» в аксиоматической связи исследуемого термина *native speaker* и выражений, описывающих перцепцию во время общения (Chastain 1981).

Подобным образом из корпуса статей были извлечены контексты содержащие ключевые слова «носитель языка» и «native speaker» и аксиоматические маркеры. Далее в данных контекстах были выявлены наиболее частотные связи, характеризующие исследуемый концепт, и определена стабильность данных связей в разные периоды. Так, в период до 1985 года в 22 случаях *native speaker* в англоязычном дискурсе рассматривался в роли модели обучения, целевого собеседника и педагога в позитивном контексте, в 10 случаях в негативном контексте и в 3 в нейтральном, но уже к 2000 году только в 2 случаях авторы употребляли термин *native speaker* в позитивном контексте и в 20 случаях в негативном, к 2020 году разрыв еще сильнее усилился до 45 негативных контекстов. Эти цифры позволяют судить о серьезной перемене, произошедшей в англоязычном лингводидактическом научном дискурсе.

В русскоязычном лингводидактическом дискурсе только с 2012 года начинают встречаться случаи употребления термина *носитель языка* в негативном смысле, как фактор, являющийся причиной неэффективности процесса обучения английскому языку. Ранее носитель языка рассматривался исключительно как необходимый компонент успешного овладения иностранным языком. В целом, современная картина мало отличается от ситуации тридцатилетней давности: носитель языка все еще является позитивной ценностью русскоязычного лингводидактического дискурса, а небольшие изменения вызваны сменой статуса английского языка и возможностью использовать его как язык-посредник для общения с представителями различных лингвокультур.

На основе выявленных аксиоматических связей и их количественного анализа было произведено фрактальное моделирование, позволившее визуализировать структуру концепта. Фрактал представляет собой геометрическую фигуру, где один и тот же узор повторяется бесконечно много раз с изменением масштаба.В отличие от геометрической фигуры, существующей в материальном мире, фрактальная самоорганизация дискурса абстрактна и не содержит четких геометрических паттернов. Тем не менее, существуют способы представления лингвистических объектов в форме фрактальной структуры. Н.С. Олизько предложила 4 структуры: концентрические круги, спираль, древо и ризома (рис. 1), Н.В. Мамонова дополнила еще одним подтипом – зеркальное древо (Олизько 200, Мамонова 2013).

Рис. 1. Типы фрактальных структур /
Figure 1. Types of fractal structures

Для нашего исследования принципиально важна связь структуры модели концепта со степенью упорядочивания дискурса. Если в структуре концептов NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА аксиоматические связи стабильны, то для визуализации на определенном синхронном среде выбирается более упорядоченная структура с ярко выраженным ядром и периферией (*концентрические круги*). Большее количество связей с другими концептами говорит о более хаотической структуре концепта, что можно визуализировать фрактальной моделью *ризома*. Если концепт становится дуальным, то используется подтип модели *древо – зеркальное древо*, который отражает развитие двух частей относительно друг друга.

Для сопоставления структуры и содержания разноязычных концептов друг с другом в динамике необходимо построить фрактальные модели на двух синхронных срезах. Выбор периодов срезов был обусловлен двумя факторами: историческим контекстом и статусом английского языка в определенный период. Так, первый период для концепта NATIVE SPEAKER был определен границами 1970–1985 гг., так как английский язык еще не обрел статус языка международного общения, и общепризнанной моделью обучения являлась бинарная система, основанная на британском и американском вариантах. Второй срез отражает современную ситуацию 2010–2020-х годов.

Для концепта НОСИТЕЛЬ ЯЗЫКА первый синхронный срез пролегает в границах 1990–2005 гг. Данный период характеризуется изменением социально-политического курса и обращением к зарубежным практикам. Более ранняя ситуация, в целом, не предполагала отношение к носителю английского языка как к ресурсу и общение с носителями не являлось целью обучения, поэтому связи, сопоставимые с англоязычным концептом, обнаружить затруднительно, а с 1990-х годов схожая структура связей начинает ярко проявляться. Второй срез для русскоязычного концепта отражает современную ситуацию в том же диапазоне.

На финальном этапе был проведен сопоставительный анализ содержания и функционирования концептов NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА в лингводидактическом научном дискурсе на современном синхроническом срезе. Так как, с точки зрения лингвосинергетического подхода, дискурс и концепт организованы фрактально и являются разными уровнями одной иерархии, концепты, следуя принципу самоподобия, содержат в себе те же проблемные поля, что и сам дискурс, но в более концентрированном виде. Таким образом, анализируя содержание и функционирование концепта, мы раскрываем процессы, происходящие на более высоком уровне фрактальной организации, то есть найти сходства и различия в русскоязычном и англоязычном дискурсе в целом.

4. Результаты исследования

4.1. Фрактальные модели концепта NATIVE SPEAKER

4.1.1. Первый синхронный срез (1970–1985 гг.)

В исследованиях по лингводидактике, психолингвистике и общей лингвистике до 1980-х годов термин *native speaker* использовался широко. Основная тематика этих исследований была связана с коммуникацией между носителями языка и неносителями: как носители языка воспринимают речь неносителей (Scovel 1969), какие стратегии используют неносители языка, чтобы понять носителя (Arthur 1980), какие ошибки в речи неносителей языка наиболее мешают общению (Chastain 1980, 1981), в каких аспектах речь неносителей языка значительно уступает речи носителей (Scarcella 1983), как носители языка упрощают свою речь, чтобы быть понятыми неносителями (Long 1981), как носители языка выполняют тестовые задания, предназначенные для проверки владения языком неносителей (Alderson 1980).

Контексто-аксиоматический анализ позволил выделить 3 основных аксиоматических связи в структуре исследуемого концепта:

1) носитель языка как модель обучения (NATIVE SPEAKER = MODEL SPEAKER);

2) носитель языка как целевой собеседник (NATIVE SPEAKER = TARGET INTERLOCUTER);

3) носитель языка как предпочитаемый учитель (NATIVE SPEAKER = IDEAL TEACHER).

В первый исследуемый период (до приобретения английским языком статуса языка-посредника) концепт представлял собой устойчивую структуру, где ядерной связью являлась связь NATIVE SPEAKER=MODEL SPEAKER, а периферийной NATIVE SPEAKER=IDEAL TEACHER (Рис 2). Функция и роль носителя в учебном процессе четко определены и разделяются большинством научного сообщества.

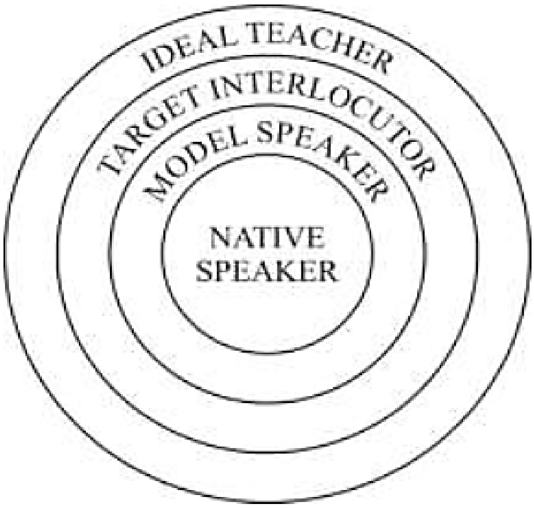

Рис. 2. Фрактальная модель концепта NATIVE SPEAKER (первый синхронный срез) /
Figure 2. The fractal model of the NATIVE SPEAKER concept (first synchronic cut)

Многие авторы подчеркивают важность роли носителя языка в обучении иностранному языку, рассматривая его как эталон (NATIVE SPEAKER = MODEL SPEAKER). Например, George отмечает, что многие учителя считают необходимым в обучении английскому языку как неродному стремление к английскому языку носителя, даже если его полное достижение маловероятно, поскольку без этого эталона невозможно достичь международного взаимопонимания (George 1971: 272).

Термин *model* часто используется в текстах статей в связи с ключевым термином *native speaker*, но это ценностное убеждение может проявляться и через другие термины, такие как *target*, *norms*, *mastery*, *aim*. Например, Ellis утверждает, что нормой для оценки языковых навыков обычно является речь образованного носителя языка (Ellis 1984: 39). Alderson (1980) отмечает, что тесты на знание языка, как правило, предназначены для определения степени, в которой пользователи неродного языка приближаются к носителям языка по способности понимать и использовать изучаемый язык. Вышеприведенные примеры демонстрируют убеждение авторов в том, что успешное овладение языком заключается в максимальном приближении к уровню носителя языка, и носитель языка в лингводидактике того времени рассматривается как эталон, с которым постоянно сравниваются station неносители, изучающие язык.

Почти также часто носитель языка в текстах статей выступает в роли предполагаемого собеседника (NATIVE SPEAKER = TARGET INTERLOCUTER). Исследования данного периода обращаются к реакции носителя языка на речь неносителя, фокусируясь на том, как различные ошибки влияют на понимание (Chastain 1981). Целью этих исследований было помочь преподавателям иностранного языка понять, как носители языка воспринимают ошибки и использовать эту информацию для выбора наиболее эффективных методик преподавания (Delisle 1982: 41).

Ключевыми словами данной аксиоматической связи являются: *reaction, interlocutor, impression, comprehension, error, evaluation*, что говорит об односторонней направленности коммуникации: неноситель языка должен подстроить свою речь под восприятие носителя и сделать ее максимально понятной. Взаимодействие двух неносителей на английском языке не находилось в фокусе внимания ученых тех лет.

Реже всего речь шла о носителе как об идеальном учителе (NATIVE SPEAKER=IDEAL TEACHER). Мы полагаем данный факт обусловлен тем, что в фокусе внимания лингводидактического научного дискурса тех лет, в основном, ситуация внутри англоязычных стран, где большинство преподавателей априори – носители английского языка, и вопрос о том, является ли носитель языка идеальным учителем, не являлся важным (Alptekin 1984).

В ряде работ, описывающих различия в общении носителей и неносителей языка, как в учебной, так и в неформальной обстановке используется термин *learner* (ученик) для обозначения неносителя языка (Day 1984, Long 1983). Таким образом, имплицитно поддерживается идея о том, что неноситель английского языка не может достичь должного уровня и остается «вечным» учеником и, следовательно, любой носитель может выступать в роли учителя в процессе общения.

4.1.2. Второй синхронный срез (2010–2020 гг.)

В современном англоязычном лингводидактическом научном дискурсе наблюдаются значительные изменения в структуре и содержании концепта. Фрактальная модель зеркальное древо наиболее ярко отображает трансформацию концепта NATIVE SPEAKER в дуальный концепт NATIVE SPEAKER – NON-NATIVE SPEAKER (рис. 3), где взаимосвязанные аттракторы имеют схожие ценностные связи, но различное содержательное наполнение.

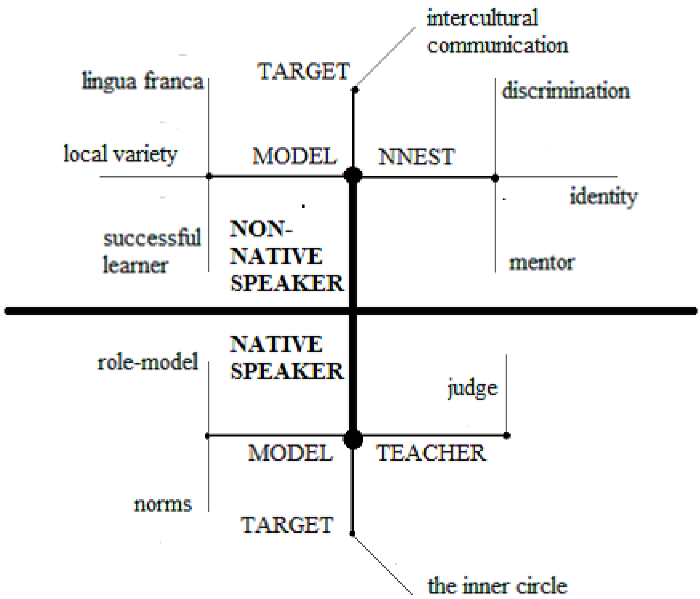

Рис. 3. Фрактальная модель концепта NATIVE SPEAKER (современный синхронный срез) / Figure 3. The fractal model of the NATIVE SPEAKER concept (present synchronic cut)

В данной модели нижняя часть, описывающая содержание концепта NATIVE SPEAKER, структурно отражается в верхней части через концепт NON-NATIVE SPEAKER, но с новым содержанием. Так, мы видим аксиоматические связи, поддерживающие научную парадигму, сформировавшуюся до смены английским языком социолингвистического статуса, но и отмечаем присутствие нового взгляда на проблему. Эту особенность можно наблюдать в текстах статей разных авторов, вышедших примерно в одно время. Одни авторы считают более разумным обучение с преподавателем носителем с «идеальным» знанием языка и произношением (Clark & Paran 2007: 420), другие – убеждены, что более предпочтительной ролевой моделью для учеников может быть носитель локального варианта английского языка (Kirkpatrick 2006: 71).

С конца 80-х возрастает число статей, переосмысляющих ключевые ценностные связи через антоним исследуемого термина, что ставит аттрактор NON-NATIVE SPEAKER в доминирующую позицию. В ряде статей традиционное представление о носителе английского языка как об образцовом коммуниканте (NATIVE SPEAKER = MODEL SPEAKER) и модели для обучения подвергается сомнению и жесткой критике (Kramsh 2014, Kirpatrik 2006, Matsuda 2003, Phillipson 1992). Основными аргументом является изменившаяся функция английского языка как глобального языка международного общения в современном мире. Так, Kramsch подчеркивает, что в глобальном масштабе количество людей, использующих английский язык, существенно превосходит число его носителей. При этом немалая часть этих пользователей, не являясь носителями английского языка, успешно общаются на нем.

Это позволяет поставить под сомнение традиционную ценностную связь и выдвинуть альтернативную модель, где в роли образца выступает билингв (NON-NATIVE SPEAKER = MODEL SPEAKER) (Kramsch 2014: 305).

В статьях развивается мысль о недостижимости неносителем языка уровня носителя и задается вопрос о том, стоит ли ставить мерилом успеха в овладении языком недоступный уровень и кто может являться адекватной моделью обучения. Все больше исследователей отмечают важность учета плюрицентричности английского языка и изменившейся функции английского языка в мире. Большинство пользователей английским языком владеют им как вторым, либо иностранным (Gration 2024). Это совершенно изменяет образ целевого собеседника, выводя на первое место значимость межкультурной коммуникации.

В современных научных исследованиях подчеркивается ценность преподавателей, не являющихся носителями английского языка. Их опыт многоязычия позволяет им выступать в качестве доступного образца для обучения и эффективно справляться с проблемами межкультурного общения. Однако, несмотря на это, преподаватели-неносители английского языка часто сталкиваются с дискриминацией. Им труднее найти работу, их могут просить «притворяться» носителями языка, и их квалификация может недооцениваться по сравнению с носителями языка (Braine 2012, Liu 1999, Matsuda 2003).

4.2. Фрактальные модели концепта НОСИТЕЛЬ ЯЗЫКА

Анализ русскоязычного лингводидактического дискурса, основанный на контексте и аксиомах, позволил разработать фрактальную модель концепта НОСИТЕЛЬ ЯЗЫКА, охватывающую два временных среза. Концепт НОСИТЕЛЬ ЯЗЫКА широко используется и упоминается в различных областях лингвистики, но начиная с 1990-х годов он приобретает статус системообразующего концепта в лингводидактическом научном дискурсе. На первом синхронном срезе концепт НОСИТЕЛЬ ЯЗЫКА, аналогично концепту NATIVE SPEAKER в англоязычном дискурсе 1970–1980-х годов, формирует следующие ценностные связи: МОДЕЛЬ ОБУЧЕНИЯ, ИДЕАЛЬНЫЙ УЧИТЕЛЬ, ЦЕЛЕВОЙ СОБЕСЕДНИК (рис. 4).

Также, как и в англоязычном дискурсе второй половины XX века, в научных русскоязычных текстах носитель языка рассматривался, в первую очередь, как модель обучения и источник нормы. Отличием является структура периферии концепта: носитель языка гораздо чаще рассматривается как желаемый и даже необходимый учитель, чем как потенциальный собеседник

Интересной особенностью является наличие множественных связей между всеми аттракторами. Зачастую можно встретить упоминание двух или всех трех компонентов структуры концепта в одной статье. Авторы рассуждают следующим образом: если носитель языка является моделью обучения, то и учить должен носитель языка или если мы хотим общаться с носителями, мы должны максимально изучить их культурные и языковые нормы, и лучше всего непосредственно от них самих. Например, в работах Демкина и Гульбинской (2001) подчеркивается важность телекоммуникационного общения обучающегося с носителями языка для эффективного изучения иностранного языка. Аналогично, Вишневская (2002) отмечает, что акцент может препятствовать эффективному общению, поскольку он затрудняет восприятие речи носителями языка.

Рис. 4. Фрактальная модель концепта НОСИТЕЛЬ ЯЗЫКА (первый синхронный срез) / Figure 4. The fractal model of the НОСИТЕЛЬ ЯЗЫКА concept (first synchronic cut)

На современном этапе анализ русскоязычного лингводидактического научного дискурса свидетельствует, что концепт не претерпел значительных изменений. Структурно концепт представляет собой ту же модель концентрические круги со стабильным ядром, но отличием от предыдущей модели (рис. 4) является наличие размытой периферии (рис. 5).

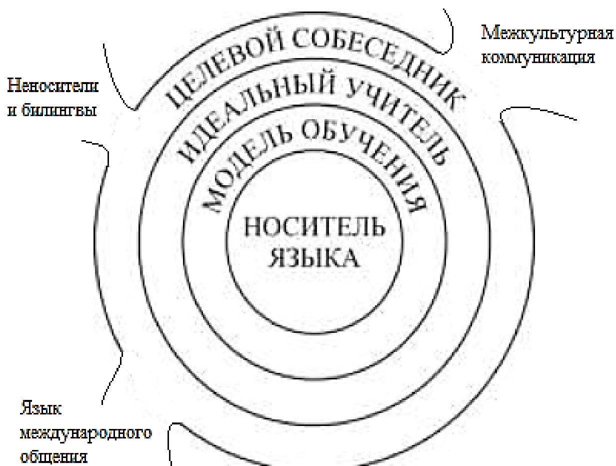

Рис. 5. Фрактальная модель концепта НОСИТЕЛЬ ЯЗЫКА (современный синхронный срез) / Figure 5. The fractal model of the НОСИТЕЛЬ ЯЗЫКА concept (present synchronic cut)

Содержательно расширилось только наполнение периферии ЦЕЛЕВОЙ СОБЕСЕДНИК, связанное с ростом значимости билингвизма. Современные исследователи, например, Прошина (2011) и Чумаков (2015), указывают на то, что в глобальном мире стратегия перфекционизма в изучении английского языка уступает место стратегии выработки коммуникативной компетенции, необходимой для общения не только с носителями языка, но и, в первую очередь, с билингвами. Это объясняется значительным количеством людей, говорящих на английском, которое значительно превышает число его носителей (Чумаков 2015).

Несмотря на возрастающую роль билингвизма и межкультурной коммуникации, большинство русскоязычных исследователей придерживаются позиции, что носители языка являются источником языковой нормы. Достижение уровня коммуникативной компетенции, близкого к уровню носителя, остается актуальной целью обучения в русскоязычном контексте, а общение и обучение с носителями языка рассматриваются как необходимые элементы процесса освоения языка.

5. Обсуждение результатов

Анализ изменений, произошедших в дискурсе вокруг терминов *native speaker* и *носитель языка*, позволяет выявить причины и последствия этих изменений. Важно отметить, что ранее эти термины и связанные с ними концепты преимущественно использовались в практическом контексте преподавания иностранных языков. Комплексное рассмотрение этих терминов в более широком контексте отсутствовало. Как правило, в научных работах затрагивалась только одна конкретная грань концепта, например, роль носителя языка как преподавателя (Medgyes 1992). В данной статье впервые предпринимается попытка системно рассмотреть сложившуюся ситуацию в англоязычном и русскоязычном лингводидактическом дискурсе через призму данных концептов.

Двойственная структура понятия NATIVE SPEAKER – NON-NATIVE SPEAKER, отраженная в зеркальном принципе (см. рис. 3), позволяет утверждать о наличии концептуального кризиса в англоязычном лингводидактическом научном дискурсе. Этот дискурс, по всей видимости, переживает период трансформации, характеризующийся неустойчивостью и сменой научной парадигмы. Концепт NATIVE SPEAKER сохраняет в себе ценности традиционных лингводидактических моделей обучения английскому языку, а концепт NON-NATIVE SPEAKER заключает в себе смыслы инновационных подходов и лингводидактических моделей.

Традиционными лингводидактическими моделями обучения английскому языку как неродному считаются две модели: *English as a Second Language* (обучение в англоязычной среде) и *English as a Foreign Language* (обучение в отсутствии англоязычной среды). Ядром обеих моделей является концепт NATIVE SPEAKER. Вся система образовательного процесса в рамках этих моделей ориентирована на носителя языка. Целью является достижение уровня владения языком, близкого к уровню носителя, чтобы обеспечить свободное и эффективное общение с представителями целевой языковой культуры. Для достижения поставленной цели отбирается содержание обучения, соответствующее языковым нормам определенных вариантов, как правило британского и американского. Международные учебники наполняются материалами, созданными носителями этих вариантов, и содержат социокультурную информацию о Великобритании и США. В роли преподавателя также более предпочитаем носитель языка как носитель культурных и языковых норм. В классе доминирует монолингвизм (*English only*).

Ядром инновационных лингводидактических моделей является концепт NON-NATIVE SPEAKER. Необходимо отметить, что эти модели многообразны и неоднородны, что визуализировано в современной фрактальной модели концепта – зеркальное древо, так как верхняя часть имеет больше ветвлений (см. рис. 3). В современном англоязычном дискурсе можно выделить 3 инновационных лингводидактических модели: *English as an International language* (EIL) (Smith 1983), *International English* (IE) (Quirk 1981), *English as a Lingua Franca* (ELF) (Jenkins 2006). Несмотря на то, что данные лингводидактические модели основаны на отличных друг от друга принципах, их объединяет отказ от носителя языка и ориентированность на неносителя английского языка. Английский язык рассматривается как язык-посредник, и целью обучения и овладения английским языком становится не следование культурным и языковым нормам одной страны или группы англоязычных стран, а способность успешно осуществлять межкультурную коммуникацию.

В лингводидактических моделях, применяемых для обучения английскому языку, ключевым становится вопрос о самоидентификации пользователя английским языком. В то время как традиционные модели обучения ставят своей целью имитацию, ассимиляцию и аккультурацию, современные подходы, акцентирующие внимание на плюрицентричности английского языка и мультикультурности, не предлагают однозначного ответа на этот вопрос. EIL предлагает фокусироваться на локальной специфике региона, в котором находится обучающийся и с представителями которого вероятно большее число языковых контактов. IE, в отличие от других подходов, предлагает исключить любые культурные элементы из английского языка, создав нейтральную, универсальную версию. Цель – сформировать единый стандарт, который объединит различные варианты английского, существующие у носителей языка по всему миру. ELF освобождает английский язык от привязки к культуре его носителей, отказываясь от референции к носителям и каким-либо стандартам. В этой модели английский язык рассматривается исключительно как средство передачи информации между неносителями, полностью исключая носителя языка и социокультурный контекст из коммуникативного процесса.

Таким образом, глобанглизация не могла не сказаться на лингводидактическом научном дискурсе. Можно говорить о трансформации ценностных основ и, соответственно, смене научной парадигмы. До глобального распространения английского языка преподавание этого языка основывалось на ***пуристическом подходе***, тогда как сегодня лингводидактический дискурс опирается на ***поликультурную парадигму***. Концепт NATIVE SPEAKER претерпел значительные изменения, что подтверждают исследования в этой области (Calafato 2019, Rose, McKinley & Galloway 2021). Новая парадигма базируется на признании плюрицентричности английского языка, ценности мультилингвальности, использовании английского как ресурса для обучения и преподавания, применении английского для межкультурного общения, признании разнообразия культур и выражения лингвокультурной идентичности через английский язык.

Русскоязычный лингводидактический научный дискурс остался, в отличие от англоязычного, относительно стабилен и упорядочен. Среди участников дискурса существует консенсус о приоритете носителя языка. Большинство поддерживает ценности лингводидактической модели EFL, то есть обучение остается ориентированным на носителя языка.

Однако наблюдаются определенные изменения. Размытая периферия современной фрактальной модели концепта НОСИТЕЛЬ ЯЗЫКА (см. рис. 5) свидетельствует о том, что статус английского языка как глобального языка порождает вопросы и поиски новых целей обучения (Ловцевич 2019). Проблемным полем становится статус и функционал английского языка для русскоязычного пользователя, а также особенности межкультурной коммуникации.

Возникает закономерный вопрос, почему изменившееся статус и функционирование английского языка в мире и его плюрицентричность (Kachru 1985), повлекли за собой серьезную трансформацию концепта NATIVE SPEAKER и сдвиг научной парадигмы в англоязычном дискурсе, в то время как ядро концепта НОСИТЕЛЬ ЯЗЫКА статично и затронута только периферия. Мы считаем важным отметить 3 определяющих фактора.

Одним из факторов может быть сложившаяся педагогическая традиция. В русскоязычном лингводидактическом научном дискурсе преподавание конкретного неродного языка определяется общей теорией. Преподавание английского языка концептуально никак не отделяется от преподавания иных иностранных языков, а соответственно вся современная специфика преподавания именно английского языка остается в «слепой зоне».

В англоязычной традиции преподавание английского языка является отдельной, самостоятельной практической областью и теорией, что обусловлено историческими и социокультурными факторами. Преподавание английского языка обременено многообразием контекстов, вовлеченностью большого количества специалистов и профессионалов. Это одновременно и большая индустрия, включающая в себя издательства, научные журналы, ассоциации занимающиеся исключительно английским языком, множество школ и курсов английского, образовательный туризм, системы тестирования, системы сертификации преподавателей и многое другое, и также большая область для научных исследований в области психолингвистики, социолингвистики, нейролингвистики, теории межкультурной коммуникации и лингводидактики (Phillipson 1992).

Еще одним из объяснений может быть объем и период существования англоязычного лингводидактического научного дискурса. В англоязычном дискурсе первые свидетельства о новом статусе английского языка появились еще в 50-е годы XX века. В русскоязычном дискурсе впервые данные темы начали затрагиваться почти полвека спустя. Объем англоязычного дискурса также значительно больше, а, следовательно, большее количество авторов высказывалось по проблемным вопросам и влияло на структуру дискурса.

Третья причина, объясняющая этот феномен, кроется в самом определении термина *носитель языка*. В русском языке часто связывают язык и культуру. В отечественном языкознании глубоко укоренилась традиция исследования особенностей языка в контексте культуры, в отличие от англоязычной лингвистики, где эта тема менее распространена. Обучение иностранному языку также неразрывно связано с обучением культуре носителя языка. Поэтому для преподавания иностранного языка в русскоязычной среде необходима территориальная привязка. Язык не может преподаваться изолированно, только как средство передачи информации. Эта традиция влияет на восприятие новых реалий и трудностей, связанных с изменением статуса английского языка

6. Заключение

Проведенное исследование достигло поставленной цели и позволило выявить глубинную разницу в структуре, содержании и функционировании внешне идентичных концептов NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА. При постановке гипотезы мы ожидали увидеть некоторое различие в содержании и структуре разноязычных концептов, однако дискурс-анализ показал сущностную разницу не только на периферии, но и в самом концептуальном ядре, что явилось неожиданным, так как на уровне семантики разноязычные термины, являющиеся именем концептов, сохраняют смысловую общность. В русскоязычном лингводидактическом научном дискурсе НОСИТЕЛЬ ЯЗЫКА остается достаточно целостным и стабильным концептом, а в англоязычном лингводидактическом научном дискурсе концепт NATIVE SPEAKER обрел дуальную форму и в текстах научных статей термин, являющийся «именем» концепта, употребляется как антагонист термина *non-native speaker*.

Лингвосинергетический подход, рассматривающий лингводидактический научный дискурс в динамике, дает инструмент, позволяющий увидеть развитие концепта в дискурсе и изменения в ценностной картине участников дискурса, которые привели к его современному виду. В научном дискурсе, посвящённом лингводидактике на русском языке, наблюдается благоприятное отношение к носителю языка. Изменения в системе ценностей участников данного дискурса происходят не из-за отрицания или уменьшения значимости носителя языка в процессе изучения иностранного языка, а благодаря добавлению новых задач, связанных с использованием английского языка как средства международного общения. В отличие от этого, в англоязычном лингводидактическом дискурсе наблюдается переход от положительного к негативному восприятию носителя языка. Начиная с 1980-х годов, количество критических публикаций, ставящих под сомнение статус носителя языка как образца для подражания, стало возрастать. В текущем англоязычном дискурсе положительная оценка роли носителя языка в процессе обучения неродному языку встречается лишь в статьях авторов-неносителей английского языка, что также подчеркивает различия в восприятии носителя языка среди участников научных сообществ, говорящих на разных языках.

В обоих языковых средах, исследуемый концепт отражает трансформацию социолингвистического статуса английского языка и вытекающие из этого изменения в лингводидактике. Традиционное представление о носителе языка как целевом собеседнике претерпело значительную эволюцию ввиду нового функционального статуса английского языка в глобальном мире. В русскоязычном дискурсе проблемы многовариантности английского языка в лингводидактике менее заметны, что указывает на сохранение бинарной модели обучения, основанной на британском и американском вариантах языка. В англоязычном дискурсе концепт NATIVE SPEAKER является зеркалом не только социолингвистических и лингводидактических процессов, но и социальных, экономических и политических аспектов жизни общества, таких как исторический контекст колониализма, современная геополитика, проблемы миграции и социального неравенства, последствия глобализации и многое другое. Таким образом, изменения в структуре концептов NATIVE SPEAKER и НОСИТЕЛЬ ЯЗЫКА отражают сложные процессы и тенденции в лингводидактике, обществе и культуре в целом.

На основе проведенного исследования, в последующих научных работах могут быть выявлены различия в других ключевых разноязычных терминах, характерных для гуманитарных наук. Также возможно рассмотрение терминологических и концептуальных особенностей в различных языках, таких как китайский, испанский, арабский и другие, с целью создания разноязычных концептосфер научного знания. Такой междисциплинарный подход может значительно обогатить понимание исследуемых явлений и усовершенствовать методологический инструментарий, способствуя дальнейшему развитию гуманитарных наук и гармонизации терминосистем. Данное исследование имеет прикладной потенциал в сфере обучения иностранным языкам. Например, возможен учет выявленных изменений в ценностной системе участников дискурса при разработке учебных программ и методик, связанных с использованием языка в международных контекстах. Также рекомендуется учитывать различия в представлении о носителе языка между различными научными сообществами при адаптации методик обучения.

Вклад авторов

Гич О.Н. – сбор и обработка материалов, анализ полученных данных, написание текста; *Ловцевич Г.Н.* – концепция и дизайн исследования, написание текста.

Authors' contribution

Gich O.N. – data collection and analysis, writing; *Lovtsevich G.N.* – conception and design of the study, writing the text.

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Alaskan English: Contexts and conditions of emergence

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Abstract
Alaskan English (AE), or the regional variety of English used by Native Alaskans, is a unique yet largely underinvestigated phenomenon. Specific conditions in which Alaskan English and its distinct characteristics have emerged remain significantly understudied. The aim of this article is to explore these conditions as well as their long-term effects on the regional native language communities. The present work gives an overview of historical and sociolinguistic factors, the influence of which can be considered crucial as far as the variety and the language situation in Alaska are concerned. The article primarily focuses on the contacts between linguacultural communities during colonization, language policy in various periods of time, the English language acquisition in local educational context as well as language shift. Data from the personal narratives of Upper Kuskokwim Athabaskans is used in the study. Twenty six interviews were recorded during the fieldwork in the Inner Alaskan settlement Nikolai by one of the authors in 2001 and 2019. To describe the consequences of language shift and the process of "shaping" the local variety of English, comparative analysis of the interview transcripts has been employed. This method enabled us to compare and contrast the linguistic realities and the conditions of language acquisition between and within generations. Apart from that, some elements of discourse analysis have been used to reconstruct the sociolinguistic context behind the narrators' statements. The obtained data sheds light on the sociolinguistic and cultural processes that took part in the region and their influence on the language situation and Alaskan English, and it lays basis for future research into the topic.
Key words: *Ethnic and cultural community, Alaska, regional variety, English, language policy, language shift*

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Аляскинский английский: контексты и условия формирования

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Аннотация

Аляскинский английский (Alaskan English), или разновидность английского языка коренных жителей территории Аляски, представляет собой уникальное, но недостаточно изученное явление. В частности, малое число исследователей посвящали работы условиям, способствовавшим возникновению феномена и его характерных особенностей. Цель данной статьи состоит в выявлении специфики условий и изменений, окружавших процесс появления аляскинского английского, а также их долгосрочного влияния на сообщества коренных жителей региона. Для этого в статье рассматриваются исторические и социолингвистические факторы, оставившие отпечаток на формировании местного английского и языковой ситуации на Аляске в целом. Особое внимание в работе уделяется значению культурных и языковых контактов различных групп населения в регионе во времена промышленного освоения территории, языковой политике в разные периоды, образовательному контексту освоения английского языка коренным населением, а также процессам языкового сдвига. Отдельные аспекты проблемы рассматриваются на примере рассказов представителей двух возрастных групп верхнекускоквимских индейцев-атабасков, интервью с которыми были взяты во время экспедиций в пос. Николай одним из авторов данной статьи в 2001 и 2019 годах. В общей сложности материалом для исследования стали 26 интервью, отражающих пережитый каждым информантом индивидуальный и семейный опыт адаптации к изменениям в их языковом сообществе. Для описания отраженных в рассказах последствий языкового сдвига и процессов формирования аляскинского английского в качестве методологии используется сравнительный анализ транскриптов бесед, позволяющий сопоставить языковые реалии и контекст овладения языковыми навыками как между поколениями, так и внутри них. Также некоторые элементы дискурсивной интерпретации текстов применяются для реконструирования социолингвистического контекста, стоящего за высказываниями рассказчиков. Полученные данные проливают свет на происходившие в регионе неоднозначные процессы, повлиявшие на языковую ситуацию и местный английский, а также являются фундаментом для дальнейших исследований этого идиома.

Ключевые слова: *Этноязыковое сообщество, Аляска, региональный вариант, английский язык, языковая политика, языковой сдвиг*

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1. Введение

С середины прошлого столетия растет интерес к изучению языковых контактов и появляющихся в результате этого языковых разновидностей. В данном вопросе большой значимостью обладают исследования английского языка, который, в силу глобального характера распространения, взаимодействовал с разными типами языков в различных ареалах и в результате этих ситуаций как оказывал влияние на местные сообщества, так и менялся сам (Иванова 2017, Hickey 2010). Многие работы в лингвистике были посвящены изучению вариантов английского языка и теориям, связанным с ними. Особое место занимает появившаяся в середине прошлого века и обретшая большую часть своей теоретической базы в 1980–1990-х годах парадигма World Englishes (WE), составляющая основу контактной вариантологии английского языка. Контактная вариантология представляет собой направление, изучающее родные или неродные для носителей современные варианты английского языка и их функционирование, с использованием социолингвистического, дескриптивного и когнитивного подходов к исследованию и фокусом внимания на межкультурных коммуникативных компетенциях (Kachru 1961, Беляева, Потапова 1961, Kachru 1986, Kachru & Smith 1985, Smith 1987, Smith & Forman 1997, Proshina & Nelson 2020).

Основываясь на главных идеях этого направления, можно выделить следующие положения:

- неоднородность и плюрицентричность английского языка;
- тесная связь каждого варианта английского с культурной идентичностью и родными языками его носителей (контактирующими с ним языками), проявляющаяся через лексику, синтаксис, фонетику и грамматические категории;
- характеристика варианта как социолингвистического явления, включающего обобщенные особенности определенного речевого сообщества, проявляющиеся (или не проявляющиеся) в речи его членов в зависимости от уровня владения языком, сферы его использования, стиля общения и персональных преференций;
- равенство вариантов в вопросах легитимности;
- динамическое развитие и распространение неэндонормативных вариантов английского в различных контекстах и частях общества (Smith 1976, Kachru 1986, Proshina & Nelson 2020).

Также в данном контексте основателем направления Браджем Качру была выдвинута теория трех кругов мирового английского языка (Kachru 1985), разделяющая варианты английского на 3 группы:

- Варианты Внутреннего круга: родные или первые варианты для большинства населения, выполняющие абсолютное большинство функций в своем социуме и обеспечивающие языковые нормы для других вариантов (эндонормативные);
- Варианты Внешнего круга: норморазвивающие и модифицирующие варианты, выполняющие роль второго официального языка в соответствующих институтах стран;
- Варианты Расширяющегося круга: варианты, использующие нормы других вариантов или комбинации этих норм, употребляемые как лингва франка в межкультурной коммуникации (в редких случаях внутри страны)

на уровнях, зависящих от компетенций и стиля речи (акролект – мезолект – базилект) (Прошина 2017, Kachru 1983, Proshina & Nelson 2020).

Аляскинский английский представляет собой весьма интересную с точки зрения контактной вариантологии разновидность английского языка, используемую коренными жителями Аляски, преимущественно населяющими «буш», или труднодоступные сельские территории. По этой причине разновидность долгое время была известна под названием Village English, позднее признанным неполиткорректным (Jones & Tarlow 2013). Следует отметить, что понятие Alaskan English в контексте данной статьи не включает в себя английский белого населения Аляски, имеющий гораздо больше сходств со стандартным вариантом американского английского. Однако особенности речи разнообразных групп неаборигенного населения, прибывшего в регион, также внесли свой вклад в формирование рассматриваемого явления. Нельзя не упомянуть и то, что группы коренных жителей (их можно условно разделить на три категории: алеуты, эскимосы и индейцы) при переходе на английский включали в него некоторые черты своих родных языков. Таким образом, можно утверждать, что Alaskan English – явление неоднородное, и внутри него также представлена вариативность, обусловленная контактными процессами (Barnhardt 2001).

На основании работ Ч. Томпсона (Thompson 1984), Р. Табберта (Tabbert 1991) и др., а также собственных предварительных исследований английского языка атабасков центральной части Аляски (Bergelson 2019, Григорьева, Бергельсон 2024)[1], можно выделить следующие лингвистические особенности Alaskan English коренных жителей:

- Особая лексика (аляскианизмы): специфические или важные для региона понятия (в том числе заимствованные из русского и местных языков), касающиеся природы, еды, быта, средств передвижения и др.,
- Слова из общего английского, употребляемые в регионе не конвенционально в фонетическом или семантико-прагматическом аспекте,
- Передача времени и аспектуальной характеристики действия: смешивание прошедшего и настоящего времени при повествовании о прошлых событиях (отличное от настоящего исторического времени); нестандартное образование форм прошедшего времени (в частности, отрицаний: доминирование „never“ в сравнении с „did not“) и т.п.,
- Выражение категорий числа и рода: нерегулярное использование или нестандартное употребление показателей рода и множественного числа,
- Нестандартное использование артиклей,

[1] См. также Григорьева А.А. Опыт исследования регионального варианта английского языка на Аляске. Выпускная квалификационная работа (степень магистра). Москва, Национальный исследовательский университет «Высшая школа экономики». 2022.

- Специфическое употребление дискурсивных маркеров: «and» (для завершения мысли) и «you know» (для придания динамичности или разделения дискурсивных единиц) с заполненными и незаполненными паузами,
- Построение высказываний (цикличность, повторения) и т.д.

Применительно к аляскинскому английскому важными факторами выступают его негомогенность, тесная связь с волнами освоения территории, автохтонным населением и их языками, а также контакт с разнообразными социолектами и диалектами английского переселенцев. Поэтому можно утверждать, что ряд особых характеристик этой разновидности английского языка предположительно сформировался под влиянием различных исторических, этноязыковых и социокультурных процессов. Однако существует очень мало работ, посвященных самому феномену и условиям, окружающим появление и функционирование аляскинского английского, поэтому данная тема требует более глубокой проработки.

Цель данной статьи заключается в выявлении основных условий, приведших к языковому сдвигу и появлению местной разновидности английского коренного населения, а также в рассмотрении оказанных этим на местные языковые сообщества эффектов в исторической перспективе. Для достижения поставленной цели мы попытались ответить на следующие исследовательские вопросы:

1. Какие аспекты в истории и языковой политике региона привели к возникновению феномена аляскинского английского в том виде, в котором он существует сейчас?
2. Как эти аспекты повлияли на закрепление данной разновидности английского в конкретном сообществе коренных жителей (атабасков верхнекускоквимского региона), и как это отразилось на школьном образовании, внутрисемейном общении, языковой и культурной самоидентификации?

Настоящая статья представляет собой обзор языковой ситуации в выбранном регионе и социолингвистических факторов, способствовавших возникновению и распространению данной региональной разновидности английского. Кроме того, в статье рассматриваются и сравниваются содержащиеся во взятых во время экспедиций интервью рассказы нескольких поколений атабасков поселения Николай о языковых и культурных трансформациях прошлого века, которые привели к закреплению аляскинского английского как основного средства коммуникации. В части «Дискуссия» также затрагиваются вопросы о неоднозначности имевших место процессов и трудностях, в том числе возникающих при попытке определить статус этого идиома и классифицировать его согласно существующим теориям.

2. Появление аляскинского английского: факторы и контекст

2.1. Исторический контекст и миграционные волны

Региональная разновидность английского языка на Аляске сформировалась под сильным влиянием исторических событий, произошедших в регионе, и взаимодействий местных жителей с множеством разнообразных групп, прибывавших на территорию преимущественно по экономическим мотивам. Особо стоит отметить тот факт, что аляскинский английский в качестве лингва франка пришел на смену выполнявшему до этого аналогичную функцию аляскинскому русскому.

Важнейшей вехой, сформировавшей языковую ситуацию на Аляске, стал приход русских промышленников в период функционирования Северо-Восточной, позднее трансформировавшейся в Российско-Американскую, компании, занимающейся освоением и добычей ресурсов территории с конца XVIII века по 1867 год (Голомидова, Сабуров 2016). Русское влияние распространялось в регионе неравномерно, а во многих случаях даже опосредованно, в зависимости от характера и интенсивности контактов с аборигенными народами, а также территориального расположения поселений. В некоторых местах, в частности, на островах Прибылова, Кенайском полуострове, Алеутских островах, Кадьякском архипелаге и юго-востоке Аляски, языковое и культурное взаимодействие между коренными жителями и промышленниками привело к формированию особых вариантов русского языка (Бергельсон, Кибрик 2018).

По причине того, что общение прежде всего было связано с торговыми отношениями, русский язык привнес в местные языки понятия в области промыслов, профессиональных занятий и материальных благ, в том числе ранее незнакомые для коренных жителей Аляски. Помимо этого в лексикон местного населения начали проникать слова, имеющие отношение к православной религии, практикуемой промышленниками (Петров 2016, Шеина, Сидорина 2020). Первоначально православие ассоциировалось у представителей аборигенных народов с повышением статуса в сообществе, и приобщение к нему носило прагматичный характер. Однако с началом деятельности православных миссионеров, работавших также над повышением уровня грамотности населения, созданием письменности для некоторых языков Аляски и основанием двуязычных учебных заведений, православие плотно сплелось с элементами местных религий и стало неотъемлемой частью идентичности коренных аляскинцев, сохранившейся даже в американский период (Голомидова, Сабуров 2016).

После продажи Аляски Соединенным Штатам Америки в 1867 году, в особенности после начала золотой лихорадки, на территорию хлынули англоязычные переселенцы из континентальных штатов. Несмотря на то, что некоторые контакты местных жителей с английским языком имели место и до этого, их плотность с этого времени значительно увеличилась, а англоязычное сообщество быстро приобрело в регионе доминирующий статус. Поскольку приехавшие на Аляску американские поселенцы происходили из разных социальных слоев, их английский также нельзя было назвать однородным. Группы употребляли свои специфические диалекты и социолекты, каждый из которых по-своему влиял на становление местной разновидности английского коренных жителей (Разумовский 2015).

Также на Аляске получила активное развитие рыбная промышленность, в частности отлов и консервирование лосося в районах заливов Аниакчак, Угашик и Чигник. Для того, чтобы обеспечить функционирование инфраструктуры в данном секторе, на территорию в конце XIX века было привлечено около 8000 специалистов-иностранцев (Ringsmuth 2007). По этой причине отдельно стоит упомянуть группы переселенцев, для которых английский не был первым языком – японцы, филиппинцы, китайцы, итальянцы, греки и, в особенности, скандинавы. Выходцы из Скандинавии, или, как их тогда газывали, «white crew» (что можно перевести как «белая бригада»), очень высоко ценились в рыбной промышленности региона и имели самые высокие доходы, так как среди них было много талантливых рыболовов, плотников и инженеров, имевших важнейший для рыбоперерабатывающей отрасли опыт. Новоприбывшие профессионалы активно взаимодействовали с трудящимися в данной сфере аборигенными жителями Аляски. Следовательно, можно предположить, что их варианты английского языка (английский скандинавов и также, в меньшей степени, английский других перечисленных групп работников), в свою очередь отмеченные своими особенностями, оставили отпечаток на аляскинском английском коренного населения.

2.2. Гендерный фактор

Говоря об условиях, повлиявших на языковое наследие Аляски и, в частности, на формирование и передачу из поколения в поколение региональной разновидности английского, важно кратко упомянуть гендерный аспект.

Как во времена освоения Аляски русскими, так и во время американского периода первые контакты и взаимодействия с языками, отличными от коренных, происходили в основном через мужчин как следствие их деятельности. Мужчины (за редким исключением) являлись трапперами (охотниками на пушных зверей) и непосредственно участвовали в торговых операциях с промышленниками. Более того, именно представители мужского населения выступали в роли проводников по малознакомой для прибывшего «белого» населения местности региона. В результате этого мужчины для коммуникации с переселенцами перенимали их лексику в необходимых сферах или на определенном уровне и с некоторыми особенностями осваивали их язык.

Однако несмотря на то, что первичное знакомство с языками происходило через мужчин, роль женщин была не менее важной, так как благодаря им элементы новых языков и культур передавались детям и укоренялись в местных общинах. Например, в период Русской Америки, когда была широко распространена практика смешанных браков между русскими промышленниками и коренными жительницами территории, женщины быстро перенимали основные характеристики, присущие языку, культуре и быту своих супругов, и передавали их следующему поколению. Так, дети, рожденные в смешанных браках, сразу становились носителями двух языков (родного матери и русского), а местные женщины могли осуществлять функции посредников между аборигенными и русскими сообществами (Голомидова, Сабуров 2016). После продажи Аляски коренные жительницы также в значительной степени влияли на языковую ситуацию, переходя в общении с детьми на первоначально не полностью освоенный в период языкового сдвига английский и закрепляя его в качестве основного коммуникативного средства для потомков.

2.3. Языковая политика в образовании

Особый интерес представляет образовательный контекст, окружавший процесс формирования и укоренения аляскинского английского в местных сообществах.

С конца XIX – начала XX века в образовательных учреждениях штата начала главенствовать политика строгого одноязычия, а использование местных языков (включая и аляскинский русский) осуждалось и воспринималось как признак «нецивилизованности», от которого необходимо избавиться. Так как семьи могли оказывать культурное и языковое влияние на детей, широкое распространение помимо обычных школ получили интернаты, где для более «качественной» ассимиляции обучение происходило в максимально изолированной от привычного образа жизни обстановке. Выговоры и физические наказания применялись практически повсеместно для того, чтобы отучить детей, часто еще не способных выражать мысли на английском, от разговоров на местных языках даже на переменах. Данная практика укрепляла у учащихся чувство беспомощности и глубокого стыда, связанного со своей культурной принадлежностью, что вылилось в отказе уже выросших школьников от коммуникации на родных языках в собственных семьях, а это, в свою очередь, способствовало языковому сдвигу и максимально его ускорило (Alton 1998, Bergelson 2019). Однако из-за неполной степени владения английским и языкового смешения вариант английского, получивший распространение в местных сообществах, имел множество специфических черт креолизации и в данном виде передавался и последующим поколениям, уже будучи для них первым языком.

Во второй половине XX века, после приобретения Аляской официального статуса штата и обострения в Америке вопросов самоидентификации и защиты культур и свобод коренных этнических групп, курс языковой политики в образовании несколько поменялся. Начали намечаться тенденции к преодолению сегрегации и внедрению в школьное обучение преподавания местных языков путем создания двуязычных программ наравне с качественным обучением английскому языку (Alton 1998).

Можно выделить несколько причин перемен в сфере образования на Аляске. Одной из них являлась слабая материальная обеспеченность населявших буш сообществ, которую, согласно идеям представителей реформирующих структур, можно было легче преодолеть с помощью параллельного овладения необходимыми компетенциями в американском английском и элементами коренных языков в рамках двуязычных занятий. Полученные знания были призваны как стабилизировать экономическое развитие региона, так и открыть их жителям дорогу в более крупные населенные пункты для заработков и проживания. Также обновление подхода к образованию коренных жителей было связано с психологическим аспектом, указанным выше. Агрессивная одноязычная политика в школах и вызванные ей негативные эмоции препятствовали усвоению коммуникативных навыков, из-за чего ученики не могли стать полноценными носителями английского, имели плохую успеваемость и отчислялись из учебных заведений. Было необходимо сгладить травмирующий опыт для молодого поколения и запустить механизмы по воссозданию их полноценной культурной и языковой идентичности. Так как большую роль в возникновении настороженности у учеников играло поведение «белых» преподавателей, то внимание акцентировалось на необходимости ознакомления учителей с традициями своих подопечных (Alton 1998, Wheeler & Swords 2004).

Положительное движение началось в 1970–1971 годы с запуска четырех двуязычных программ начального образования, нацеленных на работу над компетенциями в стандартном английском и юпикских языках в школах населенных пунктов Акиачак, Напакиак, Нунапитчук и Бетел. В следующие два года последовало расширение пилотного проекта еще на 13 школ, расположенных между реками Юкон и Кускоквим (Alton 1998). Несмотря на этот шаг, за годы функционирования новых образовательных моделей стало ясно, что они не оправдали первоначальных ожиданий. Одним из объяснений этой неудачи является отношение преподавателей к появившимся двуязычным программам как к периоду для подготовки школьников к моноязычному образованию на английском после начальной школы, что не способствовало замедлению «увядания» коренных языков. Во время перерывов уже разрешенные местные языки также использовались учениками в малом числе случаев.

Что касается английского языка, нововведения также не смогли привести к освоению стандартного английского на более высоком уровне. Большинство школьников смешивали родные языки с английским и употребляли его специфическую разновидность, а около 40 процентов детей и вовсе не были способны изъясняться на нем на уроках (Carruthers 1970). Еще одна проблема заключалась в том, что все меньше семей чувствовали мотивацию вовлекать детей в традиционные занятия и общение на местных языках. Ответственность за данный аспект образования полностью легла на плечи школ, которые из-за недостатка индивидуального подхода и внимания к вопросу не могли в достаточном объеме предоставить знания ученикам. Нельзя не отметить и тот факт, что в местных сообществах со временем оставалось все меньше полноценных носителей коренных языков, способных передать языковое и культурное наследие потомкам. В итоге все перечисленные факты дали лингвистам основание утверждать, что запоздалая смена курса языковой политики уже не могла ни предотвратить исчезновения коренных языков, ни привнести значительный прогресс в овладении учениками коммуникативных навыков в стандартном английском (Krauss 1980). Но остается открытым и вопрос о том, повлияла ли двуязычная программа на передачу младшему поколению «деревенской версии» английского языка.

Что касается современного образования на Аляске, языковая ситуация (и, в частности, ситуация с аляскинским английским) продолжает оставаться противоречивой. Во-первых, среди преподавательского сообщества отсутствует единая точка зрения на доминирование в местной коммуникации специфической разновидности английского. Сложившиеся мнения в большой степени зависят от таких аспектов, как возраст и опыт работы (молодые учителя менее консервативны и более открыты, чем учителя, заставшие «старую систему»), этническое происхождение, а также длительность пребывания в сообществах аборигенных жителей. Во-вторых, преподаватели в сельских регионах Аляски часто стоят перед порой неразрешимой дилеммой в выборе методов обучения. С одной стороны, аляскинский английский важен для культурной самоидентификации детей. Феномен не только представляет собой результат исторических изменений на территории штата, но и является основным средством повседневной коммуникации, в том числе объединяющим разновозрастных родственников внутри семьи. Попытки лишить школьников важной составляющей их жизни может вызвать недоверие детей и стать напоминанием о травмирующем опыте прошлого. С другой стороны, школьникам нелегко дается переключение кодов с регионального варианта, используемого для общения с членами семьи, довольно поздно познакомившимися с английским и использующими большое количество специфичных грамматических форм и лексических единиц, на стандарт, требуемый в учебных учреждениях. Из-за данного фактора и того, что школьные программы не адаптированы под нужды обучающихся на территории, страдают качество учебного процесса и показатели успеваемости. Исследование Национальной индейской ассоциации образования (NIEA) продемонстрировало, что менее 50% школьников сельских регионов Аляски показали при тестированиях, в частности, на навыки чтения, базовый уровень знаний (Jones & Tarlow 2013).

3. Материалы и методы исследования

При исследовании факторов, повлиявших на языковую ситуацию на Аляске в целом, а также на появление и закрепление региональной разновидности английского в частности, важно обратить внимание на перспективу «от первого лица». Описание языковой ситуации только через призму статей и мониторингов, произведенных образовательной системой через школьное тестирование, недостаточно. Поэтому в рамках нашего исследования мы проанализировали 26 интервью, записанные во время полевой социолингвистической работы в рамках экспедиций 2001 и 2019 года к атабаскам – жителям населенного пункта Николай, расположенного в районе верхнего течения реки Кускоквим. 18 интервью были взяты в 2001 году у «старейшин» племени (15 мужчин и 3 женщины; возраст 65+ на момент взятия интервью) и 8 контрольных интервью (6 мужчин и 2 женщины из следующего поколения; возраст 50-65 лет) в 2019 году. Эти полуструктурированные интервью, проводившиеся одним из авторов статьи на английском языке, содержат нарративы на темы семейной истории и личного опыта (Bergelson 2019). В фокусе внимания исследования находились процессы языкового сдвига, приведшего к вытеснению верхнекускоквимского из большинства функциональных доменов и исчезновению его как средства коммуникации. Данные процессы сопровождались повсеместным распространением английского языка в его региональном варианте. В результате и сам английский, явившийся причиной и источником языкового сдвига, подвергся значительным изменениям, в частности под влиянием вытесняемого им языка. В данной работе для сравнения языковых ситуаций, в которых находились представители нескольких поколений атабасков, мы опираемся на сопоставительный анализ содержания интервью. Также это позволяет нам сравнить условия приобретения и закрепления языковых компетенций не только представителей разных возрастных групп, но и внутри одного поколения. Помимо этого «облегченная» версия дискурсивного анализа, позволяющая отразить тональность текста, используется для выявления социолингвистического контекста, стоящего за высказываниями информантов. Примеры из интервью, демонстрирующие лексические и грамматические особенности аляскинского английского, приведены нами в транскрипции с дискурсивной разметкой, однако следует отметить, что подробное описание собственно лингвистических характеристик идиома не является основной целью нашей обзорной статьи. Подробный дискурсивный анализ текстов, затрагивающий не только последствия языкового сдвига, но и непосредственно особенности аляскинского английского двух, а в некоторых случаев трех, поколений, был проведен в рамках другой работы, посвященной этой теме (Григорьева, Бергельсон 2024).

Данные из поселения Николай представляют собой особую ценность в силу его расположения. Дело в том, что населенный пункт находится в центральной, исторически труднодоступной, части Аляски, что делает его весьма изолированным с географической точки зрения. Из-за изолированности данной территории контакт местных жителей с белыми переселенцами произошел гораздо позже, чем в других местах. Так, первое поселение в верхнем течении Кускоквима с преобладанием «белого» (смешанного) населения – шахтерский поселок МакГрат – появился только в 20-е годы XX века. В это время уже имело место знакомство местных жителей с английским языком, однако взаимодействие носило очень ограниченный характер, диктуемый нуждами торговли. Внутрь самой лингвокультурной (семейной) группы коммуникация на английском не проникала в силу кочевого образа жизни атабасков. Постоянные контакты с носителями английского языка начались в 1930-е годы благодаря развитию в регионе авиаперевозок, однако первоначально и они практически не влияли на образ жизни местных сообществ. Прибывающие в буш нуждались в информации об окружающей их территории от аборигенных проводников, а также в определенных ресурсах, но не пытались внедриться в сообщества или усвоить местный образ жизни. Коренные жители, в свою очередь, в основном ограничивались английскими понятиями, связанными с материальными благами и артефактами. Значительные изменения в языковой ситуации для данной этноязыковой группы стали происходить после 1948 года, в результате основания миссионерской школы (Rodli 1963). Появление этой школы сильно повлияло на судьбу верхнекускоквимского языка, и языковой сдвиг имел обвальный характер. Уникальность исследуемого нами материала заключается в том, что для жителей Николая языковой сдвиг состоялся практически в рамках одного поколения, и период билингвизма местного населения был крайне коротким (Collins 2004).

Чтобы проследить языковую ситуацию в динамике и в частности ответить на второй заявленный исследовательский вопрос, были рассмотрены нарративы двух возрастных групп коренных жителей. Первая из них представляет собой старейшин («elders»), рожденных в 1920–1930-х годах, родным языком для которых являлся верхнекускоквимский атабаскский. Они же являются единственным по-настоящему двуязычным поколением, так как языковой сдвиг начался в период их ранней молодости, а овладение английским языком, на который они впоследствии почти полностью перешли в общении со своими детьми, произошло в относительно взрослом возрасте. К сожалению, многие информанты, участвовавшие в исследовании, к настоящему моменту ушли из жизни. Вторая рассматриваемая в статье возрастная группа состоит из людей, рожденных в 1960-е годы, и для большинства ее представителей местный английский уже был либо первым языком, либо основным языком общения со школьного возраста; для многих из них аляскинский английский является фактически единственным известным им языком.

4. Аляскинский английский и языковой сдвиг в рассказах коренных жителей: результаты

4.1. Старшее поколение (рожденные в 1920–1930-х)

В проанализированных интервью можно заметить, что, несмотря на акцент на историях об интересных случаях из жизни и традиционном укладе, каждый из информантов так или иначе затрагивал тему перемен в обществе, начавшихся в 40–50-х годах прошлого века. Многие подчеркивали, что произошедшие изменения негативным образом сказались на людях, проживающих в Николае:

(1) *That's what we heard in our time anyway . there's going to be change . everything. It's happening right now… Bad change*[2]
‘Вот что мы слышали в наше время в любом случае . будут перемены . (во) всем. Это происходит сейчас … Плохие перемены’

(2) *It was bad you know .. really bad*
‘Это было плохо, знаете .. очень плохо’

Некоторые из старейшин вспоминали, что начали ощущать происходящие трансформации в раннем детстве из-за смены поведения членов семьи и их просьб, связанных с демонстрацией идентичности:

(3) *It's from my childhood* ***. and uh*** *things had already started changing . and mom and dad always ..* ***tell*** *us not to ... do anything .. that* ***is*** *native .* ***ways*** *. if there's .. somebody around*[3]
‘Это из моего детства . и эм все уже тогда начало меняться . и мама с папой всегда .. просили нас не … делать . традиционные для нас вещи . когда .. кто-то поблизости’

Также многие опрошенные касались темы школы и ее роли в языковом переходе. Люди из поселения не были знакомы с английским до школы. В силу высокомерно-снисходительного отношения учителей к местному образу жизни и нетерпимости к употреблению родных языков представители старшего поколения чувствовали неудобство и стыд из-за принадлежности к своей культуре:

(4) *We* ***don't talk*** *English . we just= uh when school* ***start****...we* ***learn***
‘Мы не разговаривали на английском . мы просто = эм когда школа началась… мы учились’

(5) *School teacher said that we're .. living too poorly*
‘Школьный учитель сказал, что мы .. слишком бедно живем’

(6) *I always felt ashamed about my . culture*
‘Я постоянно испытывала стыд за свою . культуру’

По этой причине учащиеся старались влиться в доминирующее сообщество, способствуя распространению аляскинского английского и вытеснению первого языка, о чем рассказывает одна из информанток, которой пришлось уехать далеко от семьи для обучения в старшей школе. Будучи первой в поселении, кто достиг данной ступени, она стремилась добиться успехов в новых условиях и стать примером для других обучающихся:

[2] Примеры даются в квази-дискурсивной транскрипции в английской орфографии, с указанием пауз разной длины (.), заполненных пауз (*uh*-), а также фальстартов и самоисправлений говорящего (= –обрыв фразы)

[3] Жирным курсивом в примерах выделены маркеры нестандартного английского, характерные для местного идиома.

(7) *I . my teacher ... she was always telling me . that I would= that I would . eh . show good example for . other kids in this community . to . be the first one to high school .and I always liked the idea*
‘Я . мой учитель … она постоянно говорила мне . что я бы= что я бы . эм . являлась хорошим примером для . других детей из нашего сообщества . будучи первой в старшей школе . и мне всегда нравилась эта мысль’

(8) *...the first semester . we got our report cards . and just Ds and Fs*[4] *... I said . “I came here to show to the kids at home . that . eh . I could go to* ***a*** *highschool . I am gonna . I am gonna work . on it” ... and I did ... I decided . you know . “if I am gonna . change . I have to . hurry up and change” ...*
‘…первый семестр . мы получили наши табели успеваемости . и только тройки и двойки … Я сказала . «Я приехала сюда, чтобы показать детям в родном поселке . что . эм . я смогла поступить в старшую школу . я буду . я буду работать . над этим» … и я … я решила . знаете . «если мне надо . измениться . то я должна . измениться, и быстро» …’

Почти все информанты согласились, что вызванные ассимиляционной политикой перемены привели к стремительной утрате местной культуры и верхнекускоквимского языка. В одном из интервью приводится история, действие которой происходит примерно в конце 1960-х, демонстрирующая огромную скорость, с которой английский заменил родной язык местных жителей, а также необычность новой реальности для старших родственников поделившегося рассказом:

(9) *Grandpa had hard time hearing ... a year or two before he died .. Health aid* ***has came*** *around . giving him hearing aid ... people were starting talk English every day . by that time . and he started also listening* ***to radio*** *... he always* ***tell*** *Grandma... ‘No . that’s not* ***this people*** *. it’s radio . radio’ ... he* ***is not used*** *to people’s . talking English . at that time*
‘Дедушка плохо слышал … за год-два до его смерти .. Приехал фельдшер . и ему дали слуховой аппарат … люди начинали ежедневно говорить на английском . к тому времени . а он еще начал слушать радио … он постоянно говорил бабушке… «Нет . это не эти люди говорят . это же радио . радио» … он не привык к тому, что люди . говорили на английском . в то время’

(10) *...that’s a different life than our .. Athabaskan native life. I would say we losing ou= we losing our .. culture .. Athabaskan way*

[4] В данном примере речь идет о полученных оценках: в американской системе оценивания D описывает работу как слабую и соответствует в русской школьной системе оценивания нижней границе оценки «3», а F («Fail») является неудовлетворительной оценкой и в русской системе соответствует оценке «2».

‘…эта жизнь отличается от нашей .. традиционной атабаскской жизни. Я бы сказал, что мы теря= мы теряем нашу .. культуру .. атабаскский образ жизни’

После запоздалого снятия запретов на местные языки и культуру на территории, отдельные представители старшего поколения жалели о том, что утратили компетенции в родном языке в результате языкового сдвига и уже не могли передать знания молодежи. Один из информантов признался, что ему неловко было осуществлять коммуникацию с детьми и внуками на верхнекускоквимском не только из-за несовершенства своей речи, но и потому, что они, хоть и частично понимая его, откликались на английском.

Несмотря на сожаления, большинство информантов не считали возможным возвращение былого традиционного уклада. Более того, многие старейшины, возможно в силу своего прошлого опыта, утверждали, что молодежи нет необходимости возвращаться в прошлое, ведь в меняющемся мире способность к адаптации играет бо́льшую роль в обеспечении благополучия. Однако некоторые опрошенные верили, что при должном подходе к системе образования возможно возродить отдельные элементы их культуры:

(11) *I don’t think it’s possible now because you lived this life so long .. and you will never be able to .. go back. And it's hard to go back*
‘Я не считаю, что сейчас это возможно, потому что ты так долго жил этой жизнью .. и ты уже не сможешь .. вернуться. И возвращаться очень тяжело’

(12) *I just want them to go ahead with the change and adapt as .. much easier . you know. Because uh it well keeps changing. And I don’t think that uh would be=it would=it wouldn’t benefit them if they would try to uh stay back and try to do our culture*
‘Я лишь хочу, чтобы они шли вперед, менялись и адаптировались .. как можно легче . знаете. Потому что эм все продолжает меняться. И я не думаю, что это эм было бы=было бы=это не принесло бы им никакой пользы, если они бы пытались эм держаться за прошлое и жить нашей культурой’

(13) *They=they would be trained to* ***have better job*** *and= and they would have their life in a city and there would be nothing to come back to Nikolai for.*
‘Они=они бы обучились для лучшей работы и= и они бы жили в городе, и у них бы не было причин возвращаться в Николай’

(14) *Its gonna be hard to change after .. not get back to the way we used to be. But uh I suppose that if you get working on it all the time and bring up some curriculum to .. at the school to= to follow and uh younger age will follows you and maybe there would be a way to bring back some of the cultural aspects*
‘После этого очень сложно поменяться .. не вернуться к тому, кем мы были раньше. Но эм мне кажется, что если начать постоянно работать над этим, создать программу обучения, чтобы .. школы ей=ей

следовали, и эм молодежь за тобой последует, и может быть тогда будет способ вернуть какие-то культурные аспекты’

Говоря об образовании следующих поколений, старейшины отмечали, что оно нуждается в улучшении, в частности, в фокусе на грамотности и преодолении недостатка индивидуального подхода к ученикам:

(15) *I don’t see how they gonna learn .. you know to read and write... They don’t grade them .. on uh writing or reading*
‘Я не знаю, как они научатся .. знаете, читать и писать… Они не оценивают их .. за эм письмо и чтение’

(16) *I think uh .. more one to one communication . I think . between* ***teacher and a student****. Just get together…*
‘Я думаю эм .. больше общения с глазу на глаз . я думаю . между учителем и учеником. Просто собраться вместе…’

4.2. Следующие поколения (рожденные в 1950–1960-х)

Данную группу интервьюируемых можно условно поделить на две категории. В первую попадают представители, очень слабо контактировавшие с верхнекускоквимским атабаскским и с детства коммуницировавшие в семье на региональной разновидности английского. Во вторую категорию можно включить людей, периодически общавшихся на верхнекускоквимском в детстве и/или сталкивавшихся с ним в молодом возрасте. В данной группе выделяется и представляет редкий для рассматриваемого периода случай одно интервью, проведенное с информантом, чья семья переехала в Николай ради его обучения в местной школе и долго придерживалась традиционных укладов жизни. Его родители занимались продажей меха, не ходили в школу, практически не владели английским и осваивали его азы самостоятельно.

(17) *Before the school came . I was= we were mostly hunting and fishing . so we lived out in the woods . or trapping*
‘До школы . я= мы в основном охотились и ловили рыбу . так что мы жили в лесу . или отлавливали животных’

(18) *Didn't speak English. My mom knew more than my dad . I think*
‘Не разговаривали на английском. Моя мама знала больше, чем мой папа . я думаю’

(19) *My= my dad could only write his name . cause he had to write his checks…uh She knew a little bit more than . writing her signature . I guess*
‘Мой= мой папа умел только писать свое имя . так как ему надо было выписывать чеки…эм Она знала немного больше, чем . как ставить свою подпись . как мне кажется’

(20) *No . they didn't go to school. They taught themselves how to speak*
‘Нет . они не ходили в школу. Они сами научились говорить’

Так как вся домашняя коммуникация велась на атабаскском, информант до школы почти не был знаком с английским и окончательно переключился на него только после смерти родителей.

(21) *Mostly Athabaskan for a long time ... My parents passed away and . I switched to English. Now I'm losing most of my Athabaskan language. I think there's nobody to talk to or . I don't hear it very often . so*
‘В основном на Атабаскском долгое время … Мои родители умерли, и . я перешел на английский. Теперь я утрачиваю большую часть моего атабаскского языка. Я думаю, сейчас не с кем на нем говорить, и . я его не так часто слышу . вот’

(22) *[про знание английского до школы] No . not really. I mean it was spoken . I think. But. .. Yeah. It was a little bit . I think . yeah. Yeah. It was . pretty .. difficult sometimes . I think*
‘Нет . едва ли. Ну на нем, конечно, говорили . я думаю. Но. .. Да. Совсем немного . я думаю . да. Да. Было . достаточно .. сложно иногда . я думаю’

Что касается представителей поколения, живших в условиях англоязычного внутрисемейного общения и лишь в незначительной степени встречавшихся с атабаскским языком, в их рассказах упоминаются причины избегания коренного языка. Одной из них являлось желание родителей дать детям возможность получить хорошее образование, что было возможно только со знанием английского. Более того, причина также крылась и в травме, полученной более старшим поколением во времена жесткой одноязычной политики, и в стремлении уберечь детей от физических наказаний:

(23) *With my mom she’d always encourage us to go to school . she= it was important for her . how she wanted us to go to college and she .. just really .. told us that she wanted us to have a better education*
‘Мама всегда побуждала нас к тому, чтобы учиться в школе . она= это было важно для нее . она хотела, чтобы мы поступили в колледж, и она .. просто очень .. она говорила нам, что хочет, чтобы мы получили лучшее образование’

(24) *Uh they were beaten . and so no . she didn’t want us um= my grandma . her mom told her . never to talk* ***a*** *language again*
‘Эм их били . и поэтому нет . она не хотела, чтобы мы=моя бабушка . ее мама просила ее . никогда больше не говорить на языке’

Также в интервью с некоторыми информантами присутствует информация, демонстрирующая, что в силу медленного темпа перестройки образовательных учреждений на новый курс, элементы травмирующего опыта прошлого сохранялись и во время их обучения. Несмотря на появление школьных занятий, посвященных коренным культуре и языку, детей все еще могли физически наказывать за использование верхнекускоквимского за пределами этих уроков:

(25) *Interviewer: Did they allow you to speak Athabaskan at school with other kids?*
Respondent: No, they didn't . like. Uh-huh.
Ir: Did they punish you for that? Spanking?
Rt: Yup. There's ***the*** *yard stick they* ***call*** *it*
'Интервьюер: Вам разрешали говорить на атабаскском с другими детьми в школе?
Информант: Нет, не разрешали. Не-а.
Инт: Вас наказывали за это? Шлепали?
Инф: Да. Линейкой, как они это называли'

Как и в рассказах старейшин, тема быстрой потери местного языка нередко фигурирует в историях местных жителей данного поколения:

(26) *It was only lik .. twenty years and then . there was nobody talking . Athabaskan anymore during that time*
'Прошло всего примерно .. 20 лет, а потом . никто не говорил . на атабаскском больше в то время'

Данная тема тесно переплетается с темой влияния старших поколений, разговаривающих на атабаскском и стремящихся передать крупицы своего знания, на скорость утраты языка молодежью. К примеру, упомянутый ранее информант, долгое время придерживавшийся традиционного образа жизни, признался, что начал «забывать» родной язык позже, чем его друзья, благодаря частому общению с пожилыми «консервативными» членами сообщества. Также в примере можно увидеть, что ему было эмоционально трудно расставаться с коренным языком:

(27) *I think they lost their faster than I did. I had a hard time be= letting my language go. So . always hanging out with the older timers* ***. you know****...*
'Мне кажется, они потеряли язык быстрее, чем я. Мне трудно было= отпускать мой родной язык. Поэтому . всегда проводил время со старожилами . знаете…'

Некоторыми опрошенными отмечался вклад старших в разработку программ двуязычного образования, а также упоминалась транслируемая людьми пожилого возраста нарративная культура региона:

(28) *So uh chief um the first chief I can remember… he did write a book for a bilingual programme*
'Так эм наш предводитель, эм первый, кого я помню… он написал книгу для двуязычной программы'

(29) *I remember . he used to tell us stories around the holiday. He used to bring everybody to his house after we go downstairs for Russian Christmas and then he used to tell us stories about . in our language… Yeah . I think he spoke uh English . Atabaskian . and Russian*
'Я помню . он обычно рассказывал нам истории в праздники. Он обычно приглашал всех к себе домой, когда мы спускались, чтобы

отметить Русское Рождество, и рассказывал истории о . на нашем языке… Да . мне кажется, он разговаривал на эм английском . атабаскском . и русском’

Однако с передачей знаний и историй было связано много трудностей, так как «белые» американские учителя долгие годы не одобряли данные практики, поэтому встреча информантов с традиционными нарративами в большинстве случаев была очень кратковременной:

(30) *I remember . um they couldn’t do that because of the teaching . that the teachers didn’t want them to speak . uh our language*
‘Как я помню . эм они не могли этого делать из-за обучения . из-за того, что учителя не хотели, чтобы они говорили на . эм нашем языке’

(31) *It was already .. cut by then … we didn’t know .. our own stories . by the time I went to school*
‘Тогда этого уже .. практически не было … мы не знали .. истории нашего народа . к тому времени, когда я пошел в школу’

Говоря о занятиях коренными языком и культурой, внедренных в школы, респонденты вспоминали, что они были короткими и в основном включали в себя обучение традиционным ремеслам. Также на основании высказываний можно утверждать, что уроки были малоэффективными:

(32) *So they started with= um we were taught how to tan marten .. and then we were taught how to tan moose hide . and uh I was only one who took shop class out of all the girls . and so I built a couple sleds*
‘Ну, они начали с того, что= эм нас учили дубить шкурки куниц .. а потом нас учили дубить лосиную шкуру . и эм я была единственной, кто из девочек ходил на уроки труда . и вот я сделала пару саней’

(33) *No . I can't speak my language now*
‘Нет . я не могу сейчас говорить на своем языке’

(34) *30 minutes here and there . seems like it was not enough it*
‘30 минут где-то . кажется, этого было недостаточно’

Несмотря на разное языковое окружение в прошлом, представители обеих категорий общаются с супругами, детьми и внуками преимущественно на региональной разновидности английского, закрепленной в местном сообществе. Однако коренные жители, имевшие минимальный опыт общения на верхнекускоквимском атабаскском или бывшие свидетелями коммуникации на данном языке, признали, что с возрастом пытаются вводить в коммуникацию с молодыми поколениями элементы коренного языка. Некоторые жители чувствуют себя неловко, делая это, так как не уверены в грамотности своих высказываний, что перекликается с историями старейшин об их попытках:

(35) *I talk to them in Athabaskan. Sometimes when I remember . you know cause . it seems like the older I get the more I try to remember . what ..*

was said to me . and so I talk that way to my kids . and I= my grandkids . and I .. make songs sometimes
'Я разговариваю с ними на атабаскском. Иногда, когда я вспоминаю . знаете, потому что . кажется, что чем старше я становлюсь, чем чаще я пытаюсь вспомнить . что говорили мне . и я так же говорю с детьми . и я= с внуками . и я .. сочиняю песни иногда'

(36) *Sometimes I try to . but . I dunno . I get= I get embarrassed a little bit … cause I'm= I'm not sure if I'm speaking right anymore*
'Иногда я пытаюсь . но . я не знаю . Мне становится= мне становится немного неловко … потому что я= я уже не уверен, что говорю правильно'

В заключение, один из опрашиваемых выразил мнение о плачевном будущем местного языка, вызванным языковым сдвигом и уходом пожилых жителей из поколения старейшин, а также о необходимости мер по его поддержке:

(37) *I think it's a pretty good idea . now that we're losing all the elders on pretty fast . you know? I mean nobody would know anything about that. 50 years from now . nobody will be speaking it probably*
'Я думаю, это хорошая идея . сейчас, когда мы стремительно теряем наших старейшин . знаете? То есть никто ничего не будет о нем знать. Еще 50 лет . и никто уже не будет на нем говорить, скорее всего'

5. Дискуссия

Рассмотренные в статье факторы и собранные в экспедициях данные демонстрируют сложность и неоднозначность процесса возникновения региональной разновидности английского коренных жителей, вытеснившей предыдущие средства коммуникации. Более того, данные из Николая показывают, насколько быстро языковой сдвиг может происходить в регионе, где, в сравнении с другими областями, традиционное языковое и культурное наследие сохранялось дольше. При этом исследование осветило новые потенциальные направления и вопросы, на которые в контексте существующих работ по теме пока не приводится однозначного ответа.

Один из таких вопросов касается статуса аляскинского английского. Хотя в данной статье не ставится цель охарактеризовать этот идиом в рамках существующих классификаций, представляется уместным затронуть данную тему. В частности, споры вызывает то, можно ли считать аляскинский английский диалектом. Согласно Крысину (2021), диалект можно охарактеризовать следующим образом:

«Термин диалект … используется обычно для обозначения территориальных разновидностей языка и чаще применяется к разновидностям речи, которыми пользуются сельские жители, хотя в специальной литературе можно встретить словосочетания «социальные диалекты», «городские диалекты», «профессиональные диалекты» и т. п.» (Крысин 2021: 35).

Также Крысин приводит следующие свойства, присущие территориальному диалекту:

1) ограничение круга носителей по социальным, возрастным и иногда половым признакам;

2) ограниченность употребления внутрисемейными бытовыми ситуациями;

3) образование полудиалектов как продуктов взаимодействия разных говоров;

4) нивелирование своеобразия речи под влиянием литературного языка (Крысин 2021).

Однако при внимательном взгляде на аляскинский английский становится понятно, что он не вполне описывается приведенными выше признаками, характеризующими идиом как диалект. Во-первых, его использование сейчас не ограничивается рамками одного поколения или социальной группы, что частично демонстрирует наше исследование. Во-вторых, аляскинский английский является не только средством внутрисемейной коммуникации, но и универсальным способом общения для коренного населения региона (не считая малых вариаций, обусловленных этнической группой носителя). Более того, для многих представителей младших поколений коренных жителей Аляски — это единственный язык. Что касается своеобразия речи, безусловно, она несколько сглаживается средствами массовой информацией и образовательными учреждениями региона, фокусирующимися и на стандартном американском английском, однако эффект выражен не столь ярко. Из этого можно сделать вывод, что аляскинский английский уместно характеризовать просто как региональную разновидность без привязки к статусу «диалект».

Весьма неоднозначно и место аляскинского английского в уже упомянутой ранее системе трех кругов Качру. С одной стороны, разновидность на сегодняшний день принадлежит Внутреннему кругу, являясь первым, а подчас и единственным, языком современного коренного населения штата и функционируя в подавляющем большинстве сфер жизни. С другой стороны, так было не всегда, так как регион прошел разные периоды истории, в каждом из которых (в особенности до присвоения Аляске официального статуса штата) языковая ситуация отличалась, и английский мог иметь характеристики, более характерные для вариантов Расширяющегося круга. Более того, даже сейчас многие коренные жители, несмотря на поверхностное знакомство с автохтонными языками или абсолютное отсутствие такового, называют именно их в качестве родных.

Также представляет интерес для исследования и пока остается открытым вопрос о том, можно ли на основании имеющихся материалов выявить, что же в большей степени повлияло на отдельные характеристики вариантов регионального английского на Аляске: типологические отличия языков коренных народов Аляски (алеутских, эскимосских, атабаскских) или условия освоения английского местными жителями. Это связано с тем, что в аляскинской разновидности помимо следов языков-субстратов отражаются явления неполного усвоения английского языка, и поэтому точное соотнесение некоторых особенностей с причинами их возникновения может представлять практически неразрешимую задачу. Помимо этого, как уже было упомянуто, в аляскинском английском присутствуют «слои», образовавшиеся в результате взаимовлияния различных диалектов и социолектов переселенцев, прибывших не только из разных частей США, но и из различных стран. Их взаимодействие с местными языками (в частности, с аляскинским русским) привело к регионализации определенной лексики. Похожий процесс образования таких «слоев» происходил и при взаимообмене между русскими диалектами и местными языками, но следует отметить, что в случае английского отпечаток на местных языках был существенно более поверхностный в силу быстрого темпа языкового сдвига. Об этом свидетельствует количество заимствований из русского языка в местные языки (до одной тысячи в алеутских языках и атабаскском языке денаина) – см. (Kari 2021) и очень незначительное число заимствований из английского.

Процесс перехода на английский в разных частях штата, несмотря на общие предпосылки, проходил неоднородно с точки зрения времени начала, скорости, сопутствующих событий и т.п. По этой причине одной из задач на будущее может являться подробный анализ и сравнение происходивших процессов и вариантов регионального английского на территориях проживания представителей разных народов Аляски. В данный момент уже ведется анализ данных, посвященных английскому кадьякских эскимосов (алютик). Помимо этого, целесообразно продолжать работу по сравнению языкового опыта представителей разных поколений, в том числе более молодых аляскинцев.

6. Заключение

Английский коренных жителей Аляски представляет собой интересное и малоизученное явление. В статье, в том числе на примере конкретного сообщества, были проанализированы аспекты, с большой долей вероятности способствующие его возникновению и закреплению в том виде, в котором оно существует и по сей день. К ним можно отнести периоды промышленного освоения и социоэкономическое взаимодействие между различными группами, языковую политику на территории в разные периоды времени, языковые контакты, повлекшие за собой языковой сдвиг, влияние образовательных процессов и др.

События и причины, сопутствовавшие стремительному переходу на английский язык, формированию и распространению его разновидности, являются важной и часто возникающей в рассказах коренных жителей Николая темой. В интервью можно заметить, что семейное влияние, школьные нормы и воспитанное в старшем поколении чувство стыда за культурную принадлежность внесли большой вклад в современную языковую ситуацию в регионе. Несмотря на сожаление об утрате культуры и попытки говорить с родственниками на местном языке, а также двуязычные школьные программы, на данный момент основным средством коммуникации, как у двуязычных старейшин, так и у более молодой и с детства знакомой с английским возрастной группы жителей, остается именно аляскинская разновидность.

Затронутая тема предоставляет много возможностей для продолжения изучения ее различных аспектов. Полученные в ходе исследования данные могут послужить фундаментом для более глубокого рассмотрения феномена английского на Аляске, его вариативности и лингвистических характеристик.

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Pragmatic markers in contemporary poetry: A corpus-based discourse analysis

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Abstract
Poetic discourse, which engages the poetic function of language as a constitutive one, transforms the postulates of pragmatics of ordinary language. New poetic practices often represent a kind of pragmatic experiment: the effect of linguopragmatic parameters inherent in conventional communication is tested here on the borderline between the norm and the anomaly. The aim of this study is to identify the specific functionality of pragmatic markers in the condition of increased permeability between discourses and to explore the features of trans-discourse interaction of poetic language and colloquial speech in new media. The study is based on a corpus of poetic texts (3 million words), including Russian, English, and Italian subcorpora. It identified new communicative strategies of addressing and clusters of deictic, modal and discourse markers, grouped according to Jakobson's communicative model (Jakobson 1975). The study identified qualitative differences between the frequency of use of several units in poetic discourse and in colloquial speech. We considered various pragmatic strategies, referring not only to individual units, but also clusters of deictic, modal, and discourse words, etc. We found that Italian and Russian poetry uses discourse markers more often than American poetry. Differences in linguistic structure also affect the specifics of a pragmatic experiment. Thus, in American poetry, a pragmatic experiment often activates the syntactic level; in Russian poetry, experiments with word formation and modality are more frequent; in Italian poetry, the pragmatic experiment is often combined with the structural-syntactic one: pragmatic markers form "clusters" or "chains", when an increase in the density of use of units leads to an increase in the range of deviations from standard usage. The research based on the poetic corpus of texts contributes to the study of poetic discourse and corpus pragmatics.
Key words: *pragmatics, poetic discourse, colloquial speech, discourse markers, corpus*

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Прагматические маркеры в современной поэзии: корпусно-дискурсивный анализ

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Аннотация
Поэтический дискурс, задействующий поэтическую функцию языка как конститутивную, производит трансформацию постулатов прагматики обыденного языка. Современные поэтические практики представляют собой зачастую своего рода прагматический эксперимент: действие лингвопрагматических параметров, свойственных конвенциональному общению (обыденной коммуникации), тестируется здесь на границе между нормой и аномалией. Цель данного исследования – выявить специфику функционирования прагматических маркеров в условиях повышенной проницаемости между дискурсами и определить особенности интердискурсивного взаимодействия поэтического языка и разговорной речи в новых медиа. Материалом исследования послужил корпус поэтических текстов (3 млн. слов), включающий три подкорпуса на русском, английском и итальянском языках. В центре внимания были новые коммуникативные стратегии адресации и субъективации, в качестве опорных единиц рассматривались не только отдельные прагматические маркеры, но и кластеры дейктических, модальных и дискурсивных маркеров, объединенные в группы на основании коммуникативной модели Р.О. Якобсона (1975). Общие выводы, сделанные на основании количественного анализа, связаны с различием в частотности употребления ряда единиц в поэтическом дискурсе и в разговорной речи. С точки зрения различий между языками, было выявлено, что некоторые единицы, например, дискурсивные маркеры, в итальянской и русской поэзии в целом используются чаще, чем в американской. Различия языкового строя влияют и на специфику прагматического эксперимента. Так, в американской поэзии прагматический эксперимент часто активизирует синтаксический уровень, в русской поэзии более частотны эксперименты со словообразованием и модальностью, в итальянской – прагматический эксперимент часто совмещается со структурным: прагматические маркеры образуют так называемые «скопления» или «цепочки», когда повышение плотности употребления единиц приводит к повышению диапазона отклонения от нормативного употребления. Полученные результаты вносят вклад в исследование поэтического дискурса и в такое малоразработанное, но перспективное направление современной лингвистики, как корпусная прагматика.

Ключевые слова: *прагматика, поэтический дискурс, разговорная речь, дискурсивные маркеры, корпус*

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1. Введение. Теоретические основания поэтической прагматики

В статье представлены результаты научного проекта, направленного на лингвистическое исследование прагматического измерения современной поэзии. Исследование представляет собой корпусно-дискурсивный анализ взаимодействия поэтического и обыденного дискурсов в условиях новых электронных медиа конца XX –начала XXI века.

Актуальность исследования обусловлена значительным интересом цикла гуманитарных наук в целом, и лингвистики в частности, к изучению языковых и дискурсивных процессов в условиях изменения канала передачи информации, которые охватывают вторую половину XX века, но развиваются особенно активно, начиная с 1990-х годов в связи с распространением Интернета. Развитие новых технологий оказывает влияние на общие изменения социальных институций и на жизнь общества. В связи с этим лингвистика все более интенсивно изучает проблемы интернет-коммуникации: новые формы общения в социальных сетях, определяемых интерфейсом и характеризующихся трансформацией всех коммуникативных параметров, начиная с доминирования канала передачи информации и включая трансформацию кода и ролей участников коммуникации (приватное – публичное, индивидуальное – социальное).

Основной целью исследования является разработка концепции интердискурсивного взаимодействия поэтического языка и разговорной речи в новых медиа, создающих условия для повышенной проницаемости между дискурсами. Для достижения поставленной цели в ходе исследования был реализован ряд задач, включающих формирование комплексного подхода, охватывающего лингвопрагматический, лингвопоэтический, дискурсивный и корпусный виды анализа; развитие концепции поэтической прагматики как области лингвистической прагматики; создание рабочего поэтического корпуса, состоящего из подкорпусов современных поэтических текстов 1960–2020-х годов на трех языках (русском, английском и итальянском); составление списка прагматических маркеров для осуществления дальнейшей разметки и аннотирования корпуса.

Прагматика как раздел семиотики, изучающий отношения между знаковыми системами и теми, кто их использует, была выделена Ч.У. Моррисом в 1930-е годы под влиянием идей Ч.С. Пирса. Важнейшим прорывом в теории языка второй половины XX века стал перформативный поворот в философии языка и впоследствии в лингвистике, который явился, в свою очередь, очередным витком лингвистического поворота. В его основу легло понимание языкового высказывания как действия, меняющего обстоятельства мира и коммуникации (в теории перформативов Дж. Остина и Э. Бенвениста, теории иллокуции Дж. Серля, теории кооперации Г.П. Грайса и др.). При этом оставалось непонятным, как трактовать перформативность и прагматическое измерение за пределами обыденного языка, в частности в языке художественном (поэтическом). Теория Дж. Остина уже спустя несколько десятилетий вдохновила исследователей (главным образом литературоведов и философов) на изучение речевых актов в литературе (Derrida 1988, Sell 1991, Hillis Miller 2001). Отдельно стоило бы отметить работу британского исследователя К. Грина, посвященную проблеме дейксиса в поэтическом тексте (Green 1992). В когнитивной поэтике дейксис рассматривается как один из способов репрезентации знания. Так, П. Стокуэлл разделяет текстовый дейксис и когнитивный дейксис (Stockwell 2002). Первый отвечает за связность самой формы представления знаний в художественном тексте, а второй – за те фреймы, которые форматируют знания на содержательном уровне высказываний. Теория дейктических сдвигов (*Deictic shift theory*) моделирует общее восприятие читателя, «погружающегося» в литературный текст, как того читателя, который занимает определенную познавательную позицию внутри мысленно конструируемого мира текста. Развивая идеи о поэтике конверсационного анализа, Г. Джефферсон впервые вводит эту область исследования в лингвистику в (Jefferson 1996), что получает развитие в наше время в коллективной монографии, посвященной преодолению разрыва между конверсационным анализом и поэтикой (Person, Wooffitt & Rae 2022). Необходимо также отметить отдельные публикации, направленные на анализ конкретных дискурсивных маркеров преимущественно в классических литературных текстах (Bonifazi 2009, Dardano 2012, Schoonjans 2014).

Предпринимаемое в нашем проекте исследование методологически восходит к ставшим классическими подходам в лингвопрагматике (Leech 1983, Levinson 1983, Sperber & Wilson 1986, Новое в зарубежной лингвистике 1985, Verschueren 1999). Лишь в самое последнее время ученые стали обращаться к большим корпусным данным для изучения прагматических маркеров и стратегий в разных видах дискурса (Aijmer & Rühlemann 2014, Rühlemann 2019). Однако, насколько нам известно, исследования прагматических параметров, их маркировки в корпусах и специфики их функционирования в поэтическом дискурсе до сих пор не предпринималось.

Несмотря на многочисленные определения «прагматических маркеров» (*pragmatic markers*), в современной лингвистике до сих пор не было сформулировано универсального термина и обобщающего определения [1]. В целом, существует более узкое понимание «прагматических маркеров» как «дискурсивных маркеров» (Fraser 2009, Aijmer & Simon-Vandenbergen 2011, Beeching 2016 и др.), т. е. единиц, которые обладают интерактивной и метаязыковой функциями, а также способностью структурировать дискурс.

[1] Обзор терминов и определений см., например, в (Brinton 2017: 2–3).

В более широком понимании, термин «прагматические маркеры» представляет собой гипероним, обозначающий общую группу прагматических единиц, охватывающих отдельные подгруппы (дейктические и дискурсивные маркеры, иллокутивные и модальные глаголы и др.). Более широкая классификация прагматических маркеров представлена в одном из первых подступов к этой проблеме (см. Fraser 1996), среди современных исследований этот подход развивают (Богданова-Бегларян и др. 2019). Ориентируясь на употребление термина «прагматические маркеры» как зонтичного по отношению к более частным группам маркеров, мы также исходим из классификаций прагматических маркеров, предложенных в (Leech 1983, Levinson 1983). Хотя в этих классических исследованиях термин «прагматические маркеры» не используется, в них представлены списки прагматических явлений, включая дейксис, разговорные импликатуры, пресуппозиции и речевые акты (Levinson 1983); пропозиции, импликатуры, перформативы и иллокутивные глаголы (Leech 1983).

Основываясь на определении С. Левинсоном «прагматики», которая «охватывает как контекстно-зависимые аспекты структуры языка, так и принципы использования и понимания языка», т.е. «взаимосвязь языковой структуры и принципов ее использования» (Levinson 1983: 9), можно предложить определение прагматических маркеров как единиц, которые выполняют коммуникативные и метаязыковые функции, выражают отношение говорящего к содержанию высказывания, а также обладают способностью ссылаться на контекст высказывания, структурировать дискурс и участвовать в организации интеракции.

2. Поэтический язык и обыденная речь в эпоху новых медиа: корпусно-дискурсивное исследование

Наше исследование посвящено аспектам взаимодействия обыденного языка и поэтического дискурса (далее – ПД) с точки зрения лингвопрагматики. Мы исходим из того, что в новейшей поэзии[2] задействуется прагматический арсенал повседневной речи и часто он подвергается трансформациям, что порождает продуктивные отклонения от прагматических максим обыденной коммуникации.

Напряжение между поэтическим и обыденным употреблением высказывания как предложения можно проиллюстрировать, обратившись к известному одностроку В. Брюсова, созданному в конце XIX века. Обратим внимание, в какой форме оно появилось впервые на страницах его сборника стихов: *О закрой свои бледные ноги*. Изначально Брюсов пробовал разные варианты, но в итоге напечатан был именно такой: без знака препинания после *О,* кото-

[2] Вслед за Ю.Б. Орлицким (Орлицкий 2020), под «новейшей поэзией» мы понимаем инновационную поэзию последних десятилетий (от 1960-х до наших дней).

рое, соответственно, функционирует не как междометие, а как частица, выражающая эмоциональное состояние говорящего, высокую степень удивления, восхищения или недовольства (ср. *О боже!; О какой синяк!*) (Шимчук, Щур 1999: 102), и с точкой вместо восклицательного знака. Этот моностих произвел не только шок на тогдашних читателей, но еще и был аномален по языковой оформленности, поскольку здесь эмоциональная частица сопровождается вполне нейтральной пунктуацией. Вместо патетического обращения и восклицания, традиционного для поэзии, эта строчка нарушает сразу два синтаксических ожидания и будто бы переходит в сниженный, почти разговорный регистр. Брюсов словно заигрывает с обыденностью столь деликатного объекта, как «открытые ноги» и снимает поэтичность имплицитного обращения. В этом примере частица *О* выступает как прагматический маркер, колеблющийся, как и положено поэтическому знаку, между смыслами обращения и эмоционального возбуждения. Подобного рода нарушения коммуникативных ожиданий, производивших шок сто с лишним лет назад, в современном поэтическом дискурсе кажутся скорее чем-то нормальным, особенно под влиянием сервисов мгновенных сообщений.

Наш интерес к поэзии в новых медиа вызван именно новыми способами взаимодействия поэтического и повседневного высказывания в рамках коммуникации. Лингвистика все более интенсивно изучает проблемы интернет-коммуникации: новые формы общения в социальных сетях, определяемых интерфейсом и характеризующихся трансформацией всех коммуникативных параметров, начиная с доминирования канала передачи информации и включая трансформацию кода и ролей участников коммуникации (приватное – публичное, индивидуальное – социальное). «Переключение» современного общения в формат онлайн-коммуникации, которое усилилось в эпоху пандемии 2020–2021 гг., реализуется в переходе различных дискурсов в виртуальное пространство. Наблюдается трансформация поэтических платформ, перекодировка из формата «бумажных» носителей в цифровую среду. Эта тенденция реализуется в области поэтических (рост количества поэтических онлайн-журналов, блогов, пабликов в соцсетях) и критических практик (критико-поэтические блоги и телеграм-каналы, например, «Метажурнал»). Кроме того, интернет-пространство подразумевает формат «открытой» семиотической структуры, включающей постоянно обновляемый контент, возможность коммуникативного перехода (*turn-taking*) между автором сообщения (поэтического текста) и адресатами (пользователям сети); сам же текст оказывается открыт комментариям, в том числе метапоэтическим (см. подробнее о новых коммуникативных форматах современной поэзии в (Соколова 2024, Feshchenko & Sokolova 2023, Самостиенко 2024)).

Основной научной задачей стал анализ особенностей прагматики новейшего поэтического дискурса, вступающего в активное взаимодействие с обыденным языком в эпоху новых медиа, для чего мы предприняли корпусно-дискурсивный анализ, состоящий из нескольких этапов.

3. Общий ход исследования

Для достижения поставленной задачи – проведения корпусно-дискурсивного анализа прагматического измерения в современной поэзии – были совмещены квалификативный и квантитативные методы исследования. В целом, анализ включал составление корпуса, формирование списка прагматических маркеров (далее – ПМ) и аннотирование корпуса, т.е. проведение внутренней разметки ПМ. Далее рассмотрим этим этапы подробнее.

3.1. Первый этап: составление корпуса (включая метаразметку, или тэггинг текстов)

Был составлен поэтический корпус (далее – ПК)[3](около 3 млн слов), включающий три подкорпуса на русском, английском и итальянском языках (по 1 млн слов в каждом). В ПК вошли тексты с конца 1960-х по 2020-е гг., опубликованные на бумажных носителях и на онлайн-платформах (в пабликах, соцсетях или личных блогах), а также включающие экспериментальные авторские онлайн-проекты. Такой широкий охват связан с тем, что в корпус вошли несколько подгрупп поэтических текстов, соответствующих разным периодам:

1. **Поэтические тексты 1970–1980-х гг., написанные под влиянием «перформативного поворота».** Хотя эти тексты были созданы раньше, чем произошло распространение новых медиа, их языковые и структурные особенности позволяют обозначить их как «предшественников» поэзии, реализуемой в интернет-пространстве. В частности, в эту группу вошли тексты американских «Языковых поэтов» («Language poets»): Б. Уоттена, Ч. Бернстина, Л. Хеджинян и др.; итальянского неоавангардного объединения «Группа 63» («Gruppo 63»): А. Джулиани, Э. Пальярани, Н. Балестрини, Э. Сангвинети и др.; «Московских концептуалистов»: Всев. Некрасова, Д.А. Пригова, Л. Рубинштейна и др.; русскоязычного неоавангарда: Г. Айги, В. Сосноры, Е. Мнацакановой, а также А. Драгомощенко и др.

2. **Поэтические тексты, написанные в период с 1990-х по 2020-е гг.**, представляют основной объект анализа. Сюда вошли авторы, которые являются активными «онлайн-пользователями»: Л. Рубинштейн, А. Скидан, Д. Давыдов, П. Арсеньев, Р. Осминкин, Ч. Бернстин, Т. Вилльямс, С. Стрикланд, М. Люзебринк, М. Янкелевич, Е. Осташевский, Дж. Фонтана, Л. Воче, Д. Полетти, Е. Галли и др.

В таблице 1 представлен пример метаразметки поэтических текстов обеих подгрупп, с 1970-х по 2020-е годы, включающей имя автора, название

[3] Данные из поэтического подкорпуса НКРЯ не привлекались, так как он сформирован по другим критериям. Учитывая, что современная итальянская и англоязычная (в частности, американская) поэзия написана преимущественно в форме свободного стиха, при отборе материала русскоязычной поэзии мы руководствовались критерием подобия по типу стихосложения.

и формат текстов (антология, книга, подборка), год/дата издания , язык (в том числе многоязычные книги и тексты), издание или ссылку и объемслов.

Таблица 1. **Метаразметка поэтических текстов /**
Table 1. **Metatextual information of poetic texts**

№№	АВТОР	НАЗВАНИЕ	ФОРМАТ (антология/ книга/ подборка)	ГОД / ДАТА	ЯЗЫК	ИЗДАНИЕ / ССЫЛКА	ОБЪЕМ (к-во слов)
РУССКОЯЗЫЧНЫЙ КОРПУС (общий объем около 1 млн. слов)							
11	Агамалова Л.	Вдоль мысли тела	Книга	2019	Рус.	Харьков: kntxt	29263
22	Арсеньев П.	То, что не укладывается в голове	Книга	2006	Рус.	AnnaNova	1254
33	Айги Г.	Здесь: Избранные стихотворения. 1954—1988	Книга	1991	Рус.	Современник	17415
44	Бельский С.	Дружеские беседы с роботами	Книга	2024	Рус.	Ozolnieki: Literature Without Borders	24981
27	Улунов Г.	Ключевые слова	Подборка	2020	Рус.	https://greza.space/klyuchevye-slova/	2830

3. «**Гибридные» тексты**, к которым относятся сообщения поэтов, публикуемые в Интернете и характеризующиеся промежуточным статусом – это «записи», «заметки» или «посты» поэтов, написанные «на границе» между поэтическим и обыденным высказыванием в период 2000-х–2020-х гг. Некоторые из этих текстов позже были опубликованы на бумажных носителях: в журналах или в виде книг, например, «Лит.ра. Избранные фб-записи» (2017) А. Скидана, «Кладбище с вайфаем» (2020) и «Бегущая строка» (2024) Л. Рубинштейна.

К таким «пограничным» поэтическим высказываниям, представленным в формате заметок («постов») в социальных сетях, относятся, например,

(1) *31 марта / жили у бабуси / три веселых гуссерля / «Кризис европейских наук»* (А. Скидан);

(2) *это стихотворение написано в метро / с помощью нового телефона / купленного, чтобы работать в одной / организации, всю дорогу / залипал в телефон, этого не одобряет / Андрей Тавров и, возможно, Ален Бадью / в последнее время я очень просто живу* (В. Гагин).

В целом, в группу «гибридных» текстов вошли три подгруппы текстов, исходя из тех интерфейсов (интернет-площадок), на которых они были опубликованы: 1) тексты в социальных сетях (около 25 тыс. слов), 2) в авторских Telegram-каналах (около 30 тыс. слов) и 3) арт- и медиапроекты (30 сайтов).

Общий объем подкорпуса составил около 55 тыс. слов. При аннотировании подкорпуса «гибридных» текстов были добавлены параметры, указывающие на формат (пост в социальных сетях, пост в “Telegram”, “Twitter”, “X” и др.) и наличие комментариев к посту (сообщений в социальных сетях, которые оставляют читатели) в виде знака “+” (табл. 2).

Таблица 2. **Метаразметка «гибридных» текстов /**
Table 2. **Metatextual information of “hybrid” texts**

№	АВТОР	НАЗВАНИЕ “+” – если пост с комментариями	ФОРМАТ (пост в сс/ пост в тг/ твит.)	ГОД / ДАТА	ЯЗЫК	URL	ОБЪЕМ (к-во слов)
11	Давыдов Д.	людоедство почему-то считается… +	пост в сс	27 май 2021	Рус.	https://www.…	2035
22		Стансы +	пост в сс	22 мая 2021	Рус.		
33		(я больной, мне можно глупости писать) +	пост в сс	30 янв 2022	Рус.		
115	Осьминкин Р. (Осминкин Р.)	звонила тетя маша родная мамина сестра… +	пост в сс	30 мая 2021	Рус.	https://www…	9157
116		дождь снаружи и внутри… +	пост в сс	24 мая 2021	Рус.		

Для исследования специфики функционирования прагматических маркеров в поэтическом дискурсе на фоне их конвенционального употребления мы обращались к соответствующим корпусам (и подкорпусам) разговорной речи и текстов из сети интернет: НКРЯ (Национальный корпус русского языка, устный подкорпус[4], около 13 млн слов); KIParla (L’italiano parlato e chi parla italiano[5], около 1 млн слов), GloWbE (Global Web-based English[6], около 1,9 млрд слов).

3.2. Второй этап: формирование списка прагматических маркеров (ПМ)

При составлении списка ПМ и работе с корпусом первоочередное внимание при составлении было уделено показателям, релевантным для анализа

[4] https://ruscorpora.ru/search?search=CgQyAggKMAE%3D
[5] https://kiparla.it/il-corpus/
[6] https://www.english-corpora.org/glowbe/

языковых явлений на трех языках, учитывая различие их строя (аналитические и синтетические), ввиду чего были отобраны следующие единицы: дейктики, дискурсивные маркеры, показатели модальности, выраженные глаголами или модальными предикативами и пр.

Для удобства работы со списком прагматических маркеров и дальнейшего квалификативного анализа полученных данных все маркеры были систематизированы с опорой на функциональную модель Р.О. Якобсона (Якобсон 1975): были выделены прагматические параметры, соответствующие коммуникативным факторам адресанта, адресата, канала, кода и контекста. Прагматические параметры, соотносимые с коммуникативным фактором *адресанта*, соответствуют эмоционально-экспрессивной функции (иллокутивные глаголы; личный, или персональный дейксис; показатели модальности), коммуникативный фактор *адресата* – соответствует конативной функции (репликовые дискурсивные маркеры), *канала* – фатической функции (интерперсональные дискурсивные маркеры), *кода* – метаязыковой функции (метатекстовые дискурсивные маркеры) и *контекста* – референтной, или коммуникативной, функции (временной дейксис; пространственный дейксис; дискурсивные маркеры отношения к действительности).

3.3. Третий этап: лингвистическое аннотирование (проведение внутренней разметки корпуса)

На основании разработанной классификации лингвопрагматических параметров была проведена разметка корпуса с учетом соответствующих индексов (например, 111 – ассертивы, 12 – маркеры личного дейксиса и т.п.). Учитывая специфику материала (поэтический дискурс, для которого характерно отклонение от языковой нормы, установка на лингвокреативность и принципы экспериментальной работы с языковыми данными), для выделения аномальных случаев употребления ПМ были введены специальные индексы отклонения от нормы, которые могут дополнять основной показатель. В случае аномального употребления в скобках после всех индексов указывается (А). Например, 111(А). Кроме того, тип аномалии может быть уточнен при более глубоком аннотировании (П – прагматическая, С – синтаксическая и др.), а у отдельных индексов могут быть дополнительные указатели: In (Indirect) – у речевых актов, Sh – (Shift) – у дейктиков, которые могут добавляться к аномальному употреблению: 111 (А, П, In), 21 (А, Sh).

Приведем в качестве примера часть списка прагматических маркеров, относящихся к группе «Коммуникативный фактор адресанта», которые служат для выражения эмотивной, или экспрессивной функции, и к которым относятся речевые акты и перформативные глаголы, маркеры личного дейксиса и показатели модальности. Всем маркерам приписаны соответствующие индексы, адаптированные для работы с корпусом и его лингвистического аннотирования:

11 – Речевые акты. Прямые РА (формальные свойства соответствуют иллокутивной силе глаголов**)**

111 – Ассертивы (констативы, репрезентативы: *говорить, сказать, утверждать, заявлять, уверять, предсказывать, сообщать, рассказывать, докладывать, извещать, осведомлять, информировать, признавать, допускать, напоминать, свидетельствовать, подтверждать, удостоверять, доказывать, признаваться, предполагать, догадываться, констатировать, выдвигать гипотезу, клясться, настаивать; speak, say, state, explain, assert, claim, describe, tell, insist, suggest, conclude, report; parlare, dire, affermare, spiegare, asserire, affermare, descrivere, raccontare, insistere, suggerire, concludere, riferire*);

112 – Директивы (побуждение: *просить, предписывать, требовать, приказывать, предлагать, ходатайствовать, побуждать, подстрекать, склонять, соблазнять, умолять, советовать, рекомендовать; order, command, dare, defy, challenge, require, direct, instruct, request, urge, authorize, appeal, warn; chiedere, prescrivere, esigere, ordinare, offrire, incoraggiare, indurre, incitare, persuadere, sedurre, supplicare, pregare, consigliare, raccomandare*);

113 – Комиссивы (обязательство: *обязываться, обещать, угрожать, соглашаться, отказываться, предлагать, присягать, ручаться; promise, threaten, intend, vow, refrain from, bet, swear, reject, pledge, offer, accept; promettere, minacciare, accettare, rifiutare, offrire, suggerire, giurare, garantire*);

114 – Декларативы (установление положения дел: *объявлять, провозглашать, утверждать, санкционировать, приговаривать, нарекать, сдаваться, благословлять; declare, proclaim, authorize, sentence, give up, bless, fire, bid, baptize; dichiarare, proclamare, approvare, sanzionare, condannare, benedire*);

115 – Экспрессивы (эмоционально-психическая позиция: *извиняться, поздравлять, благодарить, хвалить, сожалеть, соболезновать, приветствовать; congratulate, thank, deplore, condole, welcome, apologize; scusarsi, congratularsi, ringraziare, lodare, rimpiangere, salutare*).

111/112/113/114/115(In) – Косвенные РА **(**формальные свойства не соответствуют иллокутивной силе, например, просьба, выраженная в форме вопроса: *Не передадите ли мне соль*?).

12 – Маркеры личного (персонального) дейксиса *(я, мой, моя, моё, меня, мне, ты, твой, твоя, твоё, тебе, мы, наш, наша, наше, нас, нам, вы, ваш, ваша, ваше, вам, вас, он, она, оно, они, его, ее, их, всякий, каждый, любой, кто-то, кто-либо, кто-нибудь, что-то, что-либо, что-нибудь, все, никто, некто, ничто, нечто, это, этот, этого, этому, этим, этом, эта, этой, эту, эти, этих, этими, то, того, тому, тем, том, те, тех, тем, теми; I, me, myself, my, mine, we, us, our, ourselves, you, yourself, yourselves, your, yours, he, his, himself, she, her, herself, they, themselves, their, anyone, anybody, everyone, everybody, someone, somebody, something, anything, nobody, nothing, this, these,* *that, those; io, mi, me, tu, ti, te, noi, ci, voi, vi, lui, egli, lo, gli, lei, ella, la, se, si, loro, li, ognuno, ciascuno, tutto, tutti(e), qualcuno, nessuno, qualcosa, questo, questa, questi, queste, quel, quello, quella, quei, quegli, quelli, quelle, lo, ne);*

12(Sh) – Дейктический сдвиг, «мы инклюзивное» и пр.

13 – Дискурсивные маркеры отношения к содержанию собственного высказывания (*к счастью, к несчастью, на беду, к сожалению, удивительно, примечательно, увы; fortunately, unfortunately, alas, happily, I'm happy to tell, I'm sorry to tell; per fortuna, purtroppo, meravigliosamente, inverosimile, notevolmente)* и т.д.

Поскольку главной целью проекта было не составление корпуса, а проведение анализа изменений ПД в условиях новых медиа, для решения этой задачи помимо аннотирования корпуса был разработан пошаговый комплексный анализ составленного корпуса, включающий промежуточные этапы, реализованные в виде квантитативного, квалификативного и сопоставительного квантитативного анализа.

4. Результаты

Результаты исследования представлены в виде поэтапного анализа, охватывающего количественные подсчеты употребления выбранных единиц, их качественный анализ и сопоставление употребления прагматических маркеров в поэтическом дискурсе и разговорной речи.

4.1. Квантитативный анализ

Основной задачей на этом этапе был подсчет общих данных по количеству употреблений всех прагматических маркеров в корпусе, для достижения чего была проведена автоматическая и ручная обработка ПК с помощью программы AntConc. Это позволило подсчитать общее количество употреблений каждой прагматической единицы (общее количество проанализированных ПМ – 1043), входящей в общий список маркеров.

В результате была составлена рабочая таблица 3, содержащая следующие данные: индекс, группа ПМ, ПМ и количество употреблений на английском, итальянском и русском языках.

Таблица 3. **Количество употреблений ПМ в ПК /**
Table 3. **Overall distribution of pragmatic markers in the poetic corpus**

№	Группа ПМ	Английский		Итальянский		Русский	
1111	иллокутивные глаголы (перформативы)[7]: ассертивы (репрезентативы)	say	190	dire	323	говорить	406

[7] Наряду с «эксплицитными» (или «явными», «чистыми») перформативами, выраженными в форме глагола изъявительного наклонения настоящего времени активного залога (например, *Я объявляю вас мужем и женой*) (Остин 1986: 117–118), исследователи выделяют также

№	Группа ПМ	Английский		Итальянский		Русский	
1112	директивы	dare	4	pregare	35	просить	38
1113	комиссивы	swear	9	giurare	20	обещать	11
112	маркеры личного дейксиса	I	13537	mi	3166	я	10445
		you	7755	io	2322	ты	4212
		we	5539	ti	2150	мы	3338
1131	эмоциональные дискурсивные маркеры	oh	141	oh	312	ах	237
		ah	24	ah	133	боже (мой)	56
1132	дискурсивные маркеры отношения к содержанию собственного высказывания	alas	8	perfortuna	24	увы	60
		unfortunately	2	purtroppo	12	к сожалению	17
1142	модальные глаголы и предикативы	can	2366	potere	1178	можно	737
		could	1203	volere	574	надо	692
221	реактивные дискурсивные маркеры	no/nope	487	no	510	нет	822
		yes/yeah/yep	310	sì	212	да	420
222	дискурсивные маркеры привлечения внимания (аттрактивы)	(let's) say	51	sai	104	знаешь	65
		hey	44	allora	25	видишь	26
223	дискурсивные маркеры-показатели вежливости	please	79	ciao	22	прости(те)	125
		thank you/thanks	39	grazie	16	спасибо	81
442	дискурсивные маркеры противопоставления	however	4	tuttavia	60	однако	104
551	маркеры временного дейксиса	now	1532	sempre	1019	всегда	650
		never	865	mai	890	никогда	506
552	маркеры пространственного дейксиса	here	1082	qui	1261	здесь	1125
		there	708	lì	365	тут	609
553	дискурсивные маркеры соотнесенности с действительностью	maybe	253	forse	615	конечно	327
		perhaps	244	infatti	134	может быть	250
		of course	81	davvero	125	возможно	153

«косвенные» (или «имплицитные», «скрытые») перформативы, которые выражают дополнительные значения помимо того, что они непосредственно означают (например, *Не могли бы вы передать мне соль* или *Курить запрещено*) (Сёрль 1986: 196). Однако при аннотировании корпуса мы учитывали в качестве иллокутивных глаголов только те формы, которые соответствуют диалогическому режиму высказывания (1-е и 2-е лицо единственного и множественного числа настоящего времени), исключая повествовательную форму 3-го лица.

Отбор ПМ, релевантных для дальнейшего качественного анализа ПК

Из общего списка всех ПМ в корпусе были выделены 150 единиц (по 50 – в каждом языке), которые представлялись наиболее релевантными для дальнейшего качественного анализа в силу таких критериев, как высокая частота и специфичность (под которой понимается аномальность, учитывая лингвокреативную установку ПД) употребления. Поскольку при отборе учитывался критерий специфичности данной единицы для ПД, были отобраны все глаголы говорения[8], а также единицы из не слишком распространенных групп, которые характеризуются высокой прагматической нагрузкой в современной поэзии, направленной на внешнего адресата, типа интерактивных дискурсивных маркеров. Так, среди наиболее частотных единиц в ПК были выделены: в русскоязычной поэзии: *говорить 1073, сказать 551, ну 601, можно 537, возможно 232, хотеть 565, нет 290 и др.;* в англоязычной поэзии*: speak 595, say 3328, tell 942, require 489, somebody 889 и др.;* в италоязычной поэзии*: parlare 865, dire 1846, allora 346, dovere 331, no 539, cioè 128 и др*.

4.2. Квалификативный анализ

На данном этапе был проведен качественный анализ отобранных единиц, включающий составление «портрета» каждой единицы и сведение всех данных в общую таблицу, отражающую специфику аномального употребления прагматических единиц в поэтическом дискурсе.

«Портрет» единицы представлял собой файл, составленный для каждой из отобранных 150 единиц, в который были включены все контексты с ее вхождениями в ПК (иногда, как в случае с такими частотными единицами, как иллокутивные глаголы говорения типа *говорить, сказать,* контексты систематизировались и выписывались исходя из специфичности их функционирования, т.е. среди схожих контекстов выбирались наиболее показательные). В «портрете» указывался сам ПМ, источник контекста с вхождением единицы (автор и название текста), а также тот тип аномалии, который она выражала в контексте: прагматическая (П), синтаксическая (С) или графическая (Г).

Приведем в качестве примеров «портреты» единиц на русском, английском и итальянском языках с несколькими контекстами.

[8] Подчеркнем, что специфичность глаголов говорения (*говорю, кричу, шепчу* и др.) как особого вида перформативных глаголов обусловлена, с одной стороны, избыточностью их употребления в контексте, а с другой – расширением их функционирования по сравнению с остальными перформативными глаголами.

Портрет единицы «ГОВОРИТЬ»

(3) *Контекст:*
я говорю[9] о
        о твои жерла
я опою эту свою жажду
я воскурю жертвенное без жертвы
как это уже было однажды
Источник: Е. Костылева «Cosmopolitan»
Тип аномалии: П, Г, С.

В примере (3)[10] повтор перформативной глагольной формы осуществляется по принципу параллелизма (*говорю, опою*), что обозначает выведение единицы в фокус поэтического высказывания. Употребление глагола *я говорю* в форме «эксплицитного» перформатива сопровождается нарушением управления, что приводит к повышению семантической неопределенности высказывания и усложнению семантики не столько полнозначных слов (черта, характерная для поэтического языка в целом), сколько повышению функциональной нагрузки прагматических единиц.

В данном примере усложнение графики и эллипсис именной группы позволяет расширить сферу функционирования единицы *о,* которая может выступать в роли предлога[11], частицы и междометия. Эллипсис субстантивной формы после *о*, с одной стороны, выводит эту единицу в сильную позицию конца строки, а с другой, не позволяет однозначно интерпретировать ее как предлог (*я говорю о*), актуализируя другие потенциальные функции *о* как частицы и междометия, которые невозможно однозначно верифицировать в силу отсутствия пунктуации (восклицательного знака, кавычек, точки). Это, в свою очередь, позволяет интерпретировать *я говорю* с точки зрения теории речевых актов как контекст, который реализуется не в нарративном, а в диалоговом режиме.

Вместо пунктуационных знаков индексом навигации в тексте становится графика, которая позволяет прочесть строку как по горизонтали, так и по вертикали (*я говорю о твои жерла*). Однако и такое прочтение не приводит к снятию смысловой неопределенности: формально повторяясь, *о* может функционировать и как частица, и как междометие, и как предлог с эллипсисом существительного, что подчеркивает сфокусированность поэтического

[9] Здесь и далее выделение полужирным в поэтических примерах – авторов статьи, если не указано иное.

[10] В статье мы приводим развернутый анализ русскоязычных примеров, который отражает внутреннюю работу с контекстами по выявлению «аномальных» и «неаномальных» случаев употребления ПМ в ПК. В «портретах» единиц эти объяснения не были эксплицированы в силу ограниченности объема. С этой же целью мы не приводим развернутый анализ в «портретах» англо- и италоязычных единиц в статье.

[11] Подобного рода явления были исследованы преимущественно на материале предлогов, когда «сокращение элементов синтаксической структуры приводит к расширению и усложнению семантики слов, маркирующих позицию, остающуюся незамещенной» (Николина 2009: 140), но до сих не были подробно рассмотрены на прагматическом измерении языка.

эксперимента на множественности векторов, которые могут быть потенциально развиты конструкцией с перформативным глаголом и прагматической единицей *о*.

(4) *Контекст:*
я вам говорю, говорю, барабаню, слышу, «цветут»
и есть одно и то же. я **говорю отрядами цветы**,
растущие из пропустившей кожи
Источник: Н. Скандиака «[12/7/2007]»
Тип аномалии: П, С.

Нарушение логико-семантической связи в контексте (4) *говорю отрядами цветы* приводит к тому, что он может быть интерпретирован как косвенный перформатив, например: *я говорю <сделать / сажать> отрядами цветы*.

(5) *Контекст:*
не пиши стихов, **говорю**, не пиши стихов / не пиши прогуливаясь по бульвару
Источник: Д. Давыдов «Сегодня, нет, вчера»
Тип аномалии: П, Г, С.

Поскольку в поэтическом тексте, для которого характерна автокоммуникация (по Ю.М. Лотману)[12], любой перформатив направлен в том числе и на самого отправителя, контекст (5) может пониматься как иллокутивное самоубийство: ***говорю**, не пиши стихов*.

(6) *Контекст:*
я говорю / будь проклят этот дом / будь проклята каждая стена этого дома
Источник: М. Малиновская
Тип аномалии: —.
В примере (6) глагол *говорю* совмещается с императивом *будь*, что соответствует его нормативному употреблению.

Портрет единицы «THANK YOU»

(7) *Контекст:*
Rather just **I think** **Thank you** tangles on your way to the door
the tendency therefore 1·m **for continuity**
Источник: B. Benson “TUUMBA 31”
Тип аномалии: П, Г, С.
(8) *Контекст:*
THANK YOU
I AM GOING
UNDER THE TRAIN
Источник: S. Roggenbuck “Live My Lief”
Тип аномалии: П, Г, С.

[12] См. об этом с точки зрения семиотики и лингвистической эстетики (Feshchenko 2023).

(9) *Контекст:*
Thank you
I apologize
The cars were in the way
And the trees are
Источник: C. Harryman “SUE IN BERLIN”
Тип аномалии: П, Г.
Контекст:
(10) Her form takes shape, as she rises silently in bright blue, motionless, sun-lit.

Thank you for showing yourself, fulfilling a deep longing within my deep memory.
Источник: M.-M. Berssenbrugge «A Treatise on Stars»
Тип аномалии: —.

Портрет единицы «CIAO»
(11) *Контекст:*
ormai, sono una sbarra
obliqua, e metto, in mezzo, un meno (:-/):
e adesso, **CIAO**: non ti internetto,
non ti chatto più (ripeto: **CIAO e CIAO):** GRIDO IL SILENZIO, MUTO
Источник: E. Sanguinetti “Il gatto lupesco”
Тип аномалии: П, Г, С.
(12) *Контекст:*
L’ora del giorno, incerta un poco colma
o piuttosto il luogo distaccato dai rimorsi, in una incerta
ombra, distaccato dalla buriana ossessiva,
la giuliva felice **voce di addio ciao**
0 R. che (un attimo). . . dimenticato, al mio cuore . . .
Источник: R. Roversi “Le costumanze politiche”
Тип аномалии: П, С
(13) *Контекст:*
che è viva nei gesti della vita quotidiana, **nelle parole quotidiane (come ciao,**
pane, fica, grazie mille): (come quelle che ti trovi graffite dentro i cessi, spraiate sopra i muri, tra uno slogan e un altro, abbasso, viva):
Источник: E. Sanguinetti “Il gatto lupesco”
Тип аномалии: —.

Далее полученные данные были сведены в общую таблицу, отражающую специфику аномального употребления ПМ в ПД, которая включала следующие показатели: ПМ, общее количество употреблений и типы аномалий (табл. 4).

Таблица 4. **Частотность аномального употребления ПМ в ПК /**
Table 4. **Frequency of anomalous use of pragmatic markers in the poetic corpus**

ПМ	количество	Типы аномалий		
		Прагматические	Синтаксические	Графические
РУССКОЯЗЫЧНЫЙ ПОДКОРПУС				
говорить	406	138	48	35
просить	38	12	8	2
обещать	11	3	1	0
АНГЛОЯЗЫЧНЫЙ ПОДКОРПУС				
thank you	39	16	7	1
hello	24	9	5	0
please	79	21	14	3
ИТАЛОЯЗЫЧНЫЙ ПОДКОРПУС				
ciao	22	10	7	5
per fortuna	24	7	3	1
purtroppo	11	3	2	0

Приведенные в таблице данные позволили сделать вывод о том, что отклонения от речевой конвенции при употреблении ПМ регулярно запускают языковые эксперименты на других уровнях. Далее мы подробнее рассмотрим этот и другие выводы, сделанные в результате корпусно-дискурсивного анализа.

Выявление основных типов аномалий и подсчета их частотности в ПК дало возможность перейти к реализации поставленной изначально задачи по изучению особенностей употребления прагматических маркеров в ПД на фоне их использования в обыденном языке на материале разговорных национальных корпусов.

4.3. Сопоставительный квантитативный анализ

Количественные показатели по 150 прагматическим единицам из ПК были сопоставлены с данными разговорных национальных корпусов (НКРЯ, GloWbE и KIParla) через расчет корреляции употребления единиц на 1 млн слов (табл. 5), что позволило сопоставить количественные данные по частотности употребления ПМ в поэтическом языке и в разговорной речи.

Таблица 5. **Частотность употребления ПМ в ПК и национальных корпусах /**
Table 5. **Frequency of use of pragmatic markers in the poetic corpus and national corpora**

ПМ (РУС)	ПК (РУС)	НКРЯ	ПМ (АНГЛ)	ПК (АНГЛ)	GloWbE	ПМ (ИТАЛ)	ПК (ИТАЛ)	KIParla
спасибо	81	656	thank you	39	115	grazie	16	501
привет	43	171	hi	26	58	ciao	22	184
(и) вообще(-то)	146	214	in general	4	32	in generale	8	36
следовательно	20	24	therefore	83	175	generalmente	5	10
с одной стороны	36	80	on the one hand	1	8	da una parte	10	52

ПМ (РУС)	ПК (РУС)	НКРЯ	ПМ (АНГЛ)	ПК (АНГЛ)	GloWbE	ПМ (ИТАЛ)	ПК (ИТАЛ)	KIParla
с другой стороны	70	111	on the other hand	10	52	d'altra parte (dall'altre parte)	45	37
тем не менее	36	147	perhaps	244	204	al contrario	12	10
например	277	583	for example	74	177	per esempio	73	331

5. Обсуждение результатов корпусно-дискурсивного анализа

В целом, изменение коммуникативных условий высказывания в новых медиа-интерфейсах последних десятилетий часто выступает триггером для языкового эксперимента в поэзии, в силу чего можно говорить об активизации **прагматического эксперимента** в поэзии в новых медиа. Учитывая интенсивность практик коммуникации, в поэзии выявляется эксперимент в области реализации коммуникативных стратегий, выражаемый разными ПМ.

Актуализация прагматического измерения часто запускает **параллельную аномализацию на уровнях семантики, грамматики и синтаксиса**. Можно рассмотреть взаимодействие прагматики с разными языковыми уровнями на примере активизации синтаксических и морфо-деривационных процессов в поэтических текстах.

Парцелляция, будучи конструкцией экспрессивного синтаксиса, характерна как для разговорной речи, так и поэтического языка в целом, например,

(14) *В руки возьму! Чтоб не смела вертеться в кругу! / Пусть себе руки, и губы, и сердце сожгу!* (М. Цветаева);

(15) *Вот то, что нам с тобой дано. / Надолго. Навсегда. До гроба* (И. Бродский),

но в современной поэзии в качестве парцеллятов регулярно выступают не лексические единицы, а прагматические маркеры. Выделение ПМ в качестве пунктуационно и интонационно самостоятельных отрезков выражает взаимодействие поэтического высказывания с разговорной речью и охватывает разные языковые уровни:

(16) ***Не нужно***. *Прекрасно помню про волосы. Бежать, шипы кизила* (А. Драгомощенко);

(17) *Кому это? Тем, кто не выбрался?* ***Следовательно*** *— куда?* (А. Драгомощенко);

(18) *Барьер скомкано просекой / – волосок не.* ***Нельзя*** (А. Дарин);

(19) *(немного:) анонимной анатомии (*ламинированной* / ! — вениками из листьев. /* ***где надо*** (Н. Скандиака).

Неконвенциональное употребление прагматических маркеров может происходить параллельно с активизацией словообразовательных инноваций, что приводит к актуализации разных значений единицы – как части слова, и как ПМ (*мол-* в функции ксенопоказателя; *gia-* – неверное написание итал. *già*):

(20) *<говорила>, **мол** / чанием своим* (И. Краснопер);

(21) *bello parlando di / se siva avanti così se / ma dimentica non dirlo / avanza sporco **gia / llo** prima che tutto non / ntando la primi* (N. Balestrini)

По результатам исследования были сделаны выводы, касающиеся всех вошедших в корпус групп ПМ. Рассмотрим подробнее особенности функционирования иллокутивных глаголов говорения и дискурсивных маркеров. На общем фоне невысокой частотности употребления **иллокутивных глаголов** в ПК особенно часто употребляются глаголы говорения (*говорить, say, tell, dire, parlare* и др.). Частотность их употребления в ПД отражает характерную для поэзии установку на саморефлексию.

Например,

(22) *я вам **говорю, говорю**, барабаню, слышу, «цветут» / и есть одно и то же. я **говорю** отрядами цветы, / растущие из пропустившей кожи <…> я говорю, насколько белые цветки мне позволяют /говорить, мешают, дышать, иии* (Н. Скандиака);

(23) *Am I not bound, I guess, (I say to myself) to regard him tenderly, / to concentrate on the man's trunk instead of his face, which in this case, / is so impassive* (L. Scalapino);

(24) *I say I have said / here, you will say I* (C. Coolidge) и т.д.

Что касается **дискурсивных маркеров,** во всех трех языках более частотно употребление интерперсональных маркеров (таких как *да, нет, привет, пока* и др.), что выражает интенцию на повышенное вовлечение адресата в интеракцию. Метатекстовые маркеры употребляются реже, но оказываются в фокусе языкового эксперимента и метаязыковой рефлексии. Например, маркер вывода *итак*, которой регулярно встречается в середине текста и характеризует нарушение логической последовательности действий, например, в сочетании с фазовым глаголом *начинать*:

(25) *Не обнять / Небытие. / Прошлое и будущее // **Итак**, начинаю стихотворение, / Подложив том Гессе под бумагу-/ Влагу* (В. Филиппов)

Метатекстовые маркеры логической организации высказывания регулярно участвуют в прагматическом эксперименте по нарушению логических операций, например, каузальной связи (*следовательно, quindi, therefore*):

(26) Он бросил собаку что неожиданно
Собака ест птицу **следовательно**

Она парит в воздухе kua kai he kuli emanu
Ты съешь собаку без перевода (А. Драгомощенко)

В примере (26) причинно-следственные отношения нарушаются, поскольку отсутствует связь между пропозициями, соединенными единицей *следовательно*. Более того, постановка *следовательно* в конце строки и строфы может подразумевать обрыв высказывания, когда этот фрагмент (*Он бросил собаку что неожиданно / Собака ест птицу следовательно*) выступает в роли отдельной пропозиции, второй компонент которой сокращен и синтаксически, и логически. Здесь эллипсис именной группы приводит к расширению функций прагматического маркера (как в рассмотренном выше примере «я говорю о»), а нарушение синтаксических связей в поэтическом тексте может быть понято как эксперимент по выявлению границ логических связей в языке.

Схожий прием отклонения от нормативной сочетаемости за счет эллипсиса глагола-сказуемого (*il passato e quindi il pensato* ‘прошлое и потому мыслимое’) встречается в следующем примере:

(27) il passato e **quindi** il pensato
il passato in quanto corrisponde alla parola
il pensato in quanto corrisponde alla parola
il pensato che va in direzione opposta (M. Zaffarano)

Такая неполнота, характерная в большей степени для разговорной речи, позволяет повысить экспрессивность высказывания. В примере (27) она дополняется нарушением логической связи между двумя частями конструкции, соединяемыми дискурсивным маркером *quindi,* который более характерен для научного дискурса и используется для обозначения логического следствия из сказанного ранее. Однако в данном контексте две части предложения не обладают прямой логической связью: *il passato* ‘прошлое’ и субстантивированная форма с определенным артиклем *il pensato* в значении философской категории ‘мыслимое’.

Логико-семантический сдвиг в сфере эпистемической модальности с помощью нарушения каузальных отношений наблюдается в примере (28):

(28) I do not know English, and **therefore** I can have nothing to
say about this latest war, flowering through a night-
scope in the evening sky (M. Palmer).

Отказ от самовыражения мотивируется незнанием языка (*have nothing to say*), что имеет также значение ‘отсутствие собственной позиции’. Более того, такое высказывание семантически схоже с иллокутивным самоубийством, поскольку субъект отрицает собственный акт речи[13].

Таким образом, метаязыковые дискурсивные маркеры регулярно выступают в роли не «коннекторов», а «дисконнекторов»[14], становясь маркерами прагматического эксперимента по выявлению границ логических связей в языке через возможности понимания сообщения адресатом. Эти единицы

[13] Ср. с глаголами говорения, которые содержат семантический компонент, разрушающий иллокутивную цель (*лгать*, *ругать*, *льстить* и др.), поскольку нельзя обмануть, сказав *я лгу* (Вендлер 1985: 240–241).

[14] Подробнее об особенностях функций дискурсивных слов в поэтическом тексте см. (Соколова 2019).

также реализуют характерную для ПД метаязыковую рефлексию во взаимодействии с аргументативным дискурсом.

Наряду с общими чертами поэтической прагматики в трех анализируемых языках выделены и **различия**, характерные для них. Например, в русской и итальянской поэзии дискурсивные маркеры используются в целом чаще, чем в американской, что связано с более развитой системой этих единиц в русском и итальянском языках. Различия языкового строя влияют и на специфику прагматического эксперимента.

Так, для англоязычной поэзии наиболее характерен эксперимент с синтаксисом (в силу фиксированного порядка слов) (29) и с грамматическими конструкциями (30):

(29) *Suddenly photograph speak I* (R. Silliman);

(30) *To what we never knew / Nor will, nor who, nor say* (Ch. Bernstein).

«Сгущение» синонимичных единиц также подтверждает установку на синтаксический эксперимент в англоязычной поэзии:

(31) *But but. <…> Yet the narrative of / shadow crosses the garden, cool and damp. Nonetheless, those two guys in /that parked Buick have just got to be narcs* (R. Silliman).

В русскоязычной поэзии (по сравнению с англо- и италоязычной) более частотны эксперименты со словообразованием (20), (32) и (33):

(32) *да-да-нет* (Вс. Некрасов)*;*

(33) *антида и антинет* (Вс. Некрасов)

и с изменением модальности. В условиях взаимодействия прагматики с разными языковыми уровнями большое значение имеет модальность как пограничная зона между семантико-синтаксическим и прагматическим измерениями. Так, в примере (34) сферой действия показателя эпистемической модальности *возможно* оказывается и смысл как семантическая категория, и область фонового знания адресата:

(34) *в горячем / просыпающемся? — **возможно** — смысл? — тобою окруженный / как прахом — некой сущности? — **возможно** / неведомой тебе самой?* (Г. Айги).

В примере (35) эллипсис именной группы перед аккузативной формой личных местоимений (*меня и тебя*) расширяет область интерпретации отношения говорящего к ситуации, когда в сферу модификации показателя модальности попадают субъект и адресат, существование которых оказывается под вопросом:

(35) ***возможно**, меня и тебя станет чувством, понятием, пониманием, смыслом, значением, ощущением или множество sensus смыкаются через раз* (Л. Агамалова).

Поскольку итальянский язык относится к языкам pro-drop, в которых нормативно опускаются личные местоимения, в италоязычной поэзии распространен эксперимент с дейксисом, когда личные местоимения не только сохраняются, но и выделяться графически:

> (36) *io sia colui che "io" / "io" dire, almeno, può, nel vuoto, / può, nell'immenso scotoma, / "io", più che la pietra, la foglia, il cielo, "io"* (A. Zanzotto);
>
> (37) *Io | era | naufragio* (N. Cagnone).

В итальянской поэзии прагматический эксперимент часто совмещается со структурно-синтактическим: ПМ образуют т.н. «скопления» или «цепочки» (термины, введенные К. Бацанеллой для анализа ПМ в разговорной речи (Bazzanella 2015: 40)), когда повышение частотности употребления единиц приводит к расширению диапазона отклонения от нормативного употребления:

> (38) *verso un colloque-dialogue, «sessualità e creatività»): «segue, nel genere gesto mancato, **ancora**, immediato, il medicamento pagato e dimenticato (**dunque**, via via, / la guancia che si gonfia), e precedono le scarpe nuove troppo strette, **appena**, abbandonate* (E. Sanguineti).

Дейксис как одна из основных категорий прагматики традиционно изучалась в рамках теории перформативности с точки зрения проявления субъекта высказывания в его речевом действии. О функциях шифтеров в поэтическом языке высказывался Вяч. Вс. Иванов, приводя случаи дейктического выражения категории «определенности-неопределенности». Если в своих работах он отмечал возросшую роль дейксиса в поэзии XX века, которая сосредоточена на «выражении личности поэта в минуту самого акта поэтической речи» (Иванов 1979: 106), то в рамках нашего исследования удалось не только верифицировать эту гипотезу с учетом корпусных данных, но и рассмотреть динамику, связанную с повышением роли прагматики в языке новейшей поэзии. Учитывая концепцию местоименной поэтики как преимущественно лирико-поэтической разновидности дейксиса И.И. Ковтуновой, согласно которой «дейктические местоимения в поэтических текстах, устанавливая точку зрения воспринимающего, создают образ восприятия мира» (Ковтунова 1986: 26), мы расширяем сферу поэтической прагматики, вводя в нее другие прагматические параметры (перформативные глаголы, дискурсивные маркеры, показатели модальности и др.)

В этом направлении были предприняты некоторые конкретные исследования форм присутствия субъекта в поэтическом высказывании. На базе постулатов лингвистической прагматики С.Т. Золян формулирует теорию поэтической прагмасемантики (Золян 2014). В частности, он рассматривает показатели модальности в текстах классической поэзии и поэзии начала XX века, в то время как в нашем исследовании рассматриваются прагматические явления, характерные для новейшей поэзии, развивающей экспериментальную традицию. О выдвижении в современной поэзии на первый план прагматики и дейксиса пишут О.И. Северская (Северская 2018) и другие исследователи (Фещенко 2018а, 2023, Соколова, Захаркив 2021). Проанализированный в настоящей статье обширный материал поэтического дискурса демонстрирует, какие именно прагматические средства языка в целом и конкретных национальных языков (русском, английском, итальянском) получают смысловую нагрузку в реализации поэтической функции.

6. Заключение

Предложенный в данной статье подход позволяет выявить механизмы трансформации коммуникативных стратегий и языковых средств выражения в новых технологических условиях, определяющих динамику как в социальной сфере (обыденная речь в Интернете), так и в области языкового эксперимента (современная поэзия в эпоху новых медиа). Отклонения от нормы в обыденном языке в Интернете (в чатах и соцсетях) осуществляются с целью достижения эффективной коммуникации, в то время как в ПД проводится прагматический эксперимент с точки зрения как языковой, так и коммуникативной.

Употребляя ПМ, современные поэты выводят в фокус метаязыковую функцию высказывания и делают поэзию площадкой прагматического эксперимента, в который вовлекаются разные прагматические параметры: дискурсивные маркеры, дейктики, показатели модальности и др. Если в предыдущие периоды (модернизм и авангард первой половины XX века) поэзия экспериментировала в большей степени с лексикой и синтаксисом[15], то в последнее время более активным измерением поэтического эксперимента выступает прагматика. Значение прагматических маркеров варьируется в зависимости от контекста, поэтому они также обладают свойством интерактивности и вовлечения адресата (читателя) в поэтическую коммуникацию.

В целом можно заключить, что эксперимент с прагматикой поэтического высказывания – черта новейшей поэзии на разных языках в последние десятилетия. Истоки таких экспериментов восходят к перформативному повороту 1960-х годов в области философии, лингвистики и художественной практики. В частности, поэты начинают экспериментировать с коммуникативной средой поэтических текстов (карточки Л. Рубинштейна, перформансы трансфуристов и концептуалистов, лингвоцентричная поэзия в США и Европе). В последние три десятилетия поэтический дискурс реагирует на распространение новых коммуникативных медиа – персональные компьютеры, мобильная связь, Интернет, социальные сети и мессенджеры – посредством еще большей фокусировки на прагматических средствах языка.

[15] По данным проведенного исследования одним из авторов статьи: (Фещенко 2018б).

В условиях устно-письменной интернет-коммуникации в поэзию, с одной стороны, легко проникают паттерны и элементы повседневной речи, и с другой – метапоэтическая рефлексия направляется на прагматический языковой эксперимент, при котором диалектика коммуникативных конвенций и их нарушений часто становится триггером поэтических новаций.

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Review of Dániel Z. Kádár. 2024. *Ritual and Language*. Cambridge. New York: Cambridge University Press

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Dániel Z. Kádár's *Ritual and Language* aims to build a comprehensive framework for understanding ritual, drawing deeply from the principles of pragmatics. Pragmatics, a branch of linguistics, emerged in response to the understanding that language is not just a set of static rules and structures, but a dynamic tool employed by speakers to achieve various communicative objectives. The field gained significant traction through the foundational work of language philosophers John Austin (1962) and John Searle (1969), who highlighted the importance of analyzing language based on its practical functions and its impact on social interactions. Kádár's new book continues the exploration of ritual in language and communication, building upon his previous work (2017).

The term 'ritual' carries a myriad of connotations and interpretations, spanning diverse cultural, social, and linguistic contexts. From ceremonial rites to everyday social norms, rituals encompass a wide spectrum of practices that serve distinct functions within societies. Anthropological inquiries into ritual have yielded multifaceted definitions, reflecting its intricate role in shaping cultural identities, maintaining social cohesion, and expressing collective values. Within the realm of linguistic pragmatics, 'ritual' takes on additional layers of complexity. It encompasses not only formalized ceremonies and religious observances but also the performative aspects of language use in everyday interactions. Scholars influenced by sociological perspectives, particularly the insights of Erving Goffman (1967), have delved into the nuances of ritualistic behavior, distinguishing between various types of rituals based on their social functions and symbolic meanings.

For instance, Goffman delineates between presentational rituals, where individuals make specific attestations to others, and avoidance rituals, which entail expressions of deference or respect. These distinctions highlight the intricacies of ritualized communication and its role in shaping interpersonal dynamics and social hierarchies.

Furthermore, the meaning of ‘ritual’ can vary significantly across languages and individual speakers. While there may be overarching similarities in how rituals are conceptualized and enacted across cultures, each linguistic community may have its unique rituals and conventions that reflect its cultural values and norms.

Despite its ubiquity, defining ‘ritual poses inherent challenges for linguists and social scientists alike. A simplistic definition might describe ritual as communal language use aimed at reinforcing social structures. However, such a definition fails to capture the full complexity of ritualistic practices and their multifaceted functions within societies.

In summary, this book seeks to navigate the intricate terrain of ritual through a pragmatic lens, acknowledging its diverse manifestations and significance across different cultural and linguistic contexts. By elucidating the pragmatic dimensions of ritual, the aim is to provide scholars and researchers with a nuanced understanding of this fundamental aspect of human social interaction.

The book is structured into three parts, each focusing on different aspects of ritual and language.

Part I consists of three chapters, introducing readers to the basics of ritual and language. Chapter 2 discusses the pragmatic perspective of ritual, highlighting its significance in understanding language use across various contexts. It emphasizes Goffman's concept of 'interaction ritual' and outlines the pragmatic features of the ritual language. Chapters 3 and 4 illustrate how this perspective applies to studying complex interactional rituals, such as mediated aggression and public communication protocols.

Part II explores phenomena observed in interactionally complex rituals, including mimesis, (self-)displaying behavior, and liminality. Chapter 5 delves into 'performative mimesis,' where participants mimic predetermined interactional scripts, exemplified by Chinese university military training. Chapter 6 examines (self-)displaying behavior in rituals, illustrated through historical Chinese letters showcasing competitive self-displaying. Chapter 7 discusses liminality, emphasizing its temporal nature and its significance in rituals like workplace dismissal.

Part III focuses on methodological approaches to studying ritual pragmatics. Chapters 8 and 9 propose methodologies for analyzing expressions and speech acts associated with rituals, using contrastive pragmatic analysis and finite typologies. Chapter 8 explores the relationship between expressions and ritual speech acts, exemplified by apologies in Chinese and English. Chapter 9 advocates for studying existing speech act typologies to analyze ritual phenomena, demonstrated through admonishing in ancient Chinese texts. The second methodological approach, presented in Chapters 10 and 11, breaks down complex rituals into replicable pragmatic units of analysis. Chapter 10 addresses broad ritual phenomena like self-denigration in Chinese rituals, advocating for considering its use across various interpersonal scenarios. Chapter 11 proposes a discourse-analytic approach to studying erratic ritual behavior, exemplified by ritual bargaining in Chinese markets. Finally, Chapter 12 summarizes the book's contents and suggests future research directions. Overall, the book provides a comprehensive exploration of ritual and language from pragmatic perspectives, offering insights into diverse ritual phenomena and methodological approaches for their study.

"Ritual and Language" by Dániel Z. Kádár presents a comprehensive exploration of ritual from a pragmatic perspective, aiming to provide a nuanced framework for understanding the intricate interplay between language use and ritualistic practices. While the book offers valuable insights into this complex subject matter, it also exhibits certain strengths and weaknesses.

One of the key strengths of Kádár's work lies in its interdisciplinary approach. By drawing on insights from linguistics, anthropology, sociology, and philosophy, the book offers a holistic perspective on ritual, acknowledging its multifaceted nature and diverse manifestations across different cultural contexts. This interdisciplinary approach enriches the analysis, allowing readers to appreciate the complexity of ritualistic phenomena from various angles.

Furthermore, Kádár's meticulous examination of ritual through the lens of pragmatics contributes to the advancement of scholarly understanding in this field. The book not only elucidates the pragmatic functions of ritual language but also offers methodological frameworks for studying ritualistic practices systematically. This pragmatic anchoring enhances the rigor and replicability of research in the domain of ritual studies, paving the way for further inquiry and exploration.

Moreover, "Ritual and Language" provides valuable insights into the dynamic relationship between language and social structures. By highlighting the role of ritual in reproducing and reinforcing social norms, the book sheds light on the intricate mechanisms through which language shapes collective identities and maintains social cohesion. This sociolinguistic perspective adds depth to the analysis, elucidating the broader societal implications of ritualistic practices.

However, despite its strengths, the book also exhibits certain limitations. One notable weakness is its dense and specialized terminology, which may pose challenges for readers unfamiliar with the field of pragmatics or ritual studies. The complex theoretical framework and technical jargon employed throughout the book could potentially alienate non-specialist readers, limiting its accessibility and reach.

Additionally, while Kádár offers insightful case studies and examples to illustrate his theoretical arguments, the book could benefit from a more diverse range of cultural contexts and empirical data. A broader comparative analysis of ritualistic practices across different linguistic and cultural communities would enhance the book's cross-cultural relevance and applicability.

In conclusion, “Ritual and Language” by Dániel Z. Kádár offers a valuable contribution to the study of ritual from a pragmatic perspective. Its interdisciplinary approach, rigorous theoretical framework, and insightful analysis enrich our understanding of the complex relationship between language and ritual. However, the book could improve its accessibility and empirical breadth to appeal to a wider audience and enhance its scholarly impact.

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Интерпретационная парадигма переводоведения приблизилась к той черте, когда ей требуется подвести итоги своего более чем тридцатилетнего развития. Именно эту задачу решает монография российских ученых-переводоведов Э.Н. Мишкурова и М.Г. Новиковой «Переводимость – непереводимость: Былое и думы…» (2024). Монография продолжает серию фундаментальных трудов этих авторов, посвященных герменевтике перевода (Мишкуров 2018, Мишкуров, Новикова 2020 и др.).

В своем подходе авторы отталкиваются от фундаментальной дихотомии перевода, которая пронизывает всю его онтологию. Апория «переводимость – непереводимость» лежит в основе всех других онтологических оппозиций, объясняющих природу перевода, и, прежде всего, в основе оппозиции «адекватность – эквивалентность», в терминах которой обычно раскрывается феномен соответствия в переводе. В отличие от других переводоведческих парадигм – *структурно-лингвистической* и *коммуникативно-деятельностной*, трактующих непереводимость, как правило, с отрицательных позиций, как нечто, не имеющее принципиального онтологического значения и остающееся за рамками перевода, авторы монографии, опираясь на принципы интерпретационного подхода, видят в проблеме непереводимости важнейший онтологический фактор и ресурс, оказывающий генерирующее влияние на перевод. Как они справедливо отмечают, «…парадоксальность ситуации заключается в том, что не будь проблемы непереводимости, вообще не сложилась бы «Теория перевода»! ... Противоречие «переводимость – непереводимость» – это не тупиковая антиномия, а феноменологически и практически «продуктивная апория…» (С. 6). Таким образом, интерпретационная парадигма расширяет онтологические основания теории переводческой деятельности и выводит всю систему анализа перевода на новый уровень.

В первой главе монографии – «Энигма «переводимости – непереводимости» в трудах ученых XX–XXI веков» – прослеживается история отношения ученых-переводоведов различных школ и направлений к фактору непереводимости на протяжении XIX–XXI веков: от взглядов немецких ученых-романтиков конца XVIII – начала XIX века до строгих аналитических теорий перевода наших дней. По результатам исторического экскурса делается вывод о том, что «…снять проблему непереводимости ни одному из поколений теоретиков и практиков перевода так и не удалось» (С. 21). В монографии противопоставляются взгляды тех переводоведов, которые переоценивают проблему непереводимости в опыте перевода, и тех специалистов, которые считают ее малозначительной, «периферийной», онтологически несущественной. Авторы склоняются к поиску компромиссного варианта разрешения дихотомии переводимого и непереводимого. Они расширяют амплитуду приемов перевода до масштаба описательного перевода и даже содержательного комментария, предлагая в этих целях понятие «квазиперевода», которое призвано «спасти» переводчика, чтобы тот, как говорится, не «разбил себе голову» о «скалы непереводимости» и не рисковал своей репутацией (С. 18). К квазипереводу авторы относят описательный, уподобляющий, контекстуальный, вольный и свободный перевод (С. 40–41). Каждый их этих видов квазиперевода предполагает определенную степень несоответствия переводного текста исходному по критерию эквивалентности, но в то же время более полное и широкое приближение к нему по критерию адекватности. Дается подробная характеристика так называемых академических факторов непереводимости: от структурно-лингвистических до концептуально-когнитивных, лингвокультурных, этнопсихолингвистических и символико-семиотических. (С. 22–31). Эти факторы – каждый в отдельности и в комплексе – характеризуют области межъязыковой непереводимости (от ближайшей элементарной до дальнейшей более высокой, смысловой), которые требуют от переводчика принятия более или менее радикальных интерпретационных (трансформационных) решений. В заключении главы делается вывод о том, что «собственно перевод» и «квазиперевод» неразделимы в переводческой деятельности во всех ее истинных и манипулятивных формах (С. 45).

Во второй главе – «Аргументация *pro et contra* теоретической состоятельности концепции “непереводимости”» – противопоставляются позиции сторонников и противников теоретической состоятельности концепции «непереводимости». Общий вывод по итогам сопоставления двух точек зрения состоит в том, что непереводимость – постоянный спутник практики и теории перевода, своеобразная «тень» перевода, которая видна и понятна переводчику, но недоступна конечному получателю. Противники онтологического статуса непереводимости видят в ней внутреннюю «кухню» переводчика, которую тот не должен показывать получателю. Сторонники онтологического статуса непереводимости, напротив, полагают, что переводчик должен быть максимально открыт, стремиться к максимальной эксплицитации смысла. Авторы монографии отрицают крайности как «абсолютной переводимости» (идеального перевода), так и «абсолютной непереводимости», но, напротив, стремятся сблизить позиции сторонников первой и второй точек зрения и найти приемлемый компромисс (С. 50–51).

В целом авторы монографии призывают не отказываться от так называемого «эквивалентного» принципа перевода, не одобряя идею неограниченной интерпретационной свободы переводчика. Дается критика теоретических подходов, трактующих способы преодоления непереводимого как «переводческое насилие над оригиналом», как смысловой произвол или как переводческую манипуляцию. (С. 53–55). Не принимается та позиция, согласно которой «… переводчик имеет естественное право не зависеть от оригинала и изменять его» (Басснет 2016: 34–35). Критике подвергаются попытки некоторых ученых трактовать трансформационный аспект перевода как чисто смысловое явление, минуя критерии эквивалентности. Категория соответствия в переводе в этом случае предстает достаточно неустойчивой, теряя выразительные основания. Значительная часть критики направляется в адрес сторонников так называемой СКОПОС-теории (К. Райс и Г. Фермеера) (С. 58–63) и, в частности, в адрес «концепции коммуникативно-функционального перевода» В.В. Сдобникова (Сдобников 2019).

В позитивном плане с позиций онтологической дихотомии переводимости – непереводимости рассматриваются ключевые положения теорий выдающихся отечественных учёных-переводоведов: Я.И. Рецкера, Р.В. Миньяр-Белоручева, В.Н. Комиссарова, В.Г. Гака, А.Д. Швейцера, Н.К. Гарбовского, Л.К. Латышева, Г.Д. Воскобойника и др., которые, прежде всего, развивают эквивалентно-аналитический подход к переводческим трансформациям. Проводится сравнение предлагаемых этими учеными классификаций переводческих трансформаций, которые подразделяются на «закономерно-переводческие» и «вольные/квазипереводческие» («манипулятивные») приемы перевода. Так, в частности, выделяется та группа приемов, которую В.Г. Гак определял через понятие «квазитрансформация» (Гак 1988: 63–75). В монографии данные приемы характеризуются как приемы «игровой манипуляции» (С. 67–68).

В третьей главе – «Апория «переводимости – непереводимости» для различных типов текстов и их жанров» – поднимается вопрос о «коэффициенте непереводимости», который неодинаков для различных видов текстов с точки зрения их тематической и жанрово-стилистической направленности (С. 75). Рассматриваются тексты с глубокой коннотацией, при переводе которых, как правило, обнаруживаются максимальные межъязыковые выразительные и смысловые расхождения. Приводятся и критически оцениваются типологии текстов, предлагаемые различными переводоведами, разграничивающими типы текстов по их сложности для перевода, по глубине применяемых при переводе этих текстов трансформаций (К. Райс, Э. Прунч, А. Нойберт, А.Н. Сильников, А.Н. Алексеева и др.). К разряду труднопереводимых относятся тексты художественные (поэтические и прозаические), сакральные, философские, юридические, рекламные, фольклорные и другие. В одних из этих текстов действует глубокая образная и культурно-историческая ассоциация, в других сложности вызывают понятийные и терминологические абстракции (С. 82–137). Весьма интересен подраздел, посвященный переводу инвективной лексики (С. 137–143).

Четвертая глава («Когнитивно-герменевтические основы дискурсивно-игровой парадигмы перевода») посвящена установлению баланса между двумя полюсами переводческой деятельности – аспектами переводимости и непереводимости. Решение этой проблемы усматривается на пути углубления интерпретационного подхода в *рамках когнитивно-герменевтической парадигмы перевода* (С. 144–145). Предполагается, что эта парадигма должна носить инклюзивный характер, т.е. быть рассчитана на охват уже имеющегося знания и дальнейшее теоретическое развитие транслатологии. Ключевыми характеристиками парадигмы являются синтез предшествующих теорий, открытость к дальнейшему развитию, трансдисциплинарность (т.е. готовность к восприятию идей и методов других наук) (С. 147).

За переводом в предлагаемой онтологической трактовке признается людическая (игровая) природа. Делается ссылка на теорию «языковой игры» Л. Витгенштейна, в контексте которой и перевод трактуется как одна из форм «языковой игры». Феномен языковой игры в переводе связывается с дискурсом, вслед за чем предлагается комплексное наименование парадигмы как *дискурсивно-игровой и когнитивно-герменевтической.* В данной парадигме заметно расширяются смысловые границы содержательной адекватности и, тем самым, демократизируются критерии эквивалентности перевода. Это – две неразрывно связанных стороны перевода, где бóльшая свобода в одном аспекте требует аналогичной свободы в другом. Это – *интерпретационная* свобода, которая носит взаимный, амбивалентный характер. Вскрывая смысловую «тайну» текста посредством эксплицитации (т.е. более явного, непосредственного ее выражения), переводчик вынужден искать более свободную форму выражения.

Перевод как когнитивный процесс в рамках дискурсивно-игровой парадигмы трактуется континуально по принципу гадамеровского «герменевтического круга» (С. 148), т.е. как некоторая взаимная сменяемость процесса и результата понимания при переходе от ИЯ к ПЯ. Операционно перевод согласно предлагаемой концепции включает четыре фазы смыслового сопряжения при переходе от ИТ к ПТ: *предпонимание, понимание, интерпретацию и переводческое решение* (С. 149), где в каждом из аспектов когниция-процесс сменяется когницией-результатом: предпонимание – пониманием, интерпретация – решением на перевод. Возникает круговорот интерпретационной инаковости между смыслом и вербальной формой, где одно значимо и реально лишь в репрезентации другого (С. 148–152). Таким образом, интерпретация по мысли авторов – это постоянный переход к иному в процессе перевода.

На примере английских переводов известного пушкинского четверостишья («Мой дядя самых честных правил…») из поэмы «Евгений Онегин» (С. 153–166) и на примерах англо-русского юридического перевода (С. 167–172) подробно рассматриваются все фазы переводческого «герменевтического круга» – интерпретационного метода, имеющего, по мысли авторов, универсальное операционное применение в переводе, и отражающего технику смысловой и выразительной работы переводчика.

Заключительная пятая глава монографии посвящена соотношению приемов «собственно перевода» и «квазиперевода» в работе переводчика (С. 173). Первые трактуются как закономерные межъязыковые соответствия, вторые – как «незакономерные» (окказиональные, контекстуально обусловленные) соответствия. В первых усматривается максимальная степень переводимости и, значит, меньший масштаб отступления от языковой формы ИТ и менее широкая вариативность, во вторых – минимальная степень переводимости и, соответственно, больший масштаб отступления от языковой формы ИТ и более широкая вариативность. В последнем случае допускается «вольное/свободное переложение». Столь широкая амплитуда приемов доказывает реальность существования антиномии «переводимость – непереводимость» как неотъемлемой онтолого-эпистемологической черты переводческого процесса (С. 174). Примечательно, что к средствам квазиперевода авторы относят приемы транскрипции и транслитерации (С. 180). Помимо формальной непереводимости на уровне лексических номинаций и грамматических структур, авторы касаются проблемы концептуальной непереводимости уровня образных, стилистических и социокультурных окрасок.

Интерпретация на этом уровне представляет собой «извлечение смысла, минуя его языковое выражение». Интерпретация здесь, «имея дело не с единицами языка, а с идеями, со смыслом, всячески игнорирует формальные межъязыковые соответствия» (С. 185). Авторы обращают внимание на масштаб лингвокультурных смысловых ассоциаций, на передачу которых переводчик ориентирован при переводе художественных и высоко концептуализированных текстов.

Развивая дискурсивную проблематику перевода и называя перевод «дискурсивной игрой» (С. 195), авторы видят универсальный характер дискурсивной обусловленности перевода как основу всех его смысловых стратегий, называя развиваемый ими теоретический подход «дискурсивно-игровой парадигмой перевода». Данная парадигма не рушит мост между переводимостью и непереводимостью, но понимает их связь как фундаментальную для всей онтологии перевода. Дистанция между переводимым и непереводимым преодолевается посредством интерпретационных трансформационных стратегий, которые в своей основе носят манипулятивный характер.

Монографию Э.Н. Мишкурова и М.Г. Новиковой можно назвать рубежной в развитии интерпретационного переводоведения. Помимо теоретической глубины, книга характеризуется энциклопедическим охватом практически всей проблематики перевода в исторической ретроспективе. Лингвофилологическая специализация авторов органически сочетается с философскими основаниями общей онтологии перевода, что позволяет им увидеть связь собственно переводческой интерпретации с интерпретацией как феноменом социальной жизни в лингвокультурном и литературно-эстетическом масштабах рассмотрения искомых проблем.

Помимо глубокой теории, монография по охвату материала обладает всеми качествами учебника. Полагаем, что материалы рецензируемой монографии Э.Н. Мишкурова и М.Г. Новиковой могут и должны быть включены в современные дидактические курсы по теории и методологии перевода при подготовке переводческих кадров в ВУЗах страны.

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