



ISSN 2579-2903

ԳԻՏՈՒԹՅՈՒՆՆԵՐԻ ԱԶԳԱՅԻՆ ԱԿԱԴԵՄԻԱ  
NATIONAL ACADEMY OF SCIENCES OF THE REPUBLIC OF ARMENIA



ԳԻՏԱԿՐԹԱԿԱՆ ՄԻՋԱԶԳԱՅԻՆ ԿԵՆՏՐՈՆ  
INTERNATIONAL SCIENTIFIC-EDUCATIONAL CENTER

# ԿԱՃԱՌ / ԱԿԱԴԵՄԻԱ

ՀԱՍԱՐԱԿԱԳԻՏԱԿԱՆ ՊԱՐԲԵՐԱԿԱՆ



**KATCHAR / ACADEMIA**  
SOCIAL SCIENCE PERIODICAL

ԵՐԵՎԱՆ - 2025 - YEREVAN



ԳԻՏՈՒԹՅՈՒՆՆԵՐԻ ԱԶԳԱՅԻՆ ԱԿԱԴԵՄԻԱ  
NATIONAL ACADEMY OF SCIENCES OF THE REPUBLIC OF ARMENIA



ԳԻՏԱԿՐԹԱԿԱՆ ՄԻՋԱԶԳԱՅԻՆ ԿԵՆՏՐՈՆ  
INTERNATIONAL SCIENTIFIC-EDUCATIONAL CENTER

**ԿԱՃԱՌ / ԱԿԱԴԵՄԻԱ**  
**ՀԱՍԱՐԱԿԱԳԻՏԱԿԱՆ ՊԱՐԲԵՐԱԿԱՆ**

**KATCHAR / ACADEMIA**  
**SOCIAL SCIENCE PERIODICAL**

**1**

**ԵՐԵՎԱՆ-2025**

Երաշխավորվել է տպագրության ՀՀ գիտությունների ազգային  
ակադեմիայի գիտակրթական միջազգային կենտրոնի գիտական խորհրդի  
կողմից

Recommended by the Scientific Council of the International  
Scientific-Educational Center of NAS RA

## ԽՄԲԱԳՐԱԿԱԶՄ EDITORIAL BOARD

*Խմբագրական խորհրդի նախագահ*

**Արմեն Սարգսյան**, տնտեսագիտության թեկնածու

*Գլխավոր խմբագիր*

**Նաիրա Հակոբյան**, հոգեբանական գիտությունների դոկտոր,  
պրոֆեսոր

*Պատասխանատու քարտուղար*

**Նարինե Վարդանյան**, բանասիրական գիտությունների թեկնածու,  
դոցենտ

### ԽՄԲԱԳՐԱԿԱՆ ԽՈՐՀՈՒՐԴ՝

**Արմեն Սարգսյան՝**

**Կարեն Խաչատրյան՝**

**Հայկ Պետրոսյան՝**

**Աննա Աբաջյան՝**

**Տիգրան Քոչարյան՝**

**Նանա Լոմիա՝**

**Աշոտ Խաչատրյան՝**

**Անի Քալաջիան՝**

**Իրինա Սոսնիկ՝**

**Ալեսանդրո Բուֆալինի՝**

**Կարեն Սարգսյան՝**

**Մերի Սարգսյան՝**

**Գոհար Գրիգորյան՝**

**Մարիաննա Ավետիսյան՝**

**Աննա Խաչատրյան՝**

տնտեսագիտության թեկնածու

պատմական գիտությունների դոկտոր,  
պրոֆեսոր

մանկավարժական գիտությունների դոկտոր,  
պրոֆեսոր

բանասիրական գիտությունների դոկտոր,  
պրոֆեսոր

քաղաքագիտության դոկտոր, պրոֆեսոր  
բանասիրական գիտությունների դոկտոր  
(Վրաստան)

իրավաբանական գիտությունների դոկտոր,  
պրոֆեսոր

գիտությունների դոկտոր հոգեկան  
առողջության ոլորտում (ԱՄՆ)

տնտեսագիտության դոկտոր, պրոֆեսոր  
(Ուկրաինա)

իրավաբանական գիտությունների թեկնածու  
(Իտալիա)

տնտեսագիտության թեկնածու, դոցենտ  
բանասիրական գիտությունների թեկնածու,  
դոցենտ

բանասիրական գիտությունների թեկնածու,  
դոցենտ

հոգեբանական գիտությունների թեկնածու,  
դոցենտ

հոգեբանական գիտությունների թեկնածու,  
դոցենտ

<b>Նաիրա Համբարձումյան՝</b>	բանասիրական գիտությունների թեկնածու, դոցենտ
<b>Միրա Անտոնյան՝</b>	սոցիոլոգիական գիտությունների թեկնածու, դոցենտ
<b>Ֆաբիո Կորբիսիերո՝</b>	սոցիոլոգիական և հասարակագիտական գիտությունների թեկնածու (Իտալիա)
<b>Լիլիթ Ղազանյան՝</b>	իրավաբանական գիտությունների թեկնածու, դոցենտ
<b>Ֆուլիա Չորտոկ՝</b>	տնտեսագիտության թեկնածու, դոցենտ (Ուկրաինա)

*Chief of the Editorial Board*

**Armen Sargsyan**, PhD in Economics

*Editor-in-Chief*

**Naira Hakobyan**, Doctor of Psychology, Professor

*Executive Secretary*

**Narine Vardanyan**, PhD in Philological Sciences, Associate Professor

**EDITORIAL BOARD**

<b>Armen Sargsyan</b>	Ph.D in Economics
<b>Karen Khachatryan</b>	Doctor of History, Professor
<b>Hayk Petrosyan</b>	Doctor of Pedagogy, Professor
<b>Anna Abajyan</b>	Doctor of Philology, Professor
<b>Tigran Kocharyan</b>	Doctor of Political Science, Professor
<b>Nana Lomia</b>	Doctor of Philosophy in Philology (Georgia)
<b>Ashot Khachatryan</b>	Doctor of Law, Professor
<b>Ani Kalayjian</b>	Doctor of Mental Health (USA)
<b>Iryna Sotnyk</b>	Doctor of Economic Sciences, Professor (Ukraine)
<b>Alessandro Bufalini</b>	Ph.D in Law (Italy)
<b>Karen Sargsyan</b>	Ph.D in Economics, Associate Professor
<b>Meri Sargsyan</b>	Ph.D in Philological Sciences, Associate Professor
<b>Gohar Grigoryan</b>	Ph.D in Philological Sciences, Associate Professor
<b>Marianna Avetisyan</b>	Ph.D in Psychological Sciences, Associate Professor
<b>Anna Khachatryan</b>	Ph.D in Psychological Sciences, Associate Professor
<b>Naira Hambarzumyan</b>	Ph.D in Philological Sciences, Associate Professor
<b>Mira Antonyan</b>	Ph.D in Sociological Sciences, Associate Professor
<b>Fabio Corbisiero</b>	Ph.D in Sociology and Social Sciences (Italy)
<b>Lilit Kazanchian</b>	Ph.D in Juridical Sciences, Associate Professor
<b>Yuliia Chortok</b>	Ph.D in Economics, Associate Professor (Ukraine)

# ԲՈՎԱՆԴԱԿՈՒԹՅՈՒՆ

## Հումանիտար և հասարակական գիտություններ

### Հոգեբանություն

**Նաիրա Հակոբյան, Իրինա Սոտնիկ, Աննա Խաչատրյան, Էլեն Գասպարյան**  
Սուբյեկտիվ բարեկեցության գնահատման չափանիշները ..... 10

**Ռաֆիկ Պետրոսյան**  
Սոցիալական ներտրիգմի բնութագրումը ներանձնային կոնֆլիկտի համատեքստում .....20

### Լեզվաբանություն և օտար լեզուների դասավանդման մեթոդիկա

**Գոհար Գրիգորյան, Լիլիթ Մանվելյան**  
Աֆրոամերիկյան ժողովրդական անգլերեն. լեզվաբանական կառուցվածքը, պատմությունը և սոցիալական դրսևորումները ..... 31

**Նարինե Վարդանյան, Լիանա Սարգսյան, Արսեն Վարդանյան**  
Բառընտրությունը և բառային զուգակցումները արդի հայերենի գովազդային խոսույթում .....45

**Սիրանուշ Գոխոյան**  
Բանավոր թարգմանության առանձնահատկությունները տարածքային, լեզվական և մշակութային տարբեր համատեքստերում .....65

**Նարինե Հարությունյան**  
Ռազմաուսումնական հաստատություններում ավագ սպայական կազմի «Օտար լեզու (անգլերեն)» առարկայի դասավանդման որոշ առանձնահատկություններ .....75

### Տնփրկագիտություն և կառավարում

**Կարեն Սարգսյան**  
Արտասահմանյան դրամական փոխանցումների ազդեցությունը Հայաստանի տնտեսության վրա ռուս-ուկրաինական պատերազմի ազդեցությունների համատեքստում .....86

**Զարա Մկրտչյան, Տաթևիկ Մուսայելյան, Արուս Մկրտչյան, Շուշանիկ Փանյան**  
Միջազգային գիտական համաժողովների ազդեցությունը գիտական հանրությունների և նրանց միջավայրի վրա .....97

**Աշոտ Մաթևոսյան, Մանե Մաթևոսյան**  
Պեճոտ Ռիկար կորպորացիայի շուկայական կապիտալիզացիայի գնահատումը. WACC-ի հաշվարկի կիրառումը ..... 116

**Լիանա Գրիգորյան, Անի Գրիգորյան**  
Շահութաբերության և սնանկության միջև հարաբերությունը՝ հիմնված Լիսի չորս գործոն մոդելի գնահատման վրա: Ալկոհոլային խմիչքներ արտադրող ընկերության դեպքի ուսումնասիրություն ..... 126

**Մխիթար Գասպարյան**

Հանրակրթության ոլորտում կառավարման մոդելների  
տեսա-մեթոդաբանական վերլուծություն..... 135

***Քաղաքագիտություն***

**Բագրատ Բագրատյան**

Հայաստանի Հանրապետության ազգային անվտանգության  
ռազմավարության փաստաթղթավորման հիմնախնդիրները..... 147

**Անահիտ Շահումյան**

Քաղաքացիական վերահսկողության հիմնական դերակատարները  
որպես ազգային անվտանգության ապահովման մեխանիզմ..... 156

***Իրավագիտություն***

**Մարտին Մանուկյան**

Պաշտամենտարիզմը՝ որպես իրավափիլիսոփայական  
վերլուծության առարկա..... 169



## CONTENTS

### *Social and Humanitarian Sciences*

#### *Psychology*

<b>Naira Hakobyan, Iryna Sotnyk, Anna Khachatryan, Elen Gasparyan</b> Criteria for Assessing Subjective Well-Being .....	10
<b>Rafik Petrosyan</b> Characterization of Social Neuroticism in the Context of Intrapersonal Conflict.....	20

#### *Linguistics and Foreign Language Teaching Methodology*

<b>Gohar Grigoryan, Lilit Manvelyan</b> African-American Vernacular English: Linguistic Structure, History, And Social Implications .....	31
<b>Narine Vardanyan, Liana Sargsyan, Arsen Vardanyan</b> Analysis of Word Choice and Combination in Advertising Discourse .....	45
<b>Siranush Dokhoyan</b> Features of Oral Translation in Various Territorial, Linguistic and Cultural Contexts.....	65
<b>Narine Harutyunyan</b> Some Features of Teaching the Subject “Foreign Language (English)” for Senior Officers in Military Educational Institutions .....	75

#### *Economics and Management*

<b>Karen Sargsyan</b> The Impact of Foreign Remittancies on Armenia’s Economy Within the Context of the Russian-Ukrainian War Spillovers.....	86
<b>Zara Mkrtchyan, Tatevik Musayelyan, Arus Mkrtchyan, Shushanik Panyan</b> The Impact of International Scientific Conferences on Scientific Communities and Their Environment.....	97
<b>Ashot Matevosyan, Mane Matevosyan</b> Market Capitalization Assessment of Pernod Ricard Corporation. Application of Wacc Calculation.....	116
<b>Liana Grigoryan, Ani Grigoryan</b> The Relationship Between Profitability and Bankruptcy Assessment Based on Lis’s Four-Factor Model. Case Study of the Alcoholic Beverage Company.....	126
<b>Mkhitar Gasparyan</b> Theoretical –Methodological Review of the General Education Management Models .....	135

***Political Science***

**Bagrat Bagratyan**

The Fundamental Issues of Documenting the National Security  
Strategy of the Republic of Armenia ..... 147

**Anahit Shahumyan**

The Main Actors of Civilian Oversight as a Mechanism  
for Ensuring National Security ..... 156

***Law***

**Martin Manukyan**

Parliamentarism as a Legal Philosophy Subject of Analysis ..... 169

## **CRITERIA FOR ASSESSING SUBJECTIVE WELL-BEING**

**NAIRA HAKOBYAN**

International Scientific Educational Centre of the National Academy of Sciences,  
Doctor of Sciences in Psychology, Professor  
*naira.hakobyan@isec.am*

**IRYNA SOTNYK**

Professor, Sumy State University, Ukraine,  
Doctor of Sciences in Economics  
*sotnyk@econ.sumdu.edu.ua*

**ANNA KHACHATRYAN**

International Scientific Educational Centre of the National Academy of Sciences,  
Ph.D. in Psychology, Associate Professor  
*anna.khachatryan@isec.am*

**ELEN GASPARYAN**

Russian-Armenian University  
*elen.gasparyan02@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-10**

### **Abstract**

Modern psychological, economic, and social processes are characterized mainly by stress-producing features. Today, the psyche of a modern person is exposed to powerful negative impacts of social, psychological, man-made, natural, every day, and many other nature, which require special measures to protect mental health and strengthen it. In this context, studying and analyzing emotional well-being is becoming increasingly important. The concept and methodology of ensuring subjective well-being in the context of overcoming stress-producing effects of the external environment, highlighting the deep features of the relationship between social stability and subjective well-being, the search for practical ways are today, more than ever, on the agenda, relevant and urgent. Proof of this is scientific evidence of the transformation processes of modern societies, in which the individual, like social groups, regularly face complex and contradictory socio-psychological, economic, cultural, and civilizational processes. In such situations, manifestations characteristic of the phenomenon of anomie of personality and social groups develop and deepen, the normative system of behavior management of individuals is absent or levels out, the processes of self-realization of the individual, disclosure of personal potential, formation of a constructive attitude to reality and experience of subjective well-being are

hampered. Psychological features and emotional-evaluative components that determine the internal comfort and balance of the individual are transformed, which inevitably affects the individual's subjective well-being, behavior, and life. Based on the fact that the attention of the scientific community to the problems of subjective well-being is currently emphasized, it is becoming increasingly difficult to classify the signs characteristic of the phenomenon under study, which, in turn, leads to distortions in the general perception of subjective well-being. Therefore, the relevance of this study is due to the need to present a scientific concept of criteria formation for assessing subjective well-being.

**Keywords:** subjective well-being, criteria, assessing, mental health, society.

## ՍՈՒԲՅԵԿՏԻՎ ԲԱՐԵԿԵՑՈՒԹՅԱՆ ԳՆԱՀԱՏՄԱՆ ՉԱՓԱՆԻՇՆԵՐԸ ՆԱԻՐԱ ՀԱԿՈԲՅԱՆ

ՀՀ Գիտությունների ազգային ակադեմիայի  
գիտակրթական միջազգային կենտրոն,  
հոգեբանական գիտությունների դոկտոր, պրոֆեսոր  
*naira.hakobyan@isec.am*

### ԻՐԻՆԱ ՍՈՏՆԻԿ

Սումիի պետական համալսարան, Ուկրաինա,  
տնտեսագիտության դոկտոր, պրոֆեսոր  
*sotnyk@econ.sumdu.edu.ua*

### ԱՆՆԱ ԽԱՉԱՏՐՅԱՆ

ՀՀ Գիտությունների ազգային ակադեմիայի  
գիտակրթական միջազգային կենտրոն,  
հոգեբանական գիտությունների թեկնածու, դոցենտ  
*anna.khachatryan@isec.am*

### ԷԼԵՆ ԳԱՍՊԱՐՅԱՆ

Հայ-ռուսական համալսարան  
*elen.gasparyan02@gmail.com*

### Համառոտագիր

Ժամանակակից հոգեբանական, տնտեսական և սոցիալական գործընթացները բնութագրվում են հիմնականում սթրեսածին հատկանիշներով: Այսօր ժամանակակից անձի հոգեկանը ենթարկվում է սոցիալական, հոգեբանական, տեխնածին, բնական, կենցաղային և շատ այլ բնույթի հզոր բացասական ազդեցությունների, որոնք պահանջում են հատուկ միջոցներ

հոգեկան առողջության պահպանման և ամրապնդման համար: Սուբյեկտիվ բարեկեցության ապահովման հայեցակարգը և մեթոդաբանությունը արտաքին միջավայրի սթրեսածին ազդեցությունների հաղթահարման համատեքստում, ընդգծելով սոցիալական կայունության և սուբյեկտիվ բարեկեցության փոխհարաբերությունների խորքային առանձնահատկությունները, գործնական ուղիների որոնումն այսօր, առավել քան երբևէ, օրակարգային են՝ տեղին և հրատապ: Դրա ապացույցը ժամանակակից հասարակությունների տրանսֆորմացիոն գործընթացների մասին գիտական վկայություններն են, որտեղ անհատը, ինչպես սոցիալական խմբերը, պարբերաբար բախվում են բարդ և հակասական սոցիալ-հոգեբանական, տնտեսական, մշակութային և քաղաքակրթական գործընթացներին: Նման իրավիճակներում զարգանում և խորանում են անձի և սոցիալական խմբերի անոմիայի երևույթին բնորոշ դրսևորումները, բացակայում կամ թուլանում է վարքագծի կառավարման նորմատիվ համակարգը, խաթարվում են անձի ինքնաիրացման գործընթացները, անձնական ներուժի և իրականության նկատմամբ կառուցողական վերաբերմունքի ձևավորման փորձառությունը: Վերափոխման են ենթարկվում նաև հոգեբանական առանձնահատկությունները, հուզական-գնահատական բաղադրիչները, որոնք պայմանավորում են անձի ներքին հարմարվողականությունն ու հավասարակշռությունը, ինչը անխուսափելիորեն ազդում է անհատի բարեկեցության, վարքի և կյանքի սուբյեկտիվ զգացողության վրա: Ելնելով այն փաստից, որ ներկայումս ընդգծված է գիտական հանրության ուշադրությունը սուբյեկտիվ բարեկեցության խնդիրների վրա, գնալով դժվարանում է դասակարգել ուսումնասիրվող երևույթին բնորոշ նշանները, ինչը, իր հերթին, հանգեցնում է սուբյեկտիվ բարեկեցության ընդհանուր ընկալման աղավաղումների: Ուստի, այս ուսումնասիրության արդիականությունը պայմանավորված է սուբյեկտիվ բարեկեցության գնահատման չափանիշների ձևավորման գիտական հայեցակարգի ներկայացման անհրաժեշտությամբ:

**Բանալի բառեր**՝ սուբյեկտիվ բարեկեցություն, չափանիշներ, գնահատում, հոգեկան առողջություն, հասարակություն:

**Introduction**

Subjective well-being as a component of mental health is undoubtedly one of the main factors determining the quality of our lives. It is no secret that all aspects of a person’s socialization, the formation of relationships with other people, socio-economic well-being, and physical components of health are largely related to the level of emotional well-being. As evidenced by many social and psychological studies, a person’s mental abilities depend on the ability to manage one’s emotional states and behavior. The ability to manage our psyche is one of the leading indicators of mental health. In many cases, we can talk about mental health and emotional well-being in an interconnected way. Based on this logic, various authors distinguish several signs of emotional well-being, of which we will list some:

- positive self-esteem and self-respect,
- correspondence of the level of psychosocial development to the age-

specific characteristics,

- adaptability,
- coping behavior,
- moral values

Emotionally healthy people, moving from one age group to another during their lives, successfully overcome the difficulties encountered at certain stages of their life path. Therefore, as some authors note, the ability to adapt is also a sign of emotional well-being. An emotionally healthy person has a reasonable degree of independence and can make independent decisions, plan his life, and follow his plans. A sign of emotional well-being is also the ability to care for other people, which is one of the main manifestations of moral values.

### **Theoretical and Methodological Bases**

The category of subjective well-being of a person is closely related to the ideas of a harmonious and full existence of a person in various philosophical concepts, which, in turn, are associated with the psychodynamic approach to the main stages of self-knowledge and development of a person. The psychological problem of well-being, being subjective in itself as the main criterion for assessing a phenomenon, according to some authors, originates from the theories of existential-humanistic psychology and its modern branch, positive psychology.

The well-being and happiness of a person in various philosophical concepts are considered according to different principles that give meaning to human life.

Let us briefly dwell on some of them. As is known, according to the doctrine of hedonism, the main goal of human life and the criterion for assessing happiness are pleasure and constant joy. The Stoics consider the internal psychological state of a person as the main factor of happiness.

Eudaimonism connects happiness with the possession of virtue. Later, I. Kant (1922), based on the philosophical ideas of the ancient world, formulated an important idea, according to which the desire for well-being and happiness, originally given by nature, tends to be limited in the face of a rational principle, when a person, finding himself in conditions of observing social rules, is forced to adhere to these rules, thereby limiting the natural desire to receive pleasure. In the philosophy of A. Schopenhauer and F. Nietzsche, the emphasis on the assessment of well-being already carries the connotation of combining social and natural needs, and a person's happiness is assessed both as a social need for self-affirmation, self-development and as a natural desire to satisfy needs (Smith, 2014; Carus, 1907). Later, E. Fromm (Jean, 2016) and V. Frankl's (1992) ideas that a person's happiness is achieved by overcoming personal struggle and life difficulties, in realizing individuality, summarized many philosophical ideas about human well-being. For each direction or school, the methods and means of achieving psychological recovery and

well-being are formulated differently, depending on the conceptual structure of the theory and the corresponding criteria for evaluation. Thus, Z. Freud assumed that the main conditions for a well-being existence are meaningful work, love as an inner experience, and reason as the main criterion that gives meaning to a person's life (Sibi, 2020). A. Adler (Watts, 2015) changes the already entrenched perception of the criteria for assessing well-being and adds the criterion of friendship as the most important quality and skill of a person. K. Jung, in turn, introduces another feature of assessing well-being – harmony, which is capable of making a person's well-being even in the conditions of his uniqueness (O'Connor, 2024). This idea was developed by K. Horney (Sallehuddin, 2021) and E. Fromm (Jean, 2016), who formulated the ability to create meaningful relationships with other people as the most important criterion for assessing well-being, by which one can measure a person's completeness, responsibility and self-realization.

The processes of rapid development of modern societies are accompanied by socio-psychological changes in the perception of subjective well-being: subjective evaluations of human well-being, social roles, and goals change. In general, the scientific researches of recent years show that socio-psychological, economic, or political transformations of modern societies lead to the state of anomie in the social environment, where human social behavior is not guided by clear social norms. Similar observations were made by Keniston and Konty (Keniston, 1960; Konty, 2005). Kurtenbach's and Rettberg's theoretical developments point to the fact that anomic transformations lead to both the emergence of a sense of uncertainty and the disruption of the subjective perception of well-being. In anomic conditions of societal development, such as economic crises or socio-political, geopolitical transformations undermine the sense of social well-being and happiness (Kurtenbach & Rettberg, 2018). In the conditions of psychological anomie, the socio-psychological consequences of the crisis of social stability and negative changes in the perception of the level of well-being are increasingly expressed. Crises in society lead to aggressiveness, loneliness, and awareness of alienation. As a rule, an individual's behavior and priorities of psychological needs change significantly, often associated with emergencies or crises, changing the perception of happiness and subjective well-being (Hakobyan and Khachatryan, 2022a). In that context, the positive movement of social stability becomes more important, which allows to overcome previously existing anomic phenomena and to develop a concept that will have maximum applicability in new social conditions (Anheier, 2015; Walters, 2016).

There are many definitions of the well-being problem in the scientific literature. These definitions are formulated as an influence on various aspects of human life and are characterized according to society's social norms, philosophical views, and psychological needs of individuals and social groups. Therefore, ideas about well-being are expressed in the context of the level of happiness, health, and quality of life (APA Dictionary, 2023), inner harmony,

and peace (Alexandrova, 2017). According to A. Jarden and A. Roache's (2023) concept of well-being, different disciplines interpret this concept from the perspective of different scientific-theoretical approaches (Hakobyan et al., 2024; Anheier, 2015; Berk, 2006; Stone & Mackie, 2013; Zhou & Chen, 2019).

In the 21st century, when unprecedented social-political, economic, and cultural events and large-scale changes are taking place in the world, the concept of the subjective well-being of a person acquires a new aspect of manifestation.

The subjective well-being of a person and his attitude to various spheres of social life is an important indicator reflecting the level of development of society. According to Edward Diener's (1984) definition, subjective well-being mainly refers to the self-assessment of the quality of life. It includes both cognitive judgments and affective reactions through which people evaluate their lives in general and current social, socio-political, cultural, and other realities in particular. In the study of the problem of subjective well-being, two criteria levels are distinguished: internal, related to a person's self-awareness, and personal characteristics, and, secondly, external, those social conditions that are evaluated as opportunities to increase the level of well-being and lead to social stability (Hakobyan & Khachatryan, 2022b).

In the current period, well-being is explained not only by the problem of ensuring personal life conditions but also by the existence of all aspects of public life, in particular, the existence of social stability and the global problems of overcoming psychological anomie. It is in the light of these problems that certain socio-psychological processes take place, under the influence of which the perception of subjective well-being and social stability of a person is transformed, new economic, socio-psychological, and value system factors of the harmonious life of a person and social groups in society appear.

Social stability consists of three levels.

- internal stability of social systems (institutions, organizations, communities, etc.);
- stability of their relationships and interactions with each other;
- stability of the entire society, which can be called social stability.

Stability in society is achieved not by immutability or immobility, but by the principle of mature social development, during which socio-economic and other changes occur at the right time and in the right place. It can be said that social changes are a necessary condition and element of social stability. This is more relevant for the development of a conceptual model of criteria for assessing subjective well-being, especially in the context of anomic forms of social development, since in such conditions the outflow of the working population continues, social, economic, and, in general, civilizational processes proceed incomprehensibly or unpredictably for the country's population, there is no or weak trust in social institutions, which in turn undermines the basic human needs for security and life support.



Social stability is a stable state of the social system of society, allowing it to function and develop in the conditions of external and internal changes. In the long term, the main goal of developing a conceptual model of criteria for assessing subjective well-being and social stability is to coordinate the modern characteristics of subjective well-being and consider it in the context of the methodology for ensuring social stability and overcoming psychological anomie. In the future, it is planned to study the criteria for assessing subjective well-being through an empirical study, which will take into account the proposed assessment criteria, and the practical results can be aimed at ensuring sustainable growth in the standard and quality of life of the country's population and creating conditions for the development of human potential.

### **Methodology and Methods**

Within the framework of this article, a comprehensive study of the criteria of subjective well-being was conducted, and internal, and personal characteristics of the manifestation of the phenomenon of well-being were compared with external, social conditions of stability. The methodological basis for the study of subjective well-being and social stability were the directions and methodological tools of various scientific disciplines: psychology, economics, statistics, cultural studies, and others. The purpose of the study is:

1. A comprehensive study of the criteria of subjective well-being and life prospects.
2. Studying the relationships between the criteria of subjective well-being and income.
3. The relationship between subjective well-being and adaptation to life events.

### **Results**

Subjective well-being expresses the form of people's perception of health, life expectancy, and longevity, and is also expressed through subjective assessments. In psychology, the phenomenon of subjective well-being was studied mainly in the context of studying the relationship between subjective well-being and pain, which may indicate that positive emotions are associated with a decrease in pain sensitivity and an increase in the pain threshold. However, a comprehensive study of socio-psychological criteria for assessing subjective well-being and life prospects is still open.

Research in the field of social sciences examines certain criteria by which well-being is associated with a higher level of income. Among these criteria, the following can be noted:

- high income indicates the satisfaction of basic needs,
- high income indicates the achievement of goals, etc. According to the results of various studies, income is an important criterion for assessing life (as an indicator of subjective well-being), but is ambiguously assessed as a characteristic of positive and negative feelings. Therefore, to develop a conceptual model of criteria for assessing subjective well-being and social stability, it is necessary to

turn to different areas of human life, which will reveal various factors of subjective well-being.

The significance of life events is another important criterion in terms of adaptation to external, social conditions. Because the development orientation of modern societies as a whole acquires anomic forms, expressed through uncertainty, unpredictability, and social alienation of life prospects, it is necessary to deeply study not only the conditions and mechanisms of formation and deepening of psychological anomie but also the criteria and factors for assessing subjective well-being in the context of crisis, transforming societies.

Although the concept of “subjective well-being” has been studied by many authors, a universal, comprehensive understanding of this phenomenon does not exist today. It is necessary to coordinate the mass of accumulated data and develop a new conceptual model that combines the methodology and prospects of various theoretical approaches. Since the diversity of theoretical formulations also leads to certain problems in the diagnosis of subjective well-being, it is necessary to be extremely careful in choosing diagnostic tools and assessing the data obtained. Measuring subjective well-being and assessments of satisfaction with various spheres of social life will allow us to assess the degree of expression of public opinions and identify some problems of human adaptation to external conditions. The problem of social stability currently has not only scientific but also practical significance. The phenomenon of social stability is studied from the point of view of ensuring the socio-cultural and spiritual needs of people. Each person has different needs, but needs depend not only on personal qualities but also on the current state of development and activity of society. It can be said that social stability is one of the most important criteria for the development of society and the economy, since the goal of sustainable development is to make the environment, both social and natural, more favorable for life. Among the indicators of social stability are people’s stress resistance, job satisfaction, and attitude toward stability.

## **Conclusion**

Summarizing the theoretical and practical results of social and psychological studies, we have come to the classification of the following two large groups of criteria for assessing subjective well-being:

- Psychological criteria for assessing subjective well-being,
- Socio-economic criteria for assessing subjective well-being.

The first group of criteria is represented by the psychological assessment system of a person’s mental health and is expressed in the levels of self-realization, and self-esteem, as well as the peculiarities of the manifestation of coping mechanisms and value systems, the opposite direction of the feeling of alienation from society and adaptability, and cognitive skills of self-management.

The second group of criteria is expressed in the social, and external components of well-being. In particular, the criteria of internal, interpersonal, and social stability of the social system, the correlation of high income with the level

of subjective well-being, as well as the nonlinear nature of this correlation are important. As a result of further studies, there will be a need to empirically study the above-mentioned criteria, their subclassifications, and their manifestations. characteristics in different gender, age, and social groups.

### **Acknowledgement and Research Funding**

The work was supported by the Science Committee of the Republic of Armenia, in the frames of the research project № 25RG-5A025.

### **References**

1. Alexandrova, A. A. (2017). *Philosophy for the Science of Well-Being*. Oxford University Press: Oxford, UK.
2. American Psychological Association. (2023). Well-Being. In APA Dictionary; American Psychological Association: Washington, DC, USA, Available online: <https://dictionary.apa.org/well-being>
3. Anheier, H. (2015). Institutions and infrastructure of the social and behavioral sciences. In J. D. Wright (Ed.), *International Encyclopedia of the Social & Behavioral Sciences* (2nd ed., pp. 59–66). Elsevier.
4. Berk, B. B. (2006). Macro-micro relationships in Durkheim’s analysis of egoistic suicide. *Sociological Theory*, 24(1), 58–80. <https://doi.org/10.1111/j.0735-2751.2006.00264.x>
5. Carus, P. (1907). Frederich Nietzsche. *The Monist*, 17(2), 230–251. <http://www.jstor.org/stable/27900036>
6. Diener, E. (1984). Subjective well-being. *Psychological Bulletin*, 95(3), 542–575. <https://doi.org/10.1037/0033-2909.95.3.542>
7. Frankl, Victor (1992). *Man’s search for meaning*. (4th ed.). Boston, MA: Beacon Press.
8. Hakobyan N., Sotnyk I., Chortok Y., Khachatryan A., On the Issue of Rationality of Economic Choice in the Context of the Psychological Processes of Anomie, *Katchar Scientific Periodical*, 2024, 1, 13–23. <https://doi.org/10.54503/2579-2903-2024.1-13>
9. Hakobyan, N., & Khachatryan, A. (2022a). Post-war anomie in the field of management leadership and anomie overcoming models. *Business Ethics and Leadership*, 6(2), 94–102. [https://doi.org/10.21272/bel.6\(2\).94-102.2022](https://doi.org/10.21272/bel.6(2).94-102.2022)
10. Hakobyan, N., & Khachatryan, A. (2022b). Methodological approaches to the study of a person’s identity. *Katchar Scientific Yearbook*, 2, 50–67. <https://arar.sci.am/publication/288081>
11. Jarden, A., Roache, A. (2023). What Is Wellbeing? *International Journal of Environmental Research and Public Health*, 20(6), 5006. <http://doi.org/10.3390/ijerph20065006>
12. Jean, S. St. (2016). Lessons from the late Erich Fromm: Novel ideas for social work theory and practice that were ahead of their time. *Canadian Social Work Review / Revue Canadienne de Service Social*, 33(2), 255–272. <http://www.jstor.org/stable/90001609>
13. Kan, I. (1922). *Critique of pure reason*. New York. The Macmillan Company.
14. Keniston, K. (1960). Alienation and the Decline of Utopia. *The American Scholar*, 29, p. 164.
15. Konty, M. (2005). Microanomie: The cognitive foundations of the relationship between anomie and deviance. *Criminology*, 43(1), 107–132. <https://doi.org/10.1111/j.0011-1348.2005.00004.x>
16. Kurtenbach, S., & Rettberg, A. (2018). Understanding the relation between war economies and post-war crime. *Third world thematics: A TWQ Journal*, 3(1), 1–8. <https://doi.org/10.1080/23802014.2018.1457454>
17. O’Connor, P. (2024). The Application of Carl Jung’s thinking to action sports: A skateboarding case study. *Sport, Ethics and Philosophy*, 1–16. <https://doi.org/10.1080/>

17511321.2024.2432954

18. Sallehuddin, Md Y. (2021). Horney's theory in explaining personality. Open University Malaysia. <http://10.13140/RG.2.2.14709.14569>
19. Sibi, K. J. (2020). Sigmund Freud and psychoanalytic theory. Langlit, 16, 75-78. [https://www.researchgate.net/publication/342610778\\_SIGMUND\\_FREUD\\_AND\\_PSYCHOANALYTIC\\_THEORY](https://www.researchgate.net/publication/342610778_SIGMUND_FREUD_AND_PSYCHOANALYTIC_THEORY)
20. Smith, C. (2014). Philosophical pessimism: A Study In the philosophy of Arthur Schopenhauer. Thesis, Georgia State University. doi: <https://doi.org/10.57709/6006628>
21. Stone A. Mackie C. (2013). editors. Subjective Well-Being: Measuring Happiness, Suffering, and Other Dimensions of Experience. Washington (DC): National Academies Press (US), Introduction. Available from: <https://www.ncbi.nlm.nih.gov/books/NBK179225/>
22. Walters, G. D. (2016). Low self-control, peer rejection, reactive criminal thinking, and delinquent peer associations: Connecting the pieces of the crime puzzle. Journal of Developmental and Life-Course Criminology, 2(2), 209-231. <https://doi.org/10.1007/s40865-016-0028-3>
23. Watts, R. E. (2015). Adler's individual psychology: The Original positive psychology. Revista de Psicoterapia, 26(102), 123-131. <https://dialnet.unirioja.es/descarga/articulo/5399361.pdf>
24. Zhou, S., & Chen, R. (2019). Using education to enhance gender equality in the workplaces in China. Open Journal of Social Sciences, 7, 259-272. <https://doi.org/10.4236/jss.2019.79020>

*The article has been submitted for publication: 27.01.2025*  
*Հոդվածը ներկայացվել է գրախոսության. 27.01.2025*

*The article is sent for review: 19.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 19.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է գրախոսության. 31.03.2025*

# CHARACTERIZATION OF SOCIAL NEUROTICISM IN THE CONTEXT OF INTRAPERSONAL CONFLICT

RAFIK PETROSYAN

Postgraduate student, Department of Psychology,  
International Scientific-Educational Center, NAS RA

*docrafayel@gmail.com*

DOI: 10.54503/2579-2903-2025.1-20

## Abstract

The article studies the phenomenon of social neuroticism in the context of intrapersonal conflict. The theoretical and conceptual characteristics of intrapersonal conflict are discussed, and the intrapersonal characteristics that are characteristic of social neuroticism are highlighted. A comparative analysis of the literature shows that intrapersonal conflicts can manifest themselves in different areas of a person's life. They find their expression in both the cognitive, emotional, and behavioral spheres of a person. They can be manifested by a decrease in self-esteem, negative experiences, impaired activity, a decrease in the degree of general adaptability, and other indicators. The article presents the fundamentals of representatives of various psychological directions on the phenomena under discussion, as well as modern scientific interpretations of social neuroticism and intrapersonal conflict. The gender and age characteristics of the perception of intrapersonal conflict are highlighted, including social neuroticism characteristics, and methodological tools for reducing the negative impact of social neuroticism on a person's activities have been identified.

**Keywords:** social neuroticism, intrapersonal conflict, self-concept, self-esteem, anxiety.

## ՍՈՑԻԱԼԱԿԱՆ ՆԵՎՐՈՏԻԶՄԻ ԲՆՈՒԹԱԳՐՈՒՄԸ ՆԵՐԱՆՁՆԱՅԻՆ ԿՈՆՖԼԻԿՏԻ ՀԱՄԱՏԵՔՍՏՈՒՄ

ՌԱՖԻԿ ՊԵՏՐՈՍՅԱՆ

ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի  
հոգեբանության ամբիոնի հայցորդ

*docrafayel@gmail.com*

## Համառոտագիր

Հոդվածում ուսումնասիրվում է սոցիալական ներոտիզմի ֆենոմենը ներանձնային կոնֆլիկտի համատեքստում: Քննարկվել են ներանձնային կոնֆլիկտի տեսական, հայեցակարգային բնութագրումները, դրանցում առանձնացվել են սոցիալական ներոտիզմին նշաններով ներանձնային հատկանիշները: Գրականության համեմատական վերլուծությունը ցույց է տալիս, որ ներանձնային կոնֆլիկտները կարող են դրսևորվել անձի կյանքի

տարբեր ոլորտներում: Դրանք իրենց արտահայտումն են գտնում թե՛ անձի իմացական, թե՛ հուզական և թե՛ վարքային ոլորտներում: Դրանք կարող են դրսևորվել ինքնագնահատակի անկման, բացասական ապրումների, գործունեության խաթարման, ընդհանուր ադապտիվության աստիճանի նվազման և այլ ցուցիչներով: Հոդվածում ներկայացվել են հոգեբանական տարբեր ուղղությունների ներկայացուցիչների հիմնադրույթները քննարկվող երևույթների վերաբերյալ, ինչպես նաև սոցիալական ներտիզմի և ներանձնային կոնֆլիկտի ժամանակակից գիտական մեկնությունները: Առանձնացվել են ներանձնային կոնֆլիկտի ընկալման սեռային, տարիքային առանձնահատկությունները, դրանցում՝ սոցիալական ներտիզմի հատկանիշները, վեր են հանվել անձի գործունեության ընթացքում սոցիալական ներտիզմի բացասական ազդեցությունը նվազեցնելու մեթոդական գործիքները:

**Բանալի բառեր՝** սոցիալական ներտիզմ, ներանձնային կոնֆլիկտ, Ես-կոնցեպցիա, ինքնագնահատական, տագնապայնություն:

## Introduction

In the psychological sciences, various theoretical directions have emphasized the connection between social neuroticism and intrapersonal conflict. Individual psychological characteristics of a person imply innate properties, as well as those acquired during their life, which in turn determine the direction of activity that the individual will adhere to. In simpler terms, these are the mechanisms by which the human psyche functions, each separately. For a more detailed explanation, we will analyze individual psychological characteristics, as well as their manifestations. Neuroticism is a personality trait characterized by emotional instability, anxiety, low self-esteem, and sometimes autonomic disorders. Neuroticism in the understanding of others can be a neurosis, but this is fundamentally wrong. Neurotic symptoms can also be found in a healthy person. If we consider neuroticism in a broader sense, then in simple terms it is the inability to regulate one's negative emotions. In turn, negative emotions can arise in cases where people believe that they are not coping with the achievement of their intended goals. The main empirical components of neuroticism are three indicators: excitability, vulnerability, and emotionality.

Neuroticism is a very important criterion for predicting all common mental disorders since it characterizes the emotional stability of an individual. There is also an opinion that neuroticism is closely related to such an indicator of the nervous system as lability. The phenomenon of neuroticism is associated not only with individual psychological characteristics of the personality but is also closely connected with the social environment surrounding the personality, and the degree of conflictogenicity of social relations. An important component for understanding the neuroticism of the personality is the phenomenon of intrapersonal conflict of the personality. From this point of view, neuroticism of the personality appears to be a certain projection of external conflict or problematic social connections into the inner world of a person, expressed in the form of intrapersonal conflict

of the personality. The purpose of this article is to identify the characteristic features of social neuroticism from the point of view of the characteristic features of intrapersonal conflict of the personality.

### **Literature Review**

Humanistic psychology considers intrapersonal conflict in the context of personal improvement and development. As reported by Kocharyan and Barinova, According to K. Rogers, intrapersonal conflicts are located in incongruent self-concepts (Kocharyan & Barinova, 2021). It follows that the probability of destructive manifestations of intrapersonal conflict increases among people with neurotic traits and inadequate self-esteem, therefore it becomes a problem to identify them and conduct psychological work.

Unlike Rogers, another representative A. Maslow put forward the theory of the needs of the individual and linked conflict with their dissatisfaction. The cognitive and emotional needs of the individual sometimes conflict with each other, as a result of which the satisfaction of the former leads to the frustration of the latter, also accompanied by the characteristics of neuroticism (Maslow, 1943). The deepening of neuroticism creates conditions in which the satisfaction of the emotional needs of the individual becomes almost impossible, which is also an important factor in the emergence of intrapersonal conflict.

Maslow emphasizes the danger of conflict, noting that conflict does not always lead to neurotic pathology, but it becomes a serious pathogenic factor when it threatens the satisfaction of basic needs or desires that are closely related to basic needs (Maslow, 1943). In other words, in the presence of social neuroticism, not only emotional needs remain unsatisfied, but also several basic needs, the long-term neglect of which leads to serious conflict. These include the need for full sleep, rest, sexual satisfaction, security, as well as self-improvement.

In existential psychology, the approaches of Frankl and May are characteristic, who based the phenomenon under discussion on the loss of the meaning of life and the absence of the possibility of its rediscovery. For example, as reported by Devoe, V. Frankl emphasizes the existential vacuum or feeling of worthlessness and emptiness that arises within a person when there is no meaning in life. This emptiness results in intrapersonal conflict (Devoe, 2012; May, 2015).

May considers the basis of conflict to be a situation that is too difficult and traumatic for a person. As a rule, a conflict situation that leaves an extremely difficult mark is strengthened in the anxietytic, since the person is unable to fight it (May, 2015). These theoretical approaches suggest that the development of this type of conflict is often accompanied by manifestations of social neuroticism: the person has irrational beliefs, negative psychosomatic phenomena intensify, and difficulties in communicating with the social environment pass through an intrapersonal prism, leaving a negative mark on the person's mental health.

Another approach to intrapersonal conflicts is put forward by K. Levin. He connects the phenomenon with the clash of opposing forces and distinguishes three types of conflict situations:

1. Between two positive tendencies. The attractive features of one object are often enough to make that object dominant. The choice made towards one object changes the strength of the other and weakens it further

2. Between two negative tendencies. In such a case, the person tries to escape from harm and chooses the less dangerous one.

3. Between multiple tendencies. In this case, one of the vectors is shifted to the positive field, and the other to the negative field. In this case, the conflict arises in the evaluation of the positive and negative sides of the same object or in the choice of one of them (Lewin, 1997).

From Levin's approach, it becomes clear that an intrapersonal conflict arises in a person when he is faced with a difficult choice, which implies a choice between a lot and a little loss when in both cases the choice made will not satisfy the person's needs and it is not even possible to objectively assess which of the two possible choices is more harmful or harmful. In fact, in this case, we are dealing with a destructive developing conflict, which, accompanied by signs of social neuroticism, later turns into severe depression and self-blame (Toncheva-Zlatkova, 2023). Intrapersonal conflicts have been addressed by such authors as Angelo (2019), Layne et al. (2018), Yingshan et al. (2016), and others.

Many authors argue that the destructive consequences manifested at the intrapersonal level are the result of his destructive instincts and nature (Li et al., 2023; Widiger & Oltmanns, 2017; Quan et al., 2024). A similar point of view is put forward by Majer et al. (2021), who see a direct connection between intrapersonal conflicts and a high degree of social neuroticism and believe that the destructiveness of a person, formed both at the intrapersonal and social levels, is manifested by several features that have a destructive effect on the mental health of a person. Among them are:

- The specific nature of the parties to the conflict: in this case, individual aspects of the person conflict,
- The hidden nature of the conflict: Intrapersonal conflict is hidden from those around them, often from oneself as well, because many of the tendencies present in it are not recognized. It can be hidden in active activity.
- The specific nature of the conflict process: intrapersonal conflict can be accompanied by severe emotions: fear, stress, depression, and neurosis.

Dannenberg and Barrett's (2018) studies show that intrapersonal conflicts arise when a person finds themselves in difficult situations or crises. They believe that these crises, by their nature, determine the strength and power of the conflict. These crises are: "I don't know how to live", "I don't know what I'm going to live for next", and "I don't know why I live at all". This is especially true against the background of the manifestation of neuroticism when a person suffers for a long time and aggravates his/her already existing psychological problems. Dannenberg and Barrett link the means of conflict resolution with personal characteristics, in particular, temperament, since the strength, intensity, speed, and tension of any phenomenon are directly related to the person's temperament type. Therefore, people with a weak temperament type and an unstable nervous system find it



more difficult to overcome conflict. Kelley and Thibaut link intrapersonal conflict with a volitional act. According to him, a short volitional act contains a long-term volitional force, tension, and anxiety, which has a continuous effect and gives rise to a conflict in itself (1978). A vivid proof of this is that in many cases people are forced to submit to an undesirable situation against their will, to perform actions that contradict their personal qualities. Such undesirable situations, the impossibility of overcoming them or adapting to them is typical of neurotic manifestations, when the psychological problem that appears at the personal level deepens in socially undesirable conditions and acquires not only intrapersonal but also social neurotic features. Intrapersonal conflict is a contradiction between a person's motives, goals, and values, which arise simultaneously, with the same force, but in opposite directions (Dannenberg & Barrett, 2018). According to them, the emergence of intrapersonal conflict is conditioned by both personal and situational factors. Personal factors are: a complex inner world, contradictory developments of needs, the degree of development of feelings and values, the complex structure of the cognitive sphere of a person, and situational factors, in turn, are divided into internal and external factors. External conditions lead to the fact that a person finds himself in a dangerous situation, and internal ones cause a conflict between different aspects of the person (Layne et al., 2018).

As Toncheva-Zlatkova (2023) notes, social neuroticism, and intrapersonal conflict are necessarily reflected in practical relationships and the results of general activity, even in cases where it does not have a direct impact on the joint activities of people. This implies that the presence of intrapersonal conflict can cause a decrease in the effectiveness of activity. However, at the same time, we cannot ignore the fact that a person cannot bypass intrapersonal conflict and live without it throughout his existence, which is why we are required to study in detail and learn about the characteristics of the manifestation of intrapersonal conflict and their destructive, neurotic manifestations.

Angelo, links the causes of conflict with the nature of the activity, emphasizing that the emergence of intrapersonal conflict can often be due to workload or fatigue (2019).

## **Methods**

To present the relationship between social neuroticism and examine the interrelationship of theoretical and conceptual descriptions of intrapersonal conflict, we conducted a comparative qualitative analysis. Through comparative analysis, the fundamental concepts of social neuroticism and intrapersonal conflict were compared. Based on the results of the analysis, the features of the manifestation of social neuroticism and intrapersonal conflicts were classified.

## **Results**

Having classified scientific approaches to the essence and main features of social neuroticism, we can characterize such features of the manifestation of this phenomenon, which are not only accompanied by signs of neuroticism but also have social expressions and are manifested in conflict situations. Among them are:

1. Gender characteristics of conflict perception. As evidenced by research conducted on social neuroticism and intrapersonal conflicts, there is a gender difference in the assessment of intrapersonal conflict. As a rule, the level of neuroticism is assessed at a high level, and intrapersonal conflicts are considered more prolonged and harmful to mental health among men. According to the subjective assessments of the respondents, although women suffer from social neuroticism, neurotic signs are rarely accompanied by intrapersonal conflict. On the contrary, among men, social neuroticism is often perceived as an external sign of the presence of intrapersonal conflict. In other words, intrapersonal conflict and social neuroticism are perceived as internal and external manifestations of the same phenomenon (Jang et al., 2018).

2. Age-related characteristics of the manifestation of conflict. The course of manifestation of intrapersonal conflicts in adolescents is more acute. This is noted in the works of many authors (Kim et al., 2020; Yingshan et al., 2016; Layne et al., 2018). Adolescence implies an active period of socialization when a teenager masters a large number of social roles. It is these qualities that become the basis for the creation of intrapersonal conflict, as well as for the neuroticism that accompanies intrapersonal conflict. Teenagers bring with them current problems left over from adolescence, which, at any convenient opportunity, can have a destructive development. Intrapersonal conflict is often characteristic of adolescents who have high or low achievement, it is expressed in neurotic signs, anxiety, or aggression (Quan et al., 2024).

3. Professional features of the manifestation of conflict. According to some specialists, the correct direction of intrapersonal conflict can provide him with professional growth. Intrapersonal conflict can serve as a means of professional development, if only a person can correctly direct his conflict activity (Li et al., 2023). Professional manifestations of intrapersonal conflict are related to the degree of activity of a person's work, the nature of the activity, the degree of involvement in professional work, or the stability of the activity, as well as some other factors. Intrapersonal conflict related to the professional sphere can have both a positive, activity-stimulating significance and a strongly negative, disorganizing, and destructive significance. However, when considering the second, negative effects of intrapersonal conflict, the characteristics of social neuroticism are often also considered, since they largely depend on the negative, undesirable effects of the social environment on the psyche of a person.

4. Personal characteristics of the conflict. As we have already mentioned, intrapersonal conflicts are associated with such personal characteristics as: temperament type, the presence of certain character traits (meticulousness, perfectionism), intellectual characteristics, in particular, the way of thinking, diligence, volitional qualities, value system, intensity of emotional experiences, etc.). Currently, interest in the correlation between intrapersonal conflict and social neuroticism is growing in psychological science. Empirical studies of such connections indicate that studies of intrapersonal conflict inevitably lead to the need to assess and diagnose social neuroticism (Widiger & Oltmanns, 2017).

When studying social neuroticism, the question arises: what leads conflict to destructive development, what are these factors, and what functions do destructive conflicts perform? Some studies prove that there are no clear conditions, the presence of which leads to the destructive development of conflict. Whether there are favorable or unfavorable conditions, objective and subjectively different situations, this process is individualized. Destructive development of conflicts can occur even in the presence of quite favorable conditions. Under favorable conditions, the psychological factor can lead the conflict to a destructive path. If a person is dissatisfied with the outcome and feels the negative impact of its results, then the conflict develops destructively (Quan et al., 2024). The importance of the above becomes apparent when a destructively developing conflict is dangerous not only for the person in question but also for his social environment since a person in intrapersonal conflict inadequately evaluates social environmental connections and interactions.

The development of nervous reactions, suicidal behavior, and mental illnesses of a person are extreme forms of destructive manifestations of conflict. For this reason, American psychologists have long recommended paying special attention to psychological diagnostics of neuroticism and psychocorrection work, which will allow for avoiding or reducing such undesirable developments as intrapersonal conflicts. Let us note some defense mechanisms aimed at extinguishing intrapersonal conflict with signs of social neuroticism, the activation of which is organized by psycho correction work:

- Compromise: it is important to make a decision and begin to implement the chosen action
- Avoidance: there are cases when it is necessary to simply leave the given environment and get away from a difficult situation
- Reorientation: changing the attitude towards the object that caused the person's intrapersonal conflict
- Sublimation: changing the sphere of activity to receive positive emotions and new social connections
- Idealization: the mechanism of detachment from reality, which is an effective means of adapting to the social environment
- Expulsion: a defense mechanism for removing unpleasant emotions from consciousness
- Correction, regulation: the formation of an objective and realistic attitude towards one's Self (Majer et al., 2021).

Along with studying the origin of social neuroticism and intrapersonal conflicts, their causes, features, and development, it is also necessary to talk about the methods and means of studying these phenomena. The study of these methods will allow us to diagnose the presence of intrapersonal conflict, and its accompaniment with signs of neuroticism and carry out preventive work. It becomes clear from the studies that the methods for diagnosing intrapersonal conflicts are few. The difficulty is created by the fact that people are mostly unaware of the presence of intrapersonal conflict. That is, it is not possible to

diagnose the degree of expression of intrapersonal conflict. Intrapersonal conflict diagnosis can be carried out using complex methods and through the study of several psychological qualities.

The following psychological phenomena are analyzed for the diagnosis of intrapersonal conflicts:

- Worldview
- Mental tension
- Subject inner world
- Degree of social neuroticism (Widiger & Oltmans, 2017).

To diagnose intrapersonal conflicts, some methodologies are only indirectly related to the diagnosis of intrapersonal conflicts and determine their presence in a person. Among them, one can mention the methodologies for studying value orientations, cognitive processes of a person, personal traits, and the diagnosis of anxiety and depression. The methodology developed by Kellermann, reveals the presence of intrapersonal conflict, and the Big Five methodology (Kellermann, 1996; Erevik et al., 2023). These methodologies allow us to identify:

1. The degree of manifestation of neuroticism
2. The degree of expression of intrapersonal conflict
3. Its most frequent type
4. Its most relevant area (motivational, commitment, self-esteem).

## Discussion

As Wiebe et al. (2018) noted in the article titled “What Mechanisms Explain the Links Between Personality and Health?”, “Neuroticism is one of the Big Five dimensions of personality, alongside extraversion, conscientiousness, openness to experience and agreeableness. Historically, these dimensions originated from the lexical approach in which clusters of personality descriptors were identified by performing factor analyses on personality-related adjectives.” As can be seen from the analysis of the literature, today the scope of neuroticism characterization has expanded considerably. The diagnosis of this psychological phenomenon is becoming decisive for the characterization of a person’s mental health, the identification of addictive behavior, as well as the description of psychophysiological processes. In addition, it has become important to discuss and study the social weight and significance of neuroticism, the perception of the phenomenon in the external environment, and the integration and adaptation of people with signs of neuroticism in society. The methodological toolkit for the diagnosis of social neuroticism, therefore, cannot be limited only to the assessment of neuroticism. It becomes necessary to supplement it with diagnostic methods of intrapersonal conflicts, as a result of the application of which the following psychodiagnostic conclusions have been revealed in the current psychological science, in particular:

1. The higher the degree of tension, the higher the degree of manifestation of intrapersonal conflicts
2. The better The more developed the volitional qualities of a person, the

lower the severity of experiencing intrapersonal conflicts

3. Restraint is characteristic of people with high intrapersonal conflict
4. Independence and the development of behavioral normativity do not have a significant impact on the manifestation of intrapersonal conflicts
5. There is a mutual relationship between intrapersonal conflicts and neuroticism
6. There is a relationship between intrapersonal conflicts and introversion and extroversion
7. It has been proven that people with developed intelligence experience intrapersonal conflicts more severely (Erevik et al., 2023).

Emphasizing the above factors through the methods of diagnosing social neuroticism and intrapersonal conflicts allows developing psychocorrective work that will be aimed not only at extinguishing intrapersonal conflict but also have a positive effect in the attenuation of neurotic symptoms accompanying intrapersonal conflict.

### **Conclusion**

From the analysis of the existing literature, we conclude that intrapersonal conflict is the result of ideas, values, emotions, and behavior that disintegrate the self-concept, contradicting each other. Being a phenomenon characterizing the inner world of a person, it is largely related to the phenomenon of social neuroticism, which arises as a result of the unstable, neurotic interaction of a person with the social environment. Intrapersonal conflict can also have constructive, positive manifestations. The constructive development of conflict is useful for a person, it motivates the person, changes his values, pushes him to new actions and discoveries, and gives him a wide range of appropriate emotions and experiences, but its destructive development leads to destructive and painful experiences in a person, which ultimately lead to the disruption of the person's effective activity. The analysis of the literature allows us to conclude that intrapersonal conflict is especially dangerous when accompanied by social neuroticism, since Subjective factors such as unsatisfied personal needs, value inconsistency with social values, the need to exert willpower, and objective factors such as severe physical and mental strain, the presence of a life-threatening danger, the need to make quick decisions and choices, create fertile ground for the development of neurotic phenomena and their subsequent destructive behavioral outcomes. Studies on social neuroticism allow us to consider the psychological phenomenon of neuroticism from the perspective of the interaction of a person with the social environment, which will also contribute to the creation and further application of appropriate methodological tools aimed at reducing the negative and destructive impact of intrapersonal conflict.

## References

1. Angelo, E. (2019). Managing Interpersonal Conflict: Steps for Success. *Nurs Manage*, 50(6), 22–28. 10.1097/01.NUMA.0000558479.54449.ed.
2. Dannenberg, A., Barrett, S. (2018). Cooperating to avoid catastrophe. *Nat. Hum. Behav.* 2, 435–437. doi: 10.1038/s41562-018-0374-8
3. Devoe, D. (2012). Viktor Frankl’s Logotherapy: The Search for Purpose and Meaning. *Inquiries Journal/Student Pulse*, 4(07). Retrieved from <http://www.inquiriesjournal.com/a?id=660>
4. Erevik, E. K., Vedaa Q., Pallesen, S., Hysing, M., Sivertsen, B. (2023). The Five-Factor Model’s Personality Traits and Social and Emotional Loneliness: Two Large-Scale Studies among Norwegian Students. *Personality and Individual Differences*, 207, 112–115. ISSN 0191-8869, 10.1016/j.paid.2023.112115
5. Jang, D., Elfenbein, H. A., and Bottom, W. P. (2018). More than a phase: form and features of a general theory of negotiation. *Acad. Manag. Ann.*, 12, 318–356. doi: 10.5465/annals.2016.0053
6. Kellermann, P. F. (1996). Interpersonal Conflict Management in Group Psychotherapy: An Integrative Perspective. *Group Analysis*, 29(2), 257–275. <https://doi.org/10.1177/0533316496292012>
7. Kelley, H. H., Thibaut, J. W. (1978). *Interpersonal relations: A theory of interdependence*. New York, NY: Wiley.
8. Kim, J., Thompson, L., and Loewenstein, J. (2020). Open for learning: encouraging generalization fosters knowledge transfer in negotiation. *Negot. Confl. Manag. Res.*, 13, 3–23. doi: 10.1111/ncmr.12163
9. Kocharyan, A., Barinova, N. (2021). K. Rojers’ Therapeutic Strategy. *Psychological Journal*, 7, 7–16. 10.31108/1.2021.7.5.1.
10. Layne, D. M., Nemeth, L, S., Mueller, M., et al. (2018). Negative Behaviours in Health Care: Prevalence and Strategies. *Nurs Manag*, 27(1), 154–160. 10.1111/jonm.12660
11. Lewin, K. (1997). *Resolving Social Conflicts & Field Theory in Social Science*. Washington, D.C.: American Psychological Association.
12. Li, S., Kong, K., Zhang, K., Niu, H. (2023). The Relation between College Students’ Neuroticism and Loneliness: The Chain Mediating Roles of Self-Efficacy, Social Avoidance and Distress. *Frontiers in Psychology*, 14. URL=<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1124588>, DOI=10.3389/fpsyg.2023.1124588
13. Majer, J. M., Barth, M., Zhang, H., van Treek, M., Trötschel, R. (2021). Resolving Conflicts Between People and Over Time in the Transformation Toward Sustainability: A Framework of Interdependent Conflicts. *Frontiers in Psychology*, 12. URL=<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2021.623757>, 10.3389/fpsyg.2021.623757
14. Maslow, A. H. (1943). A Theory of Human Motivation, *Psychological Review*, 50, 370–396. <https://psychclassics.yorku.ca/Maslow/motivation.htm>
15. May, R. (2015). *The Meaning of Anxiety*. W. W. Norton & Company. ISBN: ISBN-13: 978-0393350876
16. Quan, F., Gou, Y., Gao, Y. et al. (2024). The Relationship Between Neuroticism and Social Aggression: a Moderated Mediation Model. *BMC Psychol*, 12(443), <https://doi.org/10.1186/s40359-024-01938-9>
17. Toncheva-Zlatkova, V. (2023). The Conflict: Types and Mode of Action. *Journal of Management Sciences and Applications*, 11, 255–264. 10.37075/JOMSA.2023.2.07
18. Widiger, T. A, Oltmanns, J. R. (2017). Neuroticism is a Fundamental Domain of Personality with Enormous Public Health Implications. *World Psychiatry*, 16(2), 144–145. doi: 10.1002/wps.20411

19. Wiebe, J. D., Song, A., Layala, M. D. (2018). What Mechanisms Explain the Links Between Personality and Health?. Neuroticism, Personality and Disease, Academic Press, 223-245. <https://doi.org/10.1016/B978-0-12-805300-3.00012-8>.
20. Yingshan, B., Zhu, F., Hu, Y., Cui, N. (2016). The Research of Interpersonal Conflict and Solution Strategies. Psychology, 07, 541-545. 10.4236/psych.2016.74055.

*The article has been submitted for publication: 14.01.2025*  
*Հոդվածը ներկայացվել է տպագրության. 14.01.2025*

*The article is sent for review: 19.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 19.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# AFRICAN–AMERICAN VERNACULAR ENGLISH: LINGUISTIC STRUCTURE, HISTORY, AND SOCIAL IMPLICATIONS

**GOHAR GRIGORYAN**

International Scientific–Educational Center of the  
National Academy of Sciences of the Republic of Armenia  
Head of the Chair of Foreign Languages  
PhD in Philological Sciences, Associate Professor  
*gohar.grigoryan@isec.am*

**LILIT MANVELYAN**

International Scientific–Educational Center of the  
National Academy of Sciences of the Republic of Armenia  
Instructor of English for Specific Purposes  
*lilit.manvelyan@isec.am*

**DOI: 10.54503/2579–2903–2025.1–31**

## **Abstract**

There have been numerous debates about African–American Vernacular English (AAVE), the most widely studied American English variety primarily spoken by African–Americans. This paper explores the nature of AAVE, trying to reveal it as a distinct linguistic variety and identity marker, highlighting its sociolinguistic implications and its relation to Standard English (SE). AAVE’s origins are revealed in the study through the dialectologist hypothesis, which traces its features to non–standard British dialects, and the Creole hypothesis, which links it to Creole languages formed during the transatlantic slave trade. Its lexical impact on Standard American English (SAE) is evident through the widespread adoption of AAVE–originated vocabulary in mainstream discourse facilitated by pop culture and digital media. The research analyses the existing literature, comparing AAVE with SAE in terms of phonology and syntax, drawing from the scholarly works of Rickford, Green, and Morgan. The findings of the study indicate that AAVE’s linguistics features, including copula deletion, negative concord, aspectual markers, and subject–auxiliary inversion, illustrate its complexity and rule–governed nature.

Furthermore, the study addresses the social implications of AAVE in the framework of public performance by middle–class African–Americans, as well as the widespread linguistic discrimination Africans face together with the educational challenges they encounter. Public performances of political leaders such as Barack Obama, Martin Luther King, and well–known talk show host Oprah Winfrey have been analyzed, emphasizing their sociolinguistic code–switching ability where speakers adjust their pronunciation and shift between different linguistic styles and dialects based on audience and context. Research outcomes prove that AAVE has deep historical and cultural roots; thus, it needs proper recognition and



valuation for linguistic equity. The findings underscore the necessity of integrating the contrastive analysis teaching method to bridge the linguistic gap between AAVE and SAE. This will promote linguistic justice and inclusivity, particularly in educational frameworks, where code-switching and contrastive approaches can enhance literacy and academic performance.

**Keywords:** AAVE, SE, creole, dialect, linguistic structure, aspectual markers, lexical contribution, middle-class African-Americans, identity marker, public speech, code-switching.

## ԱՖՐՈԱՄԵՐԻԿՅԱՆ ԺՈՂՈՎՐԴԱԿԱՆ ԱՆԳԼԵՐԵՆ. ԼԵԶՎԱԲԱՆԱԿԱՆ ԿԱՌՈՒՑՎԱԾՔԸ, ՊԱՏՄՈՒԹՅՈՒՆԸ ԵՎ ՍՈՑԻԱԼԱԿԱՆ ԴՐՍԵՎՈՐՈՒՄՆԵՐԸ

### ԳՈՀԱՐ ԳՐԻԳՈՐՅԱՆ

ՀՀ գիտությունների ազգային ակադեմիայի  
գիտակրթական միջազգային կենտրոնի  
օտար լեզուների ամբիոնի վարիչ,  
բանասիրական գիտությունների թեկնածու, դոցենտ

*gohar.grigoryan@isec.am*

### ԼԻԼԻԹ ՄԱՆՎԵԼՅԱՆ

ՀՀ գիտությունների ազգային ակադեմիայի  
գիտակրթական միջազգային կենտրոնի  
մասնագիտական անգլերեն լեզվի դասախոս

*lilit.manvelyan@isec.am*

### Համառոտագիր

Աֆրոամերիկյան ժողովրդական անգլերենը (այսուհետ՝ ԱԱԺԱ)՝ ամերիկյան անգլերենի ամենաշատ ուսումնասիրված տարատեսակը, որը հիմնականում օգտագործում են աֆրոամերիկացիները, դարձել է բազմաթիվ քննարկումների առարկա: Հոդվածում ուսումնասիրվում է ԱԱԺԱ -ի բնույթը՝ բացահայտելով այն որպես առանձին լեզվական տիպ և ինքնության ցուցիչ, ընդգծելով դրա սոցիալ-լեզվաբանական նշանակությունը և կապը ստանդարտ անգլերենի հետ: Ուսումնասիրության շրջանակներում ԱԱԺԱ-ի ծագումը դիտարկվում է երկու վարկածների միջոցով՝ բարբառագիտական, որը կապում է դրա առանձնահատկությունները ոչ ստանդարտ բրիտանական բարբառների հետ, և կրեոլյան, որը կապում է դրա ծագումը կրեոլյան լեզուների հետ, որոնք ձևավորվել են տրանսատլանտյան ստրկավաճառության շրջանում: ԱԱԺԱ-ի բառապաշարային ազդեցությունը ստանդարտ ամերիկյան անգլերենի վրա դրսևորվում է հիմնական խոսույթում ԱԱԺԱ-

ից փոխառված մի շարք բառերի լայն տարածմամբ, ինչին նպաստում են փոփ մշակույթը և թվային լրատվամիջոցները: Հոդվածում վերլուծվում է առկա գիտական գրականությունը՝ ԱԱԺԱ-ն համեմատվում է ստանդարտ ամերիկյան անգլերենի հետ հնչյունաբանության և շարահյուսության տեսանկյուններից՝ հիմք ընդունելով Ռիքֆորդի, Գրինի և Մորգանի գիտական աշխատությունները: Ուսումնասիրության արդյունքները ցույց են տալիս, որ ԱԱԺԱ-ի լեզվական առանձնահատկությունները, այդ թվում՝ օժանդակ բայի բացակայությունը, կրկնակի ժխտումը, կերպիմաստային ցուցիչները և ենթակայի ու օժանդակ բայի շրջադասությունը, վկայում են դրա բարդության և կանոնակարգված բնույթի մասին:

Այնուհետև հոդվածում դիտարկվում են ԱԱԺԱ-ի սոցիալական դրսևորումները միջին խավի աֆրոամերիկացիների հրապարակային խոսքում, ինչպես նաև լայնորեն տարածված լեզվական խտրականության և կրթական դժվարությունների խնդիրները, որոնց բախվում են աֆրոամերիկացիները: Վերլուծվում են քաղաքական առաջնորդների, ինչպիսիք են Բարաք Օբաման և Մարտին Լյութեր Քինգը, ինչպես նաև հայտնի թոք-շոուի հաղորդավար Օփրա Ուինֆրիի, հրապարակային ելույթները՝ ընդգծելով նրանց սոցիալ-լեզվաբանական կողափոխման ունակությունը, երբ խոսողը հարմարեցնում է իր արտասանությունը և անցում կատարում տարբեր լեզվական ոճերի ու բարբառների՝ կախված լսարանից և համատեքստից: Ուսումնասիրության արդյունքները ապացուցում են, որ ԱԱԺԱ-ն ունի խորը պատմական և մշակութային արմատներ, ուստի՝ այն պետք է արժանանա պատշաճ ճանաչման և գնահատման՝ լեզվական իրավահավասարության ապահովման նպատակով: Արդյունքներն ընդգծում են կրթական գործընթացում ԱԱԺԱ-ի և ստանդարտ ամերիկյան անգլերենի միջև լեզվական բացը լրացնելու համար հակադրողական վերլուծության ուսուցման մեթոդի ներմուծման անհրաժեշտությունը: Դա կնպաստի լեզվական արդարությանը և ներառականությանը, հատկապես կրթական միջավայրում, որտեղ կողափոխումը և հակադրողական մոտեցումները կարող են բարձրացնել գրագիտության մակարդակը և ակադեմիական առաջադիմությունը:

**Քանալի բառեր**՝ աֆրոամերիկյան ժողովրդական անգլերեն (ԱԱԺԱ), ստանդարտ անգլերեն, կրեոլ, բարբառ, լեզվաբանական կառուցվածք, բառապաշարային հարստացում, միջին խավի աֆրոամերիկացիներ, ինքնության ցուցիչ, հրապարակային խոսք, կողափոխում:

**Introduction to the Theoretical Frameworks and Historical Background of AAVE**

AAVE is a unique and original language that has gained significant scholarly and popular interest due to its distinctiveness and ubiquity in African-American literature, music, life, and culture. AAVE has been referred to as a linguistic variety of English spoken by African-Americans. Definitions and terminology used to describe AAVE have varied for around fifty years. “Negro dialect, Nonstandard English, Black English, Vernacular English...” and still other identifiers have been used to define the variety of English spoken by African-Americans. In the early

1970s the term “Vernacular” became more popular as a less negative way to indicate that not every variety of English spoken by African-Americans is included in it. Linguistic scholar and activist Geneva Smitherman (1977) defined AAVE as “an Africanized form of English reflecting Black America’s linguistic-cultural African heritage and the conditions of servitude, oppression, and life in America” (p. 2). Alternative terms like “Ebonics” and “African-American Language” are also associated with AAVE. Studies (Rickford, 1999; Green, 2002) indicate that Ebonics was developed as a primary means of communication between Black slaves and their white masters. Black individuals were sent to America from different countries and subjected to enslavement, however they were unfamiliar with the language of their masters and the native inhabitants of America. They began to blend their dialects with the existing dialects in the region. Both the terms “Ebonics” and “African-American Language” emphasize African ancestral roots and oppose classifying AAVE as a “dialect” of English (Rickford, 2003, pp. 41–42).

The origins of AAVE have been widely debated among linguists due to comparative data from English adaptation in the Diaspora, Caribbean Creoles, and other varieties of English. Due to limited information, various theories regarding the origins and development of the dialect are considered. There are two predominant theories – the Dialectologist Hypothesis, which suggests that AAVE developed from non-standard British dialects, and the Creole Hypothesis, which posits that AAVE evolved from a Creole language formed by African slaves who blended English vocabulary with African grammatical structures (McWhorter, 1998). These theoretical frameworks provide the foundation for understanding the historical development of AAVE and its socio-cultural significance.

**The Dialectologist Hypothesis**, prevalent in linguistic research in the 1940s, argues that AAVE is a descendant of non-standard British and Irish dialects spoken by early English settlers in North America (Bailey & Maynor, 1985). Proponents of this theory assert that many features of AAVE, such as consonant cluster reduction and grammatical structures, can be traced to regional English varieties spoken in England, Scotland, and Ireland during the colonial period. For example, linguistic similarities between AAVE and particular British dialects include the omission of the third-person singular present tense marker (-s) (e.g., He walk instead of He walks.), multiple negation (e.g., I don’t know nothing instead of I don’t know anything.) and copula deletion (e.g., He Ø happy instead of He is happy.). While this hypothesis explains some features of AAVE, it does not account for the significant grammatical structures unique to AAVE, such as aspectual markers (e.g., be, BIN).

**The Creole Hypothesis** posits that AAVE originated as a Creole language during the transatlantic slave trade, when African slaves, who spoke different native languages, developed a pidgin to communicate with each other and their English-speaking enslavers (Rickford, 1999). Over time, this pidgin became a stable creole. As African-Americans became more integrated into American society, the Creole underwent a process of decreolisation, gradually assimilating to English while retaining distinct syntactic and phonological features. Key evidence supporting the

Creole Hypothesis includes the aspectual markers (e.g. He been sick. meaning He has been sick. in SE; He finna go. meaning He is about to go. in SE) specific to AAVE that differentiate habitual, completed, and ongoing actions, which resemble features found in West African languages (Morgan, 2002, pp. 10–14). The Creole Hypothesis provides a compelling argument for the African linguistic influence on AAVE and its role in shaping African–American identity and culture. Green (2002) discusses the “substratist hypothesis” which goes in line with the Creole hypothesis suggesting that AAVE has limited features that are similar to general English and that it is directly related to West African languages with its distinct sentence and sound structure.

### **Linguistic Structure of AAVE**

AAVE has been a subject of significant interest for linguists due to its distinctiveness, popularity in African–American literature, music, life, and culture, its connection with African–American students’ educational crises, and the descriptive challenges and historical puzzles it poses for sociolinguists and variationists. AAVE exhibits systematic and rule–governed linguistic features across phonology, morphology, syntax, and pragmatics, distinguishing it from SAE and other English varieties. AAVE’s phonological and grammatical features are often shared with other metropolitan English dialects but are more frequently used in AAVE than in other American dialects. It exhibits distinct phonological features such as several systematic sound patterns that impact consonant clusters, vowel pronunciation, and prosody, as well as unique morphological patterns, particularly in verb inflexion, pluralisation, possessive constructions, and pronoun usage (Green, 2002; Rickford, 1999). The phonological and morphological patterns of AAVE demonstrate the expressive power of AAVE, its structural complexity, indicating its consistency as a distinct linguistic variety rather than a deviation from SAE. AAVE is a prime example of the orderly heterogeneity that is fundamental to sociolinguistics, with studies showing that many of its features are sharply stratified among African–American working–class and underclass speakers.

Some of AAVE’s characteristic phonology, such as the monophthongisation of [ai] (*[ra:d]* ‘ride’) or the neutralisation of [i] and [ɛ] before nasals (*[pin]* ‘pin’ or ‘pen’), are shared by Southern white dialects, too, reflecting the fact that 90% of the African–American population was concentrated in the South until 1900. However, AAVE does have more distinctive phonological features, such as the rule of deleting initial voiced stops in several tense–aspect auxiliaries (e.g., the unique use of *ain’t* for ‘didn’t’, or the realisation of *I don’t know* as [a ð no] and *I’m going to do it* as [ã mə du it]) (Rickford, 2003, p.42).

Grammatically, the most distinctive features of AAVE are in the verb phrase. They include the absence of present tense forms of the copula, the use of a wide range of preverbal tense–aspectual markers, multiple negation, the inversion of negative auxiliaries with indefinite pronoun subjects in declarative sentences, the use of *say* in serial verb–like constructions to introduce the complement of verbs like *tell*, existential *it* and *dey got*, and the absence of possessive –s (Mary boychild)

and of third person singular present tense *-s* (he walk a lot). These features are also found in other English varieties, especially in the USA South (Rickford, 2003, pp. 41–42). Key syntactic features in AAVE verb phrases include *copula deletion*, *subject-auxiliary inversion*, *existential constructions*, *negative concord*, and *aspectual markers*.

**Copula/auxiliary absence:** auxiliaries are often left out in statements and questions, as in ‘They  $\emptyset$  walking too fast’ for SE ‘They are walking too fast’, or ‘ $\emptyset$  Bob left?’ for SE ‘Has Bob left?’ (Russell, 2018, p.65). This pattern is systematic and follows specific grammatical rules. Rickford (1999, p.6) states that copula absence is for present states and actions. Research has shown that this phenomenon is consistent with copula variation in other Creole languages and English-based pidgins, suggesting historical connections between AAVE and West African linguistic influences (Rickford, 1999; Green, 2002).

**Negative concord (Double Negation):** AAVE features negative concord, commonly referred to as “double negation,” where multiple negative elements in a sentence reinforce negation rather than cancelling each other out, as in SAE. This structure is also found in many Roman languages, such as French and Spanish, indicating that negative concord is a natural linguistic phenomenon rather than an error (Labov, 1972; Green, 2002).

E.g.: *She don’t know nothing. (SAE: She doesn’t know anything.)*  
*I ain’t never been there before. (SAE: I have never been there before.)*

Negative concord in AAVE is highly systematic: all indefinite pronouns (*nothing*, *nobody*, *nowhere*) must agree in negation with the auxiliary verb (*don’t*, *ain’t*) (Green, 2002).

**Invariant “Be” and Aspect Marking:** AAVE has a sophisticated aspect system that includes invariant *be*, which marks recurring actions rather than simple present tense. Unlike SAE, where *be* is typically a linking verb or part of a future construction (e.g., *I will be there*), in AAVE, *be* is an aspectual marker that expresses habituality (Rickford, 1999).

E.g.: *She be working late. (SAE: She usually works late.)*  
*They be hanging out at the park. (SAE: They habitually hang out at the park.)*

E.g.: *She be working late. (SAE: She usually works late.)*  
*They be hanging out at the park. (SAE: They habitually hang out at the park.)*

The habitual *be* is distinct from unstressed *been*, which marks past events, and from the present progressive, which lacks *be*. The omission of *be* in other contexts (e.g., *She working late*) indicates a present progressive meaning rather than habituality (e.g., *She working late* means she is doing so right now, not habitually) (Green, 2004, p.80).

**Unstressed “been”:** The unstressed form of *been* functions similarly to the present perfect in SAE but without the auxiliary verb *have*. This form indicates that something happened in the past, but unlike stressed *BIN*, it can co-occur with time adverbials.

E.g.: *I been seen that movie.* (I have already seen that movie.)

This form is particularly useful in AAVE for marking events as past without additional words like *already* (Rickford, 1999, p.6).

**Subject–Auxiliary Inversion in Embedded Questions:** Unlike SAE, AAVE often allows subject–auxiliary inversion in embedded (indirect) questions. This feature is common in Creole languages and suggests structural differences between AAVE and SAE (Labov, 1972; Rickford, 1999).

E.g.: *I asked him did he go to the store.* (SAE: *I asked him if he went to the store.*)

*I wonder can she do it.* (SAE: *I wonder if she can do it.*)

This construction, which is also found in some Southern English dialects, reinforces the syntactic independence of embedded clauses in AAVE (Green, 2002).

**Existential “It” and “They”:** AAVE frequently uses existential *it* or *they* instead of *there is* or *there are* to indicate the existence of something. This construction is found in various creoles and non–standard English dialects (Rickford, 1999; Green, 2002).

E.g.: *It’s a lot of people here today.* (SAE: *There are a lot of people here today.*)

*They some good musicians.* (SAE: *They are good musicians.*)

This variation in existential constructions suggests different syntactic strategies for indicating presence or existence in AAVE.

**Preterite “Had” in Past Narratives:** AAVE frequently employs preterite *had* in narratives where SAE would use the simple past tense. This structure emphasises or marks past events sequences in storytelling (Labov, 1972; Rickford, 1999).

E.g.: *She had went to the store and bought some milk.* (SAE: *She went to the store and bought some milk.*)

*We had saw him last week.* (SAE: *We saw him last week.*)

Unlike the past perfect in SAE (*had gone*), AAVE’s preterite *had* does not necessarily require two past actions. Instead, it often appears in single–event past constructions as a stylistic or narrative device (Green, 2002).

### Aspectual and Verbal Markers

Aspectual markers in AAVE are crucial for expressing nuanced distinctions in tense, aspect, and habituality. Unlike SAE, AAVE has a rich aspectual system with preverbal markers indicating ongoing, completed, or habitual actions. AAVE speakers use aspectual markers to convey precise temporal and habitual distinctions, a grammatical system often overlooked as “incorrect” English, reflecting a structured and systematic approach to expressing aspect.

**Stressed “BIN” (Remote Past or Perfective Aspect):** The use of stressed *BIN* in AAVE marks an action that has been true for a long time and remains relevant. This is different from unstressed *been* in SAE, which simply indicates past action. The key difference in AAVE is the stress on *BIN*, which conveys that something happened a long time ago and is still the case.

E.g.: *She BIN married.* (She has been married for a long time.) (Rickford,

1999, p.6).

**“Done”/“Dən” (Perfective or Completive Aspect):** The preverbal marker *done* in AAVE signifies that an action is fully completed. This usage is similar to the present perfect in SAE (*has already*), but it does not require an auxiliary verb. Instead, *done* itself functions as a perfective aspect marker to indicate that an event has been concluded (Labov, 1972).

E.g.: *He done ate all the food.* (He has completely finished eating all the food.)

*She done lost her keys.* (She has already lost her keys.).

**“Finna” (Imminent Future):** *Finna* is used to mark the immediate future. It functions similarly to *about to* in SAE but is more commonly used in informal speech.

E.g.: *I’m finna leave.* (I’m about to leave.)

**“Steady” (Intensive Continuative Aspect):** The aspectual marker *steady* conveys the idea that an action is persistent, intense, and unchanging over time. This is used after invariant habitual *be*, but before a progressive verb (Rickford, 1999, p. 6).

E.g.: *She steady talking on the phone.* (She keeps talking on the phone persistently.)

**“Come” (Indignant or Unexpected Action):** The use of *come* as an aspectual marker expresses indignation, criticism, or an unexpected or unwelcome action. This is unique to AAVE and has no direct equivalent in SAE.

E.g.: *She come walking in here like she own the place.* (She walked in unexpectedly and arrogantly.) This construction adds an emotional or attitudinal layer to the statement, indicating that the speaker disapproves of the action (Green, 2002, p.73).

The above-mentioned examples illustrate that AAVE’s syntactic structure is not simply a deviation from SAE but rather a complex and rule-governed system with internal consistency. The patterns of *copula absence*, *negative concord*, *invariant be*, *subject-auxiliary inversion*, *existential constructions*, and *preterite had* illustrate how AAVE systematically marks tense, aspect, and negation in ways that are distinct from SAE. Far from being “incorrect” or “broken” English, AAVE follows predictable grammatical patterns that align with linguistic features found in creoles, African languages, and other non-standard English dialects (Labov, 1972; Rickford, 1999; Green, 2002). These syntactic features reinforce the legitimacy of AAVE as a fully developed linguistic variety with historical, cultural, and social significance. Future research should explore the influence of AAVE on other English varieties and its role in language variation and change.

### **Linguistic impact of AAVE on SE**

AAVE has had a lasting influence on SE, challenging rigid distinctions between “vernacular” and “standard” language. It has been a source of phonology, grammar, vocabulary, discourse styles, and performative language practice, which have gradually been adopted into mainstream English, especially in informal and

media-driven contexts. Instead of viewing AAVE as a separate or “non-standard” variety, Weldon highlights how it has contributed to linguistic innovation and enriched American English as a whole. Studies (Nguyen, 2006 & Grieser, 2014) indicate that AAVE is a linguistic innovator, introducing features that are later adopted into mainstream English. Some AAVE phonological features are integrated into more standard varieties of English, often through middle-class speakers who balance between vernacular and mainstream norms. Phonological contributions include changes in pronunciation and speech patterns, such as final consonant cluster reduction, monophthongisation of /ay/, glide reduction, and fronting of /ʊ/. These features have been widely adopted in SE, particularly in casual or colloquial varieties. Specific grammatical structures that originated in AAVE have influenced SE, particularly in informal speech and creative expression. Grammatical contributions include the use of invariant *be*, negative concord (double negatives), preterite *had* for past tense, and copula absence. While SE does not fully accept these features, similar structures appear in storytelling and casual speech.

In the present era cultural borrowing is a common practice in the United States, and it provides ample opportunities for mainstream speakers to borrow black verbal expressions. AAVE has significantly enriched the lexicon of SE, with many words and expressions originating in Black communities becoming widely accepted in mainstream discourse. Lexical contributions include new words and phrases that have been adopted into SE through pop culture, hip-hop, social media and digital communication. Popular daytime talk shows such as Ricki Lake and Jenny Jones, African-American music videos and commentary aired on MTV and BET, and young-oriented African-American films have become major components of American popular and youth culture over the past several years (Lee, 1999, p. 371). Slang words, idiomatic expressions, and culturally significant phrases like “**cool**” (excellent), “**bad**” (good), “**chill**” (relax), “**crib**” (home), “**funky**” (stylish), “**bling**” (jewellery), “**dope**” (great), “**lit**” (exciting), “**woke**” (socially aware), “**finna**” (about to), “**lit**” (exciting or enjoyable) and “**salty**” (bitter) have crossed into mainstream English, particularly through music, television, and social media (ICLS, 2024). Similarly, expressions such as “**I feel you**” (I understand you), “**Stay woke**” (Stay aware, don’t be fooled), “**Throwing shade**” (subtly criticise) and “**It’s all good**” (No problem, no worries) have transitioned from AAVE as niche linguistic elements to SE and are widely recognised and utilised by everyone. Linguist Lee (1999) closely examined borrowings from black English that have gained general usage providing a list of 69 words and expressions found in mainstream journals (mainly from the *Daily Press*). These expressions derive from the African-American four significant historical and cultural periods: Slavery through the 1920s (1600s–1920s), Jazz (1930s–40s), Civil Rights (1950s–60s), and Rap (hip-hop) (1980s–90s) (Lee, 1999, p. 373). Below are some of the most frequently used words and expressions with their meanings in SE (found in the *Daily Press*) that Lee observed in her study (Lee, 1991 pp. 381–386):

**Cool** (meaning *relaxed, okay, excellent, great*) e.g., *This makes me wonder: if old things are cool, could I become cool again?*



**Hip** (meaning *knowledgeable, aware, sophisticated*) e.g., *ABC changes image with smart, hip, star-studded ads*

**Gig** (meaning *Jazzman's job; any job*) e.g., *And what does he think of his new gig?*

**Boogie** (meaning *dance, celebrate*) e.g., *No way they can hide Newt [Gingrich], who was born to boogie.*

**Hot** (meaning *Exciting*) e.g., *No doubt you've read about the Hot New trend among "with it" 20-something people ...*

**Right on!** (meaning *Cry of approval, affirmation*) e.g., *... freedom means having power... to control circumstances of one's own life. Right on, we say.*

**High-five** (meaning *Gesture of agreement or approval in which open palms are slapped together in the air*) e.g., *New Kent high school student Irby Lemons . . . gets a high-five from Jim Kelly after the two hooked up for a touchdown pass Thursday.*

**AAVE's Social Stratification and Influence in Public Discourse**

There have been numerous debates about the frequency of AAVE usage regarding class and race of African-Americans. It has been found that the dialect's features are more common among working-class than middle-class speakers and are more frequent among adolescents than middle-aged speakers (Lewis, 2008, p. 158). Labov's ethnographic and linguistic research in Harlem, New York, focused on how language varied based on social class, identity, and cultural groupings. He examined the speech of different groups of young African-Americans, particularly contrasting those in working-class communities dominated by vernacular cultural norms versus Middle-class speakers ("The Lames") who were socially isolated from street culture and became more influenced by mainstream English as they approached adulthood. This and other similar research indicate that AAVE is a marker of ethnic identity, and middle-class speakers try to adhere to the "rich verbal culture" of the vernacular in order to counterbalance the effects of mainstream assimilation (Labov, 1972). Research suggests that SE does not simply replace AAVE as speakers move up the socioeconomic ladder. Instead, middle-class speakers strategically incorporate AAVE into their speeches. Despite employing SE features, they maintain that the street culture (as defined by sociologists) is essential to the community and reject any attempt to categorise it as either representative or distinct (Morgan, 1994, p. 136).

Middle-class African-American English (AAE) has been examined from the perspective of public performance, emphasising the smooth style transition of notable African-American public leaders. Studies have shown that linguistic practices and ideologies exhibited by these individuals have shaped our understanding of what certain linguistic features mean and how social rules regulate their use in daily and public speech. For example, studies have found that African-American talk show host Oprah Winfrey uses higher rates of /ay/ monophthongisation in high-frequency lexical items when discussing African-American referees, especially in casual and emotional speech settings. Her speech patterns have been influenced by her upbringing in the Southern United States,

where this linguistic feature is prevalent. Monophthongisation occurs when a diphthong like /aɪ/ (as in *my* or *time*) is pronounced as a single vowel sound [a:], making ‘my[aɪ]’ sound like *mah* [ma:] and *time*[taɪm] like *tahm* [ta:m] in motivational speeches or heartfelt moments. While in more formal situations, she uses the corresponding diphthongs [taɪm], [maɪ]). This type of variation aligns with sociolinguistic theories of code-shifting, where speakers adjust their pronunciation based on audience and context. As Gumperz (1982) defines “Conversational code switching can be defined as the juxtaposition within the same speech exchange of passages of speech belonging to two different grammatical systems or subsystems” (p. 59). In her surprise appearance at the 2024 Democratic National Convention (DNC), Oprah delivered a powerful speech endorsing Kamala Harris (Watch: Oprah Winfrey’s full speech at the 2024 DNC). The analysis of this speech reveals instances of monophthongisation:

“I am so honored...” → [a: æm] I am (min 0:35)

“...we are all in the same boat *now*.” → [na:] now (min 1:54)

“... *I’ve* seen racism and sexism...” → [a:v] I’ve (min 3:24)

These examples illustrate how Oprah’s Southern linguistic heritage influences her pronunciation, particularly in high-frequency words like *I* and *now*.

There are other AAVE features frequently used by popular political figures. Former US president Barack Obama often shifts between linguistic styles or dialects depending on the social context. Although in formal situations he adheres to SA, in less formal situations he has been observed to use AAVE features. In 2012 before an exhibition game against Brazil, President Obama visited the Team USA men’s basketball locker room (Behind the Scenes with President Obama & Team USA Basketball), where he greeted LeBron James with a hug, saying, “*What’s up, champ?*” (min 0:16) using “*champ*” as an informal term of endearment and respect. Obama adapted his language to communicate with the players. He used informal language and cultural references familiar to the athletes, demonstrating his ease in shifting linguistic registers. He addressed the staff with “*y’all*,” a common Southern and AAVE expression used to address a group of people meaning “you-all”. He constructed his sentence with copula/auxiliary absence, which is a typical AAVE syntactic feature, saying “*If you don’t listen you going shave*” (min 0:28) leaving out the auxiliary *are*. Then he said “*I know you guys got to concentrate, we just want to come by say hello, say congratulations...*” (min 0:33). In the latter sentence he used popular AAVE word “*got to*” which indicates “*have to*”. In SE “*have got to*” is similarly used with the same meaning, however the omission of “*have*” is characteristic to AAVE speakers. Besides, in the same sentence Obama omitted the indefinite particle “*to*” when saying “*we just want to come by say hello*”, another AAVE common feature. Another instance of AAVE usage was observed during his “White House to Main Street” tour in Savannah Georgia in 2010 (Raw Footage: President Obama’s Surprise Lunch Stop), when President Obama makes a surprise lunch stop at the famous Mrs. Wilkes’ Boarding House restaurant. In his informal conversation he said “*...now we got to do some hard things*” (min. 1:44) meaning “*...now we have to do some hard things*”. The phrase ‘got to’ is a common AAVE

expression that is commonly used in colloquial English. In AAVE, however, it is used with copula deletion (omitting forms of “to be”).

Many AAVE feature usage instances were highlighted by Analysing Martin Luther King’s 1968 speech of “I’ve Been to the Mountaintop” (I Have Been to the Mountaintop Full Speech). This speech exemplifies his masterful use of AAVE features, enhancing his connection with the audience and reinforcing his message. Below are some examples from the speech.

**Consonant Cluster Reduction:** This is the simplification of consonant clusters in words that contain two consonants. E.g.:

“You reveal that you are determined to go on anyhow.” → (Pronounced as /di’tɜ:mi:n/ with a softer or omitted final consonant) (min 1:09)

“We got some difficult days ahead.” → (Pronounced as /’dɪf.i.kət/) (min 41:52)

“Let us move on in these powerful days.” → (Pronounced as /’paʊfəl/pow’ful) (min 35:03)

**Use of “Ain’t” for Emphasis:** Ain’t is a classic AAVE grammatical feature used for emphasis. It replaces *aren’t* or *isn’t*.

E.g.: “...I say we *ain’t* going to let dogs or water hoses turn us around, we *ain’t* going to let anything turn us around.” (min 18:15).

**Dropping the final “g”:** this is a phonological reduction when the final -ing is pronounced as [-in’].

E.g.: talkin’, somethin’, warnin’, standin’) (min 00:25 – 01:35)

**Absence of third singular present tense -s:**

E.g.: “it don’t matter now.” it really don’t matter what happens now. (min 40:42)

Thus, the above-mentioned examples illustrate that AAVE has different manifestations in the public discourse. It is a critical social force affecting literature, music, media, communication, social perceptions, racial behaviour, and systemic structures such as education, employment, and legal frameworks. Critics are deeply concerned that the educational application of AAVE still increases segregation between linguistic groups and hinders prospects for advancement in society. Some argue that its presence in the classroom causes lower academic achievement among African-American students. In contrast, others advocate teaching SE by using their dialect as a foundation. AAVE speakers often face problems in professional fields as well as judicial environments because of language-prejudice-driven discrimination that affects both employment opportunities and fair treatment in legal systems. These issues continue to persist and need additional investigation in future academic research.

**Conclusion**

The historical, cultural, and social experiences of African-Americans are reflected in the complex and dynamic language of AAVE, which AAVE has developed through complex sociolinguistic processes, influencing and being influenced by the cultural expressions of its speakers. The misconceptions that Africans, speaking

many languages, had lost all traces of their linguistic background, heavily criticized and marginalized AAVE. However, linguistic analyses indicate that it should be considered an authentic language variety originating from African languages and English dialects. It is characterized by unique grammatical structures and phonological features, functioning as an organized linguistic system rather than a mere deviation from English. AAVE is a significant source of lexical innovations in SE due to its presence in hip-hop, literature, and social media. It is widely used in public speeches by famous African-Americans. Recognizing it as a genuine linguistic system is crucial for promoting inclusivity and linguistic equity in societal contexts.

## References

1. Bailey, G., & Maynor, N. (1985). The divergence controversy. *American Speech*, 60(1), 12–30.
2. Green, L. (2002). *African American English: A linguistic introduction*. Cambridge University Press.
3. Green, L. (2004). African American English. In E. Finegan & J. R. Rickford (Eds.), *Language in the USA: Themes for the twenty-first century* (pp. 76–91). Cambridge University Press.
4. Gumperz 1982. *Discourse Strategies*. Cambridge: Cambridge University Press.
5. ICLS (International Corpus of Linguistic Studies). (2024). The influence of African American Vernacular English on Standard English. *Linguistic Research Journal*, 39(2), 215–238. <https://www.icls.edu/blog/african-american-vernacular-why-it-matters-in-language-learning>
6. Labov, W. (1972). *Language in the inner city: Studies in the Black English vernacular*. University of Pennsylvania Press.
7. Lewis, L. (2008). African American Vernacular English. Ronald E. McNair Post-Baccalaureate Degree Program, 155–165
8. McWhorter, J. (1998). Identifying the creole prototype: Vindicating a typological class. *Language*, 74(4), 788–818.
9. Morgan, M. (2002). *Language, discourse and power in African American culture*. Cambridge University Press.
10. Morgan, M. (1994). *The African-American speech community: Reality and sociolinguistics*. Oxford University Press.
11. Nguyen, S. (2006). African American English and linguistic innovation. *Journal of Language Variation*, 18(3), 311–328.
12. Rickford, J. R. (1999). *African American Vernacular English: Features, evolution, educational implications*. Blackwell.
13. Rickford, J. R. (2003). *Language in the USA: Themes for the twenty-first century*. Cambridge University Press.
14. Smitherman, G. (1977). *Talkin and Testifyin*. Detroit: Wayne State University Press.
15. Weldon, T. L. (2021). *Middle-class African American English*. Cambridge University Press. <https://doi.org/10.1017/9781139021531.002> Websites
16. Watch: Oprah Winfrey’s full speech at the 2024 DNC By Jennifer Earl Updated on: August 22, 2024 / 12:30 AM EDT / CBS News <https://www.cbsnews.com/news/watch-oprah-winfreys-full-speech-2024-dnc-transcript/> last seen 11/03/2025
17. Behind the Scenes with President Obama & Team USA Basketball <https://www.youtube.com/watch?v=a7fjQHdMqY4> last seen 11/03/2025

18. I Have Been to the Mountaintop Full Speech <https://www.youtube.com/watch?v=ixfwGLxRJU8> last seen 11/03/2025
19. Raw Footage: President Obama's Surprise Lunch Stop
20. <https://www.youtube.com/watch?v=ITgFb6L1DDg> last seen 19/03/2025

*The article has been submitted for publication: 21.01.2025*  
*Հոդվածը ներկայացվել է փայագրոթյան. 21.01.2025*

*The article is sent for review: 25.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 25.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է փայագրոթյան. 31.03.2025*

## **ANALYSIS OF WORD CHOICE AND COMBINATION IN ADVERTISING DISCOURSE**

**NARINE VARDANYAN**

International Scientific-Educational Center of NAS RA,  
PhD of Philological Sciences,  
Associated Professor at ISEC NAS RA  
*narine.vardanyan@isec.am*

**LIANA SARGSYAN**

Yerevan State University, PhD of Philological Sciences,  
Associated Professor at YSU  
*sargsyanlian@mail.ru*

**ARSEN VARDANYAN**

Yerevan State University  
*arsenvardanian11@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-45**

### **Abstract**

The discourse surrounding advertisement language style is noteworthy in contemporary communication processes. This survey explores several facets, elucidating key dimensions within this domain. The survey underscores the significance of determining the dominant theme and motivational elements intended for brand advertising. Notably, family-related themes emerge as the preference among most respondents, particularly in the context of construction material or confectionery advertisements. Findings indicate that protracted texts, laden with information, lack memorability. The appropriateness of such comprehensive textual content in advertisements is questioned, suggesting a propensity among audiences for concise and impactful messaging. The study discerns the establishment of a distinct influence milieu within advertisements through the deployment of spoken units. Noteworthy is the cultivation of word collocations, which evolved into an indispensable marketing attribute. Within this paradigm, food brand slogans such as «Do Snickers,» «Coca-Cola Forever,» and «Chosen grain: The secret of the taste» stand out, showcasing the potency of language in fostering memorability. The survey underscores the criticality of word selection and collocation in advertising. Remarkably, the strategic pairing of words and the employment of specialized vocabulary to enhance persuasive appeal exhibit a profound impact. Noteworthy instances include food brand slogans, which are highly memorable linguistic constructs. In synthesizing survey statistics, a discernible societal inclination toward family-related themes in construction

material and confectionery advertisements is evident. Furthermore, the study posits that the social-psychological proclivity of the populace is distinctly polarized toward the food industry, a phenomenon satisfactorily addressed by current advertising practices. This research contributes substantively to our understanding of the nuanced interplay between advertisement language, societal preferences, and cognitive responses, thereby advancing the scholarly discourse in this domain.

**Keywords:** Language of advertisement text, topic selection, collocation, unusual word combinations, compression of speech, colloquial language units.

## **ԲԱՌԸՆՏՐՈՒԹՅՈՒՆԸ ԵՎ ԲԱՌԱՅԻՆ ԶՈՒԳԱԿՅՈՒՄՆԵՐԸ ԱՐԳԻ ՀԱՅԵՐԵՆԻ ԳՈՎԱԶԳԱՅԻՆ ԽՈՍՈՒՅԹՈՒՄ ՆԱՐԻՆԵ ՎԱՐԴԱՆՅԱՆ**

ՀՀ ԳԱԱ միջազգային գիտակրթական կենտրոն,  
բանասիրական գիտությունների թեկնածու, ՀՀ ԳԱԱ ԳԿՄԿ դոցենտ  
*narine.vardanyan@isec.am*

### **ԼԻԱՆԱ ՍԱՐԳՍՅԱՆ**

Երևանի պետական համալսարան,  
բանասիրական գիտությունների թեկնածու, ԵՊՀ դոցենտ  
*sargsyanlian@mail.ru*

### **ԱՐՄԵՆ ՎԱՐԴԱՆՅԱՆ**

Երևանի պետական համալսարան  
*arsenvardanian11@gmail.com*

### **Համառոտագիր**

Հոդվածում ընդհանուր կողմերով ներկայացվում են արդի հայերենի գովազդային տեքստերում բառընտրության և բառազուգորդումների յուրահատկությունները: Խոսքի սեղմության և մատչելիության արժանիքները պահպանելու համար տեքստերում հաճախ գործածվում են համագործածական և խոսակցական բառեր, պատրաստի լեզվակաղապարներ և այլն: Բացի այդ՝ բառընտրության գործում մեծ դերակատարություն ունի թեմայի և թիրախավորված լսարանի հստակ որոշարկումը, քանի որ դրանք են նաև պայմանավորում, թե գովազդն ինչպիսի լեզվական հնարքներով պետք է ներկայացվի: Արդի գովազդներում ունենք սեղմ, հետաքրքրող և ներազդող տեքստեր, որոնք կազմված են ոլորտի «օրենքներով»: Բայց միաժամանակ կան այնպիսիք, որոնք սեղմ ժամանակի մեջ փորձում են մեծ ու սպառիչ տեղեկատվություն տալ՝ առանց նկատի առնելու բառընտրության և խոսքը լսարանին հասցեագրելու խնդիրները: Այս դեպքերում հոդվածում առաջարկվում են երկարաբան տեքստերի շտկման նմուշներ, որոնք կարող են օգտակար լինել հետազայում այդօրինակ սխալներից խուսափելու համար: Առանձնա-

կի ուշադրություն է դարձվում այնպիսի բառերի ու արտահայտությունների զուգակցումներին, որոնք խոսքի՝ հոգեբանական ազդեցության դրսևորումներ են և մեծ ներուժ ունեն խթանելու ապրանքի/ծառայության սպառումը:

**Բանալի բառեր՝** գովազդային տեքստի լեզու, թեմայի ընտրություն, բառակապակցումներ, անսովոր զուգակցումներ, խոսքի սեղմություն, լեզվական սխալ:

## Introduction

Advertising has become an inseparable companion of life, permeating all spheres and inevitably influencing us, piquing our interests, and compelling us to take action. In this regard, advertising discourse, as a crucial component of comparative products, adheres to specific principles concerning its structure and the utilization of linguistic units. These principles encompass topic selection, word choice, and the formation of word combinations. This study is devoted to exploring and analyzing these aspects. Research on advertising texts holds significant relevance for several reasons. Firstly, advertising speech represents one of the most rapidly evolving forms of communication. Advertisements serve as a mirror of societal changes, and in the highly competitive landscape, it becomes necessary to assess the connection between the structure of advertising texts periodically, the usage of linguistic units, and their impact on public perception.

Furthermore, discussing examples of successful or unsuccessful brand advertisements offers valuable opportunities for advertising specialists to stay abreast of prevailing trends. It allows them to fine-tune their language tools to effectively influence diverse social groups and navigate the nuances of their usage. After all, in the ever-changing world of advertising, there is always a need to follow the tricks of wordsmithing, the internal patterns of coexistence of the topic and the word chosen to advertise the product, and the prevailing trends in the design of advertising speech.

**The novelty of this research** lies in the fact that in the Republic of Armenia, there is currently no comprehensive study available that provides practical guidance on various aspects of advertising text, such as its structure, composition, topic selection, vocabulary, word combinations, rhetorical devices, and other related issues. This article fills that gap by offering explicit instructions, numerous examples of advertising copy, and in-depth analysis. By incorporating theoretical insights, this study analyzes the language usage in advertising texts from the past decades, identifies common errors, and suggests effective means of influencing speech through word choice and word combinations. Additionally, the research proposes techniques to animate the text and effectively target specific audiences.

## Theoretical and Methodological Bases

The current state of research on advertising speech is characterized by the significant attention it has received in linguistic thought since the middle of the twentieth century, as evidenced by several references (Bove & Arens, 1995; Djefkins, 2008; Gamper, 2010; Serdobinceva, 2010; Ogilvy, 2011). However,



despite the gradual strengthening and improvement of advertising culture over the past 20–25 years, the linguistic structure and technological features have yet to be extensively studied in our context. The available sources provide limited information on the linguistic description of this phenomenon (Grigoryan, 2013; Mkhitarian, 2013). There are a few exceptions, such as A. Adilkhanyan’s article (2004) titled “Armenian TV Advertising Language” and the summary in the “Advertising Language” textbook (Avetisyan et al., 2016) “Linguistic features of advertising supports” (Santryan, 2011). In the first two, the primary uses of the vocabulary and visual aids of Armenian advertising texts are described in general terms, and the third one primarily is focused on statistical analysis, presenting the most commonly used adjectives, pronouns, verbs, and other linguistic elements in Armenian advertisements (Barseghyan, 2010). L. Sargsyan (2016) has contributed scientific articles that specifically examine phonetic and lexical aspects of advertising speech. Other relevant articles include (Sargsyan, 2018a, p. 208–216; Sargsyan, 2018b; Sargsyan, 2021; Sargsyan, 2022), each of which delves into specific issues related to speech vocabulary within the advertising context. These articles propose methods for composing influential advertising texts along with visual analysis. It is worth noting that all observations and findings presented in this research are based on international experiences and a study of local market characteristics, ensuring a comprehensive perspective on the subject matter.

### **Research Methods**

The research methodology employed for the study of advertising texts varies depending on the specific objectives of the examination. In the case of this article, the research was guided by several vital methodologies, namely discursive analysis, lexical analysis, contextual analysis, and statistical analysis.

The method of discursive analysis employed in this study facilitated an examination of the text structure and its substructures, including the brand name, slogan, and the text itself. This method allowed for a focus on placing essential information within the advertising text, which plays a crucial role in conveying the intended message. In the case of this research, the critical information was often expressed through a single word or unusual word combinations, with the choice of words determined explicitly by the topic or theme of the advertisement. The meanings of the words in their respective contexts, the extent of their emotional impact, and the excessive use of those words were discussed separately. By employing a combination of these methods, the focus was placed on using carefully selected words in advertising texts. These are the words that imbue the texts with an active and influential quality while also identifying those that render the texts inaudible and weak when overused.

Statistics were instrumental in determining the practical viability of the theoretically proposed assumptions. Specifically, by analyzing the responses of survey participants, it became evident that concise and descriptive language held the most significant potential for influence.

## **Aim and problems**

Advertising is an essential tool for organizing market relations. Qualitative shifts in Armenian advertising production have been evident over the last two decades. Rapid developments in socio-economic relations and global advertising policies are gradually influencing local advertising products. This research focuses on determining the target audience of commercial and corporate advertisements in RA, selecting topics, choosing words, and combining them. In this regard, this study addresses issues crucial for the practical development of advertising discourse by delving into theoretical literature with a measured approach. As a result, it holds significant **practical** significance. It assists advertising text authors in identifying specific linguistic elements that facilitate swift and accurate advertisement communication. The article aims to guide authors of advertising texts, minimizing inaccuracies by highlighting shortcomings and errors in the structural composition of various advertisements. Additionally, it occasionally suggests alternative approaches or techniques for constructing the text. The theoretical material and diverse examples provided will aid industry professionals in enhancing the effectiveness and purposefulness of their creative work on advertising texts.

## **Research object**

This research aims to examine the utilization of words and word combinations in corporate and commercial advertising texts, as well as the selection of themes and motifs for the promoted products. However, it should be noted that the research aims to explore only some possible perspectives and solutions to the issue. Instead, it primarily focuses on the primary manifestations of text phrasing in the types mentioned above of advertising, which are commonly employed in most present-day advertising texts. These words and word combinations exert a psychological impact on the target audience, prompting them to take action, as well as verbose and redundant advertising texts that negatively affect comprehension. In addition to analyzing the subject matter, particular attention was given to the linguistic elements that enhance the persuasive quality of the discourse and their practical applications.

## **Research scope**

The research examines the nuances of word usage in advertising texts related to construction materials, banking, food, and alcohol. These specific industries are discussed primarily regarding speech compression and the potential impact of the texts. To achieve this goal, we focused on target audience groups most likely interested in the products above and could become buyers. A total of 220 individuals aged 18 and 55 participated in the survey (n=220).

## **Research questions**

To assess the accessibility, comprehensibility, and impact of advertising texts on the target audience, the following questions were posed:

- What themes and motifs do advertisers most commonly choose for

brand ads?

- Are long and informative texts influential?
- Are texts composed of short, well-chosen word combinations effective?
- Does colloquial word usage affect the effectiveness of ads?
- What words make the subject of the advertisement most interesting and prompt action?

## Results

We are particularly interested in examining the word choices and combinations in commercial (including brand) and corporate advertisements prepared in the Republic of Armenia (RA) over the past two decades (Without strictly delineating the boundaries between different types, we can draw comparisons and draw parallels between various forms of advertising as required). This analysis will consider the unique global development of the advertising industry within this context.

Indeed, there are dozens of advertising production companies operating in Armenia ("Sharm" Holding, "Paradise" LLC, "Pan-Armenian" Media House, "GMG" Media Group, etc.). However, we will refrain from mentioning their names during the study. In a narrow professional circle (**advertising production**), indicating the name of the company producing the advertisement is desirable or mandatory. However, for the general public, it is generally unimportant. The audience is either interested in or disappointed by the product itself, the ad (in whole or part). We will mention only the name of the object of the advertisement, and highlighting the discussed realities of the speech and some linguistic nuances of the construction of the text will be helpful for the representatives and those in charge of the field.

In linguistics, advertising is a form of verbal communication that seeks to manage the demand and supply of specific services or products, promote trade, and influence the consumer's mood (Matveeva, 2003). While language is a primary means to achieve these goals, it is essential to note that other elements such as music, color schemes, and moving images (animations) also contribute to the overall impact of advertisements. However, our examination will primarily focus on the linguistic aspects of advertising texts.

Indeed, various components comprise the structure of advertising speech, including the **name, logo, subtitle, main content, comment, and slogan**. While each component serves a specific function, they are interdependent and should collectively fulfill the requirements of a compelling advertising text, such as brevity, informativeness, persuasive ability, accuracy, and more (Serdobinceva 2010). Therefore, it is practical to examine these components together, considering their relevance and appropriateness within the overall structure of the speech or the specific part of the text being analyzed. This comprehensive approach thoroughly evaluates how well these elements contribute to the advertisement's effectiveness.

Certainly, **brevity** plays a significant role in the composition of advertising

texts, and the correct choice of words is crucial in achieving conciseness. The word fulfills and word pairings are often influenced by the **selected topic**, which is determined by accurately identifying the **target audience** or addressee. **The choice of topic** is essential as it establishes a direct connection with the **addressee** and contributes to speech compression. This compression is achieved not only through the use of unconventional word usage but also by selecting popular motifs that resonate with the audience. In this case, the motive serves as a prompt guiding the creation of the advertising text.

Advertising generally utilizes various psychological techniques and persuasion tactics to **exert influence**. Two commonly employed techniques are suggestion and anchoring: **a)** favorable social positions **and b)** anchors of archetypes and images of national culture. In this approach, the advertisement incorporates national traditions, folklore, well-known historical events, and similar aspects of the culture. By tapping into these familiar and culturally significant references, the advertisement aims to create a connection with the audience. Consequently, thematic similarities and comparable verbal tricks in Armenian advertising speech are expected to be observed, as these techniques align with the prevalent patterns and cultural context (Melkonyan, 2015). Indeed, the "Ararat" brandy advertisements often have an underlying ideological theme. The brand is often associated with **friendship and unity**, as exemplified by the slogan, "For one, the glass is half full; for the other, it is half complete. However, every glass raised with friends is always full. For those who make our lives complete." This theme of **friendship and raised glass** is further emphasized through a male voiceover, slow-motion visuals, and a harmonious melody, creating a distinctive and compelling appeal. Combining these elements contributes to a timeless and evocative message that resonates with the audience.

The idea of changing the well-known concept that "the glass is half empty for one person and half full for another" is intriguing. The clever play on words – "half-full, half-complete" – captures special attention. Similarly, the commercials of "Grand Candy" often revolve around the theme of family and the warmth of a home. Vibrant visuals, lively melodies, and skilled acting, accompanied by well-chosen **conversational phrases** such as "Uncle dies on your body" (Քեղիս մեռնի ջանիս, *which means I love you*), "Came! Came! Neighbors came!" (Էկան, Էկան, հարևանները եկան), "Dad, when you come home, bring "Globus" with you" ( Պապա՛, որ գաս տուն, հետդ «Գլոբուս» կբերես) and so on. It is worth noting that the most effective advertising texts are sometimes found in the most straightforward situations and words.

Our country's advertising texts for building materials and electrical engineering often revolve around **family and household needs**. Interestingly, specific motifs are repeated in a nearly identical manner. For instance, family members have heated discussions regarding "renovation," or spouses navigating product selection and financial matters. Another common scenario involves an artisan and a customer finding common ground through questions and answers. These texts predominantly employ satirical passages, using dialogue as a **critical**

**element of speech** compression. For instance: **WOMAN**: You are a master who is renovating our house, but the condition of our house is deplorable, Mkhitar.

**A**: Knik, I know the condition of our house better than you...", **HUSBAND**: It is freezing outside, and you have built a grill inside our house. Have you turned our place into a chicken coop? **WOMAN**: Why? **HUSBAND**: The neighbor's house has only one room, and he pays more for gas than our four-room house...". The involvement of famous TV personalities and the use of domestic comparisons make these texts easily understandable, impressive, and somewhat amusing. It is through these elements that advertisers effectively influence their target audience.

Advertising household appliances and products related to home repair are now permissible, which has led to the emergence of creative slogans like the one seen on the advertisement poster or video of the "Mercury" gas boiler: **"Do not throw your money to the wind"**. This slogan effectively conveys the message of saving money in a colloquial and relatable manner, eliminating the need for common advertising phrases such as "save...", "spends sparingly...", or "reduces your expenses...". In another example, the text of a commercial for the "Ideal" store demonstrates a successful combination of literary and colloquial language elements. It incorporates foreign words commonly used in everyday speech, accompanied by solid acting and humor. For instance, the dialogue might go like this: **A**: Repairing (ռեմոնտ) in Armenia is like the battle of Avarair. Vardanants market... drunk masters... fire-loving welders (սվարչիկները)... That is why I ran away to Europe. It is entirely different here (Էստեղ լրիվ ուրիշ ա), like this store. On the first floor, we have paints and wallpapers (աբոյներ), and heating systems; on the second floor, tile and brick (մետալախ) on the third floor, plumbing on the fourth floor, and so on. The masters of the shop come and fix (սարքում են) your house, solving any problem (պրոբլեմ) that arises. Don't you understand how good and easy (հեշտ) European stores are?

**B**: It seems this person has lost his/her sense of space. He/she believes he/she is in Europe, but they are actually in Armenia, precisely one of the stores in the "Ideal" system. ...Although "Ideal" stores are so good, they can make you feel like you have gone crazy". The use of emphasized words, pauses, and rhythm in the advertisement text contributes to its brevity and reflects the natural flow of everyday speech. The copywriters skillfully employ these techniques, tone, and contrast to create an impactful and memorable advertisement. Notably, this particular company incorporates colloquial words in many of its ad texts, which may have a strong psychological impact. Given that the company primarily deals with household goods and materials used in repair works, featuring artisans in their advertisements, it is only natural that the language used is adapted to their thinking. The advertisement's target audience is addressed in the speech, ensuring effective communication (Ideal Master, 2011; 2012a; 2012b; 2018).

Advertisements for children's utensils and food often utilize colloquial language to make them more accessible to children. These texts are designed to be quickly perceived and easy to remember, thus increasing their impact on the target audience.

For example, consider the "Ashtarak Kat" cheese advertisement. The dialogue between the characters is crafted with colloquial words and phrases to create a relatable and engaging experience for children.

**A:** Hey, uncle (**ձյաձյա՛ ջաաան**)! We want to get some fresh stuff.

**B:** Teeeeelll mee (Ասեննը)?

**A:** We want a little fresh bread (**հաղիկ**).

**B:** Okay! (Ըհը). Then? Then some fresh milk (**կաթիկ**).

**B:** Yeeesss! (**Ըհը**)

**A.** And please give us one of our favorite little cheeses (**պանրիիիկ**).

It is important to note that the success of the advertisement is not only dependent on the text but also on other factors such as the actors' performances, the use of well-known TV personalities, appropriate voice acting, the inclusion of children's music, and tonal fluctuations that resemble children's speech and pronunciation.

The sweets of "Grand Candy" commercials often revolve around the theme of family and the comforting atmosphere of a warm home. These commercials feature vibrant visuals, lively melodies, and acting that combines well-crafted conversational templates. For instance, the advertisement incorporates simple yet powerful situations and words that resonate with the audience. Some examples include phrases like "Uncle dies on your body (Քեռին մեռնի ջաւնի, *which indirectly translated means "I love you so much"*)," "Came! Came! Neighbors came!" and "Dad, come home, and bring "Globus with you". That is to say that the advertisement text is more frequently hidden in the most simple situations and words.

One notable concern is the excessive use of colloquial, dialectal, and even slang language elements in advertising. Nearly every aspect of advertising texts seems controversial and generates either exclusively positive or negative opinions. This dilemma highlights the complex relationship between linguistic norms, speech cultures, and advertising discourse. Maintaining a harmonious balance between linguistic and verbal realities in advertising proves to be a challenging task. Advertisers often prioritize their campaigns' profitability, which can sometimes overshadow considerations of linguistic and cultural appropriateness. They may adopt a "the goal justifies the means" approach in pursuit of their goals.

However, it is crucial not to overlook the significant impact that advertisements, even those considered temporary or ephemeral, have on society's cultural and linguistic fabric. Advertisements contribute to a given community's spiritual and language culture, shaping preferences and influencing the cultural profile of the public to some extent.

The Armenian advertising industry is not immune to advertisements criticizing their imperfect and tasteless nature. Approximately 4–5 years ago, a series of commercials for the "Family Lotto" lottery featuring a "unique doll" aired on television. From an aesthetic standpoint, the doll's appearance was unconventional and unattractive, and her talking further contributed to an unpleasant viewing experience. The dialogue in these commercials included phrases such as "Girl, give

me a piece of lottery... hee-hee, yay, what is this..." (Աղջի՛, մի հաստ լոտո տո՛ւ հի՛-հի՛, իա՛, էս ի՛նչ ա...), "Drive quietly here, there're cops... Stupiiid (turns to the husband driving the car – Էստեղ հա՛նգիստ քշի՛, միլիցա կա.... Հիմաա՛ր). What are you doing (signals)? Did you see what I did? You parasite (Պարազի՛տ)! He is driving the car I won, and it is not enough; he is rolling his eyes at me (Շահածս ավտոն քշում ա, հերիք չի, աչքերն էլ օդ ա թոցնում)."

Another example includes the line "Ah, drinking tea with slurping is different.." (Ա՛, դե ֆոշտացնելով չայ խմելը ուրիշ ա, էլի...).

These commercials "series" consisted of about 8-9 clips, and, arguably, even the mildest examination should have led to their exclusion from the airwaves.

In the advertisement for the "Havana" restaurant, both the advertiser and the advertising agency attempted to create a rhyme consistent with the name and possibly evoke an intimate ambiance. However, they chose what they believed to be an appropriate approach by combining two or three dialects, colloquial elements, and vulgarities. The following are examples from the advertisement:

**Example 1:**

"Then write! Tomorrow is my father's birthday; he is ninety years old. My papa ("Dad" in Russian, which is commonly used in Armenian everyday language) reached my granddad's age (accompanied by vulgar laughter). Let us celebrate the birthday somewhere where everything is organized with taste, without losing the essence. In other words, it should be done in the proper place for Papa to eat, drink, and be happy. In one word, Ha-va-na..." (Ուրեմս գրա՛. «Վաղը պապայի ծնունդն ա, իննսուն տարեկանն ա: Պապան դառավ պապուս թայ (ուղեկցվում է գռեհիկ ծիծաղով)....: Ծնունդը ընենց տեղ պտի նշենք, որ ամեն ինչ համով-հոտով ըլա, բայց համը չհելնա..... Այսինքը՝ ընենց տեղ պտի ընա, որ պապան ուտա, խմա, ուրախանա: Մի խոսքով՝ հա-վա-նա ).

**Example 2:**

"Bride(ik) Varsik, why are you eating that much sunflower seeds? ( Հարսիկ Վարսիկ, էս ընչի ես ադին-ադին հելե սեմըշկի հեա)

It's very tasty, isn't it, uncle Vipoyan? (Ախր շատ համով ա, է՛, Վիպոյանձյա)

Did Squirrel (referring to his wife) roasted these? (Էս Սկյուռիկի՛ն (նկատի ունի կնոջը) ա բովել)

If your squirrel can sew sunflower seeds like this, I am Miss World. These are the elite sunflower seeds of "Ot Solneshki" (Եթե Սկյուռիկիկդ կարնա սենց սեմըշկա բովի, ուրեմն ես միսս աշխարհքն եմ: Էսի «Ատ սոլնեշկի» էլիտար սեմըշկեն ա).

While attempting to create a unique and catchy advertisement, using a mixture of dialects, colloquialisms, and vulgar language may not be universally appreciated. It is essential to consider the impact of such language choices on the target audience and ensure that they align with cultural norms and sensitivities.

The text of one of the advertisements for "Gyumri" beer and the overall clip is considered even more unsuccessful, potentially violating advertising legislation.

According to Article 5 of the RA Law “On Advertising,” advertising must be legal, reliable, and appropriate (RA Law, 2023) (pointed out. – L. S.). Additionally, Article 8 of the same law emphasizes that advertisements should not violate etiquette, which includes avoiding offensive expressions, comparisons, and images related to race, nationality, profession or social origin, age group or gender, language, religious beliefs, and other factors (RA Law, 2023).

In the video, physically fit men, who appear tired after their hard work, are shown looking at the assumed leaders with grimacing faces and bent backs while they drink beer. In response to their gaze, a voiceover says, “What about your muscles? Why are you looking at us? Do your job!”, and the slogan “Gyumri: Beer for real men”. However, it remains unclear from both the text and the plot what is being advertised in general, who strictly “real men” are being referred to, and what the modern perception of a “real man” entails. Unfortunately, the local advertising market is saturated with such texts and poorly executed clips, which further adds to the confusion and lack of clarity in many advertisements (Garik govazd, 2012; Shen Décor, 2011).

In the professional literature, many have referred to the negative impact of advertisements. Distorted language culture and false values are formed in society. Advertising is often considered a “cultural bulldozer” that leaves no stone unturned in the old walls of values and traditions, making no distinction between good and evil. It destroys the cultural environment without thinking about its consequences. The only important goal is to benefit and profit. Therefore, in accepting the AIDA model<sup>1</sup> of advertising policy, we do not accept the vulgar manifestations mentioned above. The means do not justify the end. However, these and similar texts find their addresses unacceptable and counter-cultural. By surpassing the permissible limits of advertising speech, which generally adhere to stylistic norms, advertisers distort language, disrupt national language thinking and language culture, and influence perceptions and psychology, particularly among teenagers. N. Kochtev (1997, pp. 19–20) notes, “Many people read advertisements, and its linguistic merits and shortcomings significantly impact the reader’s speech. Mistakes are automatically remembered and can be adopted by the speaker or writer, subsequently ‘infecting’ those around them. Therefore, advertisers need to prioritize politeness and maintain verbal ethics”.

It is believed that the likelihood of mistakes increases when creating concise and particularly engaging advertising texts. Such violations are prevalent, especially in the local market, stemming from several reasons. Firstly, advertisers often need more time to order the text, providing the producer with limited time for its creation. Secondly, our advertising industry operates within a small and limited scope, especially concerning text preparation. It is typical for the author of a previously successful text to be entrusted with new projects. Due to factors such as ranking or social dynamics, these individuals sometimes attempt

<sup>1</sup> Even in 1896, E. Lewis was one of the prominent figures in American advertising. Lewis succinctly formulated the four-component model of creating successful advertising - AIDA - which quickly gained popularity worldwide. AIDA stands for attention, interest, desire, and action. Advertisers often utilize alternative means in this model.



to handle multiple projects independently within a short timeframe. However, it is widely recognized that making a compelling advertising text takes months in numerous countries, and even prominent companies typically delegate this task to a specialized team.

Furthermore, such forms of speech have never been encouraged and are being phased out in global advertising production. Currently, advertising texts are primarily constructed by adhering to forms dictated by literary norms or forms closely resembling them. These linguistic elements can and should be utilized in advertising; **however, careful consideration must be given to their usage to maintain clarity**. It is strongly recommended that you abandon the mentality of creating texts similar to those above 2 to 3 examples once and for all. If there is a desire to create an intimate and direct atmosphere through advertising while influencing in a simple style, a rich ethnographic vocabulary can be employed instead of sociological or slang words.

Of particular significance are advertisements created with a patriotic or historical theme. These ads resemble short film stories with concise, inspiring text that captures the audience’s attention. Such advertisements are scarce in the Armenian market and are rare globally, primarily due to the challenge of delivering a high-quality production within a limited timeframe.

One example of a remarkable advertisement is the “Ararat” beer clip. It presents a unique storyline: “In the 4th century BC, during my journey home after a bitter defeat, accompanied by the remnants of my army, we traversed a land called Armenia. There, we encountered an extraordinary beverage made from barley and water, a drink we had never even heard of before. Benevolent people welcomed and provided shelter for us. Their joy and happiness were contagious. The bitterness we experienced was eased when we tasted that strong and satisfying beverage: Ararat beer, always at the peak”. The text seamlessly combines images of campfires, battles, the Armenian landscape, beer, and camaraderie, effortlessly transitioning from historical eras to present-day friendly gatherings. This remarkable advertisement captivates, influences, and intrigues. It is a rare example of concise and straightforward storytelling, devoid of elaborate speech stylization. The choice of topic and the environment depicted in the clip are reliable guarantees for effectively reaching the audience with a simple yet impactful text.

Each word used in an advertisement must have a clear purpose and be justified by the context. The structural characteristics of an advertisement require conveying maximum information with a minimal number of words. It has been observed in studies that excessive information resulting from an abundance of words can be detrimental to advertising effectiveness (Kokhtev 1997). Creating texts for specific types of advertising can be particularly challenging. Bank advertisements, in particular, often require skillful condensation of extensive information into a preferred ad format. For example, consider the successful compilation of the following text from “Anelik” bank’s loan advertisements: *“Anelik” bank offers low-interest loans for apartment purchase and repair,*

*installment loans for equipment and furniture, and favorable conditions for a car purchase. The bank that turns your dreams into reality...almost all of them*". Using terms that create a sense of interest and openness is more engaging and informative than specifying deadlines and conditions for borrowing and repayment, as is typically done. Therefore, phrases like **"low-interest rates"** may be unnecessary in the text, as emphasizing the **most suitable conditions** is more impactful. Even the syntactical error in the text, such as the order of words in **"acquisition of equipment"** (← equipment acquisition – **ապահիկ տեխնիկայի... ձեռքբերում** ← տեխնիկայի... **ապահիկ** ձեռքբերում)), becomes less significant. Furthermore, the advertisement lasts 37 seconds, with a speech segment of 20 seconds, which is constructed with a humorous touch. This type of advertising is profitable, and there is a high probability of generating interest from the audience.

More often than not, advertisers, in their attempt to convey a large amount of information about the advertised product or service, end up hindering its perception. This is particularly true when we consider that individuals tend to extract only what is most relevant to their current needs from advertisements. They may disregard or ignore information that they subjectively deem unnecessary. As a result, lengthy and verbose texts can be considered irrelevant and ineffective.

In a clip advertising a loan or a new card, the excessive use of verbiage can diminish the impact of the message. For instance, consider the following text: "Invest your funds in "Anelik" bank with an available option and receive a stable income with an annual interest rate of up to 12.5 percent. You can obtain a credit line for almost the entire invested amount, with an additional interest rate of 2.8 percent. It is important to remember that if you return the borrowed amount within 12 days, no interest will be charged on the loan. Let your money work for you and always be in your pocket" ("Anelik" bank). When used side by side, numerical expressions of dates and interest rates can overload the information and make it confusing for the audience. Mixing thoughts expressed at a high speed can also hinder comprehension. To address these issues, replacing some verbal elements with visual elements such as animation and color separation would be beneficial, as seen in the advertisement.

Additionally, it is advisable to separate the words indicating numbers and quantities from each other. A revised version of the advertising text could be as follows: "Invest your money in "Anelik" bank and enjoy an annual income of up to 12.5%. Borrow the same amount as your investment with an interest rate starting from 2.8 per cent. No interest will be calculated if you repay the loan within 15 days. Let your money work for you while it stays in your pocket".

Another example: "Congratulations! You are now a cardholder of VTB Armenia Bank." "Your card offers numerous benefits, including four currencies in one card, easy card replenishment through payment terminals, access to the VTB group's electronic ATM map, instant and round-the-clock card-to-card transfers through ATMs, unlimited wallet functionality to keep your funds safe, convenient access to multiple accounts, available 24/7 and free of charge, experience the

great possibilities of your card with VTB Armenia Bank.” The duration of 37 seconds in a long clip, along with oppressive speech structures and a fast pace of speech, can hinder perception. Indeed, in advertising, using concise and engaging text rather than lengthy explanations is often more effective. Experience has shown that long texts or lengthy verbal interventions in advertisements can irritate the audience and make the advertisement less effective. Maintaining speech **compression** and avoiding excessive length in all forms of advertising can help ensure better audience engagement and comprehension.

Ogilvy (2001), one of the prominent figures of global advertising production, writes: “Formulate your thoughts in short sentences, placing them in small paragraphs; do not use complex words and expressions. When copywriters argue, I say: “Take the bus to Iowa. Stay at a farm for a few days and interact with the hosts. Then, take the train back to New York, chatting with the companions. If after all this you still want to use complex words and voluminous expressions in your speech, I will not interfere” (Adilkhanyan, 2004).

Many advertisements worldwide utilize keywords and phrases considered impactful and psychologically influential. Marketing experts carefully choose these words. Examples of such words include **limited, savings/save, free, call now, discounts (today only), flexible discount system, easy, fast, right now, gift, and more. In today’s modern world, consumers often seek quality and value for their money.** Advertisers aim to appeal to consumers’ desires for quality and economy by emphasizing limited-time offers and discounts. These psychologically impactful words and phrases are carefully selected to create a persuasive message that encourages the audience to become active consumers. The word **limited** creates a sense of urgency in the buyer, prompts him to buy the product, and the words quick and easy, in the consumer’s mind in a busy, nervous modern pace, form affordable and quick actions for acquiring the product/service. By the way, with this mentality, one of the communication operators circulated the slogan “We are always fast” in their advertising posters, or *we have fast loans, fast payment* and other combinations. The client’s expectations may still need to be fully met, but this is another problem that should be solved not by advertising but by the company’s working style. The purchasing power of any product increases when the advertisement sounds, say, “Buy X item and get your gift”, “Surprise gifts are waiting for you”, “Your gift is waiting for you”, and so on. This, indeed, is one of the few wordings in advertising policy that should accurately justify the consumer’s expectation. However, in terms of usefulness or importance, the so-called gift may be useless or unnecessary.

**Conclusions**

To make the advertising speech as concise and attractive as possible, as well as to get a word that is familiar to our linguistic thinking, it is correct first to clarify the choice of the topic and addressee and then use the necessary language

units, which are diverse: ready-made templates in the language, colloquial and colloquial words, their usual combinations, etc. As part of the research, a survey was conducted, in which 220 people aged 18–55 participated. The questions and answers of the statistics conducted within the scope of the research are as follows (Table 1):

**Table 1**  
**Answers percentage data**

1. Which of the given themes/motifs for repair products is most notable in the ad?			
family environment 54.1% (119 people)	the store chain itself 32.3% (71 people)	work/office environment 9.5% (21 people)	Other 4.1% (9 people)
2. Which of the given themes/motifs for alcohol advertising is most notable in the ad?			
family environment 7.3% (16 people)	Friendly environment 80.5% (177 people)	Work/office environment 4.5% (10 people)	Other 7.7% (17 people)
3. Does the theme/motive influence you to make a purchase?			
Strongly affecting 8.2% (18 հոգի)	Partially affecting 69.5% (153 people)	Nit affecting 21.8% (48 people)	Other 0.5% (1 person)
4. Advertising text affects you if:			
short and to the point 84% (184 people)	long informative and 5% (11 people)	there are many unusual word combinations and figurative images 4.6% (10 people)	Other 6.4% (14 people)
5. It is preferable that the advertising texts related to the banking system be:			
Long, but with detailed information 9.5% (21)	Mainly the names of services 15.9% (35 people)	With short and targeted words mentioning the approximate dates of percentages 72.7% (160 people)	Other 1.8% (4 people)
6. Advertising text may be of interest if it uses the following phrases:			
We are fast service Fast and affordable 19.5% (43 people)	Discounts, discounts Flexible discount system Discounts only for two days 26.4% (58 people)	Buy and get a surprise Buy one, get one Your gift is waiting for you 22.7 (50 people)	Other 31.4% (69 people)
7. Is the moderate use of speech units in advertising text remarkable to you?			

Yes 43.6% (96 people)	Partially 42.3% (93 people)	No 12.7% (28 people)	Other 12.7% (28 people)
8. Do you agree with the idea that the more colloquial phrases, the more accessible the ad will be?			
Yes 12.7% (28 people)	Partially 42.7% (94 people)	No 43.6% (96 people)	Other 0.9% (2 people)
9. Advertising text on the consumer to buy the product.			
Has a strong influence 33.6% (74 people)	Has a partial influence 58.6 % (128 people)	Has no influence 2.7% (6 people)	Other 2.3% (5 people)
10. Write the most impressive advertising phrase.			
The answers are given in the diagram with the corresponding percentage distributions.			

The survey results indicate that most respondents prefer family-related motifs in construction material advertisements, while corporate themes are favored in alcohol ads. Conversely, historical motifs in the same context are found to be less exciting and influential. Additionally, when it comes to advertising texts related to the banking system, the respondents prefer concise and to-the-point information, particularly numerical data, instead of lengthy texts overloaded with information.

As for question 10, a disguised question about word combinations and conjugations, let us note that the answers lead to ambiguous interpretations. Like this. Out of the 220 people who participated in the survey:

- 25, or 11.4%, did not answer the question. This supports the idea that advertising is generally a phenomenon that is not closely watched or listened to; many advertisements are simply ignored.

- 25, or 11.4%, wrote that they do not remember or do not exist. In this case, it is difficult to draw a definitive conclusion that this group only consists of individuals who are indifferent or unaware of advertising speech. Regardless, the **"I do not have/do not remember"** answers suggest that the respondents took a few seconds to think about the question and chose the provided answers, not recalling any specific phrases. This could indicate that Armenian advertising speech has yet to be able to create entirely captivating or memorable messages for a particular segment of society.

- 118 or 53.6% (over half) of the respondents remembered lines from advertising texts about food varieties. The most recognized slogans were Coca-Cola's "Forever Coca-Cola" (23 people, 10.5%) and Snickers' "Don't Snickers!" (22 people, 10%). Other slogans that participants recalled include "Hay Cola"

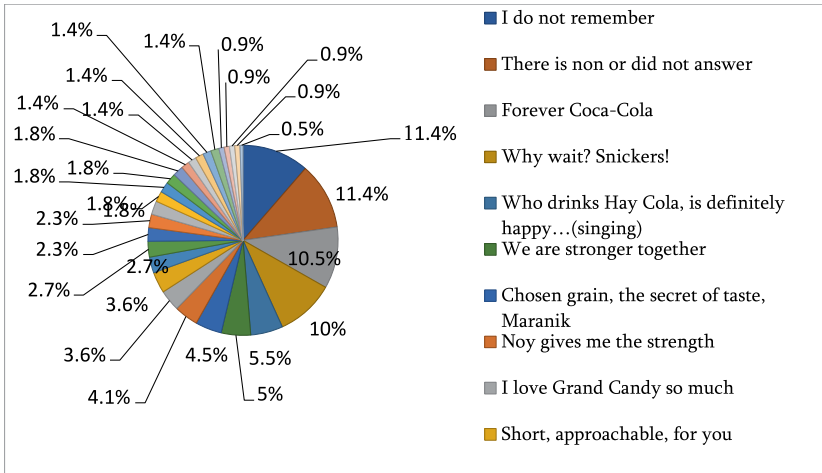
("Who drinks Hay Cola, is happy" – 12 people, 5.5%), "Maranik" ("Chosen grain, the secret of taste, Maranik" – 10 people, 4.5%), "Noy" ("Noy" gives me strength" – 9 people, 4.1%), "Grand Candy" ("I love Grand Candy" – 8 people, 3.6%), and slogans from other brands. This pattern indicates a correlation between society's socio-psychological interest and polarized advertising production. Armenian advertising production has successfully created a strong influence in promoting food brands, and the public has shown a significant interest in food products.

A small percentage of respondents, 11 people or 5%, remembered the motto of "Ameriabank" – "We are strong together." Similarly, the slogans "Perfection in everything" from the "Ideal" stores chain (6 people or 2.7%) and "If APPA, then Ingo" from INGO insurance company (6 people or 2.7%) were also recalled by a limited number of participants. This observation highlights the need for clear development and reformulation in the composition of advertising texts for construction equipment and other banking and financial services companies. These sectors have weaker possibilities of impact and influence. It is possible that the reason behind this is not a lack of public interest in these areas but rather a deficiency in the advertising strategies employed.

- The remaining few organizations also pertain to commercials for various types of food.

- the advertising phrases provided by the respondents mainly consist of short words with novel combinations. These phrases are precise in their uniqueness and have an impact on the listener. Interestingly, even though texts containing conversational units are not necessarily encouraged in terms of language and advertising standards, the percentage distributions show a consistent preference for such texts, regardless of the product type. This indicates that participants favor advertising texts composed of spoken language units.

- All advertisements create a specific field of influence through word combinations that have become marketing clichés (such as quick service, fast food, discount system, unprecedented discounts, surprise gifts, buy one, get a gift). However, according to the percentage distributions provided in the table, it is worth noting that 31.4 percent of the respondents, which happens to be the most significant percentage within that category, chose another answer. This suggests that these word combinations may have become clichés for consumers, gradually losing their inspirational power. Therefore, advertisers should seek new and fresh approaches alongside the word above combinations. The whole picture of the statistics is below (Diagram 1).



**Diagram 1.** Percentage summary data

Indeed, advertising requires significant creative effort and a flexible mindset. However, only some unique ideas or approaches guarantee success or the ability to attract and engage the audience. Additionally, crafting concise and impactful speeches can be challenging. To enhance the effectiveness of advertising texts, it is advisable to consult established guidelines of marketing psychology. These guidelines can provide valuable insights into understanding the target audience, shaping accurate messaging, and maximizing the impact of advertising efforts.

**References**

1. Web page: Garik govazd, 2012. <<https://www.youtube.com/watch?v=AgECJ-PD7al>> (Retrieved from: 12. Oct. 2022)
2. Web page: Ideal Master, 2011. <https://www.youtube.com/watch?v=foNdnvLiFgc> (Retrieved from: 10. Sept. 2021)
3. Web page: Ideal Master, 2012. <<https://www.youtube.com/watch?v=RZouJMGJpts>> (Retrieved from: 6 Sept. 2021)
4. Web page: Ideal Master, 2018. <https://www.youtube.com/watch?v=RS5f6ELMPts> (Retrieved from: 04 Feb. 2021)
5. Web page: RA LAW ON ADVERTISING, 2023. <<http://www.irtek.am/views/act.aspx?aid=1471>> (Retrieved from: 25 Oct. 2023)
6. Web page: Shen Décor Part2, 2011. <<https://www.youtube.com/watch?v=Qrl3BBd0PC0&t=1s>> (Retrieved from: 07 Oct. 2022)
7. Боуф, К., Аренс, Ю. (1995). Современная реклама. Творчество в составлении текстов, Москва, Догян Принт [Bove, K., Arens, U. (1995). Modern advertising. Creativity in composing advertising texts, Moscow, Dogvan Print, in Russ.]
8. Гампер, Е. (2010). Влияние рекламы на ментальный компонент культуры (на примере англоязычных журналов), *Человек в информационном пространстве текста: межвузовский сборник научных трудов, 1*, Ярославль, ЯГПУ Принт [Gamper, E. (2010). Influence of advertising on the mental component of culture (on the example of English-language women’s magazines), *Man in the informational space of the text: interuniversity collection of scientific works*, 1, Yaroslavl: YGPU Print, in Russ.]

9. Джефкинс, Ф. (2008). Реклама, Москва, Юнити–Дана [Djefkins, F. (2008). Advertisement, Moscow, Yniti–Dana, in Russ.]
10. Кохтев, Н. (1997). Реклама: Искусство слова, Москва, МГУ Принт [Kokhtev, N. Advertising: The art of the word, Moscow, MSU Print, in Russ.]
11. Матвеева, Т. (2003). Учебный словарь: русский язык, культура речи, стилистика, риторика, Москва, Флинта: Наука Принт [Matveeva, T. (2003). Academic vocabulary: Russian language, culture of speech, stylistics, rhetoric, Moscow, Flinta: Nauka Print, in Russ.]
12. Огилви, Д. (2011). О рекламе, Москва, ЭКСМО Принт [Ogilvy, D. (2011). On advertising, Moscow, Eksmo Print, in Russ.]
13. Сердобинчева, Ю. (2010). Структура и язык рекламных текстов: Учебное пособие, Москва, Флинта: Наука Принт [Serdobinceva, Y. (2010). Structure and Language of Advertising Texts: Study Guide, Moscow, Flinta: Nauka Print, in Russ.]
14. Ադիլխանյան, Ա. (2004). Հայկական հեռուստագովազդի լեզուն. *Կրթությունը և գիտությունը Արցախում, 1, Երևան, Բնագետ հրատ.* [Adilkhanyan, A. (2004). The language of Armenian TV advertising. *Education and science in Artsakh, 1*, Yerevan: Bnaget Print, in Arm.]
15. Ավետիսյան, Յու., Սարգսյան, Ա., Թեյյան, Լ. (2016). Հայոց լեզու և մշակույթ, Երևան, ԵՊՀ հրատ. [Avetisyan, Yu., Sargsyan, A., Telyan, L. (2016). Armenian language and speech culture, Yerevan, YSU Print, in Arm.]
16. Բարսեղյան, Լ. (2010). Հեռուստատեսային գովազդի լեզվագործարանական առանձնահատկությունները անգլերենում (հայերենի և անգլերենի զուգորդությամբ), թեկ. առեն. թեզիս, Երևան հրատ. [Barseghyan, L. (2010). Linguistic features of television advertising in English (along with Armenian and Russian), PhD thesis, Yerevan Print, in Arm.]
17. Գրիգորյան, Զ. (2013). Գրքի գովազդի լեզվագործարանական առանձնահատկությունները ժամանակակից անգլերենում, թեկ. առեն. թեզիս [Grigoryan, Z. (2013). Linguistic Features of Book Advertising in Modern English, PhD thesis, Yerevan Print, in Arm.]
18. Մելքոնյան, Ն. (2015). ԶԼՄ–ում կիրառվող մանիպուլյացիոն հնարքներն ու սոցիալ–հոգեբանական ազդեցության մեխանիզմները, *21-րդ դար, 5*, 53–74, Երևան, Նորավանմք հրատ. [Melkonyan, N. (2015). The manipulative tricks and socio-psychological influence mechanisms used in mass media, *21st century, 5*, 53–74, Yerevan, Noravank Print, in Arm.]
19. Մխիթարյան, Կ. (2013). Գովազդային տեքստի լեզվի և ոճի ուսուցման հիմնախնդիրը (անգլերեն նյութի հիման վրա), թեկ. առեն. թեզիս, Երևան հրատ. [Mkhitaryan, K. (2013). The problem of teaching the language and style of advertising text (based on English material), PhD thesis, Yerevan Print, in Arm.]
20. Սարգսյան, Լ. (2011). Գովազդային հենքերի լեզվական առանձնահատկությունները. Զահուկյանական ընթերցումներ, Երևան, Գիտություն հրատ. [Santryan, L. (2011). Linguistic features of advertising support: Jahukian Readings, Yerevan, Gitutyun Print, in Arm.]
21. Սարգսյան, Լ. (2015). Գովազդային խոսույթի հնչյունական և գրության առանձնահատկությունները արդի հայերենում, *Տեղեկագիր Երևանի համալսարանի. Լեզվաբանություն*, 44–57, Երևան, ԵՊՀ հրատ. [Sargsyan, L. (2015). Phonic and writing features of advertising speech in modern Armenian, *Bulletin of Yerevan University. Linguistics*, 44–57, Yerevan: YSU Print, in Arm.]
22. Սարգսյան, Լ. (2016). Արդի հայերենի գովազդային խոսույթը և օտար բառերի գործածության խնդիրը, *Տեղեկագիր Երևանի Վ.Բրյուսովի անվան պետական լեզվաբանական համալսարան. Լեզվաբանություն*, 1, 402–415, Երևան, Լինգվա հրատ. [Sargsyan, L. (2016). Modern Armenian advertising language and the



- problem of using foreign words, *Bulletin of Yerevan V. Brusov State University of Linguistics and Social Sciences. Linguistics*, 1, 402–415, Yerevan, Lingva Print, in Arm.]
23. Սարգսյան, Լ. (2018a). Արդի հայերենի գովազդային խոսույթը. Բառնստրուկտուրային և բառագործածություն, *Հայագիտության հիմնախնդիրներ*, 1, 166–176, Երևան, ԵՊՀ հրատ. [Sargsyan, L. (2018a). Advertising speech in modern Armenian. word choice and word usage, *Issues of Armenian studies*, 1, 166–176, Yerevan: YSU Print, in Arm.]
  24. Սարգսյան, Լ. (2018b). Նորակազմությունները արդի հայերենի գովազդային խոսույթում, *Հայագիտության հիմնախնդիրներ*, 2, 208–216, Երևան, ԵՊՀ հրատ. [Sargsyan, L. (2018b). Innovations in modern Armenian advertising speech, *Issues of Armenian studies*, 2, Yerevan: YSU Print, in Arm.]

*The article has been submitted for publication: 29.01.2025*  
*Հոդվածը ներկայացվել է փայագրության. 29.01.2025*

*The article is sent for review: 20.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 20.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է փայագրության. 31.03.2025*

# FEATURES OF ORAL TRANSLATION IN VARIOUS TERRITORIAL, LINGUISTIC AND CULTURAL CONTEXTS

**SIRANUSH DOKHOYAN**

Senior Lecturer in the Foreign Languages Group of  
the National Defense Research University of the Ministry of  
Defense of the Republic of Armenia

*sirushodokhoyan0@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-65**

## **Abstract**

In the modern world, interlingual and intercultural communication is constantly expanding and becoming more complex due to the development of information technologies, contradictory trends in globalization, and the intensification of information exchange. These trends create a demand for translation specialists who solve the problems of organizing intercultural contacts, designing the translation process, information exchange, and processing in a changing socio-cultural context. In essence, translators and interpreters are the means of communication that allow the information exchange between people representing different cultures to be carried out in the most reliable, undistorted, timely, and local manner possible. The training of specialists in the field of translation and intercultural communication includes the formation of linguistic knowledge and practical skills in the analysis and application of linguistic means, which are necessary for professional activity. Translation, as a science, in the course of its development, faces more and more problems related to the creation of mutually understandable communication mechanisms between different cultures, languages, and environments and implies the development of a constantly developing set of translation tools. Trying to answer the question "How to translate?" researchers focus on various objects of translation, which often require the use of various tools. The relevance of this topic lies in the fact that when performing translations, the translator is faced with the difficult task of identifying individual elements of foreign and native language systems and finding an accurate translation of the realities of one culture into the language of another culture. Particular attention is paid to the problems of choosing a methodological toolkit for oral translation. The purpose of the research is to present the types of oral translation, as well as the territorial, linguistic, and cultural features of translation.

**Keywords:** interpretation, experience, interpretation, types of translation, translation skills.

**ԲԱՆԱՎՈՐ ԹԱՐԳՄԱՆՈՒԹՅԱՆ  
ԱՌԱՆՁՆԱՀԱՏԿՈՒԹՅՈՒՆՆԵՐԸ ՏԱՐԱԾՔԱՅԻՆ,  
ԼԵԶՎԱԿԱՆ ԵՎ ՄՇԱԿՈՒԹԱՅԻՆ ՏԱՐԲԵՐ  
ՀԱՄԱՏԵՔՍՏԵՐՈՒՄ**

**ՍԻՐԱՆՈՒՇ ԴՈՒՈՅԱՆ**

ՀՀ ՊՆ պաշտպանական ազգային հետազոտական համալսարանի  
օտար լեզուների խմբի ավագ դասախոս  
*sirushodokhoyan0@gmail.com*

**Համառոտագիր**

Ժամանակակից աշխարհում միջլեզվային և միջմշակութային հաղորդակցության ոլորտը անընդհատ ընդլայնվում և բարդանում է՝ կապված տեղեկատվական տեխնոլոգիաների զարգացման, գլոբալացման հակասական միտումների և տեղեկատվության փոխանակման արագացման հետ: Սույն միտումներն առաջացնում են թարգմանիչ մասնագետների պահանջարկ, ովքեր լուծում են միջմշակութային շփումների կազմակերպման, թարգմանության, տեղեկատվության փոխանակման և մշակման գործընթացի նախագծման խնդիրները փոփոխվող սոցիալ-մշակութային համատեքստում: Ըստ էության՝ գրավոր և բանավոր թարգմանություն իրականացնողները այն հաղորդչամիջոցն են, ովքեր թույլ են տալիս տարբեր մշակույթներ ներկայացնող անձանց միջև տեղեկատվության փոխանակումը իրականացնել առավելագույն հավաստի, չխեղաթյուրված, ժամանակին և տեղական ինքնատիպություններին հնարավորինս համահունչ կերպով: Մասնագետների պատրաստումը թարգմանության և միջմշակութային հաղորդակցության ոլորտում ներառում է լեզվական գիտելիքների ձևավորում և լեզվական միջոցների վերլուծության ու կիրառման գործնական հմտություններ, որոնք անհրաժեշտ են մասնագիտական գործունեության համար: Թարգմանչությունը, որպես գիտություն, իր զարգացման ընթացքում առերեսվում է ավելի ու ավելի շատ խնդիրների, որոնք վերաբերում են տարբեր մշակույթների, լեզուների և միջավայրերի միջև փոխադարձ հասկանալի հաղորդակցական մեխանիզմների ստեղծմանը ու հրնթացս զարացող թարգմանչական գործիքակազմի մշակում են ենթադրում: Փորձելով պատասխանել «Ինչպես թարգմանել» հարցին՝ հետազոտողները կենտրոնանում են թարգմանության տարբեր օբյեկտների վրա, որոնք հաճախ պահանջում են տարատեսակ գործիքակազմի կիրառություն: Սույն թեմայի արդիականությունը պայմանավորված է նրանով, որ թարգմանություններ կատարելիս թարգմանիչը բախվում է օտար և մայրենի լեզուների համակարգերի առանձին տարբերի նույնականացման, մեկ մշակույթի ռեալիաները այլ մշակույթի լեզվով ձգբրիտ թարգմանելու բարդ խնդրին: Առանձնահատուկ ուշադրություն է

դարձվում բանավոր թարգմանության մեթոդական գործիքակազմի ընտրության խնդիրներին: Հետազոտության նպատակն է ներկայացնել բանավոր թարգմանության տեսակները, թարգմանության տարածքային, լեզվական և մշակութային առանձնահատկությունները:

**Բանալի բառեր`** բանավոր թարգմանություն, փորձառություն, մեկնաբանություն, թարգմանության տեսակներ, թարգմանության հմտություններ:

### **Introduction**

To understand the linguistic, cultural, and territorial features of interpreting, it is necessary to refer to the key characteristics of the oral and written forms of translation. At first glance, the difference between oral and written translations lies in their form: an interpreter (oral translator) performs an oral translation, while a translator (written) performs a written translation in the form of a written text. Here it is important to emphasize the difference between the two types of translation, based on the concepts and etymology given to the words expressing them in English. If translating in English primarily means “to transform into one’s own or another language”, then to interpret means “to explain or interpret the meaning or to present in understandable terms” (Merriam-Webster’s Collegiate Dictionary, 2003; Lew, 2019). In other words, if the goal of written translation is to convey thoughts from the source language to the target language as clearly as possible, then the goal of oral translation is to interpret thoughts from the source language into the target language in a limited time and under the influence of external environmental and communicative heterogeneous factors. Both oral and written translations assume appropriate manifestations of linguistic thinking and deep knowledge of more than one language. However, there are differences between the professional skills of an oral and a written translator. The key skill of a skilled written translator lies in the ability to write well and express oneself clearly in the target language. This is a reason why professional translators work in one direction, translating the target language only into their native language. Meanwhile, translators fluent in two or even more languages are rarely able to speak equally on a given topic in these languages. Many excellent translators are far from being bilingual; they cannot and do not even need to be as fluent in the target language as a native speaker (when translating the language of the source text). The secret of a translator’s skill lies in the ability to understand the language of the source text, to imagine the culture of the country where the text originated, and to use good literature (dictionaries, reference materials) to transform the given material into a text in the target language.

### **Theoretical and Methodological Bases**

Written translation is a skill that requires the most precision, but not all written translators can do oral translations well. An important prerequisite for interpreting is a developed memory, mastery of the art of rhetoric, as well as an excellent knowledge of the language. For interpreters and translators, excellent knowledge of the language and developed research skills are mandatory. Both oral and written translators must be well-rounded individuals, but a translator can

specialize in a narrow professional field (for example, physics, military science, literature, and even more narrowly in terms of genre, for example, prose or poetry). A written translator can be less sociable than an interpreter. High-quality interpreters easily navigate in various fields and have developed within themselves the second I-image of an “original translator” (Cholodová, 2016).

Let's consider a few questions to get a better idea of the types and forms of oral interpretation. The qualities required to be an interpreter are:

- Precognition
- Listening skills
- Comprehension of the message (in terms of information grouped by semantic units)
- Ability to separate words
- Concentration (ability to perform tasks)
- Memory
- Flexibility
- Quick orientation
- Language knowledge by levels: high, medium, and low levels
- Dialect sensitivity (variations of regional languages)
- Strategies for solving problems correctly
- Ability to reproduce materials
- Ability to express oneself clearly

The first steps in the translation process are (Nicholson, 1995):

- First of all, understand how the translation should be done: with the help of existing dictionaries or a terminology glossary established in the given field.
- Active listening
- It is imperative to preserve meaning during translation
- Manage the stress that arises when reproducing material under the observation of others, especially when some members of the audience have some knowledge of the target (reproduced) language.
- Manage the stress that is caused by the fact that, unlike translation with a headset, when translating material, the translator hears his voice, which is a disturbing situation in itself.

The main methods of translation are:

- Direct translation
- Consecutive
- Simultaneous
- Mutual understanding
- Escorted

Direct translation is the oral translation of written material in a fast manner while reading it in turn. The translator's goal when translating the material is to accurately reproduce the original. Some translators find this version of translation to be quite difficult than other forms since it is difficult to focus not on the words, but on the meaning, which must be preserved.

Reading is one of the most important elements in translation since a correct understanding of the material is considered a prerequisite at the beginning. As a result, the translator is obliged to translate the document quickly and not leave anything out. Consecutive translation is the process of oral translation, in which the translator, after carefully listening to a certain part of the material, immediately begins to translate. The clarity of the thoughts expressed by the speaker (the person whose thoughts are being translated) is important. The speaker should also enable the interpreter to distinguish the structural elements of the thought he is conveying: tone of voice, pauses, etc. According to many professional interpreters, however illogical it may seem, consecutive interpretation is more difficult and stressful than simultaneous interpretation since in the second case the interpreter is isolated from the audience, quickly reproduces the message and moves on, and, unlike the first case, does not have to memorize the entire expressed thought, which in some cases can be quite long if the speaker does not maintain “discipline” in speaking, and the interpreter is quite timid about interrupting him. In general, it can be argued that, using the terminology of the field of information technology, the total memory capacity of the human brain is important in consecutive interpretation, and in the case of simultaneous interpretation, the operational memory (Naumenko, 2019).

Many translators believe that simultaneous translation is one of the most difficult forms since it is not easy to maintain all the provisions of the translation at the same time. The meaning here is that the translator must translate simultaneously with the speaker without interruption. Such translations are mainly performed at international conferences and conventions. For example, during trials, if it is necessary to turn to an interpreter, the latter is also obliged to perform simultaneous translation. However, all questions and accusations addressed to the accused must be translated into a language understandable to the latter. Translation takes place via a camera or microphone (Naumenko, 2019).

Types of interpreting are:

- Thematic interpreting (medical, judicial, etc.)
- Press conference interpreting
- Public interpreting
- Telephone conversation interpreting
- Group interpreting

Thematic interpreting is a consecutive interpretation, during which a transition is made from one language to another. Here it is important to master thematic (medical, other) terminology and have the appropriate knowledge in the field of conversation. For example, doctors testify that they often need highly qualified specialists, since the number of people who do not speak English is increasing. Such specialists work in various medical institutions: hospitals, psychiatric hospitals, polyclinics, forensic psychiatric facilities, etc. Medical interpreting is performed both consecutively and simultaneously. Judicial interpreting is a consecutive interpretation, in which mainly judicial terms are used. It is often necessary to perform simultaneous interpretation. During such

interpretations, one must have the appropriate knowledge of the legal field and be informed about jurisprudence. These specified conditions are observed by the translator since he translates from one language into another. However, the translator is not allowed to make any wording changes in the existing laws during the translation, as this would change the main meaning of the legal acts.

Press conference interpretation is a simultaneous speech at official and international conferences. It requires appropriate skills and is usually translated into one or three languages. However, the translator usually translates into one language. Such interpreters are usually provided with a separate and quiet room. To ensure communication, both parties are given headphones.

Public interpretation is consecutive and simultaneous interpretation from one language to another in a public setting. This type of interpretation focuses on facilitating communication between individuals who speak different languages, usually in a non-professional setting. It often includes interpretation in various sectoral settings, such as social services (relations between immigrants and social workers), education (parent-teacher meetings), and public services (interaction with government agencies). The role of a public interpreter is to fill the language gap and ensure that all parties can communicate effectively, especially in situations where one or more individuals do not speak the same language. Unlike other forms of interpreting, community interpreting usually deals with practical, everyday situations that require cultural sensitivity and an understanding of the cultural features of the community.

Group interpreting is the sequential and simultaneous interpretation of one language into another among small groups. Being a group interpreter requires knowledge of the language and cultural specifics (Delistathi, 2017).

**Research Methods**

- Taking into account the above-mentioned types of translation, we have developed a translation methodology based on the following main strategies:
  - Parrot strategy: repeat everything you hear, orally and in writing.
  - Pendulum strategy: pay attention to the source and only one person.
  - Shadow dubbing, that is, a modification of expressions and meaning, while maintaining the meaning.
  - Public speaking: interpretation.
- Based on the strategic directions of the above-presented methodology of oral translation, we have classified the most important skills for translation, including:
  - Reading comprehension
  - Sensitivity to information memorization
  - Word transformation
  - Use of synonyms
  - Reading
  - Comprehension
  - Memory

- Public speaking
  - Pace
  - Pronunciation
  - Correct presentation
  - Correct delivery
  - Correct reproduction of materials
  - Problem-solving strategies
  - Flexibility (ATA French Language Division).

## Results

Effective interpreting requires several skills to ensure that communication between speakers of different languages is seamless. One of the key skills is pre-reading, which allows interpreters to anticipate what is coming up in a conversation and be prepared for the flow of information. In addition, interpreters must be adept at using synonyms and paraphrasing to express ideas without changing the meaning, even when a direct translation is not possible. Speed of speech is also a very important skill, as interpreters must be able to process and deliver information in real-time without losing the accuracy of the information. This requires a large memory and the ability to quickly connect ideas, ensuring that the main idea or meaning is accurately conveyed, even if the exact words differ between languages. Text composition is also essential, as interpreters must maintain clarity of speech and the ability to convey ideas coherently, presenting ideas logically for the listener. They often rely on problem-solving strategies to overcome challenges such as: such as ambiguous phrases or unexpected topics and must be able to detach from the written word to understand the main meaning in context. Public speaking skills, including pace, clear pronunciation, and correct delivery/presentation, are also of great importance. Finally, interpreters must be flexible, adapting their approach as necessary to accommodate different contexts, tones, and conversational styles while maintaining professionalism and accuracy. The above-mentioned diverse skills are put to use together to ensure that interpreters can provide high-quality, effective language support in a variety of settings (Torop, 2002).

The listed translation skills are demonstrated during the interpretation methods of intermittent and simultaneous (simultaneous) interpretation. Interpretation generally occurs in sequential (intermittent) and simultaneous (synchronous) forms. During simultaneous interpretation, the speaker speaks, and the interpreter waits until 2–3 words are uttered and immediately begins to translate (since there is still a small pause during simultaneous (synchronous) interpretation, the term “simultaneous interpretation” cannot be considered completely accurate). Notes (taking notes) are not allowed during oral interpretation and the interpreter is not able to use the prepared text in all cases.

Simultaneous (synchronous) interpretation was first performed during the First World War, during the Nuremberg Trials. It is used during multilingual briefings, conferences, and meetings. It is usually used during conferences of



international organizations, and simultaneous interpretation requires special equipment (interpretation booths, headsets, etc.). This is a difficult and problematic job. Simultaneous interpretation is mostly performed by pairs of interpreters, taking turns every 15–20 minutes. If we consider that all types of oral interpretation are laborious and energy-intensive, simultaneous interpretation is even more problematic. Another secret of the skill of a simultaneous interpreter is decisiveness (the ability to make a decision) since there is simply no time to do the heavy lifting (think of more worthy versions of the translation) or to match expressions (idioms) to equivalent expressions in the given language. Any delay may lead to missing a few words (and possibly a thought) the speaker has already said (Nicholson, 1995).

During punctuated interpreting, the speaker pauses every 5 minutes (usually at the end of each paragraph or complete thought or concept), and then a translator translates step by step to show what was said in the target language. The key skill in punctuated interpreting is note-taking, as few translators can memorize an entire paragraph without forgetting a single word. However, the notes taken by a translator are significantly different from those taken by a stenographer, since writing down words in the source language complicates the translator's work when he or she has to translate those words into the "target" language. Many professionals develop their notation system, which allows them to record not words but the speaker's thoughts in a language-independent manner. As a result, the translator's output (i.e., the translation) is more idiomatic and less dependent on the target language, in other words, it is linguistically limited. This means that the translation should not be taken literally, but rather the concept should be translated, i.e. the key ideas and concepts (Lew, 2019).

Let us also emphasize that during “pause” or “sequential” translation, the speaker speaks with pause, allowing the translator to formulate his thoughts as best as possible. The goal is to convey the message, that is, to convey the idea or message. How is this done? By working with concepts. The translator must know the material of the conversation to translate it. The speaker, in turn, must try never to speak in incomplete sentences or that lack meaning and verbs. The interpreter should have an idea (if at all possible, that is, if possible, he should be helped to form an idea) of what direction the conversation will take and or what point in the conversation the speaker is targeting (Cholodová, 2016).

In other words, a translator converts words into meanings and then converts those meanings into words in another language. Therefore, to make a good translation, a translator is required to have the following key qualities:

- ▶ The presence of relevant knowledge is the main prerequisite for accurately translating the material.
- ▶ Basic education and spiritual affinity between the two cultures.
- ▶ Extensive vocabulary knowledge in both languages.
- ▶ The ability to formulate one’s thoughts clearly and concisely in both languages.
- ▶ Excellent note-taking technique when performing simultaneous

(simultaneous) translation.

- Good listening skills.
- Awareness of the importance of the 5 “Ws” (“What”, “When”, “Who”, “Where”, “Why”).
- Good Voice, Eye-contact, Gestures, Attitude = VEGA!
- Excellent public speaking skills (Naumenko, 2019).

### Conclusions

Translation support plays a crucial role in ensuring clear and effective communication. Acting as a bridge between two or more languages or cultures, this support helps interlocutors to overcome spatial, cultural, and linguistic barriers to communication more effectively. Therefore, the art of translation consists not only of translating words, but also of the translator’s proper time management, having some information in advance, and planning for further actions. The following factors are of particular importance:

- Advance information regarding the material to be translated:
  - List of delegation members, their full names, and organization names (without abbreviations).
  - Slides to be used during the speech (if prepared in advance, they can be bilingual).
  - Prepared speeches or announcements to be read aloud.
  - List of the technical terms, abbreviations, jargon words, and expressions that may be used during the upcoming speech/discussion.
  - Reference information, such as drafts, photocopies of drawings, or direct handwritten notes. The more extensive the information the translator has about the material to be translated, the better the translation will be perceived.
- The nature of the meeting and the environmental/territorial characteristics: technical, formal diplomatic, formal/informal working groups, heterogeneous cultural communication environment, territorial limitations of translation, etc.
- The temporal and functional coordination of the meeting should take into account the time allocated for translation and the necessary logistical support for the translator.

### References

1. Cholodová, U. (2016). Cognitive-pragmatic aspects of translation and interpretation within discourses. *International Journal on Language, Literature and Culture in Education*, 3(1), 100–117. <http://dx.doi.org/10.1515/llce-2016-0006>.
2. Delistathi, C. (2017). He stole our translation. *Target. International Journal of Translation*, 29(2), 201–21. <http://dx.doi.org/10.1075/target.29.2.01del>.
3. Lew, R. (2019). Dictionaries for learners of English. *Language Teaching* 49(2), 291–94. <http://dx.doi.org/10.1017/s026144481500049x>.
4. Merriam-Webster’s Collegiate Dictionary. (2003). 11th edition, Springfield, Massachusetts. (Retrieved from 12.12.2024).
5. Naumenko, A. (2019). The author’s individual style in translation. *Naukovy Visnyk of South Ukrainian National Pedagogical University named after K. D. Ushynsky: Linguistic Sciences*, 18(28), 139–48. <http://dx.doi.org/10.24195/2616-5317-2019-28-13>.

6. Nicholson, N. S. (1995). Translation and Interpretation. *Annual Review of Applied Linguistics*, 15, 42–62. <http://dx.doi.org/10.1017/s0267190500002609>.
7. Torop, P. (2002). Translation as translating as culture. *Sign Systems Studies*, 30(2), 593–605. <http://dx.doi.org/10.12697/sss.2002.30.2.14>.

*The article has been submitted for publication: 28.01.2025*  
*Հոդվածը ներկայացվել է տպագրության. 28.01.2025*

*The article is sent for review: 10.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 10.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# **SOME FEATURES OF TEACHING THE SUBJECT "FOREIGN LANGUAGE (ENGLISH)" FOR SENIOR OFFICERS IN MILITARY EDUCATIONAL INSTITUTIONS**

**NARINE HARUTYUNYAN**

Lecturer in the Foreign Languages Group of  
the National Defense Research University of the Ministry of  
Defense of the Republic of Armenia

**DOI: 10.54503/2579-2903-2025.1-75**

## **Abstract**

In modern environments full of conflicts, the priority is for states to confront complex international challenges and deepen international cooperation. The involvement of states in forms of international cooperation is expressed in participation in joint military exercises, peacekeeping missions, and exchange of experience in educational and training programs. The effective involvement of personnel in these processes is ensured by sufficient knowledge of English.

In the process of transformation of the RA Armed Forces, the teaching of foreign languages, in particular the teaching of English, acquires strategic importance to analyze leading international experience, compare different approaches to warfare, and develop more effective models for the RA Armed Forces, which is impossible without knowledge of world experience. In the context of this reality, the teaching of English in military educational institutions acquires priority importance. It not only develops the language skills of military personnel but also contributes to professional progress and the expansion of international military cooperation. Officers must be able to communicate, analyze international experience, participate in joint military exercises, and improve their professional skills.

Therefore, teaching English in military educational institutions should be considered not only as language training but also as a means of strategic development that will contribute to the modernization of the RA Armed Forces and their integration into the international security system.

**Keywords:** challenge, military cooperation, international cooperation, training, SWOT analysis.

# ՌԱԶՄԱՌՍՈՒՄՆԱԿԱՆ ՀԱՍՏԱՏՈՒԹՅՈՒՆՆԵՐՈՒՄ ԱՎԱԳ ՍՊԱՅԱԿԱՆ ԿԱԶՄԻ «ՕՏԱՐ ԼԵԶՈՒ (ԱՆԳԼԵՐԵՆ)» ԱՌԱՐԿԱՅԻ ԴԱՍԱՎԱՆԴՄԱՆ ՈՐՈՇ ԱՌԱՆՁՆԱՀԱՏԿՈՒԹՅՈՒՆՆԵՐ

## ՆԱՐԻՆԵ ՀԱՐՈՒԹՅՈՒՆՅԱՆ

ՀՀ ՊՆ պաշտպանական ազգային հետազոտական համալսարանի  
օտար լեզուների խմբի դասախոս

### Համառոտագիր

Հակամարտություններով լի ժամանակակից միջավայրերում առաջնա-  
հերթ է դառնում միջազգային բարդ մարտահրավերներին պետությունների  
դիմակայումը և միջազգային փոխգործակցության խորացումը: Պետություն-  
ների ներգրավումը միջազգային համագործակցության ձևերի մեջ արտա-  
հայտվում է համատեղ գորավարժություններին մասնակցությամբ, խաղա-  
դապահ առաքելություններում ներգրավվածությամբ և կրթական ու վերա-  
պատրաստման ծրագրերում փորձի փոխանակմամբ: Այս գործընթացներում  
անձնակազմի արդյունավետ մասնակցությունն ապահովվում է անգլերենի  
բավարար իմացությամբ:

ՀՀ զինված ուժերի կերպավորման գործընթացում օտար լեզուներ-  
ի ուսուցումը, մասնավորապես, անգլերենի ուսուցումը ռազմավարական  
նշանակություն է ստանում միջազգային առաջատար փորձը վերլուծելու,  
տարբեր պատերազմավարման մոտեցումները համեմատելու և ՀՀ զինված  
ուժերի համար առավել արդյունավետ մոդելներ մշակելու նպատակով, ինչը  
հնարավոր չէ առանց համաշխարհային փորձի իմացության: Այս իրողությ-  
յան համատեքստում անգլերենի դասավանդումը ռազմական ուսումնական  
հաստատություններում առաջնահերթ նշանակություն է ստանում: Այն ոչ  
միայն զարգացնում է զինվորականների լեզվական հմտությունները, այլև  
նպաստում է մասնագիտական առաջընթացին և միջազգային ռազմական  
համագործակցության ընդլայնմանը: Անհրաժեշտ է, որ սպաները կարողա-  
նան հաղորդակցվել, վերլուծել միջազգային փորձը, մասնակցել համատեղ  
գորավարժություններին, կատարելագործել իրենց մասնագիտական հմտու-  
թյունները:

Ուստի՝ ռազմական ուսումնական հաստատություններում անգլերենի  
դասավանդումը պետք է դիտարկվի ոչ միայն որպես լեզվական ուսուցում,  
այլ նաև որպես ռազմավարական զարգացման միջոց, որը նպաստելու է ՀՀ  
զինված ուժերի արդիականացմանն ու միջազգային անվտանգության հա-  
մակարգում ինտեգրմանը:

**Բանալի բառեր՝** մարտահրավեր, ռազմական համագործակցություն,  
միջազգային փոխգործակցություն, ուսուցում, SWOT վերլուծություն:

## Introduction

English language teaching is one of the mandatory academic subjects of the National Defense Research University of the Ministry of Defense of the Republic of Armenia. It is taught within the framework of the “State Military Security” training course and the “State and Military Management” master’s program, to impart to the students such knowledge that will allow them to get acquainted with professional literature in English and communicate effectively on international platforms.

The students of this group are military personnel aged 35–50, who hold leadership positions in the operational and strategic circles of the armed forces and have experience in participating in combat operations. Due to the lack of use of a foreign language for many years, the majority of them are classified as A1–A2 levels according to STANAG 6001 standards (NATO BILC. Official site).

To overcome the challenges arising in the process of teaching English in these groups, it is necessary to develop a curriculum that will meet the needs and goals of the students. It should stimulate the development of foreign language skills, improve strategic communication, and strengthen the mastery of international military terminology. The learning process should include practical and applied approaches, ensuring the effective use of the language in a professional environment.

To ensure sufficient knowledge of the English language of the target group, it is necessary to develop the curriculum and the most effective teaching methods, taking into account the achievements of students and the challenges that may arise during the learning process. Now let us dwell in more detail on the advantages and disadvantages of students with age, combat experience, and high military positions in learning English.

## Theoretical and Methodological Bases

In the theoretical and methodological literature on the process of learning a foreign language, certain learning challenges and advantages are highlighted. Let us note the most important of them (Mirjaliisa, 1996; Thomas, 2000; Birdsong, 2006; Brookfield, 2010).

### Age-related benefits of learning:

- Discipline and high level of self-organization.

Officers with long service years, as a rule, follow clear rules and agendas, which contributes to a systematic and regular process of language learning.

- Motivations due to professional growth.

At this age, officers and soldiers often strive for career advancement, for which knowledge of a foreign language (especially English) is necessary, and they also realize its importance in civilian life.

- Rich life and service experience

The experience accumulated in communicating with people and solving non-standard problems contributes to the ability to find parallels between the military sphere and communicative situations in language learning, which facilitates the assimilation of the material.

- Ability to work under stress

Servicemen are used to taking responsibility for making decisions and can remain focused even under heavy workloads. This is an advantage when preparing for intensive courses and exams.

- A conscious approach to choosing teaching methods

Adult learners (especially military students) often have a clear idea of why they need English and how it will be used. This increases the effectiveness of independent learning (reading special texts, viewing military reports in English, etc.).

- Developed teamwork skills

Military personnel are accustomed to teamwork and effective communication, which is important when using group training methods.

**Age-related challenges in learning:**

- Age-related changes in memory and cognitive processes

After the age of 35–40, some cognitive functions, including the speed of memorization and the ability to process new information, begin to decline. This can make it difficult to master a large amount of new vocabulary and grammatical structures.

- Limited free time for learning

Servicemen aged 35–50 often face a shortage of time due to service and family obligations. This can make it difficult to carry out regular training and slow down the pace of progress.

- Difficulties in adapting to new educational technologies

Although military personnel are often proficient in modern information systems, some learners find it more difficult to adapt to online learning platforms, mobile applications, and interactive simulators.

- Fear of making mistakes and limitations in speaking

Adult students often have a fear of speaking a foreign language because they do not want to make a mistake or appear ignorant in front of their colleagues. In a military environment, this anxiety can be even more pronounced, due to hierarchy and high responsibility.

- Difficulty in using professional vocabulary in foreign languages

Military personnel use their professional language, including terms, abbreviations, and coded formulations. Switching to English equivalents and using both language systems in parallel can create confusion (Bloom, 1968; Cross, 2010; Falasca, 2011).

**Benefits of training among military personnel with combat experience:**

- High level of endurance

Participation in combat operations develops the military personnel's ability to strictly follow instructions and orders, as well as self-control and self-organization, which has a positive effect on language learning.

- Realistic approach to learning

Military personnel with combat experience value the practical application of what they have learned and focus on those language skills that are necessary for performing professional tasks.

- Experience in teamwork and group learning

Combat experience implies strong interaction within a group. During English training, this helps during group assignments, project work, and role-playing games

- Stress resistance and adaptability

Experience in participating in combat operations develops endurance and the ability to remain stable under stressful conditions. This can help military personnel adapt more quickly to intensive English courses and the burden of exams.

- Ability to react quickly and make decisions ability to make decisions

Combat experience develops the ability to react quickly, analyze situations, and make operational decisions. These abilities are applicable during language learning, where verbal communication requires quick thinking and reaction.

- High motivation to learn military terminology

After participating in international exercises or peacekeeping missions, servicemen appreciate the importance of English more highly for international cooperation and effective interaction with partner countries (Hoge et al., 2004).

### **Learning challenges among servicemen with combat experience:**

- Post-traumatic stress and psychological consequences

Servicemen who have participated in combat operations may have post-traumatic stress disorder or related psychological problems, which can negatively affect the learning process.

- Difficulty adapting to the learning environment

For servicemen accustomed to combat conditions, it is difficult to return to the “classroom” learning format, which can reduce the effectiveness of learning.

- Transition between military terminology and common language difficulty

Long years of using military-specific terminology and abbreviations sometimes hinder the mastery of the general language. This can complicate the acquisition and correct use of English equivalents.

- Lack of time due to frequent business trips and training

Servicemen with combat experience often continue to serve with a high workload, which makes systematic learning of English difficult.

- High demands on themselves and the learning process

Servicemen with experience working in risky conditions are accustomed to quick results and strict discipline. This sometimes leads to high expectations for the pace of language learning, and a mismatch in expectations can reduce motivation.

- The risk of neglecting the general language when focusing on professional terminology

The desire to learn military terminology and professional language can sometimes lead to the neglect of everyday communicative language. This can create vocabulary gaps in general everyday communication (Hoge et al., 2004).

### **Benefits of training among officers holding high military positions:**

- High discipline and self-organization

Discipline and time management skills formed in the military environment



make it possible to effectively distribute study time, maintain the study regimen, and complete tasks within the established deadlines.

- Realistic approach to training content

High-ranking officers focus only on those language skills that are directly applicable to their professional activities: when preparing reports, conducting international negotiations, or giving orders.

- Systematic thinking and analytical skills

High-ranking officers have developed analytical thinking, which contributes to the assimilation of the language, allowing them to perceive grammatical structures and new vocabulary in logical connections.

- Teamwork skills

High-ranking military personnel are used to working in a team environment and communicating effectively with colleagues. This supports English language learning through group projects, discussions, and practical simulations.

- Awareness of the importance of international relations

High-ranking military personnel are often involved in international cooperation processes (NATO, UN peacekeeping missions), which is a strong motivation for learning English.

- Ability to make quick decisions

Management work requires quick and accurate decisions, which is compatible with the development of oral communication in English when it is necessary to negotiate or make strategic decisions (NATO BILC; DLIELC).

### **Learning challenges among officers in high-ranking military positions:**

- Time constraints and busy schedules

High-ranking military personnel often have very busy schedules, which reduces the time allocated for English learning.

- High expectations for the speed of learning

Military managers are used to achieving quick results, which can be inconsistent with the natural process of language learning and lead to a decrease in motivation.

- Fear of making mistakes and lack of self-confidence

Senior military personnel may avoid speaking English for fear of making mistakes, as mistakes are often viewed as a sign of weakness in a military environment.

- Predominance of military terminology

Senior military personnel are accustomed to using military terminology and abbreviations, which can make it difficult to master general English.

- Difficulty adapting to new technologies

Some military personnel have difficulty adapting to new learning platforms (e.g., online courses, and apps), which can slow down the learning process.

- Predominance of professional content

During English training, senior military personnel focus primarily on professional communication, neglecting the development of everyday conversational language (<https://vumo.mil.ru>).

## Research Methods

Considering the challenges and benefits of learning presented above, we conducted an empirical study among senior officers. The study was conducted using a SWOT analysis, which allowed us to classify the challenges and benefits of learning English.

## Results

The observed group has both strengths and weaknesses, opportunities and threats. The use of SWOT methodology makes it possible to analyze these factors, identify optimal solutions, and propose an appropriate strategy, taking into account the needs of learners and educational challenges (SWOT Analysis-Research Methodology).

### SWOT analysis

#### 1. Strengths

- Discipline and high level of self-organization
- Motivation for professional advancement
- Rich life and service experience
- High teamwork skills
- Awareness of the importance of international cooperation

Recommendations for the most effective use of strengths are:

- Development of a clear curriculum, which will include “a combination of physical and online courses”, ensuring maximum efficiency.
- Application of integrated courses, where training will include “Development of a clear curriculum”, “military professional materials, reports, strategic documents”.

#### 2. Weaknesses

- Lack of time and overloaded schedule
- Fear of making mistakes and speech limitations
- Age-related and cognitive changes, the dominance of military terminology
- Difficulty adapting to new technologies

Recommendations for overcoming weaknesses are:

- Use of practical methods, for example, training based on strategic scenarios
- Encourage the free use of speech, for example, through Speaking Clubs and individual courses.

#### 3. Opportunities

- Expanding international military cooperation
- Access to professional training programs
- Development of new educational technologies

Recommendation for making the most of opportunities is:

- Flexible curriculum that will allow military personnel to combine service and training.

#### 4. Threats

- Lack of time

- Decreased motivation
- Psychological barriers

Recommendations to reduce threats is:

- Develop motivational mechanisms, such as competitive programs, and incentive methods (e.g., increasing opportunities for official advancement, training abroad).

SWOT analysis shows that English language teaching in military educational institutions should be adapted, integrated, and practical. It is necessary to use strengths and opportunities while responding to challenges and reducing threats.

## **Conclusion**

Based on the results of the SWOT analysis, a targeted English language training program for senior officers in military educational institutions has been developed and proposed, which will help to more effectively overcome existing challenges and ensure high-quality training.

### **1. Main goal of the program**

The main goal of the program is to increase the level of English language proficiency of senior officers, ensuring the language skills necessary for international military cooperation, diplomatic contacts, and the implementation of tactical programs (Galskova & Gez, 2006; Horwitz, 2010; Johnson, 2017). To achieve this goal, it is planned to:

#### **1.1. General goals**

- Provide the minimum necessary level of communication that will allow officers to participate in international exercises, negotiations, and military training programs.
- Increase the volume of professional vocabulary, including military orders, reports, diplomatic terms, and the language component of strategic analyses.
- Promote oral and written communication skills, which will allow officers to speak and write freely on topics related to the military sphere.
- Apply interactive and technological methods that will contribute to the organization of an effective and modern learning process.
- Make the training process more flexible, taking into account the workload and time constraints of military personnel.

#### **1.2. Specific objectives**

- Increase the English level of senior officers according to STANAG 6001 standards from A1–A2 to B1–B2.
- Focus on practical and applied language skills that are necessary during official communications, exchange of orders, drafting reports, and diplomatic contacts.
- Overcome psychological barriers associated with the fear of communicating in English, especially during oral speech.
- Use modern educational technologies, including online platforms, simulators, and applications related to military terminology.

- Apply group learning methods that develop team cooperation and communication effectiveness.

## 2. Thematic content

The English language training program should include three main components: general language skills, mastery of military language, and development of diplomatic and international contacts (Knowles, 1984; Galskova & Gez, 2006; Merriam et al., 2007).

### 2.1. General language skills

- Basic grammar and syntax (common word structures, verb forms, tenses).
- Speaking (everyday and professional dialogues, interviews,
- Listening skills (understanding reports, briefings, and orders).
- Written skills (compiling orders, reports, and official documents).

### 2.2. Military terminology and professional communication

- Military orders and reports (language of interaction at the command level).
- Tactical and operational terminology (targeted operations, chain of command).
- Linguistics of strategic and defense policy (terms of troop deployment, allied cooperation).
- Emergency communication language (disaster response, conflict management terminology).

### 2.3. International Relations and Diplomacy

- Negotiation (language of international cooperation, diplomatic terminology).
- Participation in conferences and international meetings (preparation of public speeches, presentation of reports).
- Official correspondence (formulation of documents within the framework of military diplomacy).

## 3. Organizational formats

English language teaching should be organized by combining group and individual training, and on-site and online courses, which will allow for more effective involvement of different learning formats (Litz et al., 2016; Zakharova, 2017; Tighe et al., 2019).

### 3.1. Teaching methods and formats

- Group training (groups of 6-10 people) focused on team tasks, debates, and situational exercises.
- Individual courses (in 1:1 format) – targeted training for senior military officers.
- Online learning (E-learning) – the possibility of independent learning through interactive platforms, simulators, and applications.
- Speaking Practice (Speaking Clubs, Role Plays), with an emphasis on professional communication.

### 3.2. Hybrid Learning Model

- Physical courses (classical learning format, classroom lessons).
- Online learning (E-learning, Moodle, Zoom, MS Teams), enabling officers to combine service and training.
- Use of technological platforms (Quizlet, Duolingo for Military, LingQ) for fast independent learning.

### 3.3. Assessment System

- Entry Testing (initial assessment according to STANAG 6001 standards).
- Ongoing Assessment (Progress Tracking System): continuous monitoring of students' progress.
- Final Exam: assessment of reports, speeches, and written work.

## 4. Conclusion

The presented curriculum is based on the results of the SWOT analysis and is designed to improve the language training of senior officers. It focuses on practical training, includes specific strategic and military terminology, and provides flexible teaching methods, which will dramatically improve the level of English proficiency and communication skills of military personnel.

## References

1. Birdsong, D. (2006). Age and second language acquisition and processing: A Selective overview. *Language Learning*, 56, 9 – 49. <http://10.1111/j.1467-9922.2006.00353.x>, [https://www.researchgate.net/publication/227539526\\_Age\\_and\\_Second\\_Language\\_Acquisition\\_and\\_Processing\\_A\\_Selective\\_Overview](https://www.researchgate.net/publication/227539526_Age_and_Second_Language_Acquisition_and_Processing_A_Selective_Overview)
2. Bloom, B. S. (1968). Learning for mastery. *Instruction and curriculum*. Regional education laboratory for Carolinas and Virginia. Topical papers and reprints, N 1. Evaluation Comment, 1(2), 1-12. <https://eric.ed.gov/?id=ED053419>
3. Brookfield, S. (2010). Critical reflection as an adult learning process. In book: *Handbook of reflection and reflective inquiry*, 215–236. 10.1007/978-0-387-85744-2\_11
4. Cross, R. (2010). Language teaching as sociocultural activity: Rethinking language teacher practice. *The Modern Language Journal*, 94, 434–452. <https://doi.org/10.1111/j.1540-4781.2010.01058.x>
5. Falasca, M. (2011). Barriers to adult learning: Bringing the gap. *Australian Journal of Adult Learning*, 51(3), 583–590. <https://files.eric.ed.gov/fulltext/EJ954482.pdf>
6. Hoge, C. W., Castro, C. A., Messer, S. C., McGurk, D., Cotting, D. I., Koffman, R. L. (2004). Combat duty in Iraq and Afghanistan, mental health problems, and barriers to care. *N Engl J Med*, 351(1), 13–22. <https://10.1056/NEJMoa040603>, <https://pubmed.ncbi.nlm.nih.gov/15229303/>.
7. Horwitz, E. K. (2010). Foreign and second language anxiety. *Language Teaching*, 43(2), 154–167. <https://www.cambridge.org/core/journals/language-teaching/article/abs/foreign-and-second-language-anxiety/3782D56F94F86BFA6765E5F32910DB39>
8. Johnson, D. (2017). The Role of Teachers in Motivating Students to Learn. *BU Journal of Graduate Studies in Education*, 9, 46–49. <https://files.eric.ed.gov/fulltext/EJ1230415.pdf>
9. Knowles, M. S. (1984). *Andragogy in action. Applying modern principles of adult education*. San Francisco, CA: Jossey Bass.
10. Litz, B., Maguen, S., Tankersley, A., & Hundert, C. (2016). Peacekeeping. In G. Fink (Ed.), *Stress: Concepts, cognition, emotion, and behavior* (pp. 401–404). Elsevier Academic Press. <https://psycnet.apa.org/record/2016-26280-050>
11. Merriam, S. B., Caffarella, R. S., Baumgartner, L. M. (2007). *Learning in adulthood: A*

- comprehensive guide. (3rd edition). San Francisco, CA: Jossey-Bass. <https://archive.org/details/learninginadulth0004merr>
12. Mirjaliisa Ch., M. (1996). Business negotiations: Interdependence between discourse and the business relationship. *English for Specific Purposes*, 15(1), 19–36, ISSN 0889-4906, [https://doi.org/10.1016/0889-4906\(95\)00029-1](https://doi.org/10.1016/0889-4906(95)00029-1)
  13. Thomas, J. W. (2000). A review of research on project-based learning, The Autodesk Foundation. [https://www.pblworks.org/sites/default/files/2019-01/A\\_Review\\_of\\_Research\\_on\\_Project\\_Based\\_Learning.pdf](https://www.pblworks.org/sites/default/files/2019-01/A_Review_of_Research_on_Project_Based_Learning.pdf)
  14. Tighe, E. L., Little, C. W., Arrastia-Chisholm, M. C., Schatschneider, C., Diehm, E., Quinn, J. M., & Edwards, A. A. (2019). Assessing the direct and indirect effects of metalinguistic awareness on the reading comprehension skills of struggling adult readers. *Reading and Writing*, 32, 787–818. <https://link.springer.com/article/10.1007/s11145-018-9881-2>
  15. <https://vumo.mil.ru>, Официальный сайт Военного университета имени князя Александра Невского министерства обороны Российской Федерации [<https://vumo.mil.ru>, Official site of the Military University named after Prince Alexander Nevsky of the Ministry of Defense of the Russian Federation]. (Retrieved from: 10.01.2025).
  16. <https://www.dlielc.edu/> Official site of DLIELC. Defense language institute. English language center. (Retrieved from: 10.01.2025).
  17. <https://www.natobilc.org/en/info/about-us/>. "Official site of the Bureau for International Language Coordination". NATO BILC. (Retrieved from: 13.01.2025).
  18. <https://research-methodology.net/theory/strategy/swot-analysis/> SWOT Analysis- Research Methodology. (Retrieved from: 13.01.2025).
  19. Гальскова, Н. Д., Гез, Н. И. (2006). Теория обучения иностранным языкам. Лингводидактика и методика, Москва, Издательский центр «Академия». [Galskova, N. D., Gez, N. I. (2006). Theory of teaching foreign languages. Linguodidactics and methodology, Moscow, Academy Press.]. <http://learnteachweb.ru/articles/galskova.pdf>
  20. Захарова, Е. А. (2017). Методы обучения иностранному языку в историческом контексте и их значимость в современной практике иноязычного образования. *Наука и школа*, 3, 174–183. [Zakharova, E. A. (2017). Methods of teaching a foreign language in a historical context and their importance in modern practice of foreign language education. *Science and school*, 3, 174–183.]. <https://cyberleninka.ru/article/n/metody-obucheniya-inostrannomu-yazyku-v-istoricheskom-kontekste-i-ih-znachimost-v-sovremennoy-praktike-inoyazychnogo-obrazovaniya>

*The article has been submitted for publication: 17.01.2025*  
*Հոդվածը ներկայացվել է փպագրությամբ. 17.01.2025*

*The article is sent for review: 25.02.2025*  
*Հոդվածն ուղարկվել է գրախոսությամբ. 25.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է փպագրությամբ. 31.03.2025*

# THE IMPACT OF FOREIGN REMITTANCIES ON ARMENIA'S ECONOMY WITHIN THE CONTEXT OF THE RUSSIAN-UKRAINIAN WAR SPILLOVERS

**KAREN SARGSYAN**

International Scientific-Educational Center of the National Academy of Sciences  
of the Republic of Armenia

Head of the Department of Management and Economics,  
PhD in Economic Sciences, Associate Professor

*karen.sargsyan@isec.am*

**DOI: 10.54503/2579-2903-2025.1-86**

## **Abstract**

Although in modern economic realities, foreign remittances are an important source of financing for low- and middle-income countries, a clear consensus on their impact on the country's economic growth has not yet been formed. There are two main opposing views on this issue. A group of studies confirms that at the macroeconomic level, foreign remittances often contribute to economic growth by providing a significant source of foreign exchange inflows, increasing national income and aggregate demand, financing imports, and improving the balance of payments.

At the same time, some authors draw attention to the negative impact of private foreign remittances on the country's economy, in particular, the loss of competitiveness of export-oriented sectors, the strong dependence of the economy on foreign transfers, the outflow of resources from the manufacturing sector to the service sector, the deterioration of the balance of payments, as well as the increase in the inflation rate.

After the ongoing of the Russian-Ukrainian conflict, the volume of foreign private remittances inflows in the Republic of Armenia has sharply increased since the second quarter of 2022, due to new financial and economic realities in Russia and the economic and financial sanctions imposed on it by Western countries. This led, in particular, to a rapid growth in private consumer spending in the short term, which in turn stimulated economic activity in non-exportable sectors of the Armenian economy, such as trade, construction, and services. Analyzing the dynamics of the indicators of net flows of external private transfers and the rates of economic growth in Armenia, it becomes quite obvious that in the years of high economic growth in the Republic of Armenia, a high growth of private external transfers was also recorded, and in the years when foreign private transfers decreased, economic growth was quite low or an economic decline was recorded. Accordingly, it can be concluded that the economic growth of the Republic of Armenia continues to be largely determined by the growth of non-exportable sectors stimulated by external factors, in which case, in the event of a decrease

in the impact of external factors, economic growth sharply slows down or even declines. Meanwhile, if economic growth were determined by the growth of export sectors, such as manufacturing and agriculture, then dependence on external financial resources would be weaker, and economic growth would be more stable.

**Keywords:** foreign private remittances, net inflow, economic growth.

## ԱՐՏԱՍԱՀՄԱՆՅԱՆ ԴՐԱՄԱԿԱՆ ՓՈԽԱՆՑՈՒՄՆԵՐԻ ԱԶԴԵՑՈՒԹՅՈՒՆԸ ՀԱՅԱՍՏԱՆԻ ՏՆՏԵՍՈՒԹՅԱՆ ՎՐԱ ՌՈՒՍ-ՈՒԿՐԱԻՆԱԿԱՆ ՊԱՏԵՐԱԶՄԻ ԱԶԴԵՑՈՒԹՅՈՒՆՆԵՐԻ ՀԱՄԱՏԵՔՍՏՈՒՄ

### ԿԱՐԵՆ ՍԱՐԳՍՅԱՆ

ՀՀ Գիտությունների ազգային ակադեմիայի  
գիտակրթական միջազգային կենտրոնի  
կառավարման և տնտեսագիտության ամբիոնի վարիչ,  
տնտեսագիտական գիտությունների թեկնածու, դոցենտ

*karen.sargsyan@isec.am*

### Համառոտագիր

Թեև ժամանակակից տնտեսական իրողություններում արտաքին տրանսֆերտները ֆինանսավորման կարևոր աղբյուր են ցածր և միջին եկամուտ ունեցող երկրների համար, երկրի տնտեսական աճի գործում վերջիններիս ազդեցության վերաբերյալ հստակ կոնսենսուսս դեռ չի ձևավորվել: Այս հարցում հիմնականում առկա են երկու հակադիր տեսակետներ: Ուսումնասիրությունների մի խումբը հավաստում է, որ մակրոտնտեսական մակարդակում արտաքին տրանսֆերտները (դրամական փոխանցումները) հաճախ նպաստում են տնտեսական աճին՝ ապահովելով արտաբյուջեի ներհոսքի զգալի աղբյուր, ավելացնելով ազգային եկամուտն ու համախառն պահանջարկը, ֆինանսավորելով ներմուծումը և բարելավելով վճարային հաշվեկշիռը:

Մինչույն ժամանակ որոշ հեղինակներ ուշադրություն են դարձնում երկրի տնտեսության վրա մասնավոր արտասահմանյան տրանսֆերտների բացասական ազդեցությանը, մասնավորապես՝ արտահանմանն ուղղված ոլորտների մրցունակության կորստին, տնտեսության ուժեղ կախվածությանը օտարերկրյա փոխանցումներից, ռեսուրսների արտահոսքին արտադրական հատվածից դեպի սպասարկման ոլորտ, վճարային հաշվեկշռի վատթարացմանը, ինչպես նաև գնաճի մակարդակի աճին:

Ռուս-ուկրաինական հակամարտության մեկնարկից հետո՝ 2022 թվականի 2-րդ եռամսյակից Հայաստանի Հանրապետությունում կտրուկ ավելացել են օտարերկրյա մասնավոր տրանսֆերտների ներհոսքի ծավալը՝ Ռուսաստանում ձևավորված ֆինանսատնտեսական նոր իրողությունների



և վերջինիս հանդեպ արևմտյան երկրների կողմից կիրառված տնտեսական ու ֆինանսական պատժամիջոցների պատճառով: Դա կարճաժամկետ ժամանակահատվածում առաջացրեց, մասնավորապես, մասնավոր սպառողական ծախսերի առաջանցիկ աճ, որն իր հերթին խթանեց տնտեսական գործունեությունը Հայաստանի տնտեսության ոչ արտահանելի հատվածներում, ինչպիսիք են առևտուրը, շինարարությունը և ծառայությունները: Վերլուծելով արտաքին մասնավոր տրանսֆերտների զուտ հոսքերի ցուցանիշների և Հայաստանում տնտեսական աճի տեմպերի դինամիկան միանգամայն ակնհայտ է դառնում, որ Հայաստանի Հանրապետությունում բարձր տնտեսական աճի տարիներին արձանագրվել է նաև մասնավոր արտաքին տրանսֆերտների բարձր աճ, իսկ այն տարիներին, երբ արտասահմանյան մասնավոր տրանսֆերտները նվազել են, տնտեսական աճը բավականին ցածր է եղել կամ գրանցվել է տնտեսական անկում: Ըստ այդմ, կարելի է եզրակացնել, որ Հայաստանի Հանրապետության տնտեսական աճը շարունակում է մեծապես պայմանավորված լինել արտաքին գործոններով խթանվող ոչ արտահանելի ոլորտների աճով, ինչի պարագայում արտաքին գործոնների ազդեցության նվազման դեպքում տնտեսական աճը կտրուկ դանդաղում է կամ նույնիսկ անկում է գրանցվում: Մինչդեռ, եթե տնտեսական աճը պայմանավորված լիներ արտահանվող ոլորտների աճով, ինչպիսիք են մշակող արդյունաբերությունը և գյուղատնտեսությունը, ապա արտաքին ֆինանսական ռեսուրսներից կախվածությունն ավելի թույլ կլիներ, իսկ տնտեսական աճը՝ ավելի կայուն:

**Բանալի բառեր՝** արտասահմանյան փոխանցումներ, զուտ ներհոսք, տնտեսական աճ:

**Introduction**

A growing income gap between richer and poorer nations, demographic pressures, and changes to the world economy itself will add to the number of people who migrate in search of economic opportunity. This will, in turn, fuel the flow of remittances for decades to come.

Foreign remittances that are transferred back to a migrant's home country are typically used for need-based expenses, such as food and clothing. Foreign remittances are the private savings of migrant workers that have left their home country to find work in another country.

Migrant remittances have been growing rapidly in the past few years and now represent the largest source of foreign income for many developing economies. Not in far past, private foreign remittances were viewed exclusively as a socially specific form of exchange of funds between individuals and households. However, over time, when the volumes of the latter increased sharply, they turned into an important economic factor that has a tangible impact on the economies of many countries, in particular, on the level of consumer spending and aggregate demand, since recipients of private foreign remittances mainly spend the funds received for consumption purposes.

It is hard to estimate the exact size of remittance flows on economy, because

many take place through unofficial channels. Officially recorded remittances to low – and middle–income countries (LMICs) are expected to reach \$685 billion in 2024. The true size of remittances, including flows through informal channels, is also believed to be even larger. The top five recipient countries for remittances in 2024 are India, with an estimated inflow of \$129 billion, followed by Mexico (\$68 billion), China (\$48 billion), the Philippines (\$40 billion), and Pakistan (\$33 billion). The growth rate of remittances in 2024 is estimated to be 5.8 percent, significantly higher than 1.2 percent registered in 2023 (The World Bank, 2024).

Russia is another large source of remittances. After the ongoing war in Ukraine in 2022, remittances to Central Asia rose sharply. This confounded expectations, especially after sanctions imposed via the SWIFT payment system. The rise stemmed from a spike in the price of oil—Russia’s principal export and the main driver of the ruble’s exchange rate. It meant that the value of ruble remittances was larger when expressed in dollars.

After growing sharply by 18 percent in 2022, remittance flows to Europe and Central Asia declined by 10 percent to reach about \$71 billion in 2023. However, flows have remained much higher than prewar levels. The sharp decrease in remittances last year, from the high 2022 baseline, was driven mainly by a slowdown of money transfers from the Russian Federation to its neighboring countries, especially to Central Asian countries. Nearly 39 percent depreciation of the Russian ruble against the US dollar in 2023 decreased the value of money transfers from Russia. Furthermore, remittance flows to Ukraine and Russia remained weaker than expected in 2023 due to negative effects from the ongoing war. Migration from Russia, significant in 2022, has been slowing, with some migrants electing to return home.

The slowing of remittances from Russia in 2023 also led to a decline in remittances to Azerbaijan and the Kyrgyz Republic, which are highly dependent on Russian remittances. Money transfers from the United States to these economies have declined significantly as well, contributing to further weakness in overall remittances. Many other countries in the region experienced sharp declines: Armenia, Azerbaijan, and Kazakhstan posted at least a 29 percent drop in 2023. In contrast, remittances to Albania, Bulgaria, Kosovo, and Türkiye posted double-digit growth in 2023.

Monthly data indicate that remittance growth for many countries in the region remained subdued as normalization of Russian money transfers continued throughout the first three months of 2024. As estimated by World Bank, remittance flows to Europe and Central Asia are projected to decline by 2 percent in 2024 due to the continued slowdown of outward remittances from Russia and a lingering weakness in flows to Ukraine and Russia. Money transfers from Russia are expected to continue declining. The projections for 2024 are subject to downside risk, including weaker-than-expected economic growth in major remittance-sending economies or a sharper-than-expected drop in Russian outbound remittances. In 2025, remittances to the region are expected to grow by about 4 percent to \$72 billion (The World Bank, 2024).

Unrecorded flows of remittances through informal channels are believed to be at least 50 percent larger than recorded flows. Not only are remittances large but they are also more evenly distributed among developing economies than capital flows, including foreign direct investment. Remittances are especially important for low-income countries and account for nearly 4 percent of their GDP, compared with about 1.5 percent of GDP for middle-income countries (International Monetary Fund, 2022).

The importance of remittances is also underlined by the fact that their volume has exceeded the volume of foreign aid (net official development assistance) received worldwide by three times. From a macroeconomic perspective, remittances are particularly important for low-income countries, for which they currently account for about 6% of gross domestic product (GDP). For countries such as Haiti, Kyrgyzstan, Nepal, El Salvador and Tajikistan, the ratio of remittances to GDP exceeds 20%. However, remittances do not flow only to low- and middle-income countries. Among the countries receiving absolute remittances are developed countries, including Germany, France and Belgium (Yang, 2011).

Cross-country analyses generally find that remittances have reduced the share of poor people in the population (Gupta & Wagh, 2009). World Bank studies, based on household surveys, suggest that international remittance receipts helped lower poverty by nearly 11 percentage points in Uganda, 6 percentage points in Bangladesh, and 5 percentage points in Ghana. In poorer households, remittances may buy basic consumption goods, housing, and children’s education and health care. In richer households, they may provide capital for small businesses and entrepreneurial activities. They help pay for imports and external debt service; in some countries, commercial banks have raised overseas financing using future remittances as collateral (The World bank, 2006).

Remittances proved to be resilient during the financial crisis in source countries such as the United States and western European countries. The crisis affected migrants’ incomes, but they tried to absorb the income loss by cutting consumption and rental expenditures. Those affected by the crisis moved to jobs in other sectors. While the crisis reduced new immigration flows, it also discouraged return migration because migrants feared they would not be able reenter the host country. Thus, the number of migrants—and hence remittances—continued to rise even during the global financial crisis and even more so in recent years in the face of conflicts and natural disasters such as hurricanes and earthquakes (International Monetary Fund, 2011).

**Theory and methodology**

Despite the fact that private foreign remittances in the last third of the 20th century became an important factor influencing the economy, the issues on impacts of the latter on economy are still not unambiguous in economic literature and investigations. Given the above, the impact of private foreign remittances on the country’s macroeconomic indicators has recently become the subject of extensive economic research.

The growing importance of remittances flows has given rise to a large literature that analyzes the economic impact of these flows. The existing literature is also very diverse on the spillover effects of the increase in remittances.

Several theoretical and empirical studies analyze the impact of remittances on macroeconomic variables, such as consumption, investment and growth in recipient countries, yet the results of these studies remain largely inconclusive.

Remittances affect the economy of the home country through various transmission channels. There is empirical evidence that remittances contribute to economic growth, through their positive impact on consumption, savings, and investment.

Some studies state, that there is rather discernible positive link between remittances and economic growth. Analyzing the data of 15 countries from the Middle East and North Africa, (Mim & Ali, 2012) find a positive influence of remittances on investment and economic growth.

Channeled towards the accumulation of human capital, remittances act effectively on economic growth in these countries. Another investigation show that the increase in transfers has a direct positive effect on economic activity, and also an indirect positive effect through investment, the depreciation of the real exchange rate, and the development of the financial sector (Rao & Hassan, 2012).

In some countries, remittances are a vital source of external financing for the domestic economy, easing credit constraints, stimulating investment and thereby positively contributing to economic growth (Giuliano & Ruiz-Arranz, 2009).

Remittances also have economic, social and political life and contributed to the expansion of wire transfer and courier companies as well as money exchanges (Russell, 1986).

Moreover, remittances can also assist the domestic economy during specific recessions, as they serve as an insurance mechanism, stimulating consumption and increasing disposable income when other sources of domestic aggregate demand are depressed (Yang & Choi, 2007).

Moreover, cross-country analyses in some investigations generally find that remittances have reduced the share of poor people in the population (Adams & Page, 2005).

Conversely, remittances may have negative effects on economic growth by reducing labor supply and participation. They increase the recipients wealth and can undermine their incentives to work, which, in turn, slows economic growth. Several investigations state that external remittances fail to help the economy and can have absolutely adverse effects on economy of home country, by contributing to Dutch disease, creation dependence among the recipients, reducing the labor supply (Acosta et al, 2009), which decreases the likelihood of investment by the Government or foreign investors because of an unreliable workforce. Moreover, these researchers view remittances as unpredictable and as a cause of increasing inequality.

### Research Methods

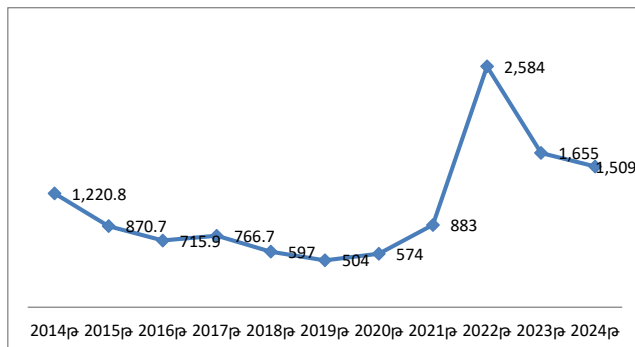
Research methods applied within the investigation framework of the article include universal scientific methods such as dialectical, systematic, comparative analysis, historical–logical, structural–functional, as well as private methods economic–statistical, comparability, graphical.

#### Results

The stability of economic growth largely depends on the stability of the factors underlying growth and when certain factors which ensure high economic growth will likely be neutralized, the latter’s impact on economy will decrease, then economic growth will fall drastically with all negative aftermaths stemming from it. A similar situation occurs when economic growth is based on domestic demand, and growth is generated in non–exportable sectors of the economy (construction, trade, services). In this case, any shock to domestic demand (which often occurs under the influence of changes in external factors such as remittances) can lead to a significant slowdown in economic growth or even an economic recession as it was recorded in Armenia during 2009, 2016 and 2020).

It is noteworthy that the economic growth of the Republic of Armenia is significantly correlated with foreign remittances. After ongoing of Russian–Ukrainian conflict, from the 2<sup>nd</sup> quarter of 2022, the volume of private remittances inflows increased drastically in the Republic of Armenia due to war spillovers and economic and financial sanctions implied by Western countries against Russia. In short-term period it caused in particular, progressive growths in private consumer spendings, which in its turn boost the economic activities in non–exportable sector of Armenian economy, such as trade, construction and services. Under these conditions, the inflows of capital to the Republic of Armenia has increased sharply, which has led to a significant acceleration of economic growth. Moreover the unprecedented inflows of remittances also caused abrupt appreciation of Armenian dram exchange rate: the Armenian dram appreciated by 22.0% compared to the beginning of the year (Central Bank of Armenia, 2024).

During the time period 2022–2024, the external private remittances net inflows dynamics are the following (Figure 1):

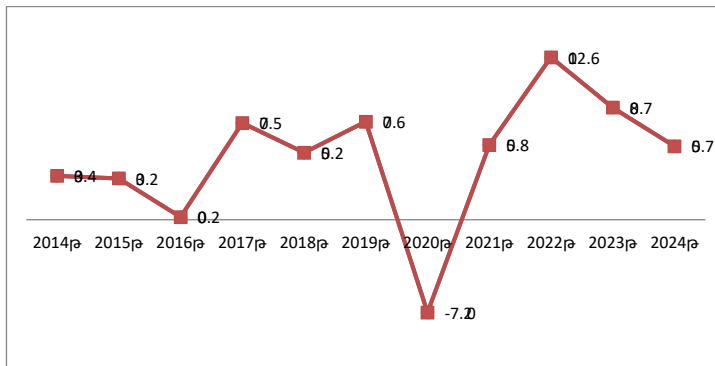


**Chart 1.** External privat remittances net inflows dynamics in Armenia in 2014–2024(Central Bank of Armenia,2024)

As it is can be seen from the Chart 1, the high volumes of private transfers inflows are recorded in years 2014, 2022,2023 and 2024, but the highest level net inflows have reached in 2022, when the impacts of Russian–Ukrainian conflict and Western sanctions spillovers were most influential.

After the unprecedented growth recorded in 2022, the remittances of individuals gradually decreased from second half of 2023, which also eased the pressure on domestic demand, which in turn curbed inflation in the Armenian economy. The decrease in money transfers of natural persons accelerated in 2024 and amounted only 1509.0 bln dollars, which is about 42% less then it recorded 2022(Central Bank of Armenia,2024).

As for economic growth rates in Armenia in detected period (2014–2024) the dynamics of latters are represented below in Chart 2.



**Chart 2.** Economic growth rate in Armenia in 2014–2024 (Statistical Committee of the Republic of Armenia,2024)

In the fourth quarter of 2024, economic activity in Armenia continued to approach the estimated level of long-term sustainable growth. It continued to be affected by some short-term factors, containing significant uncertainties regarding the sustainability of economic growth, the long-term outlook, as well as future trends in domestic demand. External demand for services continues to adjust. In such a situation, labor market conditions have weakened somewhat, reflected in a certain decrease in wages, inflation in services characterized by rigid prices, and inflation expectations.

Analyzing the economic growth by sectors, it should be noted that the main driver of growth in the services sector was the trade sector with economic activity amounted 17%, which was determined both by the progressive growth of demand compared to supply as well as by the high activity of the re-export sector. The next driver of growth was construction with 14.5% growth and the

third large growth recorded in service sector 10.6% (*Statistical Committee of the Republic of Armenia, 2024*).

As for the manufacturing sector, the relatively high growth recorded here was not widespread, but was mainly concentrated in the jewelry manufacturing sector, and a number of sub-sectors even recorded some reductions in output.

**Table 1**

The Correlation between Remittances net inflows and Economic Growth Rate in Armenia in 2014–2024

Period, Years	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Remittances net inflow, bln dol.	1,220.8	870.7	715.9	766.7	597.0	504.0	574.0	883.0	2,584	1,655	1,509
economic growth rate, %	3.4	3.2	0.2	7.5	5.2	7.6	-7.2	5.8	12.6	8.7	5.7
Correlation coefficient, $0 \leq r \leq 1$	r=0.603288										

Detecting and comparing the data from the Chart 1 and Chart 2 and analyzing the relationship between the indicators of external private remittances net inflows and economic growth rate in Armenia, it is quiet discernible, that in the years of high economic growth in the Republic of Armenia a high growth in remittances was also recorded. And in the years when foreign remittances decreased, economic growth was quite low or an economic recession was recorded. To get a clearer picture, the correlation coefficient for the indicators of net inflow of private transfers and economic growth rate was calculated, which amounted 0.603288 for the entire detected period (Table 1), and for the period of 2022–2024 it amounted 0.948144.

Thus, the economic growth rate in Armenia is highly correlated with the private remittances net inflows, which boost the domestic demand in non-exportable sectors of economy.

**Conclusion**

As in the precrisis period during 2001–2008, high economic growth in Armenia from 2022 is also conditioned by the growth of non-exportable sectors such as services, construction and trade. In particular, the contribution of services to the 12.6% economic growth was about 9.2%. Moreover, as a result of the large remittances inflow, the Armenian dram has significantly appreciated as mentioned above, which hinders the growth and development of the exportable sector of Armenian economy.

Large capital inflows (especially if they are irregular, foreign currency, and not properly “insured” against foreign exchange risk) can lead to “overheating” and financial risks. Besides that, it should be noted, that the net inflow of funds is usually highly sensitive to irregular and various unpredictable factors.

Considering that such unpredictable factors are objectively more numerous in the case of Armenia, the Government is forced to consider a larger number of development scenarios than usual. In particular, the geopolitical instability is one of the major factors for economic stability. For example, the Azerbaijan aggression toward Armenia in 2022 showed fragility of positive dynamics recorded in the economy, when the Armenian dram depreciated by about six percent during the two days of the aggression. If the hostilities had lasted for longer time, the negative impact on the economy would have been much deeper. In this case, it is difficult to predict what behavior net transfer inflows will exhibit in the future.

Based on the above, it can be concluded that the economic growth of the Republic of Armenia continues to be largely conditioned by domestic demand. It is known that the latter increases sharply mainly in the case of an increase in foreign remittances, leading to economic growth. And in the case of a reduction in capital flows, economic growth sharply slows down or a decline is recorded. Meanwhile, if economic growth were conditioned by the growth of exportable sectors, such as manufacturing industry and agriculture, then dependence on external financial resources would be weaker, and economic growth would be more stable. In the long term, in order to avoid such negative consequences as much as possible, the Government should tangibly support the sectors of the exporting branches of the economy so that in the event of possible negative trends in the services sector, they can act as a buffer for economic growth.

## References

1. Acosta, P., Lartey, E. & Mandelman, F. (2009). Remittances and the Dutch disease, *Journal of International Economics*, 79(1), 102–116, <https://EconPapers.repec.org/RePEc:eee:inecon:v:79:y:2009:i:1:p:102-116>
2. Adams, R., Page, J. (2005), Do international migration and remittances reduce poverty in developing countries? *World Development*, 33(10), 1645–1669, <https://doi.org/10.1016/j.worlddev.2005.05.004>
3. Bhaskara, B., Hassan, G. (2012). Are the Direct and Indirect Growth Effects of Remittances Significant?, *The World Economy*, Wiley Blackwell, 35(3), 351–372, DOI: j.1467-9701.2011.01399.x
4. Giuliano, P., Ruiz-Arranz M. (2009). Remittances, financial development, and growth. *Journal of Development Economics*, 90(1), 144–152, <https://doi.org/10.1016/j.jdeveco.2008.10.005>
5. Gupta, S., Pattillo, C. & Wagh S. (2009). Effect of Remittances on Poverty and Financial Development in Sub-Saharan Africa. *World Development*, Elsevier, 37(1), 104–115, [http://www.sciencedirect.com/science/article/pii/S0305-750X\(08\)00190-3](http://www.sciencedirect.com/science/article/pii/S0305-750X(08)00190-3)
6. Mim, S., Ali, M. (2012). Through which channels can remittances spur economic growth in MENA countries?, *Economics – The Open-Access, Open-Assessment E-Journal* (2007–2020), Kiel Institute for the World Economy (IfW Kiel), 6, 1–27. DOI: 10.5018/economics-ejournal.ja.2012-33
7. Russell, S. (1986). Remittances from International Migration: A Review in Perspective, *World Development*, 14(6), 677–696, [https://doi.org/10.1016/0305-750X\(86\)90012-4](https://doi.org/10.1016/0305-750X(86)90012-4)



8. Yang, D. & Choi, H. (2007). Are Remittances Insurance? Evidence from Rainfall Shocks in the Philippines, *The World Bank Economic Review*, 21(2), 219–248.
9. Yang, D. (2011). Migrant remittances. *Journal of Economic perspectives*, 25(3), 129–52. DOI: 10.1257/jep.25.3.129
10. Statistical Committee of the Republic of Armenia. *Main statistical data*. <https://armstat.am/am/?nid=82> (12.02.2025)
11. Statistical Committee of the Republic of Armenia. *Statistical report*. <https://armstat.am/file/doc/99555638.pdf> (12.02.2025).
12. World Bank. (2024). *Remittance flows to low- and middle-income countries – Armenia*. World Bank Blogs. <https://blogs.worldbank.org/en/peoplemove/in-2024-remittance-flows-to-low-and-middle-income-countries-armenia> (10.02.2025).
13. World Bank. *Remittance trends and economic impact report*. <https://documents1.worldbank.org/curated/en/099714008132436612/pdf/IDU1a9cf73b51fcad1425a1a0dd1cc8f2f3331ce.pdf> (12.02.2025).
14. World Bank. (2006). *Global economic prospects 2006: Economic implications of remittances and migration*. <https://documents1.worldbank.org/curated/en/507301468142196936/841401968200510319014701/additional/Global-economic-prospects-2006-economic-implications-of-remittances-and-migration.pdf> (12.02.2025).
15. Central Bank of Armenia. *Exchange rate archive*. <https://www.cba.am/en/sitepages/exchangearchive.aspx?DateFrom=2022-01-01&DateTo=2023-01-01&ISOcodes=USD,GBP,RUB,EUR> (10.02.2025).
16. Central Bank of Armenia. *External sector statistics*. <https://www.cba.am/en/SitePages/statexternalsector.aspx> (10.02.2025).
17. International Monetary Fund. *Back to basics: Remittances*. <https://www.imf.org/en/Publications/fandd/issues/Series/Back-to-Basics/Remittances> (10.02.2025).
18. Ratha, D. *Remittances*. International Monetary Fund. <https://www.imf.org/external/pubs/ft/fandd/basics/pdf/ratha-remittances.pdf> (10.02.2025).

*The article has been submitted for publication: 18.02.2025*  
*Հոդվածը ներկայացվել է փպագրության. 18.02.2025*

*The article is sent for review: 28.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 28.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է փպագրության. 31.03.2025*

# THE IMPACT OF INTERNATIONAL SCIENTIFIC CONFERENCES ON SCIENTIFIC COMMUNITIES AND THEIR ENVIRONMENT

## ZARA MKRTCHYAN

Head of Innovation Department,  
Institute of Applied Problems of Physics, NAS, RA,  
Lecturer, Course developer,  
Management and Economics Department,  
International Scientific Educational Centre, NAS, RA,  
PhD in Economics  
*zarahmkrtyan@gmail.com*

## TATEVIK MUSAYELYAN

MBA, Engineer, Innovation Department,  
Institute of Applied Problems of Physics, NAS, RA  
*musayelyantatevik@gmail.com*

## ARUS MKRTCHYAN

MBA, Engineer,  
Network Cooperation Division,  
Institute of Applied Problems of Physics, NAS, RA  
*arusperj@gmail.com*

## SHUSHANIK PANYAN

MBA, MBA Post graduator from ISEC, NAS, RA,  
Senior technician, Innovation Department,  
Institute of Applied Problems of Physics, NAS, RA  
*panyanshushanik@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-97**

### Abstract

International scientific conferences, symposiums and forums offer and provide a unique opportunity to raise awareness of research findings faster and more effectively than any other platforms. Researchers, scientists, students, educators, and professionals in the field should seize every advantage of all opportunities to present their research results. Presenting and delivering papers, real-life presentations, and virtual reports at ISCSs is an effective way to consolidate and share knowledge. Speakers have the opportunity to talk about and present their research findings and innovations to colleagues in the similar and related academic fields, receiving both positive feedback and constructive criticism that can enhance their research work. The exchange of ideas on areas of interest seeds

global connections, laying ground for future collaborations. Many who were once simply participants in ISCSs are now working on the world's largest research projects, writing, developing and publishing groundbreaking research papers and studies.

The new research methodologies and innovations discussed at conferences can be practically applied across and spread to different scientific fields and industries. And all together the high-profile events attract greater attention and participation, increasing the overall impact on the scientific community. The toolset used in the event of the ISCS is comprehensive, varies based on the set goals and the potential investment. In a critical light, this is one of the platforms for marketing of scientists and their results, essentially functioning as a business management tool for scientific outcomes and events.

**Keywords:** Scientific Conferences, Innovation, Impact, Interdisciplinary, Toolset.

## ՄԻՋԱԶԳԱՅԻՆ ԳԻՏԱԿԱՆ ՀԱՄԱԺՈՂՈՎՆԵՐԻ ԱԶԳԵՅՈՒԹՅՈՒՆԸ ԳԻՏԱԿԱՆ ՀԱՆՐՈՒԹՅՈՒՆՆԵՐԻ ԵՎ ՆՐԱՆՑ ՄԻՋԱՎԱՅՐԻ ՎՐԱ

### ԶԱՐԱ ՄԿՐՏՅԱՆ

ՀՀ ԳԱԱ ֆիզիկայի կիրառական պրոբլեմների ինստիտուտի  
նորարարությունների բաժնի ղեկավար,

ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի  
կառավարման և տնտեսագիտության ամբիոնի դասախոս,  
տնտեսագիտության թեկնածու

*zarahmkrtyan@gmail.com*

### ՏԱԹԵՎԻԿ ՄՈՒՍԱՅԵԼՅԱՆ

ՀՀ ԳԱԱ ֆիզիկայի կիրառական պրոբլեմների ինստիտուտի  
նորարարությունների բաժնի ինժեներ,

մագիստրոս

*musayelyantatevik@gmail.com*

### ԱՐՈՒՍ ՄԿՐՏՅԱՆ

ՀՀ ԳԱԱ ֆիզիկայի կիրառական պրոբլեմների ինստիտուտի  
ցանցային համագործակցության բաժնի ինժեներ,

մագիստրոս

*arusperj@gmail.com*

### ՇՈՒՇԱՆԻԿ ՓԱՆՅԱՆ

ՀՀ ԳԱԱ ֆիզիկայի կիրառական պրոբլեմների ինստիտուտի  
նորարարությունների բաժնի ավագ տեխնիկ,

մագիստրոս, ԳԿՄԿ շրջանավարտ

*panyanshushanik@gmail.com*

### Համառոտագիր

Միջազգային գիտական կոնֆերանսները, սիմպոզիումներն ու ֆորումները առաջարկում և ընձեռում են եզակի հնարավորություն՝ բարձրացնելու հետազոտությունների արդյունքների մասին իրազեկությունն ավելի արագ և արդյունավետ, քան ցանկացած այլ հարթակ: Հետազոտողները, գիտնականները, ուսանողները, մանկավարժներն ու ոլորտի մասնագետները պետք է օգտվեն իրենց հետազոտության արդյունքները ներկայացնելու բոլոր հնարավորություններից: ՄԳՀՄ<sup>2</sup> -ներում (Միջազգային գիտական համաժողովներ և սիմպոզիումներ) հոդվածների, իրական ներկայացումների և վիրտուալ

<sup>2</sup> Միջազգային գիտական համաժողովներ և սիմպոզիումներ

գեկույցների ներկայացումն ու մատուցումը գիտելիքների համախմբման և փոխանակման արդյունավետ միջոց է: Բանախոսները հնարավորություն ունեն խոսելու և ներկայացնելու իրենց հետազոտության արդյունքներն ու նորարարությունները նմանատիպ և հարակից ակադեմիական ոլորտների գործընկերներին՝ ստանալով և՛ դրական արձագանքներ, և՛ կառուցողական քննադատություններ, որոնց միջոցով կարող են բարելավել հետազոտական աշխատանքի որակը: Հետաքրքրությունների ոլորտների վերաբերյալ մտքերի փոխանակումը սերմանում է գլոբալ կապերը՝ հիմք ստեղծելով ապագա համագործակցությունների համար: Շատերը, ովքեր ժամանակին պարզապես ՄԳՀՄ-ների մասնակից էին, այժմ աշխատում են աշխարհի խոշորագույն հետազոտական նախագծերի վրա՝ գրելով, մշակելով և հրատարակելով բեկունային հետազոտական հետազոտություններ և ուսումնասիրություններ:

Գիտաժողովներում քննարկվող հետազոտությունների նոր մեթոդաբանությունները և նորարարությունները կարող են գործնականում կիրառվել և տարածվել գիտական տարբեր ոլորտներում: Բարձր մակարդակով կազմակերպված միջոցառումները գրավում են ավելի մեծ ուշադրություն և մասնակցություն՝ մեծացնելով ընդհանուր ազդեցությունը գիտական հանրության վրա: ՄԳՀՄ-ի դեպքում օգտագործվող գործիքակազմը համապարփակ է, որը տարբերակվում է կախված սահմանված նպատակներից և հնարավոր ներդրումներից: ՄԳՀՄ-ները գիտնականների և նրանց արդյունքների շուկայավարման հարթակներից մեկն են, որոնք հիմնականում բիզնեսի կառավարման գործիք են գիտնականների, գիտական արդյունքների և իրադարձությունների համար:

**Բանալի բառեր՝** գիտական համաժողովներ, նորարարություն, ազդեցություն, միջտարակարգային, գործիքակազմ:

**Introduction**

The purpose of this research is to study the impact of international conferences, forums, and symposiums on the organization, its environment, the sector, and stakeholders, and to evaluate the results created by international conferences and forums in specific scientific fields. For scientists, international conferences serve as a platform for disseminating research findings, gaining recognition and establishing new collaborations. The popularity of scientific events is often influenced by the caliber of speakers, the relevance of topics, and the opportunities for networking and collaboration. Usually, innovations in various fields of science, research findings and applications get presented at ISCS<sup>3</sup>. And the new research methodologies and innovations discussed at conferences can be practically applied across and spread to different scientific fields and industries. And all together the high-profile events attract greater attention and participation, increasing the overall impact on the scientific community. The toolset used in the event of the ISCS is comprehensive, varying based on the set goals and the potential investment. In a critical light, this is one of the platforms for marketing scientists and their results, essentially functioning as a business management tool for scientific outcomes and events.

<sup>3</sup> International Scientific Conferences and Symposiums

For these purposes, the outcomes of organizing, implementing, and summarizing international conferences, forums, and symposiums was put on pass of analyses.

### **Theory And Methodology**

Usually, encouraging the adoption of cutting-edge approaches ensures the continued evolution of research and practice.

During international scientific conferences, forums, and symposiums (hereinafter referred to as ISCS), the followings are layered:

- Solution to the problem is presented
- New areas of research are identified,
- Participants are informed about and familiarized with the latest scientific results,
- Scientific findings and applied results are shared and disseminated,
- Access to scientific and applied knowledge and results is facilitated,
- Participants are introduced to and acquainted with new culture,
- Opportunities to get acquainted and interact with experienced representatives and professionals of the field is provided, (Oester et al., 2017)
- Discussions and clarifications of issues of mutual interests occur,
- New collaborations are initiated, agreed upon, and created,
- New research works are published and made publicly available.

When participating in ISCSs, stakeholders include all those involved in conference: honored guests, keynote speakers, speakers, presenters, participants, organizers, hosts, attendees, the audience, those who are involved in infrastructure regulation, as well as representatives of local government bodies.

During ISCS, complex networks of academic and non-academic professionals are formed and actively operate, contributing to the discussions and dissemination of new knowledge. (Oester et al., 2017)

During ISCS, actions, activities are taken, processes are unfold that extend far beyond the mere exchange of information. During ISCS, researchers have the opportunity to meet with peers, researchers, establish new connections, maintain old contacts, existing relationships, conduct in exploratory discussions, and initiate new collaborations. Therefore, we can say Conferences can have a great scientific and social impact. International Conferences and Symposiums are considered as important roads and crucial events for generating both scientific and social impact. (Haus, 2020)

The experience gained by young scientists during conferences is an integral part of their learning process. It enhances and stimulates their information and research capabilities, fosters the development of networking strategies and relationships, and helps establishe valuable connection with other specialists. Analysis of studies and surveys has shown that doctoral students apply strategic approaches to seeking new knowledge in scientific institutions, tailored to their specific stage of qualification.

Four stages of socialization are distinguished in the process of participation of ISCS.

In the first phase, doctoral students are faced with new rules and roles. During this phase, novices learn and assimilate the rules of the ISCS and become familiar with the distribution of roles, listen to and accumulate flows, and observe the regulations in practice.

In the second and third stages, newcomers become more goal-oriented. They master the disciplinary rules of the engagement, gain confidence in formulating their professional goals, and take purposeful steps to advance in their field.

In the fourth stage, newcomers assimilate their new formed role as a researchers, solidifying their professional identity. (Hauss, 2020)

Communication with experts in the field, along with the scientific and technical support received, serves as a powerful source of motivation for participants in international conferences. During these events, participants have the opportunity to:

- Get acquainted with and explore innovative directions in their field,
- Receive created incentives for career growth,
- Form new perspectives,
- Hear diverse and opposing viewpoints,
- Identify promising research approaches,
- Receive motivational support and mentoring, perspectives which are demonstrated for newcomers,
- Discover outlined knowledge-based entrepreneurial opportunities,
- Get the instilled technical foresight,
- Improve presentation and communication skills,
- Receive valuable feedback,
- Generate the opportunity for close collaboration, establish close collaboration,
- Build bridges to new partnerships.

Connecting with experts in the field, traveling, socializing, interacting with experts and professionals from diverse age groups, and publishing their research contribute to strengthening the research discipline and lay a foundation for future collaboration.

Participation in ISCS offers an opportunity for self-reflection and the evaluation of one's own knowledge and potential at an international conference, fosters communication and collaboration, and enhances presentation skills. (George, 1981), (Allconference alert, 2024)

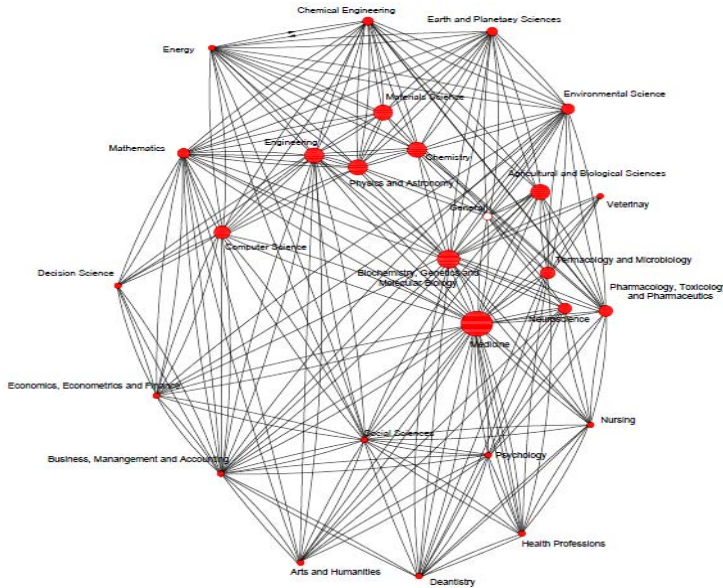
Participating in SCS reveals areas for improvement, helping individuals identify abilities, skills and behaviors that need improvement. It also provides a strategy to focus on and expand hidden abilities, while avoiding habits and customs that hinder progress.

Participating and presenting at ISCS broadens the scope of the one's work, showcasing it to a diverse and wide audience gathered from various countries around the world.

Additionally, ISCS and SCS offer ample opportunities to visit new places, experience new different cultures, and explore the cuisine of the host countries.

The numerous goals and benefits outlined above provide strong and sufficient reasons for organizing and participating in ISCS and SCS<sup>4</sup>.

Innovations in the fields of physics, astronomy, chemistry, and materials science, along with findings and research results and the corresponding applications of these developments are presented at ISCS and SCS. The innovations, with their inherent potential, spread to related fields in a hierarchical manner. The hierarchy revealed by these discoveries is unique and clearly illustrates the interconnectedness of disciplines, even in areas where these connections might not be immediately apparent. (See Figure 1.)



**Figure 1.** The Impact on the Sector and Related Industries.<sup>5</sup>

The stronger the mutual connections and feedback loops, the greater the influence one sphere has on another. The diagram illustrates spheres of mutual influence. However, in all cases there is some degree of interconnectedness, even if these connections are weak in certain instances. The extent of influence is also shaped by meanders.

Scientific events, such as ISCS and SCS, etc., may undergo various changes in terms of organization, structure and communication methods. Epidemics, crises and force majeure are prompting a redefinition in science landscape. Scientific communities, unions and associations are called upon to think more about the inclusion of digital tools into the traditional formats of an academic conference and the digital transformation of the format and to actively embrace the transformation of these events.

Digital technologies should be purposefully and timely employed to

<sup>4</sup> Local scientific conferences and symposiums

<sup>5</sup> Composed and revised by the authors; autocoded by T.Musayelyan



enhance the qualification of young scientists, enabling the organization of virtual conferences, interactive webinars and online discussions. When conferences are held “virtually”, of course, one of the key challenges is maintaining the informal, personal and social aspects that are important component and crucial to knowledge production.

Attending a conference provides an opportunity to enrich foundational knowledge, acquire new skills, and make contacts that would not otherwise be possible. (Bourliofas, 2023), (Allconference alert, 2024). Often, networking is acquired during conferences and particularly during breaks. Depending on who the conference speakers are and the audience size is, the impact of the conference can be understood and gauged. And the higher the impact indicators, the greater the rating of the ISCS.

Conducted analyses and studies show that the impact of ISCS and SCS is directly linked to the quality of the participating speakers and the quality of the audience.

In line with the times, participation in ISCSs is becoming increasingly important for scientists at all levels. An academic representative, a scientist can participate in ISCS and SCS in five different formats.

1. As a participant, receiving an ISCS and/ or SCS participation package.
2. As a speaker, presenting at the ISCS and receiving the ISCS package.

If the speaker is skilled, he/she receives an additional certificate as the “Best Speaker”.

3. As a representative of the specified research and/or field.
4. As a representative with outstanding influence in the specified field.
5. As a jury member and/ or a chair of a specific research field, the ISCS participant receives an organizational certificate for the work performed, for their contributions, and an appropriate honorarium.

In all five cases listed above, event participants will earn “points” that will add value to their resumes and these accumulated “points” will be taken into account for job promotions: from assistant to associate professor, from associate professor to professor, etc..

Thus, we can conclude that International Conferences are very important and have groundbreaking impact on the careers of scientists and on scientists as humans as well.

ISCSs mainly focus on presenting research results, ideas on productivity, innovation and entrepreneurship. They bring together leading scientists, researchers who share their experience, skills, findings and research results on all the cornerstones of innovation, productivity and entrepreneurship, as well as the special issues that need to be addressed. (George & Coddington, 2009), (George, 1981). These conferences also offer and provide an interdisciplinary, cross-sectoral, dual and multi-purpose platform for researchers, practitioners and educators to present and discuss the latest developments, innovations, trends and concerns, as well as practical challenges and possible solutions in various areas of productivity, innovation, entrepreneurship and the economy.

## Research Method

The need for organizing ISCSs in Armenia and the impact of participation have been determined through marketing research conducted via a series of substantive surveys. Specific target groups of respondents were selected for each case. Questionnaires<sup>6</sup> were developed and compiled considering the outlined specificities. The results of each survey are based on the outcomes of discussions with different “narrow” professional groups that participated in ISCSs and SCSs at various time intervals.

The questionnaire package was composed of sub-questionnaires as follows: 10+1+1+6 questions. The questionnaire package was provided to the participants of the target groups for completion in both paper and electronic formats.

Research was conducted among the participants of three youth ISCSs. The number of participants in the three youth SCSs was 47, 93, and 61, respectively. In the second youth ISCS the survey involved 93 participants. In the first and third ISCSs, the number of participants was 47 and 61, respectively.

To save time for ISCSs participants and avoid unstructured responses, the questions were designed with “borderline style” answers. Additionally, the participants’ age groups, levels of professionalism, and academic degrees were taken into account, as well as the involvement of the audience. The overall data obtained from the completion of the questionnaires during the ISCS sessions have been summarized. The results of the questionnaires completed by the selected target group from each ISCS participant are presented in “Table 1”<sup>7</sup>, “Table 1.1”, “Table 1.2”, “Table 1.3”, “Table 1.4”, “Table 2”, “Table 2.1”, “Table 2.2”, “Table 2.3”, “Table 2.4”, “Table 3”<sup>8</sup>, “Table 3.1”, “Table 3.2”, “Table 3.3”, and “Table 3.4”.

To provide a clear view of the data, graphical representations have been created based on the “Table 2”, “Table 2.1”, “Table 2.2”, “Table 2.3”, “Table 2.4” for the ISCS with 93 participants.

The tables and graphical representations are done and evaluated. Here are presented only the data of the ISCS with 93 participants among whom the individual questionnaires within the questionnaire package were conducted. The questions in questionnaires have their boundary responses, and the graphical representations of their analyses were driven.

The detailed analysis of the surveys conducted during the youth ISCSs literally describe the results obtained.

## Results

The interpretation of survey tables for youth ISCS with 93 Participants in lined with used method.

<sup>6</sup> Questionnaires were developed by the research team.

<sup>7</sup> “Table 1.” and its sub-tables – Questionnaires and surveys of ISCS with 47 participants. Tables are not included in paper. The results are included in conclusions, recommendations and are summarised.

<sup>8</sup> “Table 3.” and its sub-tables – Questionnaires and surveys of ISCS with 61 participants. Tables are not included in paper. The results are included in conclusions, recommendations and are summarised.

According to the research data, the degree of necessity for organizing ISCSs is substantiated on the following surveys<sup>9</sup> results.

*Table 2.1. The questionnaire containing 10 questions, titled “Why organize International Conferences” has recorded the following results:*

*1. There is the problem that needs to be investigated:*

According to the surveys, 16.13% of respondents answered “insignificant”, 19.35% chose the “slightly” option, 26.88% selected the “moderate” response, 21.51% chose “very,” and 16.13% selected “expressed.”

*2. The sector needs a conference:*

The survey results were as follows: 18.28% of respondents answered “insignificant,” 22.58% chose the “slightly” option, 21.51% selected the “moderate” response, 20.43% chose “very,” and 17.20% selected “expressed.”

*3. The organization is planning a targeted gathering:*

The results of this survey were as follows: 10.75% of respondents answered “insignificant,” 12.90% chose the “slightly” option, 32.26% selected the “moderate” response, 27.96% chose “very,” and 16.13% selected “expressed.”

*4. There is a crisis or problem that needs to be solved:*

The percentage results of the survey are as follows: 19.35% of respondents chose “insignificant,” 13.98% selected the “slightly” option, 25.81% chose the “moderate” response, 31.18% selected “very,” and 9.68% chose “expressed.”

*5. It strengthens the sectoral targeting:*

The following survey results were recorded: 25.81% of respondents answered “insignificant,” 15.05% chose the “slightly” option, 18.28% selected the “moderate” response, 21.51% chose “very,” and 19.35% selected “expressed.”

*6. Feedback is required:*

The results of this survey are as follows: 9.68% of respondents chose the “insignificant” option, 21.51% selected the “slightly” option, 20.43% answered “moderate,” 25.81% chose “very,” and 22.58% selected “expressed.”

*7. It is the demand of the financier:*

The results of this survey are as follows: 12.90% of respondents chose the “insignificant” option, 23.66% selected the “slightly” option, 27.96% answered “moderate,” 18.28% chose “very,” and 17.20% selected “expressed.”

*8. It recruits the public in order to develop the field, either through work or advocacy:*

The results of this survey are as follows: 21.51% of respondents chose the “insignificant” option, 18.28% selected the “slightly” option, 19.35% answered “moderate,” 22.58% chose “very,” and 18.28% selected “expressed.”

*9. It strengthens the reputation, credibility and/ or accreditation of the organization:*

The survey results are as follows: 20.43% of respondents chose the “insignificant” option, 17.20% selected the “slightly” option, 25.81% answered “moderate,” 15.05% chose “very,” and 21.51% selected “expressed.”

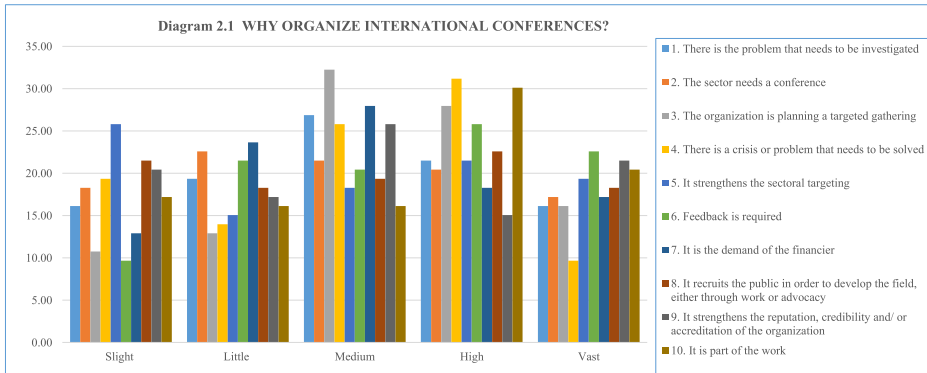
*10. It is part of the work:*

<sup>9</sup> Surveys were developed and analysed by the research team.

The results in this section are as follows: 17.20% of respondents chose the “insignificant” option, 16.13% selected the “slightly” option, 16.13% answered “moderate,” 30.11% chose “very,” and 20.43% selected “expressed.”

**Table 2.1 WHY ORGANIZE INTERNATIONAL CONFERENCES?**

	93 is 100%	Slight	Little	Medium	High	Vast
1. There is the problem that needs to be investigated	fom which in %	16.13	19.35	26.88	21.51	16.13
2. The sector needs a conference	fom which in %	18.28	22.58	21.51	20.43	17.20
3. The organization is planning a targeted gathering	fom which in %	10.75	12.90	32.26	27.96	16.13
4. There is a crisis or problem that needs to be solved	fom which in %	19.35	13.98	25.81	31.18	9.68
5. It strengthens the sectoral targeting	fom which in %	25.81	15.05	18.28	21.51	19.35
6. Feedback is required	fom which in %	9.68	21.51	20.43	25.81	22.58
7. It is the demand of the financier	fom which in %	12.90	23.66	27.96	18.28	17.20
8. It recruits the public in order to develop the field, either through work or advocacy	fom which in %	21.51	18.28	19.35	22.58	18.28
9. It strengthens the reputation, credibility and/ or accreditation of the organization	fom which in %	20.43	17.20	25.81	15.05	21.51
10. It is part of the work	fom which in %	17.20	16.13	16.13	30.11	20.43

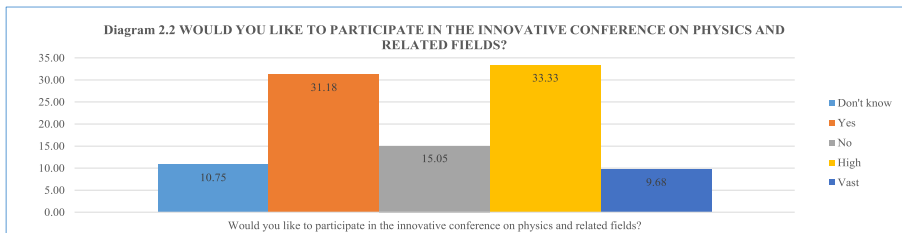


*Table 2.2. The question “Would you like to participate in the innovative conference on Physics and related fields?”*

*recorded the following results based on the surveys: 10.75% answered “I don’t know”; 31.18% answered “yes”; 15.05% answered “no”; 33.33% selected the “very” option, which was the dominant response; 9.68% selected the “expressed” option. A total of 74.19% of participants (31.18% + 33.33% + 9.68% = 74.19%) expressed varying degrees of interest in participating in such a conference. 15.05% did not wish to participate, and 10.75% were undecided.*

**Table 2.2. WOULD YOU LIKE TO PARTICIPATE IN THE INNOVATIVE CONFERENCE ON PHYSICS AND RELATED FIELDS?**

	93- 100%	Don't know	Yes	No	High	Vast
Would you like to participate in the innovative conference on physics and related fields?	fom which in %	10.75	31.18	15.05	33.33	9.68



*Table 2.3. The question “When should a conference be organized?” with its 6 sub-questions yielded the following results:*

1. *When we want to develop the field or inform a certain group of the community about the problem:*

The survey results have the following percentage distribution: 7.53% of respondents answered “insignificant”, 15.05% chose the “slightly” option; 31.18% selected “moderate”; 30.11% chose “very”; 16.13% selected the “expressed” option.

2. *When we want to bring together experienced people, solve the problem that needs to be solved, or work on the problem:*

The options for the sub-question had the following percentage distribution: 8.60% of respondents chose “insignificant”; 16.13% selected the “slightly” option; 29.03% answered “moderate”; 33.33% chose “very”; 12.90% selected the “expressed” option.

3. *When new work or paper in the field should be published:*

The options for the survey question had the following percentage distribution: 5.38% of respondents chose “insignificant”; 18.28% selected the “slightly” option; 26.88% answered “moderate”; 35.48% chose “very”; 13.98% selected the “expressed” option.

4. *When we want to inspire people or restore their work interest:*

The responses to the question were distributed as follows: 13.98% of respondents chose “insignificant”; 12.90% selected the “slightly” option; 25.81% answered “moderate”; 36.56% chose “very”; 10.75% selected the “expressed” option.

5. *Unite the professionals of the field’s expertise:*

The respondents’ selections for the question were as follows: 10.75% chose the “insignificant” option; 11.83% selected the “slightly” option; 24.73% answered “moderate”; 37.63% chose “very”; 15.05% selected the “expressed” option.

6. *Stakeholder wants to achieve success and be prepared for challenges:*

The following results were recorded: 9.68% of respondents chose the “insignificant” option; 17.20% selected the “slightly” option; 30.11% answered “moderate”; 25.81% chose “very”; 17.20% selected the “expressed” option.

Table 2.3. WHEN SHOULD A CONFERENCE BE ORGANIZED?

	93 is 100%	Slight	Little	Medium	High	Vast
1. When we want to develop the field or inform a certain group of the community about the problem	from which in %	7.53	15.05	31.18	30.11	16.13
2. When we want to bring together experienced people, solve the problem that needs to be solved, or work on the problem	from which in %	8.60	16.13	29.03	33.33	12.90
3. When new work or paper in the field should be published.	from which in %	5.38	18.28	26.88	35.48	13.98
4. When we want to inspire people or restore their work interest	from which in %	13.98	12.90	25.81	36.56	10.75
5. Unite the professionals of the field’s expertise	from which in %	10.75	11.83	24.73	37.63	15.05
6. Stakeholder wants to achieve success and be prepared for challenges	from which in %	9.68	17.20	30.11	25.81	17.20

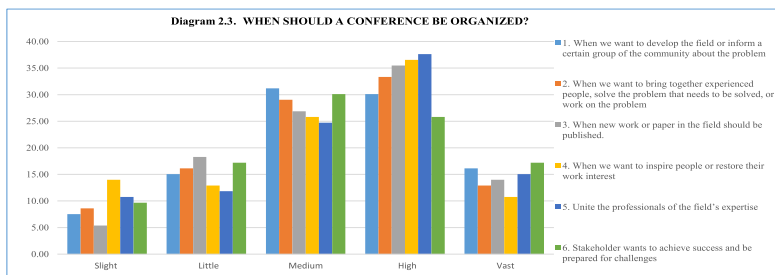


Table 2.4. The question “Change of the impact of the papers submitted and

presented at international conferences” with its sub-questions yielded the following results according to the survey outcomes:

1. To what extent have changed the citations to your papers after the international conferences?

The survey recorded the following results: 16.13% of respondents chose the “insignificant” option; 27.96% selected the “slightly” option; 26.88% answered “moderate”; 17.20% chose “very”; 11.83% selected the “expressed” option.

2. Do the downloads of your papers increase after the international conferences?

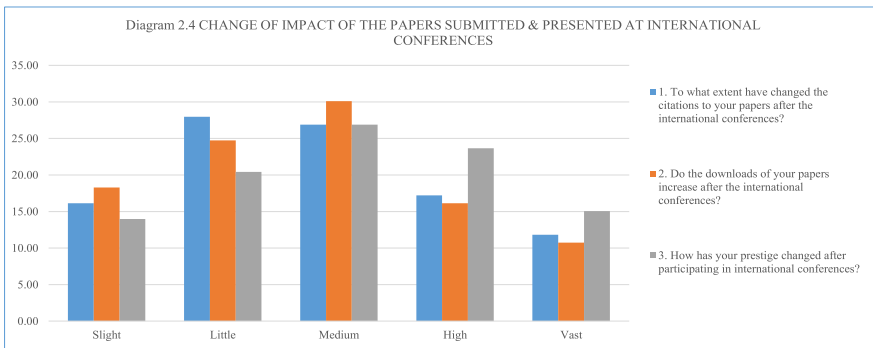
The survey results were as follows: 18.28% of respondents chose the “insignificant” option; 24.73% selected the “slightly” option; 30.11% answered “moderate”; 16.13% chose “very”; 10.75% selected the “expressed” option.

3. How has your prestige changed after participating in international conferences?

The survey results were as follows: 13.98% of respondents chose the “insignificant” option. 20.43% selected the “slightly” option; 26.88% answered “moderate”; 23.66% chose “very”; 15.05% selected the “expressed” option.

**Table 2.4. CHANGE OF IMPACT OF THE PAPERS SUBMITTED & PRESENTED AT INTERNATIONAL CONFERENCES**

	93 is 100%	Slight	Little	Medium	High	Vast
1. To what extent have changed the citations to your papers after the international conferences?	fom which in %	16.13	27.96	26.88	17.20	11.83
2. Do the downloads of your papers increase after the international conferences?	fom which in %	18.28	24.73	30.11	16.13	10.75
3. How has your prestige changed after participating in international conferences?	fom which in %	13.98	20.43	26.88	23.66	15.05



Survey results make clear that participation in ISCS and SCS provides and holds an average level of Popularity within the scientific community. When organizing ISCS and SCS, one should choose a venue that aligns as close as possible to the theme of the conference. Organizers should understand the level and kind of involvement the conference will have, how honored guests, speakers, participants, and audience members will get to the location where the ISCS or SCS will be organized. In other words, careful planning of all possible options is needed for transportation, accommodation, food, coffee, catering, recreation, familiarization with the country, its attractions and its culture for all participants of the event.

For scientists, ISCS and SCS and R&Ds events serve as platforms for disseminating findings and results, gaining recognition, and establishing new collaborations. Participating in ISCSs provides opportunities to communicate with experts in the field, receive scientific and technical support, and verify authenticity of research findings.

Attending these events helps participants explore and get acquainted with innovative directions, strengthen professional positions. This, in turn, leads to career growth and to the formation of new perspective goals, inspires and encourages participants, also often guiding them toward knowledge-based entrepreneurship. Additionally, participation instills technical foresight, improves communication and presentation skills, creates feedback, promotes close cooperation, as well as weaves bridges for new collaborations and partnerships. To design, develop and strengthen research discipline, it is necessary to establish connections within interconnected professionals in the field of interconnected disciplines, to travel and socialize with professionals across different age groups, and publish work.

Several conclusions based on full analyses and drawn are related to the responses. Here are a few possible insights:

*General Interest in ISCSs:* A significant portion of respondents expressed varying levels of interest in participating in ISCSs. Around 74.19% of respondents showed some degree of interest (combining those who answered “yes,” “very,” and “expressed”). This suggests that there is a strong interest in ISCSs, especially within specialized fields.

*Diverse Views on ISCSs Content:* The distribution of responses regarding the effectiveness or impact of articles presented at ISCSs shows diversity in opinions. For example, about 27–30% of respondents chose the “moderate” response, while a considerable number (around 11–16%) felt the content had a “significant” or “expressed” impact, implying that while ISCSs are valuable to many, their impact may vary among participants.

*Opinions on ISCSs Timing:* When asked “When should a ISCSs be organized?”, the distribution of answers showed a mix of opinions, but the dominant response was “very” (around 30–36% in different instances). This suggests that most participants feel that ISCSs should be scheduled at times that offer maximum relevance and value to them.

*Preference for Article Impact:* Some respondents felt that the impact of presented articles at ISCSs could be “insignificant” or “slightly” impactful, but a substantial percentage (around 30–40%) selected higher levels like “moderate” or “very,” signaling that, for many, the ISCSs serve as an important platform for knowledge exchange.

Taking into consideration the participants answers and analyses the following is brought forward and offered to organizers:

*Focus on Timing and Relevance:* The interest in participation is high, but careful attention should be paid to selecting appropriate times for the ISCSs that maximize relevance.

*Tailor Content to Different Audiences:* Given the diversity in opinions

regarding the impact of ISCSs content, organizers may want to tailor presentations to meet the varying needs and expertise levels of attendees.

*Encourage More Active Engagement:* Given the fairly strong interest in ISCSs, there might be an opportunity to increase active participation through interactive sessions or networking, which can increase the perceived impact of the ISCSs content.

These insights could be valuable for planning and organizing future ISCSs based on the survey data and will create added value.

### **Conclusion**

The overall conclusion and recommendations are done based on all ISCS's collected data within this research scheme.

*Variation in Response Trends:* The data shows a notable variation in responses, particularly when measuring the effectiveness or impact of conferences. This indicates that there are likely different groups of people with varying needs and expectations. Some attendees may be looking for more in-depth discussions, while others might prefer lighter, more general sessions. This variation could be indicative of a need to offer multiple types of sessions or track-based programming to cater to diverse preferences.

*Interest in Specialized Topics:* It's evident that a significant portion of participants is interested in specific topics like Physics and related fields, based on the survey's focus. This suggests that specialized conferences should maintain a robust presence in areas where people feel the need for further exploration and research.

*Content Depth and Engagement:* The choice of responses, like "moderate" or "very" in terms of article impact, suggests that while there's interest, the depth of content may not always meet the needs of all participants. Perhaps, future conferences could include more opportunities for in-depth discussions, debates, and collaborative workshops to improve participant engagement and satisfaction.

*Using of "data-driven approach"* for elevating the conference to the next level could be considered for content personalization, implementation of "innovative formats" could be considered for deeper engagement, and creating of "long-term impact" could be focused on that extends beyond the event itself. Moreover, "strategic partnerships", "community-building" efforts, and an emphasis on "sustainability" will ensure the conferences remain relevant, accessible, and highly valued by attendees for years to come.

By integrating these strategies, the quality and impact of the events can be continually improved, the leadership in the field can be solidified, and the long-term success can be ensured.

*Recommendations to elevate further are the followings:*

*Segmenting the Audience:* Given that the survey data suggests varying levels of engagement and interest, will be beneficial to consider segmenting the audience based on their interests, expertise levels, or professional background. This would allow for targeted content, ensuring participants receive the most relevant and beneficial information. For example, parallel sessions for different expertise levels



(e.g., beginners, intermediate, advanced) could be organized.

*Using Interactive and Collaborative Formats:* Participants who are already interested in attending may feel even more engaged if interactive formats such as Q&A sessions, roundtable discussions, or panel debates will be incorporated. Encouraging interaction can also increase the perceived value of the conference, especially for those who selected the “expressed” or “very” categories in the surveys.

*Post-Conference Engagement:* Post-conference engagement could be a powerful tool for increasing long-term impact. Offering follow-up materials, such as recordings of presentations, further readings, or discussion forums, could ensure that participants continue to feel connected and gain more from the event long after it ends.

*Survey Follow-ups for Continuous Improvement:* Consider conducting follow-up surveys after the conferences to gather insights about what worked well and where improvements could be made. This will not only show participants that their feedback is valued but will also provide critical data for future event planning.

*Creating a Sense of Community:* As the survey responses show, participants are highly interested in these events. Creating a sense of community around the conferences (perhaps through social media groups or online communities) could help keep attendees engaged, allow them to share their experiences, and increase the overall value they place on the event.

*Personalized Content Tracks:* The survey results could be used to segment attendees into smaller, highly specific groups based on their expertise, interests, or professional goals. Tailor content to each group. For example, when it is noticed that participants are split between those with basic knowledge and those with advanced expertise, the content streams can be created that meet each group at their respective levels. Personalized tracks will enhance relevance and engagement.

*Predictive Analytics for Topics:* Leveraging data science to predict trends in attendee interests. For instance, by analyzing responses over multiple conferences, emerging topics could be identified that are gaining traction among attendees and proactively incorporate them into future events.

*Gamification and Rewards:* Integrate elements of gamification into the conference experience. For example, a point system for engagement could be set up, where attendees earn points for asking questions, attending specific sessions, or interacting with speakers. Points could lead to rewards like exclusive content, certificates, or even access to VIP networking events.

*Interactive Formats Beyond Q&A:* Consider moving beyond traditional Q&A. Incorporate “live polls, group challenges”, or “real-time problem-solving sessions” where attendees can collaborate on pressing issues. This not only increases participation but also deepens the value attendees get from the content.

*Post-Event Analytics:* After each event, not just attendee feedback should be analyzed but also how they engage with post-event materials (e.g., videos, resources). Do they return to specific presentations? Do they share content on

social media? This behavior data can provide valuable insights into what truly resonated with the audience and where adjustments are needed.

*Tracking of Professional Growth Post-Event:* Survey attendees months after the event to gauge the long-term impact of the knowledge gained. Have they applied the insights in their work? Have they made connections that helped advance their professional goals? This feedback can help in refining content for future conferences.

*Hybrid and Micro-Content:* As conferences increasingly move online, the ISCSs organizers should think about offering “hybrid models” where participants can choose between in-person and virtual attendance. Additionally, consider breaking up longer talks or presentations into bite-sized micro-content pieces (e.g., 7–12-minute videos or audio). This allows participants to engage with the material on their own schedule, which is especially useful for international participants in different time zones.

*Immersive Technologies:* “Virtual reality (VR)” or “augmented reality (AR)” can be integrated into the conferences for immersive, interactive sessions. This is particularly powerful for scientific, technical, and artistic topics, providing participants with a deeper, more hands-on experience.

*Eco-Conscious Events:* As sustainability continues to rise in importance, eco-friendly practices can be made a core part of the ISCS event. The paperless conferences, “reduce waste”, and “use digital badges” can be encouraged rather than printed ones. If hosting physical events, partnerships with sustainable vendors can be considered and “all materials are recyclable or biodegradable” can be ensured.

*Focus on Diversity and Inclusion:* The ISCSs can be ensured to be inclusive in terms of gender, race, and socioeconomic background. Scholarships for underrepresented groups can be offered to attend and actively recruit speakers and participants from diverse backgrounds. A more inclusive environment leads to richer discussions and a broader perspective on issues.

*Collaborate with Leading Brands:* The strategic partnerships with well-known academic institutions, research organizations, or leading industry brands can be formed. This will not only raise the profile of the conference but also help secure valuable sponsorships. Sponsors can provide financial support, as well as resources and expertise that will add value to the event.

*Create Cross-Promotion Opportunities:* Co-hosting ISCSs can be considered with other reputable organizations or influencers in the field. Cross-promotion can significantly increase visibility and attendance. Moreover, it opens doors for knowledge-sharing and networking with a wider pool of experts.

*Curated Networking Opportunities:* Structured networking opportunities can be created and tailored to specific interests or fields of expertise. For example, “meetups” based on topics like “Emerging Tech”, “Sustainability”, or “Research Innovation” can be organized. Apps or online platforms can be used to connect participants with similar interests before, during, and after the ISCS event.

*Long-Term Community Building:* Beyond the events themselves, a

community around the ISCSs can be built. This can be done through social media groups, online forums, or membership platforms that continue engaging attendees throughout the year. Encouraging participants to stay connected and share insights or projects post-event, thus sustaining the value of the community.

*Dynamic Pricing Models:* To increase access, “tiered pricing” offer can be considered based on when participants register, with early birds receiving a discount. Offer of different ticket types can be explored (e.g., VIP tickets with exclusive access to speakers or content) to diversify the revenue streams.

*Streamlined Operations:* “AI tools” can be used for administrative tasks such as scheduling, registrations, and personalized content recommendations. Automating these processes not only reduces operational costs but also enhances the participant experience by providing personalized interactions.

*Conclusion Summary:*

Participating in ISCSs and SCSs helps to test the theories behind their work, enrich the research, and expose it in meaningful debates. ISCSs and SCSs are ideal platforms for presenting research, listening opinions and receiving valuable feedback. No matter how progressive the virtual world continues to advance, nothing can replace or surpass the power and impact of real in-person conferences, seminars, and forums.

ISCSs and SCSs are the rarest and most versatile events, and participation is beneficial across all age groups and professional fields. While the interest and engagement levels for conferences are promising, the diverse needs and expectations of the audience suggest that the format and content of future events should be dynamic and tailored. Offering specialized tracks, increasing interaction, and maintaining post-event engagement could greatly enhance the effectiveness and satisfaction of participants.

By focusing on all these, the expectations of the audience will not only meet but also foster growth, ensuring that future conferences continue to attract and engage people and might help refine future strategies and make it even more impactful:

**Author Contributions**

All authors listed have made a substantial, direct and intellectual contribution to the work, and approved it for publication.

**Conflict of Interest Statement**

The authors declare no conflict of interest.

## References

1. Bourliofas, N. Benefits of Attending International Conferences, Australian Institute of Company Directors (AICD), Company Director Magazine. <https://www.aicd.com.au/leadership/qualities-of-a-good-leader/development/benefits-of-attending-international-conferences.html> (last access 24 October 2024).
2. George, A. & Coddling, Jr. Influence in International Conferences. Published Online by Cambridge University Press. Volume 35. doi.org/10.1017/S0020818300034299 <https://www.cambridge.org/core/journals/international-organization/article/abs/influence-in-international-conferences/7DD121E43999AAD368B8A8469B517112> (last access 12 October 2024).
3. George, A., & Coddling, Jr. (1981) Influence in International Conferences. International Organization. 35(4), 715–724.
4. Hauss, K. What Are The Social And Scientific Benefits of Participating at Academic Conferences?. Insights from a Survey Among Doctoral Students and Postdocs in Germany; 10.1093/reseval/rvaa018, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7499794/> (last access 12 October 2024).
5. Oester, S., Cigliano, J.A., Hind-Ozan, E.J. & Parsons, C. M. (2017). Why Conferences Matter—An Illustration from The International Marine Conservation Congress. Frontiers In Marine Science, Front Mar Sci., 4. doi.org/10.3389/fmars.2017.00257 <https://www.frontiersin.org/articles/10.3389/fmars.2017.00257/full> (last access 10 November 2024).
6. Web Citations
7. Субачев, Ю. В. Международные Научные Конференции: Стоит Ли Игра Свеч?. <https://xn--80aegcaa6cbngm5a6c1ci.xn--p1ai/mezhdunarodnye-nauchnye-konferenczii/#4> (last access 17 October 2024).
8. Importance of International Conferences. 16 December, 2021. <https://www.allconferencealert.com/blog/importance-of-international-conferences/> (last access 24 October 2024).
9. Important Reasons You Should Attend International Conferences. Jan 8, 2017. <https://www.ierek.com/news/reasons-attend-international-conferences/> (last access 24 October 2024).

*The article has been submitted for publication: 17.02.2025*  
*Հոդվածը ներկայացվել է տպագրության. 17.02.2025*

*The article is sent for review: 26.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 26.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# MARKET CAPITALIZATION ASSESSMENT OF PERNOD RICARD CORPORATION. APPLICATION OF WACC CALCULATION

**ASHOT MATEVOSYAN**

Doctor of Sciences, Professor, Department of Finance,  
Armenian State University of Economics  
*matevosyan.ashot@asue.am*

**MANE MATEVOSYAN**

PhD in Economics, Lecturer, Department of Finance,  
Armenian State University of Economics  
*matevosyan.mane@asue.am*

**DOI: 10.54503/2579-2903-2025.1-116**

## **Abstract**

In the article, we have assessed the most significant financial indicators of the Pernod Ricard Corporation, with the aim of revealing the effectiveness of the corporation's capital management. Pernod Ricard is one of French companies, whose branch also operates in Armenia, as a producer and seller of a wide range of wines and spirits. In the article, based on the data of the Pernod Ricard Corporation, we have assessed the corporation's:

1. debt-to-sales ratio behavior
2. relationships between the components of the capital structure
3. level of coverage of liabilities with assets
4. debt service capacity
5. weighted average cost of capital (WACC).

The weighted average cost of capital (WACC) represents the combined cost of capital from all sources. However, WACC weighs the cost of each type of capital as a percentage of the total capital. It can include debt and equity types such as bonds, convertible debt, distributable reserves, issued share capital, lease financing, non-convertible long-term finance, long-term loans, mortgage bonds, undistributed reserves, preferred stock, and retained earnings.

We have considered it appropriate to estimate the weighted average cost of capital of an organization because we believe that WACC is useful for determining the value of each aspect of the organization's capital structure based on the proportion of debt, equity, and preferred stock. It is often used as a discount rate in financial modeling, especially when calculating NPV.

**Keywords:** Pernod Ricard Corporation, debt-to-income ratio, asset-liability ratio, market capitalization, weighted average cost of capital (WACC).

# ՊԵՌՆՈ ՌԻԿԱՐ ԿՈՐՊՈՐԱՅԻԱՅԻ ՇՈՒԿԱՅԱԿԱՆ ԿԱՊԻՏԱԼԻԶՄԻ ԳՆԱՀԱՏՈՒՄԸ. WACC-Ի ՀԱՇՎԱՐԿԻ ԿԻՐԱՌՈՒՄԸ

## ԱՇՈՏ ՄԱԹԵՎՈՍՅԱՆ

Հայաստանի պետական տնտեսագիտական համալսարանի  
ֆինանսների ամբիոնի դասախոս,  
տնտեսագիտության դոկտոր, պրոֆեսոր

*matevosyan.ashot@asue.am*

## ՄԱՆԵ ՄԱԹԵՎՈՍՅԱՆ

Հայաստանի պետական տնտեսագիտական համալսարանի  
ֆինանսների ամբիոնի դասախոս,  
տնտեսագիտության թեկնածու

*matevosyan.mane@asue.am*

## Համառոտագիր

Հոդվածում իրականացրել ենք Պեռնո Ռիկար Նիկար կորպորացիայի ֆինանսական կարևորագույն ցուցանիշների գնահատումներ, նպատակ ունենալով բացահայտելու կորպորացիայի կապիտալի կառավարման արդյունավետությունը: Պեռնո Ռիկարը ֆրանսիական ընկերություն է, որի մասնաձյուղը գործում է նաև ՀՀ-ում՝ որպես գինիների և ոգելից խմիչքների լայն տեսականի արտադրող և վաճառող:

Հոդվածում Պեռնո Ռիկար կորպորացիայի տվյալների հիման վրա՝ գնահատել ենք կորպորացիայի՝ պարտքի և իրացումից հասույթի հարաբերակցության վարքագիծը, կապիտալի կառուցվածքի բաղադրիչների միջև փոխհարաբերությունները, ակտիվներով պարտավորությունների ապահովվածության մակարդակը, պարտքի սպասարկման կարողությունը, կապիտալի միջին կշռված արժեքը (WACC):

Կապիտալի միջին կշռված արժեքը (WACC) ներկայացնում է կապիտալի համակցված արժեքը բոլոր աղբյուրներից: Այնուամենայնիվ, WACC-ը կշռում է յուրաքանչյուր տեսակի կապիտալի արժեքը՝ ըստ ընդհանուր կապիտալի ընդհանուր տոկոսի: Այն կարող է ներառել պարտքի և սեփական կապիտալի տեսակներ, ինչպիսիք են՝ պարտատոմսերը, պարտքը՝ սովորական բաժնետոմսերի փոխարկելու օպցիոնով, բաշխելի պահուստները, թողարկված բաժնետիրական կապիտալը, վարձակալության ֆինանսավորումը, երկարաժամկետ ֆինանսներն՝ առանց սովորական բաժնետոմսերի փոխարկելու հնարավորության, երկարաժամկետ վարկերը, հիփոթեքային պարտատոմսերը, անբաշխելի պաշարները, արտոնյալ բաժնետոմսերը, պահպանված եկամուտը: Հատկանշական ենք համարել կազմակերպության կապիտալի միջին կշռված արժեքի գնահատումը, քանի որ կարծում ենք, որ WACC-ը շահավետ է կազմակերպության կապիտալի կառուցվածքի յուրաքանչյուր կողմի արժեքը որոշելու նպատակով՝

հիմնված պարտքի, սեփական կապիտալի և արտոնյալ բաժնետոմսերի համամասնության վրա: Այն հաճախ օգտագործվում է որպես զեղչի դրույքաչափ ֆինանսական մոդելավորման մեջ՝ հատկապես NPV-ն հաշվարկելիս:

**Բանալի բառեր՝** Պեռնո Ռիկար կորպորացիա, պարտքի և իրացումից հասույթի հարաբերակցություն, ակտիվներով պարտավորությունների ապահովվածության մակարդակ, շուկայական կապիտալիզացիա, կապիտալի միջին կշռված արժեքը (WACC):

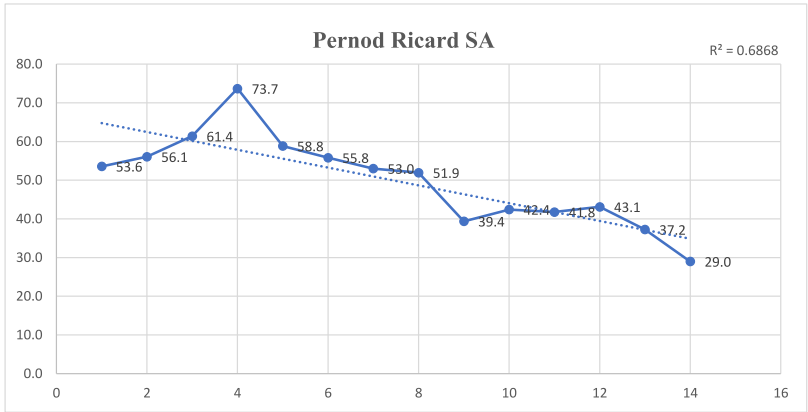
**Introduction**

Pernod Ricard Corporation operates as a holding company, with a structure divided between brand-owning subsidiaries, such as The Absolut Company, Havana Club International and Chivas Brothers, which produce and develop marketing strategies for the brands, and regional distribution subsidiaries, such as Pernod Ricard Europe. Pernod Ricard Americas and Pernod Ricard Asia, which implement marketing strategies and distribute local brands. The company is active in eight main beverage sectors: whiskies, aniseed spirits, liqueurs, cognacs and brandies, white spirits and rums, bitters, champagnes and wines. Pernod Ricard SA’s leading brands include Ricard, Havana Club, Ballantine’s, Malibu, Martell, The Glenlivet, Chivas Regal, Jameson and Absolut Vodka, among others.

**The closing price of Pernod Ricard’s last shares as of December 31, 1969 is 0.00** (Macrotrends, n.d.-a).

The company’s weighted average cost of debt in 2021 was 2.8%, compared to 3.6% in fiscal 2020.

The weighted average cost of debt is defined as net financing costs plus structuring and underwriting fees divided by the average net financial debt plus the average amount outstanding under factoring and securitization programs (Pernod Ricard, 2021).



**Figure 1** Pernod Ricard Corporation Value (EV)

*Note.* As of January 2025, Pernod Ricard has a market capitalization of €27.43 billion.

This makes Pernod Ricard the 697th most valuable company in the world according to our market capitalization data. Market capitalization, commonly referred to as market cap, is the total market value of a publicly traded company's outstanding shares and is commonly used to measure the value of a company<sup>1</sup>.

**Table 1**

Market Capitalization Trend in Pernod Ricard Corporation (RI.PA, 2025)

Years	Market Capitalization	Change
2024	\$40.84 B	-8.6%
2023	\$44.68 B	-11.03%
2022	\$50.22 B	-19.23%
2021	\$62.18 B	23.49%
2020	\$50.35 B	7.29%
2019	\$46.92 B	8.37%
2018	\$43.30 B	4.08%
2017	\$41.60 B	44.52%
2016	\$28.78 B	-5.17%
2015	\$30.35 B	1.94%
2014	\$29.78 B	-1.88%
2013	\$30.35 B	-0.46%
2012	\$30.49 B	24.89%
2011	\$24.41 B	-1.34%
2010	\$24.74 B	9.22%
2009	\$22.65 B	39.29%

*Note.* 2023–2009 /Enterprise Value (EV) = Market Value of Shares + Market Value of Debt – Cash

<sup>a</sup> Pernod Ricard Corporation's EV increased in 2010. In particular, in 2023 it amounted to 53.6 million USD, increasing by 1.84 times compared to 2010. The maximum value in 2010–2023 was reached in 2020 – 73.7 million USD.

<sup>b</sup> The EV change trend over the past five years is as follows:

- 2023 compared to 2022 – 4.44%
- 2022 compared to 2021 – 8.67%
- 2021 compared to 2020 – 16.69%
- 2020 compared to 2019 – 25.25%
- 2019 – 2018 – 5.40%

**Theory and Methodology**

In the stock market, there have always been corporations with relatively large capitalization. The main reason for this condition is a significant increase in the value of their shares resulting from an increase in profits and the volume of sales of products (goods, services). The size of the market and the financial capacity

<sup>1</sup> See the same source.



of investors have certain boundaries that call into question further substantial growth in the capitalization of such corporations. Under these conditions, the study of the hypothesis regarding the impossibility (or possibility) of a significant growth in shares of the corporations that are already leaders in the level of capitalization in the stock market is important (Morhachov et al., 2024).

WACC is a measurement indicator that describes capital financing in a company. If the movement of shares is higher, the WACC value is not good in the company because the burden increases – the WACC value that the company has must be smaller so that the company can carry out its obligations, especially regarding share payments (Hurian, 2021).

The aim of this study is to analyze the factors that affect the WACC in the company, namely liabilities and market capitalization.

In our research the method we used is multiple linear regression. Secondary data, namely financial reports and data streams (Pernod Ricard) were analyzed and calculated using data from metrotrends basis. We chose financial data from a 10-year period.

The results of this study explain that liabilities and market cap affect WACC. This can be because market conditions depend on the amount of company debt and market capitalization, because other external factors such as trust in companies and investors' confidence in the banking sector are increasing and developing.

### Research Methods

1. In the first step, the behavior of the debt-to-sales ratio in the studied organization is assessed:

- o *Total Debt/Sales*
- o *Short-Term Debt/Current Revenue*
- o *Long-Term Debt/Current Revenue*

2. In the second step, we determine the ratios characterizing the relationships between the components of the capital structure:

- o *(non-current liabilities + current liabilities)/ equity:  $G_{1,1}$*
- o *current liabilities/ assets:  $G_{1,2}$*
- o *non-current liabilities/ assets:  $G_{1,3}$*
- o *non-current liabilities/ (equity + non-current liabilities):  $G_{1,4}$*

3. In the second step, we determine the ratios characterizing the relationships between the components of the capital structure:

- o *(non-current liabilities + current liabilities)/ equity:  $G_{2,1}$*
- o *current liabilities/ assets:  $G_{2,2}$*
- o *non-current liabilities/ assets:  $G_{2,3}$*
- o *non-current liabilities/ (equity + non-current liabilities):  $G_{2,4}$*

4. In the fourth step, we determine the debt service ratio using the following ratios:

- o *gross profit/ net cash flow:  $G_{3,1}$*
- o *EBIT/ long-term debt:  $G_{3,2}$*
- o *cash /current liabilities:  $G_{3,3}$*
- o *(cash + accounts receivable)/ (long-term debt + current liabilities):  $G_{3,4}$*

5. In the fifth step, we estimated *the weighted average cost of capital (WACC)* of Pernod Ricard Corporation.

**Results**

The developed methodology estimates started from the ratio of Pernod Ricard Corporation’s debt, its components, and sales revenue. The results of the assessment are presented below in Table 2 (Macrotrends, n.d.–b).

**Table 2**

The ratio of Pernod Ricard Corporation’s debt, its components, and sales revenue<sup>2</sup>

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Total Debt/ Sales from Sales	1.41	1.49	1.53	1.63	1.21	1.22	1.29	1.42	1.47	1.46	1.41	1.43	1.00	0.97	0.75
Short-Term Debt/ Sales from Sales	0.57	0.57	0.48	0.54	0.51	0.42	0.47	0.57	0.60	0.49	0.52	0.45	0.39	0.56	0.39
Long-Term Debt/ Sales from Sales	0.84	0.92	1.05	1.09	0.70	0.81	0.82	0.84	0.87	0.97	0.90	0.98	0.61	0.41	0.35

**Table 3**

R2 estimates of the mathematical trend of total debt and its components relative to sales revenue for Pernod Ricard Corporation

	Total debt/Sales from sales	Short-term debt/ Sales from sales	Long-term debt/ Sales from sales
Pernod Ricard SA	0.431	0.1796	0.3745

Then, having determined the indicators characterizing the relationships between the components of the corporation’s capital structure, namely: (non-current liabilities + current liabilities)/ equity:  $G_{1,1}$ , current liabilities/assets:  $G_{1,2}$ , non-current liabilities/assets:  $G_{1,3}$ , non-current liabilities/(equity + non-current liabilities):  $G_{1,4}$ , we estimated the relationships between the components of the capital structure. The results of the assessment are as follows.

<sup>2</sup> The table was constructed using data from the studied alcoholic beverage companies taken from the website <https://www.macrotrends.net/stocks/industry/19/alcoholic-beverages>

**Table 4**

Indicators characterizing the relationships between the components of the capital structure of Pernod Ricard Corporation

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
$G_{1,1}$	1.25	1.22	1.13	1.22	0.92	0.97	1.17	1.27	1.29	1.34	1.42	1.59	1.71	1.90	2.27
$G_{1,2}$	0.18	0.17	0.13	0.14	0.15	0.13	0.14	0.16	0.17	0.14	0.16	0.13	0.11	0.15	0.11
$G_{1,3}$	0.37	0.38	0.40	0.40	0.33	0.37	0.40	0.40	0.39	0.43	0.43	0.48	0.52	0.51	0.58
$G_{1,4}$	0.46	0.46	0.46	0.47	0.39	0.42	0.46	0.47	0.47	0.50	0.51	0.56	0.58	0.60	0.65

We assessed the level of coverage of liabilities with assets of Pernod Ricard Corporation using the following indicators characterizing the level of coverage of liabilities with assets in the company: (inventories – current liabilities) / non-current liabilities:  $G_{2,1}$ , current assets / current liabilities:  $G_{2,2}$ , (current assets – current liabilities) / current assets:  $G_{2,3}$ , long-term debt / assets:  $G_{2,4}$ . The assessment results are summarized in Table 5.

**Table 5**

Indicators characterizing the level of asset–liability coverage in Pernod Ricard Corporation

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
$G_{2,1}$	0.08	0.09	0.18	0.13	0.11	0.16	0.09	0.03	0.02	0.08	0.01	0.04	0.07	0.00	0.06
$G_{2,2}$	1.73	1.95	2.45	2.08	1.79	2.09	1.77	1.47	1.44	1.70	1.47	1.76	1.95	1.50	1.98
$G_{2,3}$	0.42	0.49	0.59	0.52	0.44	0.52	0.43	0.32	0.31	0.41	0.32	0.43	0.49	0.33	0.50
$G_{2,4}$	0.27	0.27	0.29	0.29	0.21	0.24	0.25	0.24	0.25	0.28	0.28	0.28	0.18	0.11	0.10

We assessed the debt service capacity of Pernod Ricard Corporation using the following indicators: gross profit/net cash flow:  $G_{3,1}$ , EBIT/long-term debt:  $G_{3,2}$ , cash/current liabilities:  $G_{3,3}$ , (cash + accounts receivable) / (long-term debt + current liabilities):  $G_{3,4}$ . We presented the assessment results in a table.

**Table 6**

Indicators characterizing the debt service of Pernod Ricard Corporation

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
$G_{3,1}$	3.564	2.822	2.64782	4.30737	3.321	3.1554	3.4123	4.0202	5.1169	5.3053	4.9318	4.4814	4.065	3.5004	3.737
$G_{3,2}$	0.319	0.302	0.25387	0.10603	0.3691	0.3171	0.3024	0.2856	0.2131	0.2366	0.273	0.414	0.398	0.5904	0.692
$G_{3,3}$	0.234	0.419	0.49455	0.42669	0.1987	0.206	0.1647	0.1164	0.1158	0.1288	0.1403	0.2215	0.262	0.1763	0.183
$G_{3,4}$	0.165	0.207	0.1964	0.17298	0.1521	0.142	0.1201	0.1016	0.1057	0.1005	0.1119	0.1212	0.103	0.0926	0.084

We have summarized the methodological assessment used and proposed

in the research by determining the weighted average cost of capital (WACC) of Pernod Ricard Corporation, for which we have developed the 3–step sequence of calculations.

Calculation of Pernod Ricard Corporation’s WACC:

***Step 1: Weights***

In general, the company’s assets are financed by debt and equity. We need to calculate the weight of equity and the weight of debt.

The market value of equity (E) is also called “Market Capitalization”.

The market value of debt is usually difficult to calculate, therefore, GuruFocus uses the book value of debt (D) to perform the calculation. It is simplified by adding the average of the last half–year short–term debt and capital lease obligations and the long–term debt and capital lease obligations. 2023 As of December 2018, the average book value (D) of Pernod Ricard’s latest one–year semi–annual debt is \$13,101.8343 million.

a) Equity weight =  $E / (E + D) = 40,063.319 / (40,063.319 + 13,101.8343) = 0.7536$

b) Debt weight =  $D / (E + D) = 13,101.8343 / (40,063.319 + 13,101.8343) = 0.2464$

***Step 2: Cost of Equity***

GuruFocus uses the Capital Asset Pricing Model (CAPM) to calculate the required rate of return. The formula is as follows:

Cost of Equity = Risk–Free Rate of Return + Asset Beta \* (Expected Market Return – Risk–Free Rate of Return)

a) GuruFocus uses the 10–year Treasury fixed–rate as the risk–free rate. It is updated daily. The current risk–free rate is 2,65%:<sup>3</sup>

b) Beta is the sensitivity of the expected excess return of an asset to the expected excess market return. The Pernod Ricard beta is 0.50.

c) (Expected Return of the Market – Risk–free Rate of Return) is also called the market premium. GuruFocus requires a market premium of 6%.

Cost of Equity =  $2,65\% + 0,50 * 6\% = 5,65\%$

***Step 3: Cost of Debt***

To get the simplified cost of debt, GuruFocus uses the latest TTM interest expense divided by the last one–year semi–annual average debt.

As of December 2023, Pernod Ricard’s interest expense (a positive number) was \$379.667 million. Its total book value of debt (D) is \$13101.8343

Cost of Debt =  $379.667 / 13101.8343 = 2.8978\%$ .

***Step 4: Multiply by one minus the TTM Tax Rate***

To calculate the tax rate, GuruFocus uses the most recent TTM tax expense divided by the most recent TTM Pre–Tax Income. The estimated TTM tax rate is limited to 0% to 100%. If the estimated tax rate is greater than 100%, it is set to

<sup>3</sup> Please note that we use the 10–year Treasury fixed rate for the country/region where the company is headquartered. If data for that country/region is not available, we will use the US 10–year Treasury fixed rate as a default.

100%. If the estimated tax rate is less than 0%, it is set to 0%.

The most recent estimated TTM tax rate =  $614.355 / 2866.209 = 21.43\%$ .

**The Pernod Ricard weighted average cost of capital (WACC) for today is calculated as follows:**

$WACC = E / (E + D) * \text{Cost of Equity} + D / (E + D) * \text{Cost of Debt} * (1 - \text{Tax Rate}) = 0.7536 * 5.65\% + 0.2464 * 2.8978\% * (1 - 0.2143\%) = 3.91\%$

**Table 7**

Pernod Ricard Corporation WACC, CAMP

	The range	Selected
Selected beta	0.80-1.02	0,91
Cost of equity	8.0%-10.0%	9.0%
Tax rate	18.0%-18.0%	18.0%
Cost of debt	4.5%-4.9%	4.7%

Note. WACC low 8.0 %, WACC average 8.8 %, WACC high 9.3 %

**Conclusion**

The assessment and control of the weighted average cost of capital (WACC) in commercial organizations is one of the key areas of financial management. Of the various approaches to assessing WACC, the approaches of the weighted average cost of capital and the capital asset pricing (CAPM) have gained significant importance in practice. Problems arise in calculating the market value of debt in the WACC calculation; therefore, the adjusted book value of debt is mainly used, adding the average of the last one-year semi-annual short-term debt and capital lease obligations and the long-term debt and capital lease obligations.

A similar approach is also used when determining the cost of equity. In particular, the capital asset pricing model (CAPM) uses the 10-year US Treasury fixed interest rate as the risk-free rate. In both calculation approaches, the tax adjuster plays a role:  $(1 - \text{Tax rate})$ .

From the estimates made, we can It should be noted that the WACC of Pernod Ricard Corporation was significantly affected by the cost of equity (7.2%), which, according to estimates, was 2.95% higher than the cost of debt (4.25%).

In practice, from the point of view of financial management, equity in this company is considered expensive, therefore, we propose to achieve a decrease in the cost of equity under the conditions of the permissible debt burden through optimization of the capital structure.

## References

1. CompaniesMarketCap (n.d.). *Pernod Ricard (RI.PA) – Market Capitalization*. Retrieved January 28, 2025, from <https://companiesmarketcap.com/eur/pernod-ricard/marketcap/>
2. Hurian, K. (2021). Liability, Market Cap Terhadap WACC: Pendekatan Sektor Perbankan. *Journal of Applied Accounting and Taxation*, 6(1), 115–122. <https://doi.org/10.30871/jaat.v6i1.2884>
3. Macrotrends (n.d.-a). *Alcoholic Beverages – Top Stocks*. Retrieved January 18, 2025, from <https://www.macrotrends.net/stocks/industry/19/alcoholic-beverages>
4. Macrotrends (n.d.-b). *Pernod Ricard SA Financial Statements 2009-2024 | PRNDY*, Retrieved January 28, 2025, from <https://www.macrotrends.net/stocks/charts/PRNDY/pernod-ricard-sa/financial-statements>
5. Morhachov, I., Oviechkina, O. Maslosh, O., & Serikova, O. (2024). Assessment of the Possibility of Significant Growth of Corporate Shares with Large Capitalization. *Management Theory and Studies for Rural Business and Infrastructure Development*, 46(2), 202–212. <https://doi.org/10.15544/mts.2024.21>
6. Pernod Ricard (2021). *Universal Registration Document 2020–2021*. Retrieved January 18, 2025, from <https://www.pernodricard.com/sites/default/files/202110/Consolidated%20financial%20statements%20FY21.pdf>

*The article has been submitted for publication: 02.02.2025*  
*Հոդվածը ներկայացվել է փրագրությամբ. 02.02.2025*

*The article is sent for review: 11.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 11.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է փրագրությամբ. 31.03.2025*

# THE RELATIONSHIP BETWEEN PROFITABILITY AND BANKRUPTCY ASSESSMENT BASED ON LIS'S FOUR-FACTOR MODEL. CASE STUDY OF THE ALCOHOLIC BEVERAGE COMPANY

**LIANA GRIGORYAN**

Doctor of Sciences. Professor,  
Chairman of Managerial accounting and auditing,  
Armenian State University of Economics

*liana.grigoryan@asue.am*

**ANI GRIGORYAN**

PhD in Economic, Lecturer, Chair of Finance,  
Armenian State University of Economics

*ani.grigoryan@asue.am*

**DOI: 10.54503/2579-2903-2025.1-126**

## **Abstract**

In the article, we researched the key indicators of Diageo Corporation, aiming to identify the most risky trends. For the study the chosen time lag was the trend of the last 10 years.

Diageo is a part of the beverage industry. Its business involves the supply of alcoholic beverage under a collection of brands such as Johnnie Walker, Crown Royal, Buchanan's and Windsor whiskies, Smirnoff, Cîroc and Ketel One vodkas.

Diageo's dividend grew at a compound annual rate of almost 6%, which is far ahead of inflation and more than enough the most income investors to keep happy.

Using methodological assessment, we assessed the profitability of the company, for which we identified return on equity, economic profitability, and net return on assets.

Taking into account the analysis conducted and the indicators recorded during the assessment, we considered it essential to assess the company's bankruptcy risk. For this purpose, we used the bankruptcy risk assessment method by R. Liss, which is widely used in international practice.

The assessment recorded as a result of the model implementation is perceived as a safe financial situation for the company.

**Keywords:** return on equity, economic profitability, net return on assets, profitability assessment, risk assessment, model by Lis.

# ՇԱՀՈՒԹԱԲԵՐՈՒԹՅԱՆ ԵՎ ՄՆԱՆԿՈՒԹՅԱՆ ՄԻՋԵՎ ՀԱՐԱԲԵՐՈՒԹՅՈՒՆԸ՝ ՀԻՄՆՎԱԾ ԼԻՍԻ ՉՈՐՄ ԳՈՐԾՈՆ ՄՈԴԵԼԻ ԳՆԱՀԱՏՄԱՆ ՎՐԱ: ԱԿՈՆՈԼԱՅԻՆ ԽՄԻՉՔՆԵՐ ԱՐՏԱԳԻՐՈՂ ԸՆԿԵՐՈՒԹՅԱՆ ԴԵՊՔԻ ՈՒՍՈՒՄՆԱՍԻՐՈՒԹՅՈՒՆ

## ԼԻԱՆԱ ԳՐԻԳՈՐՅԱՆ

Հայաստանի պետական տնտեսագիտական համալսարանի  
կառավարչական հաշվառման և աուդիտի ամբիոնի վարիչ,  
տնտեսագիտության դոկտոր, պրոֆեսոր

*liana.grigoryan@asue.am*

## ԱՆԻ ԳՐԻԳՈՐՅԱՆ

Հայաստանի պետական տնտեսագիտական համալսարանի  
ֆինանսների ամբիոնի դասախոս,  
տնտեսագիտության թեկնածու

*ani.grigoryan@asue.am*

## Համառոտագիր

Հոդվածում ուսումնասիրել ենք **Դիազեո** կորպորացիայի հիմնական ֆինանսական ցուցանիշները՝ նպատակ ունենալով բացահայտել ամենա-  
նիսկային միտումները: Հետազոտության համար ընտրված ժամանակային  
լագ է համարվել վերջին 10 տարվա միտումը:

**Դիազեո** կորպորացիան խմիչքների արդյունաբերության մի մասն է:  
Վերջինիս բիզնեսը ներառում է ալկոհոլային խմիչքների մատակարարում  
այնպիսի ապրանքանիշերի հավաքածուի ներքո, ինչպիսիք են՝ “Johnnie  
Walker”, “Crown Royal”, “Buchanan’s” և “Windsor” վիսկիները, “Smirnoff”,  
“Ciroc” և “Ketel One” օղիները:

Միայն 2024 թվականի առաջին կիսամյակում ընկերության շահաբա-  
ժինն աճել է գրեթե 6 տոկոսով, ինչը ոչ միայն խոստումնալից ցուցանիշ է,  
այլև ներդրողների տեսանկյունից գրավիչ:

Հոդվածում, մեթոդական գնահատման միջոցով, գնահատել ենք ըն-  
կերության շահութաբերությունը, որի համար վերլուծել ենք սեփական կա-  
պիտալի եկամտաբերությունը, տնտեսական շահութաբերությունը և ակտիվ-  
ների գուտ եկամտաբերությունը:

Հաշվի առնելով իրականացված վերլուծության պատկերը և գնահատ-  
ման ընթացքում արձանագրված ցուցանիշները, առանցքային ենք համարել  
ընկերության սնանկության ռիսկի գնահատման անհրաժեշտությունը: Այդ  
նպատակով օգտագործել ենք միջազգային պրակտիկայում լայն կիրառու-  
յուն գտած Ռ. Լիսի սնանկության ռիսկի գնահատման մոդելը: Մոդելի տե-  
ղայանացման արդյունքում արձանագրված գնահատականն ընկերության



համար ընկալվում է անվտանգ ֆինանսական իրավիճակ:

**Բանալի բառեր՝** սեփական կապիտալի եկամտաբերություն, տնտեսական շահութաբերություն, ակտիվների զուտ եկամտաբերություն, շահութաբերության գնահատում, ռիսկի գնահատում, Լիսի մոդել:

**Introduction**

Stock split history for Diageo since 1996. Prices shown are actual historical values and are not adjusted for either splits or dividends. Please see the “Historical Prices” tab for adjusted price values.

Historical daily share price chart and data for Diageo since 1996 adjusted for splits and dividends. The latest closing stock price for Diageo as of January 17, 2025 is 118.79.

- The all-time high Diageo stock closing price was 206.66 on January 04, 2022.
- The Diageo 52-week high stock price is 154.71, which is 30.2% above the current share price.
- The Diageo 52-week low stock price is 113.99, which is 4% below the current share price.
- The average Diageo stock price for the last 52 weeks is 134.14.

**Table 1.**

Diageo Historical Annual Stock Price Data<sup>4</sup>

Year	Average Stock Price	Year Open	Year High	Year Low	Year Close	Annual % Change
2025	120.4218	126.1200	126.1200	114.5000	118.7900	-6.56%
2024	133.2054	139.8251	150.1531	117.7514	127.1300	-10.08%
2023	160.7228	166.8902	181.0788	134.8553	141.3879	-16.35%
2022	175.0697	205.5487	206.6560	154.5880	169.0148	-17.48%
2021	172.7873	145.4202	206.3582	140.3875	204.8230	41.72%
2020	129.1851	148.0056	151.5116	91.9190	144.5283	-3.32%
2019	143.1737	121.1289	156.1981	119.9735	149.4879	21.35%
2018	121.8009	123.0071	129.3614	113.0928	123.1878	-0.47%
2017	104.6023	86.1450	123.7699	86.1450	123.7699	44.13%
2016	88.5601	86.5428	96.6539	81.5389	85.8723	-1.98%
2015	89.6879	87.4743	96.0691	82.4385	87.6029	-1.48%

Market capitalization (or market value) is the most commonly used method

<sup>4</sup> Data from Macrotrends.net, <https://www.macrotrends.net/stocks/charts/DEO/diageo/stock-price-history>

of measuring the size of a publicly traded company and is calculated by multiplying the current stock price by the number of shares outstanding. Diageo market cap as of January 21, 2025 is **\$66.08B**.<sup>5</sup>

Diageo operates in approximately 180 countries and is involved in producing, distilling, brewing, bottling, packaging as well as distributing spirits, wine and beer.

The company offers its products under globally recognized flagship brands, such as Smirnoff, Johnnie Walker, Captain Morgan, Baileys, Buchanan's, J&B, Tanqueray and Guinness. Among these, 14 brands ' Johnnie Walker, Smirnoff, Baileys, Crown Royal, Captain Morgan, Jose Cuervo, JeB, Buchanan's, Windsor, Ketel One vodka, Tanqueray, Bushmills and Guinness ' are classified as global strategic brands. The company operates through five regions: 'North America includes four operating units'. U.S. Spirits, Diageo–Guinness USA, Diageo Chateau & Estate Wines Co. and Diageo Canada. Europe comprises Great Britain, Ireland, Iberia, France, Germany, Benelux, Italy, Nordics, Greece, Switzerland, Austria, the Western European reserve brands, Diageo Guinness Continental Europe, European wines and the Western European operations of Global Travel.

### **Theory and methodology**

In addition to profitability, bankruptcy risk analysis is also of direct interest to many stakeholders in making decisions based on the likelihood of bankruptcy of companies (Buzgurescu & Elena, 2020).

The question is whether the language used in the annual report accurately reflects the company's bankruptcy risks.

Lopatta et al. (2017) confirmed that the 10-K reports of bankrupt companies contained significantly more negative language than reports of healthy companies. Lohmann and Ohliger (2020) demonstrate that based on structural and linguistic factors and qualitative information in annual reports, it is possible to accurately distinguish companies that have gone bankrupt and those that are solvent but facing financial difficulties.

According to Cherry et al. (2023), economic stress caused by the COVID-19 pandemic can lead to unexpected changes in organizational performance. Therefore, the question of how the information disclosure practices of managers of these companies have changed during the COVID-19 epidemic has become contextually relevant.

Non and Ab Aziz (2023) posit that companies apply a variety of emotional tones when communicating with stakeholders. Most companies use negative emotions to express their concerns about how the COVID-19 pandemic has affected their business (Binh Le, Cong Nguyen, 2024). For the purposes of the methodology used in the article, we have identified three methods of application:

**1. Analysis of key general financial indicators of the corporation based on consolidated annual data:**

**2. Corporate profitability assessment, for which we have identified the following coefficients:**

- Return on equity: net profit/equity\*100,

<sup>5</sup> Data from Macrotrends.net <https://www.macrotrends.net/stocks/charts/DEO/diageo/market-cap>

- economic profitability: balance sheet profit/assets\*100,
- Net return on assets: net profit/assets\*100,
- Return on sales: Net profit/net sales revenue\*100, Cost return: net profit / cost\*100

**3. Assessment of insolvency and the risk of bankruptcy of a corporation.**

**Research Methods**

Various methods of assessing insolvency exist. For example in the period from 1969 to 1975, Tafler, (Baykina, 2008) having studied 92 organizations, 46 of which went bankrupt and 46 were financially stable, proposed the following model for predicting the potential risk of bankruptcy:

$$Z = 0,53 * X_1 + 0,13 * X_2 + 0,18 * X_3 + 0,16 * X_4, \quad (1)$$

Altman proposed the following five-factor model for joint-stock companies whose shares are listed on the financial market (Altman, et al., 1998).

$$Z = 1,2 * X_1 + 1,4 * X_2 + 3,3 * X_3 + 0,6 * X_4 + X_5, \quad (2)$$

In the article, we applied the method of assessing the risk of bankruptcy of organizations by R. Lis.

Lis proposed the following four-factor model for assessing the risk of bankruptcy of organizations (Melnikova, 2015).

$$L = 0.063 * K_1 + 0.092 * K_2 + 0.057 * K_3 + 0.0014 * K_4, \quad (3)$$

Where:

- $K_1$  – current assets/ assets,
- $K_2$  – profit/assets from sale,
- $K_3$  – retained earnings/ assets,
- $K_4$  – equity/ borrowed capital,

According to the model:

- If  $L < 0.037$ , the probability of bankruptcy of the organization is high.
- If  $L > 0.037$ , the probability of bankruptcy of the organization is low.

**Results**

**1. Analysis of key general financial indicators of the corporation based on consolidated annual data:**

EBITDA can be defined as earnings before interest, taxes, depreciation and amortization. Diageo 2024 annual EBITDA was \$6.494B, a 5.11% decline from 2023. In 2023 EBITDA was \$6.844B, a 1.82% decline from 2022 and in 2022 it was increase about 23.97% from 2021.

**Table 2.**

**Alcoholic Beverages - Top Stocks<sup>6</sup>**

Company name	Country	Market cap	Dividend Yield
Anheuser-Busch	Belgium	\$86,266	1.36%
Diageo	UK	\$66,082	4.22%
Heineken	Netherlands	\$38,502	1.60%
Constellation Brands Inc	US	\$33,310	2.19%
Ambev S.A	Brazil	\$28,042	3.86%
Pernord Ricard SA	France	\$27,851	3.11%
Brown-Forman	US	\$16,208	2.64%

Revenue can be defined as the amount of money a company receives from its customers in exchange for the sales of goods or services. Revenue is the top line item on an income statement from which all costs and expenses are subtracted to arrive at net income.

Diageo annual revenue for 2024 was \$20.269B, a 1.39% decline from 2023. Revenue for 2023 was \$20.555B, a 0.06% decline from 2022. In 2022 was \$20.568B, a 20.02% increase from 2021.

Diageo total assets for 2024 were \$45.474B, a 1.32% increase from 2023. In 2023 assets were \$44.883B, a 7.66% decline from 2022 and 2022 were \$48.606B, a 13.02% increase from 2021<sup>7</sup>.

Total liabilities can be defined as the total value of all possible claims against the corporation. Diageo total liabilities for 2024 were \$33.404B, a 0.69% increase from 2023.

Total liabilities for 2023 were \$33.174B, a 7.7% decline from 2022 and for 2022 were \$35.942B, a 13.53% increase from 2021.

**Table 3.**

**Diageo Annual Financial Results**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Annual Revenue (Millions of US \$)</b>	16,685	17,042	15,561	15,283	16,384	16,651	14,817	17,137	20,568	20,555	20,269
<b>Total Assets (Millions of US \$)</b>	37,351	40,670	42,283	36,588	40,026	40,500	41,995	43,006	48,606	44,883	45,474
<b>Total Liabilities (Millions of US \$)</b>	25,006	26,081	27,175	21,333	24,249	27,357	31,354	31,658	35,942	33,174	33,404

<sup>6</sup> Source: <https://www.macrotrends.net/stocks/industry/19/>

<sup>7</sup> Source: <https://www.macrotrends.net/stocks/charts/DEO/diageo/total-assets>

**2. Corporate profitability assessment, for which we have identified the following coefficients:**

Using Diageo’s data, we calculated the following corporate profitability ratios:

- Return on investment: net profit/equity,
- Return on investment: net profit/assets,
- ROS: net profit/net sales revenue:

**Table 4.**

Calculated values of profitability coefficients of Diageo

	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	ave- rage
ROE	0.402	0.402	0.341	0.316	0.167	0.311	0.258	0.221	0.220	0.257	0.296	0.307	0.304	0.337	0.364	0.536	0.309
ROA	0.105	0.105	0.089	0.083	0.042	0.101	0.102	0.092	0.079	0.092	0.098	0.099	0.093	0.102	0.090	0.095	0.091
ROS	0.218	0.218	0.210	0.209	0.120	0.246	0.248	0.221	0.214	0.220	0.219	0.217	0.193	0.203	0.178	0.185	0.207

**3. Assessment of insolvency and the risk of bankruptcy of a corporation.**

Taking into account the results of the simulation assessment, we assessed the insolvency and bankruptcy risk of the corporation using the logical chain of the methodological sequence used in the article, the results of which are shown in the table below:

**Table 5.**

Results of the assessment of insolvency and bankruptcy risk of Diageo using the Lis’s model<sup>8</sup>

The name of the indicator	Results
1. (working capital / total capital (assets)) * 0.063	0,056
2. (profit from sales / total assets) *0.092	0,011
3. (retained earnings / total assets) *0.057	0,005
4. (equity/borrowed capital)* 0.001	0,0001
5. Z is the bankruptcy prediction coefficient	0,073
6. the probability of bankruptcy	0,073 > 0.037

**Conclusion**

Since the sale of alcoholic beverages is associated with certain regulatory issues consequently, financial management in organizations producing it and

<sup>8</sup> The data required for the calculations of the Lis’s model were taken from the reports of the organizations under study.

working capital management within it have certain peculiarities (Matevosyan et. al, 2023).

There were three important aspects of Diageo’s approach; audit work performed on individual business units, at shared service centres, and at the group level and for the company.

Scotch whisky represents 24% of Diageo’s net sales as of 2022, and is therefore one of the most important aspects of their portfolio. Diageo owns 30 whisky distilleries in Scotland, including Lagavulin, Clynelish and Talisker, and control the production of 27.71% of Scotland’s Scotch production capacity.

Pernod Ricard is their closest competitor and owns 13 distilleries producing 19.14% of Scotland’s total capacity (GRIGORYAN, A., 2024).

Beverages analysis of the cash flow data of the alcoholic beverage companies listed and studied in Alcoholic Beverages – Top Stocks shows, there has been a tendency to hold on to free cash rather than invest it in profitable deals especially in the last five years. Essentially, alcoholic beverage companies show high caution in investment processes (Matevosyan, 2023).

As revealed by the analysis of the 2024 Diageo audit, the company continued to drive more standardisation in their audit work performed for individual business units and centralise more of their work in shared service centre locations (Diageo Annual Report, 2024).

From the results obtained using the bankruptcy risk assessment method by R. Liss, we can draw the following conclusion:

- ▶ A value above 0.037 was obtained from the bankruptcy limit point, which gives reason to assert that the SH-organization is not at risk of bankruptcy according to these results:

## References

1. Altman, E. I. & Saunders, A. (1998). Credit risk measurement: Developments over the last 20 years. *Journal of Banking and Finance*, 21, 1721.
2. Baykina, S. G. (2008). *Accounting and analysis of bankruptcies: A textbook*. Moscow: Publishing and Trading Corporation Dashkov & Co., 169.
3. Binh Le, C., & Cong Nguyen, N. (2024). Studying the impact of profitability, bankruptcy risk, and pandemic on narrative tone in annual reports in an emerging market in the East. *Humanities and Social Sciences Communications*. <https://doi.org/10.1057/s41599-024-03980-9> Available from: [https://www.researchgate.net/publication/385354865\\_Studying\\_the\\_impact\\_of\\_profitability\\_bankruptcy\\_risk\\_and\\_pandemic\\_on\\_narrative\\_tone\\_in\\_annual\\_reports\\_in\\_an\\_emerging\\_market\\_in\\_the\\_East](https://www.researchgate.net/publication/385354865_Studying_the_impact_of_profitability_bankruptcy_risk_and_pandemic_on_narrative_tone_in_annual_reports_in_an_emerging_market_in_the_East) The last seen: 31/01/2025
4. Buzgurescu, O. L. P., & Elena, N. (2020). Bankruptcy risk prediction in assuring the financial performance of Romanian industrial companies. In O. L. P. Buzgurescu & N. Elena (Eds.), *Contemporary issues in business economics and finance*.
5. Cherry, C., Mohamed, W., & Brahmabhatt, Y. (2023). Using FinBERT as a refined approach to measuring impression management in corporate reports during a crisis. *Communicare: Journal of Communication Studies in Africa*, 42(1), 64–80. <https://doi.org/10.36615/jcsa.v42i1.2318>
6. Diageo – 29 year stock price history | DEO. (n.d.). *Macrotrends.net*. Available from <https://www.macrotrends.net/stocks/charts/DEO/diageo/stock-price-history> The last seen: 14/01/2025

7. Diageo market cap 2010–2024 | DEO. (n.d.). Macrotrends.net. Available from <https://www.macrotrends.net/stocks/charts/DEO/diageo/market-cap> The last seen: 14/01/2025
8. Diageo total assets 2010–2024 | DEO. (n.d.). Macrotrends.net. Available from <https://www.macrotrends.net/stocks/charts/DEO/diageo/total-assets> The last seen: 16/01/2025
9. Diageo Annual Report 2024, 156, Available from: <https://www.diageo.com/~media/Files/D/Diageo-V2/Diageo-Corp/investors/results-reports-and-events/annual-reports/financial-statements-2024.pdf> The last seen: 21/01/2025.
10. Grigoryan, A. (2024). The Ratio of Debt, Its Components and Sales Revenue of Diageo. KATCHAR Scientific Periodical, 2, 122. DOI:10.54503/2579-2903-2024.2-122, Available from: [https://www.isec.am/images/gitakan\\_hraparakumner/Katchar\\_\\_02\\_for\\_web.pdf](https://www.isec.am/images/gitakan_hraparakumner/Katchar__02_for_web.pdf) The last seen: 20/01/2025.
11. Lohmann, C., & Ohliger, T. (2020). Bankruptcy prediction and the discriminatory power of annual reports: empirical evidence from financially distressed German companies. Journal of Business Economics, 90(1), 137–172. <https://doi.org/10.1007/s11573-019-00938-1>
12. Lopatta, K., Gloger, M. A., & Jaeschke, R. (2017). Can language predict bankruptcy? The explanatory power of tone in 10-K filings. Accounting Perspectives, 16(4), 315–343. <https://doi.org/10.1111/1911-3838.12150>
13. Matevosyan, A. V., Hovakanyan, L. Y., Matevosyan, M. H., Grigoryan, A. Z. (2023). The Proposed Approach to Current Financial Requirement Management in Organizations of The Alcoholic Beverages, 10, Available from: [https://www.researchgate.net/publication/384159712\\_The\\_Proposed\\_Approach\\_to\\_Current\\_Financial\\_Requirement\\_Management\\_in\\_Organizations\\_of\\_The\\_Alcoholic\\_Beverages](https://www.researchgate.net/publication/384159712_The_Proposed_Approach_to_Current_Financial_Requirement_Management_in_Organizations_of_The_Alcoholic_Beverages) The last seen: 21/01/2025.
14. Melnikova, G. A. (2015). Architecture of foreign modeling of bankruptcy probability assessment. Young Scientist. 11, 55–58.

*The article has been submitted for publication: 04.02.2025*  
*Հոդվածը ներկայացվել է տպագրության. 04.02.2025*

*The article is sent for review: 11.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 11.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# THEORETICAL –METHODOLOGICAL REVIEW OF THE GENERAL EDUCATION MANAGEMENT MODELS

**MKHITAR GASPARYAN**

Postgraduate student of the Department of Management,  
Armenian State University of Economics

*mkhitargasparyan98@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-135**

## **Abstract**

Management of the general education system is a theoretical and practical area of social sciences aimed at developing a strategy for the education system, planning and monitoring educational processes, identifying current management tasks, and solving them effectively. Management of general education has become an integral part of the educational system as a whole since the organization and implementation of educational processes are impossible without the use of management mechanisms and skills. Moreover, the area of general education management has become a kind of link between the academic needs of society and the strategic goals of the state. Therefore, management of the general education system is not only an area of theoretical knowledge but also has great practical and social significance.

Along with the achievements of scientific thought in the field of general education management, it should be noted that the rapid development of modern societies requires periodic revision of theoretical management models and their compliance with the current educational needs of society. Modern social demands and expectations regarding the educational system dictate the need to develop criteria for selecting a management model. Today, such issues have already emerged in the field of general education management, of which the following issues are of particular importance:

- the presence of various management models in practice and the absence of their theoretical description;
- formal choice of management models for educational systems;
- contradictions between multiple changes in the education system and the lack of theoretically sound models for managing these changes.

To formulate theoretical and practical recommendations aimed at solving of current problems in the area of general education management there were investigated trends of management models formed and their essential characteristics. The objectives of this study include describing the main characteristics of social connections that form configurations of relationships between general schools and society and constructing a typology of management models that dominate modern schools of various countries. These objectives were formed based on qualitative data obtained during a comparative study of international experience in the field of general education management.



**Keywords:** General education management, management models, educational holding, consortium, claster.

## ՀԱՆՐԱԿՐԹՈՒԹՅԱՆ ՈԼՈՐՏՈՒՄ ԿԱՌԱՎԱՐՄԱՆ ՄՈԴԵԼՆԵՐԻ ՏԵՍԱ-ՄԵԹՈԴԱԲԱՆԱԿԱՆ ՎԵՐԼՈՒԾՈՒԹՅՈՒՆ

**ՄԻԻԹԱՐ ԳՎՍՊԱՐՅԱՆ**

Հայաստանի պետական տնտեսագիտական համալսարանի կառավարման ամբիոնի հայցորդ

*mkhitargasparyan98@gmail.com*

### Համառոտագիր

Հանրակրթության ոլորտի կառավարումը սոցիալական գիտությունների տեսական և գործնական ոլորտ է, որն ուղղված է կրթական համակարգի ռազմավարության մշակմանը, կրթական գործընթացների պլանավորմանն ու մոնիթորինգին, ընթացիկ կառավարման խնդիրների բացահայտմանը և դրանց արդյունավետ լուծմանը: Հանրակրթության ոլորտի կառավարումը դարձել է կրթական համակարգի անբաժանելի մասը, քանի որ կրթական գործընթացների կազմակերպումն ու իրականացումն անհնար է առանց կառավարման մեխանիզմների և հմտությունների կիրառման: Ավելին, հանրակրթության կառավարման ոլորտը դարձել է հասարակության կրթական կարիքների և պետության ռազմավարական նպատակների միջև կապող օղակը, ուստի՝ հանրակրթության ոլորտի կառավարումը ոչ միայն տեսական գիտելիքի ձևավորման ոլորտ է, այլև ունի գործնական և սոցիալական մեծ նշանակություն:

Հանրակրթության կառավարման ոլորտում գիտական մտքի ձեռքբերումներին զուգընթաց պետք է նշել, որ ժամանակակից հասարակությունների արագ զարգացումը պահանջում է տեսական կառավարման մոդելների պարբերական վերանայում և համապատասխանեցում հասարակության ներկայիս կրթական կարիքներին: Կառավարման մոդելի ընտրության չափանիշների մշակման անհրաժեշտությունը պայամանավորված է կրթական համակարգի վերաբերյալ ժամանակակից սոցիալական պահանջներով և սպասելիքներով: Հանրակրթության կառավարման ոլորտում այսօր արդեն իսկ ի հայտ են եկել այնպիսի խնդիրներ, որոնցից առանձնահատուկ կարևորություն են ներկայացնում հետևյալ խնդիրները.

- պրակտիկայում կառավարման տարբեր մոդելների առկայությունը և դրանց տեսական հիմնավորման բացակայությունը,
- կրթական համակարգերի կառավարման մոդելների ֆորմալ ընտրությունը,
- հակասությունները կրթական համակարգում բազմաթիվ փոփոխությունների և այդ փոփոխությունները կառավարելու նպատակով մոդելների

տեսամեթոդական հիմնավորվածության բացակայության միջև:

Հանրակրթության կառավարման ոլորտում առկա խնդիրների լուծմանն ուղղված տեսական և գործնական առաջարկությունների ձևակերպման համար ուսումնասիրվել են կառավարման մոդելների ձևավորման միտումները և դրանց էական բնութագրերը: Այս հետազոտության նպատակներից ներառում են սոցիալական կապերի հիմնական բնութագրերի նկարագրությունը, որոնք կազմում են հանրակրթական դպրոցների և հասարակության միջև փոխհարաբերությունների հիմնական կոնֆիգուրացիաները, և տարբեր երկրների ժամանակակից դպրոցներում գերիշխող կառավարման մոդելների տիպաբանության կառուցումը: Այս նպատակները ձևավորվել են հանրակրթության կառավարման ոլորտում միջազգային փորձի համեմատական ուսումնասիրության արդյունքում ձեռք բերված որակական տվյալների հիման վրա:

**Բանալի բառեր՝** Հանրակրթության ոլորտի կառավարում, կառավարման մոդելներ, կրթական հոլդինգ, կոնսորցիում, կլաստեր:

## Introduction

Education reforms affect all aspects of the functioning of the schools. The success of the educational changes carried out by the state depends on many factors, among which the management system of educational organizations is of particular importance. Researchers note that the essence of the educational reforms of recent years is to delegate the right to resolve many issues related to the functioning of the school to the level of the school itself. As a result, it is expected to increase the responsibility of the school administration for achieving the educational result and at the same time provide it with a certain degree of independence. So, school management systems are at the center of attention of researchers and experts analyzing social-administrative, economic, and managerial changes and their effectiveness in the field of education. When talking about school management, we usually mean directors who make decisions on various issues of school functioning: from educational to administrative, economic, financial, and managerial. The sustainability and activity success of each educational institution depends on the level of involvement of the principal and his employee team in the management of the educational process. The model of management of an educational institution is a tool that helps to see what issues the director delegates to his team, what issues he reserves for himself, and what areas of activity are a priority when drawing up the management profile of the school.

A modern school sets itself the task of ensuring the quality of education. If previously the development of programs for the transformation of the education system took place based on forecasts of managers and/or expert assessments, now the most popular proposals are those based on the analysis of consumer demand, societal contextual factors, monitoring data on the effectiveness of educational programs, the conditions for their implementation, etc.

The management model is a complex tool, the optimal combination of elements of which will allow to effectively solve management problems. The management model should reflect not only the educational needs of the school but also the real needs of the development of society and correspond to the economic,

social, and cultural–historical environment in which it is applied.

The management model of the educational system is a structural and functional organization of activities aimed at achieving goals within the framework of the management strategy of all levels of the education system.

**Literature Review**

For a long time, starting in the mid-20<sup>th</sup> century, the dominant idea was to manage a school by analogy with an industrial enterprise (Pont et al., 2008). Following this, the role of the school director was defined as a figure who is responsible for the results of the school’s functioning. For various reasons, this model of management – “principalship” – turns out to be inadequate for modern society. Researchers, initiators of reforms, experts, and the principals themselves note that managing a school alone is becoming not only ineffective but also impossible. The principalship model is being replaced by another understanding of the essence of school management – the leadership model. In this case, the director not only shares responsibility for the development of the school with other subjects of the educational process but also grants them authority and a certain degree of freedom in decision-making (Mikelsons et al., 2023; Mbangula & Albert, 2022).

Over the past decades, researchers have attempted to classify the existing models of school management. As a result, a description of various types of leadership appeared: pedagogical, transactional, transformational, distributed, etc. The managerial mechanisms underlying this or that type of leadership allowed researchers to describe various models of organizational management. Thus, Bossert et al. (1982) presented an instructional management model for organizing the general educational system. This model was based on teachers’ attitudes to the school principal from the standpoint of instructional functions’ effectiveness. Thompson and Glase (2018) analyzed the main principles of the situational leadership model of P. Hersey and K. Blanchard and emphasized the necessity of changing the managerial functions of the school directors. Ramasamy and Ramaswamy (2017) criticized the change management model of John Kotter and expanded the area of change management tools from small enterprises to an educational sphere as well. Liden et al. (2008) presented the servant leadership management model with multidimensional assessment tools and configured the perspectives to understand contemporary management models in general education. According to Hallinger et al. (2013), it was established that pedagogical leadership (practices aimed at managing the educational process) is the key factor influencing the effectiveness of the school. The lack of a conceptual framework for pedagogical leadership served as an impetus for the development of the Principal Instructional Management Rating Scale (PIMRS) instrument, which is used for measuring the level of the principal’s involvement in the management of the educational process.

Today, researchers noted that the Bossert et al. (1982) model emphasizes the personal characteristics of the principal while the conceptual model of F. Hallinger focuses on management practices, which made it possible to form a management profile of the principal and his team.

In a broad sense, a “model” is an analog (image, description, diagram, plan,

etc.) of any object, process, or phenomenon. As noted by Uddin and Hossain (2015), the dynamics of management typology link with the Taylor idea that a management model is not an invention, but an evolution. It is formed over a long period, it should not be “alien”, but only “native”, organic, and corresponding to the culture, traditions, and spirit of the people of the country in which this model is instilled (Nebieridze, 2023). The management model is understood as a theoretical and methodological concept that constructs the management system, the area of its influence on the management object, and the mechanisms of adaptation to the external social environment. The purpose of modeling management in general, and modeling general education management in particular, is to achieve the goals set for the educational institution, as well as to form the prospects for the development of educational programs and the growth of social significance. It includes the basic principles of management, strategic vision, target settings and tasks, jointly developed values, the structure and order of interaction of its elements, organizational culture, analytical monitoring, and control over the situation, which in general constitutes the motivational policy of the educational institution.

By generalizing the management models discussed above, we can formulate a typology of the main management models in the general education sector: According to this, the management key tool consists of the following factors:

- pedagogical (directly aimed at managing the educational process) factors, which ensure the management of the learning and teaching process,
- meta-pedagogical (indirect factors influencing the educational process) factors, which consider to management of educational results and their assessment, and ensure a sustainable perspective of school development as well,
- managerial (controlling tools necessary for the conduction of the educational process as a whole) factors, such as the definition of school aims and key tasks, cooperation with state and social institutions, and constructing of interschool relationships, personnel policy, and communication.

Thus, the dynamics of general education management modeling start with the paradigm of single decision-making. As noted in the OECD report (Pont et al., 2008), this modeling concept has methodological ties with the industrial epoch of societies' development. Like an industrial enterprise, the school had to produce an educational product under the director's single control. In this case, the director was responsible for higher education management bodies. An organizational hierarchy was built within the school, at the top of which was the director.

The development of management models led to a change in the video-methodological paradigm. The managerial functions of the school principal begin to include the pedagogical-professional component. The principal ceases to be a mere administrator, but, along with this, carries out teaching and professional guidance functions. This transformation of the management model, although it brought significant changes to the management system of a public institution, nevertheless contributed to the fact that school management became more complicated, and management mechanisms continued to remain only at the administrative

level. Researchers characterize this position of the principal as the position of an educational leader.

Further development of management models led to the methodology of distributed leadership in school management, which is opposed to the concept of centralized leadership (Hallinger, 2013). Attempts are being made to overcome the perception of the school as a hierarchical structure, which is characteristic of other models. The vision of vertical management was replaced by the principles of cooperation and mutual control at the horizontal level. In the case of the idea of distributed leadership, the principle of collegiality of management is introduced, which already implies a variety of management tools and greater opportunities for improving the quality of education than before. Based on the above-mentioned methodological approaches to the organizing general education process, clusters are born, which designate models of managing the educational process in the school we can present through the following model types.

- An operational model that is characterized by the delineation of the functions of the founder and the school director. The founder’s functions include developing a single policy and management strategy for all schools. Along with this, the functions of the school’s director are limited to the operational or executive level. That is, the director acts as an operator, monitoring signals from above, and controls their implementation by deputies. His area of attention is the implementation of the founder’s strategic goals, that is, ensuring the implementation of management functions (Sutomo et al., 2023).

- The contract model is a management model that is characterized by contractual relations between executive authorities and school principals. The functions of the director are mainly limited to the administrative area of management, while the structure of school management is more complex, consisting of various independent structures. These management structures may differ from each other, as they provide for the solution of various problems. The functions of the school director are characterized by the role of an intermediary between government bodies and intra-school structures. This management model is effective if each of the structures has sufficient resources to solve the tasks set. Ensuring the effectiveness of the contract management model is determined by the high executive discipline of persons included in different levels of the multi-stage management system. The advantage of the contract management model is the flexibility of management schemes, and the ability to quickly restructure when changing the overall management strategy.

- The leadership model assumes the presence of a leader in the school responsible for the organization of management, which is mainly the school principal. This model provides for greater independence of the school principal, who has the right to conduct an independent management strategy. The leadership model in management is characterized by the fact that the director acts according to his internal value guidelines. A school headed by a leading director develops well in a competitive environment, and actively contacts with external structures, seeing them as a resource for development. The risk of such a management system is, first of all, the loss of controllability associated with the lack of a clear

centralized power structure in the field of general education management (Good, 2008; Sutomo et al., 2023).

– The team model is a model of school management through the teamwork of the director and his team. The model consists of organizing intra-school clusters divided into different management functions. The main management function of the director is working with the development strategy and forecast of the school’s development. The effectiveness of this model is determined by the assessment of the director’s function in implementing innovations. According to this management model, the director promotes cooperation between teachers in developing new teaching methods. As a result, the changes taking place in these schools are qualitatively significant.

At present, various authors (Thompson & Glase, 2018; Pont et al., 2008; Mbangula & Albert, 2022) highlight the following main elements (criteria) for all types of management models:

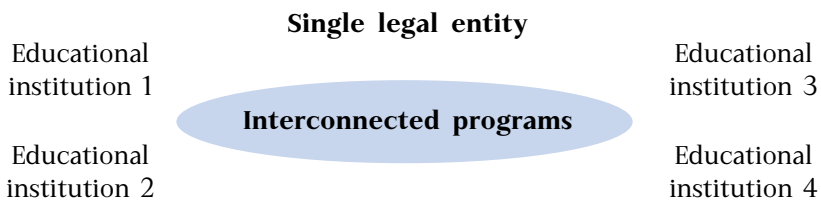
- management structure;
- functions;
- goals and values;
- strategies;
- development

### Methods

The research methods are comparative analysis, logical and historical approaches, modeling (Hallinger & Chen, 2013). Management models such as the educational holding model, educational consortium, cluster, program-target model, and network model were considered.

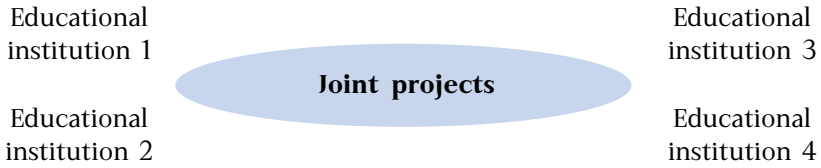
### Results

By comparing the trends in the development of scientific thought regarding modern management models in the general education sector, we have compiled schematic images of the models presented below.



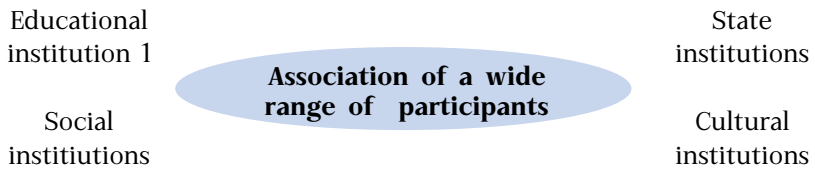
**Figure 1.** Educational holding model

The educational holding model goes beyond the management of a single educational institution. The idea of an educational holding is to create an interconnected integrated management system, implying the integration of educational institutions to combine resources to achieve greater efficiency. It is system integration, in turn, that allows for the efficient use of material, technical, personnel, and other resources.



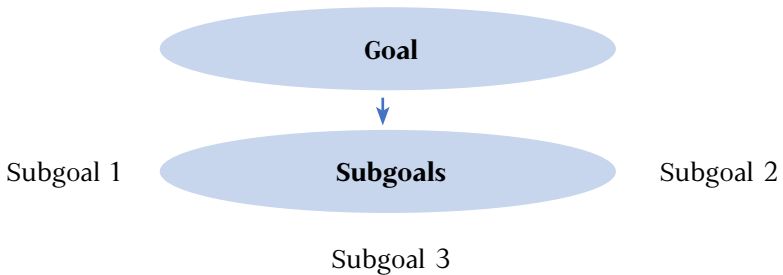
**Figure 2.** Educational consortium model

The educational consortium model is a joint project of several individual educational organizations to strengthen their academic and intellectual base, improve the quality of the educational process, and provide improved support to students (Long et al., 2013).



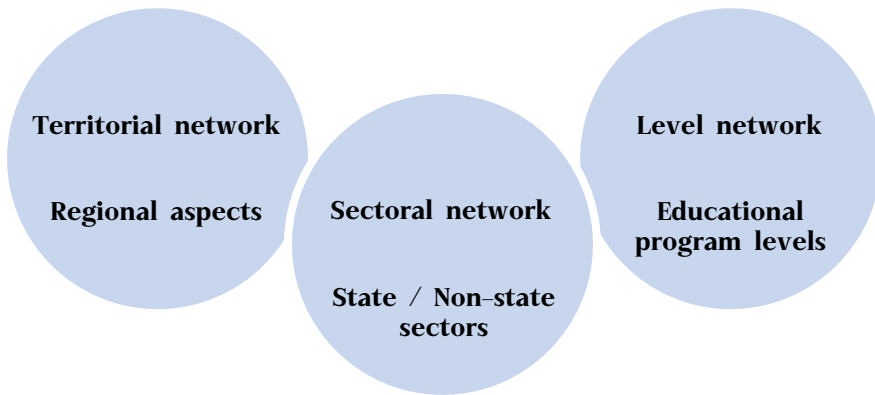
**Figure 3.** Educational cluster model

Cluster – an association of several homogeneous elements, which can be considered as an independent unit with certain properties; more flexible than networks (Ali & Ansari, 2023; Chikoko, 2007).



**Figure 4.** Educational program-target model

The program-target model is a set of methods in which the goals of the plan are linked to resources using programs. They represent the application of a systems approach and are based on the formulation of economic development goals, their division into subgoals of a more detailed nature, and the identification of resources necessary for their coordinated implementation (Muller, 2001; Bizin, 2023).



**Figure 5.** Educational network model

The network model is an integrated system capable of concentrating resources to meet the diverse educational needs of the population and ensure the development of the economy and social sphere. The following general principle of effective functioning of the education management system can be identified: the purpose of the educational network is to coordinate, satisfy, and accelerate the formation of demand for educational services and graduates within the framework of the specified requirements for the quality of education (including state educational standards), institutional restrictions and existing resource provision in territorial, sectoral and level aspects (McMeekin, 2003).

### **Discussion**

The "educational holding" management model represents a form of organization of educational systems as a union of organizationally integrated educational institutions implementing a set of interconnected programs of various levels (Figure 1). The educational holding model has a higher degree of organizational integration and interconnection of the programs being implemented than in the case of the network management model (Bossert et al., 1982).

When creating an educational holding, the integration of educational institutions is carried out within one department, when the reorganized educational institutions are subordinate to a single founder. The application of the educational holding model at the level of general education is possible under the auspices of the ministry responsible for organizing the educational process.

At the same time, the application of the educational holding model requires a deep analysis of the possibility of organizing a holding, and the feasibility and effectiveness of the main educational goals set for the general education system. To apply the educational holding model, it is necessary to take into account the possible organizational, financial, and personnel risks associated with this management model. The idea of creating educational holdings was brought from the business sphere, where a holding association is understood as the integration



of various enterprises to create large-scale production aimed at implementing innovative programs. Accordingly, an educational holding can be considered an association of various educational institutions to create a common educational space. From a methodological point of view, the educational holding model implies the creation of a common database on various issues, such as:

- creation of a common database to exchange experience in conducting innovative educational programs;
- holding joint educational events;
- coordinated educational policy for covering personnel needs
- the possibility of large-scale use of resources in the implementation of educational programs;
- increasing the mobility of teachers and pupils,
- common electronic library funds.

The educational consortium differs slightly from the educational holding model in the mechanism of managing integrated educational institutions. When implementing the educational holding model, it is necessary to have a single legal entity, and management innovations apply to all educational institutions that make up a single educational holding.

In the practice of managing general education, it is also necessary to distinguish between the concepts of "educational consortium" and "educational cluster", which represent different forms of organizing cooperation in the field of education. Thus, an educational cluster is a wider territorial network uniting educational institutions, enterprises, organizations, and government agencies for joint work on educational goals and development of the region. A cluster can include both educational institutions and enterprises, research centers, cultural institutions, and other organizations working in the educational sphere.

Thus, the main difference lies in the level of coordination and territorial organization of cooperation. An educational consortium is a narrower format of cooperation, focused on cooperation between educational institutions, while an educational cluster includes a wider range of participants and covers various aspects of education in a society. Strategic management is a model for transition from crisis management to various types of corporate management; it links multidirectional goals, and diverse resources within the boundaries of one flow of activity, and instead of coercion and violence, moves to cooperation and understanding (Kamara et al., 2024).

### **Conclusion**

The fact that management models of schools belonging to each of the clusters are not divided into "good" or "bad", since there are no bad or good management models. Because the quality of management of an educational organization is determined by its effectiveness, which, in turn, should be adequate to the situation in which the school is, its resources, etc., as well as the tasks facing the school management. That is, a good manager chooses a change strategy and a management model that will allow, having coordinated the interests of all subjects of the educational process, to achieve the tasks set for the school. If the

obtained results are supplemented by cases of successful management practices of schools in each cluster, then management decisions can be made by users taking into account their experience, which should help novice school managers who are in similar conditions. Cases will help the director and his team determine priorities in the organization's development program.

To build management models, it is necessary to analyze in detail the decision-making process of school principals and the circle of agents with whom they interact. To build a theoretical and practical perspective for creating an optimal management model in the field of general education, the results of the study are presented in the form of the following recommendations and proposals:

- monitor the structure of the internal environment of the school, based on regional features, sectoral differences in state/non-state schools, and the level of educational programs used;
- conduct a comparative analysis of formal and informal forms of management of general education institutions;
- conduct a pilot study on the application of the above-studied management models among schools that differ by the structure of the internal environment;
- describe each model quantitatively and thereby answer the question of which model dominates in the regions under study or in the country as a whole, how these models are related to the reforms being carried out, the legislative framework, and dominant management practices. Analyze each of the constructed types from the socio-economic, management, and educational points of view to understand in detail the nature of certain management decisions and explain why this particular model was implemented.

## References

1. Ali, S., Ansari, A. N. (2023). Policy Analysis: School Clustering Policy. Institute for Educational Development, [https://ecommons.aku.edu/cgi/viewcontent.cgi?article=1346&context=pakistan\\_ied\\_pdck](https://ecommons.aku.edu/cgi/viewcontent.cgi?article=1346&context=pakistan_ied_pdck)
2. Bizin, S.V. (2023). Application of a Program-Targeted Approach in the Organization and Management of Leisure Activities of Children and Adolescents in the Region. *Journal of Economics, Entrepreneurship and Law*, 13(8), 3117-3136. 10.18334/epp.13.8.118611
3. Bossert, S., Dawyer, D., Rowan, B., Lee, G. (1982). The Instructional Management Role of the Principal. *Educational Administration Quarterly*, 18 (3), 34-64.
4. Chikoko, V. (2007). The School Cluster System as an Innovation: Perceptions of Zimbabwean Teachers and School Heads. *Africa Education Review*, 4(1), 42-57. <https://doi.org/10.1080/18146620701412142>
5. Good, T. L. (2008). In the Midst of Comprehensive School Reform: Principals' Perspectives. *Teachers College Record: The Voice of Scholarship in Education*, 110(11), 2341-2360. <http://dx.doi.org/10.1177/016146810811001104>.
6. Hallinger, P. Chen, Chia-Wen. (2013). Assessing the Measurement Properties of the Principal Instructional Management Rating Scale A Meta-Analysis of Reliability Studies. *Educational Administration Quarterly*, 49, 272-309. 10.1177/0013161X12468149
7. Hallinger, P., Wang, W. C., Chen, C. W. (2013). Assessing the Measurement Properties of the Principal Instructional Management Rating Scale. A Meta-Analysis of Reliability Studies. *Educational Administration Quarterly*, 49(2), 272 -309.
8. Kamara, Y., Rahida, F. G., Wusu K. W., Koroma, Ch. (2024). Application of Strategic

- Management in Educational Organizations, Global Scientific and Academic Research Journal of Education and literature, 2(7), 01–11.
9. Liden, R. C., Wayne, S. J., Zhao, H., Henderson, D. (2008). Servant Leadership: Development of a Multidimensional Measure and Multi-Level Assessment. *The Leadership Quarterly*, 19, 161–177. <http://dx.doi.org/10.1016/j.leaqua.2008.01.006>
  10. Long, J., White, P., Moran, W. (2013). The Teaching and Learning Consortium: a Field Based Model for Preservice Teacher Education. [https://www.researchgate.net/publication/228805614\\_The\\_Teaching\\_and\\_Learning\\_Consortium\\_a\\_field\\_based\\_model\\_for\\_preservice\\_teacher\\_education](https://www.researchgate.net/publication/228805614_The_Teaching_and_Learning_Consortium_a_field_based_model_for_preservice_teacher_education)
  11. Mbangula, D.K., Albert, I. (2022). Effectiveness of Principals’ Roles on School Performance: Perspective of School Principal-Ship. *Research Journal of Education*, 81, 1–10. <http://dx.doi.org/10.32861/rje.81.1.10>
  12. McMeekin, R. (2003). Networks of Schools. *Education Policy Analysis Archives*, 11(16), 1–22. [10.14507/epaa.v11n16.2003. https://www.researchgate.net/publication/49610143\\_Networks\\_of\\_schools](https://www.researchgate.net/publication/49610143_Networks_of_schools)
  13. Miķelsone, I., Grava, J., Lāsma Latsone, L. (2023). A School Principal as a Change Leader in Education. *Innovation. Diversity*, 2(7), 53–63. <http://dx.doi.org/10.17770/eid2023.2.7352>
  14. Muller, D. (2001). Target Setting in School Education. A Discussion Paper, <https://wcedonline.westerncape.gov.za/documents/PlanningStrat/ArticlesforLeaders/PlanEducation/EduTargetSetting-in-SchoolEducation.pdf>
  15. Nebieridze, K. (2023). Innovative School Leadership Aspects. *Journal of Legal Studies*, 31(45), 17–37. <http://dx.doi.org/10.2478/jles-2023-0002>.
  16. Pont, N., Nusche, D., Moorman, H. (2008). Improving School Leadership. Policy and Practice. Organisation for Economic Co-operation and Development (OECD), 1, [https://www.pall.asn.au/wp-content/uploads/2015/09/2-Improving-School-Leadership\\_OECD-Report\\_2008.pdf](https://www.pall.asn.au/wp-content/uploads/2015/09/2-Improving-School-Leadership_OECD-Report_2008.pdf)
  17. Ramasamy, R., Ramaswamy, K. (2017). A Critical Analysis of John P. Kotter’s Change Management Framework. *Asian Journal of Research in Business Economics and Management*, 7, 181–203. [10.5958/2249-7307.2017.00106.2](https://doi.org/10.5958/2249-7307.2017.00106.2)
  18. Sutomo, S., Masduki A. M., Heni, R. (2023). Strengthening Professionalism of School Principals Through Integrity, Communication Skills, and Teamwork. *AL-ISHLAH: Jurnal Pendidikan*, 15(4), 4650–4661. <http://dx.doi.org/10.35445/alishlah.v15i4.4428>.
  19. Thompson, G., Glase, L. (2018). Situational Leadership Theory: a Test From a Leader-Follower Congruence Approach. *Leadership & Organization Development Journal*, 39, 574–591. [10.1108/LODJ-01-2018-0050](https://doi.org/10.1108/LODJ-01-2018-0050)
  20. Uddin, N., Hossain, F.. (2015). Evolution of Modern Management through Taylorism: An Adjustment of Scientific Management Comprising Behavioral Science. *Procedia Computer Science*, 62, 578–584. [10.1016/j.procs.2015.08.537](https://doi.org/10.1016/j.procs.2015.08.537)

*The article has been submitted for publication: 08.01.2025*  
 Հոդվածը ներկայացվել է տպագրության. 08.01.2025

*The article is sent for review: 19.02.2025*  
 Հոդվածն ուղարկվել է գրախոսության. 19.02.2025

*The article is accepted for publication: 31.03.2025*  
 Հոդվածն ընդունվել է տպագրության. 31.03.2025

# THE FUNDAMENTAL ISSUES OF DOCUMENTING THE NATIONAL SECURITY STRATEGY OF THE REPUBLIC OF ARMENIA

**BAGRAT BAGRATYAN**

Postgraduate student at the Institute of Philosophy,  
Sociology and Law of the National Academy of Sciences  
of the Republic of Armenia

*bsbagratyan@gmail.com*

**DOI: 10.54503/2579-2903-2025.1-147**

## **Abstract**

In the modern world order, Armenia seeks to balance its relations with neighboring countries, regional powers, and international actors while simultaneously pursuing its own national interests and security objectives. In this context, Armenia develops and implements its security policy, which is multifaceted in nature and covers various spheres and levels. Ensuring national security is the fundamental task of security policy, which pursues the implementation of such goals as not only protection from threats directed against the survival of the nation, statehood, strengthening and development of public and political life, but also the planning and implementation of unified and coordinated mechanisms to prevent them.

In the past years, various security documents have been adopted in the Republic of Armenia, which, being aimed at ensuring security, have not actually ensured the comprehensive regulation of the issues outlined therein in terms of implementation. Among such security documents, the national security strategy stands out first of all. In this context, one of the important issues in the development of a national security strategy is the choice of a specific methodology. The following two methods are distinguished as the main directions:

- systemic establishment of national security and the creation of sectoral strategies based on it and
- the development of separate sectoral strategies and the creation of a single comprehensive document by generalizing them. The first method has actually been used in Armenia. The article examines methodological issues of developing a national security strategy. The results of a comparative analysis of the documentation of national security strategies of the Republic of Armenia for 2007 and 2020 are presented.

**Keywords:** national security, strategy, methodology, political goal, ultimate goal, analysis.

# ՀԱՅԱՍՏԱՆԻ ՀԱՆՐԱՊԵՏՈՒԹՅԱՆ ԱԶԳԱՅԻՆ ԱՆՎՏԱՆԳՈՒԹՅԱՆ ՌԱԶՄԱՎԱՐՈՒԹՅԱՆ ՓԱՏՏԱԹՂԹԱՎՈՐՄԱՆ ՀԻՄՆԱԽՆԴԻՐՆԵՐԸ

## ԲԱԳՐԱՏ ԲԱԳՐԱՏՅԱՆ

ՀՀ ԳԱԱ փիլիսոփայության, սոցիոլոգիայի և  
իրավունքի ինստիտուտի հայցորդ  
*bsbagratyan@gmail.com*

### Համառոտագիր

Արդի աշխարհակարգում Հայաստանը ձգտում է հավասարակշռել իր հարաբերությունները հարևան երկրների, տարածաշրջանային տերությունների և միջազգային դերակատարների հետ՝ միաժամանակ հետապնդելով սեփական ազգային շահերը և անվտանգային նպատակները: Այս համատեքստում Հայաստանը մշակում և իրականացնում է իր անվտանգության քաղաքականությունը, որն ունի բազմակողմանի բնույթ և ընդգրկում է տարբեր ոլորտներ ու մակարդակներ: Ազգային անվտանգության ապահովումն անվտանգային քաղաքականության հիմնարար խնդիրն է, որը հետամուտ է այնպիսի նպատակների իրականացմանը, ինչպիսիք են՝ ոչ միայն ազգի գոյահպահանության, պետականության, հասարակական-քաղաքական կյանքի ամրապնդման ու զարգացման դեմ ուղղված սպառնալիքներից պաշտպանություն, այլ նաև դրանք կանխարգելող միասնական ու համակարգված կառուցակարգերի նախատեսում և իրագործում:

Հայաստանի Հանրապետությունում անցած տարիների ընթացքում ընդունվել են տարբեր անվտանգային փաստաթղթեր, որոնք, նպատակաուղղված լինելով անվտանգության ապահովմանը, կատարողականության առումով փաստացի չեն ապահովել դրանցով նախանշված խնդիրների համընդգրկուն կարգավորումը: Այդպիսի անվտանգային փաստաթղթերի շարքում առաջին հերթին առանձնանում է ազգային անվտանգության ռազմավարությունը: Այս համատեքստում ազգային անվտանգության ռազմավարության մշակման կարևոր հարցերից է կոնկրետ մեթոդաբանության ընտրությունը: Որպես հիմնական ուղղություններ՝ առանձնացվում են հետևյալ երկու եղանակները. ազգային անվտանգության համակարգային կայացում, դրա հիման վրա ոլորտային ռազմավարությունների ստեղծում և առանձին ոլորտային ռազմավարությունների մշակում, դրանց համընդհանրացմամբ մեկ ամբողջական փաստաթղթի ստեղծում: Հայաստանում փաստացի կիրառվել է առաջին եղանակը: Այս հողվածում քննարկվում են ազգային անվտանգության ռազմավարության մշակման մեթոդաբանական հիմնահարցերը: Ներկայացվում են 2007 և 2020 թվականների Հայաստանի Հանրապետության ազգային անվտանգության ռազմավարությունների միջև փաստաթղթավորման համեմատական վերլուծության արդյունքները:

**Բանալի բառեր՝** ազգային անվտանգություն, ռազմավարություն, մեթոդաբանություն, քաղաքական նպատակ, վերջնանպատակ, վերլուծություն:

## Introduction

In the substantive clarifications on security, its observation at different levels is emphasized, in this regard, according to the spheres, it is distinguished: political, economic, military, cultural, etc. According to the subject, three levels are distinguished: individual, society and state, which are functionally closely interconnected and complement each other. For example, state or national security is called upon to ensure the interests of the individual and its collective manifestation, society. Therefore, the individual, society and state pursue collective interests from the perspective of ensuring the security triangle. This is also present in the definition of national security: “a state of protection of the vital interests of the individual, family, society and state from real and potential external and internal threats, which is ensured by the military, political, economic, social and other capabilities of the state” (Chilingaryan & Erznkyan, 2015, p. 34, in Arm.).

In the context of national security, one of the important issues is its institutionalization, when state security, as a system with its components and subsystems, functions effectively. From the perspective of fixing and regulating the above-mentioned approaches, the development of strategic documents is also essential hierarchical classifications, culture and development methodology (Buzan, 1983, p. 36–37). In this regard, strategic documents, if we classify them according to size and importance, we can mention the following:

- national (development) program,
- national security strategy,
- national ideology (national dream),
- conceptual documents,
- doctrinal documents and
- multi-sector program documents, etc.

## Theoretical and Methodological Bases

Issues of development, modernization and effectiveness of the security policy of the Republic of Armenia have always been in the focus of immediate attention of public and political circles. Various security documents have been adopted for years, which, being aimed at regulating security issues, were often of a formal nature and had numerous problems in theoretical and practical terms.

In general, the culture of drafting strategic documents is practically important, first of all, taking into account the fact that its development and the adoption of advanced experience contribute to the institutionalization of the national security of the Republic of Armenia as a complex system. Then, the documentation of security issues in political reality allows us to gradually form our own culture of drafting strategic security documents.

The drafting of strategic documents is one of the most important functions of the political leadership of any state. The methodology for drafting strategic documents, their content and form have their own characteristics in different states, which is due to the civilizational, historical and political-state culture characteristic of these states (Lincke, 2015, p. 103). In this regard, the experience of drafting such documents in some Western states (USA, Great Britain, Canada,

etc.) can be considered advanced. This is due to the fact that, first of all, these states have accumulated a correspondingly rich experience, along with a special development methodology. At the same time, two fundamental directions of the methodology are used: threat-based and goal-based (Brandon, 2017). Although in any case, factors such as danger, threat, challenge, risk, etc. are taken into account. Moreover, a rich methodological toolkit for assessing and analyzing security concepts has also been developed and modernized in these states (Kugler, 2006, p. 35). For example, in the practice of the United States, there are serious mechanisms for assessing risks, preventing dangers and repelling threats. They are, of course, different in different states, but they are still aimed at solving the same type of security problems.

The development of a national security strategy (NSS) is a complex and long-term process, in which it is essential to take into account all the nuances and mutual connections and interactions. At the same time, the basis for the development of the NSS is the interconnection and meaning-making of the present and the future, aimed at the transition from the current state to a more desirable, favorable situation. This new situation is the political goal of national security, to achieve which it is planned to focus feasible efforts on a capability-based basis. Therefore, in the development of the national security strategy, competitive advantages are emphasized, which can emerge in competitions of different nature, for example, between nation-states, ethnic units, non-governmental and other actors. In the case of the Republic of Armenia, we believe that it is more appropriate to use the term “documentation” instead of the concept of “NSS development methodology”. This is due to a number of circumstances. First, the documentation of the process is a purely technical formal process, and then it is mainly characteristic of the RA security policy documents, since the above-mentioned methodological components are almost absent in them (Freedman, 2013, p. 491).

The history of the process of developing the RA National Security Strategy indicates that it is not so much connected with the processes preceding the declaration of independence and the formation of statehood. In fact, the first copy of the NSS in the RA was created in 2007, which has not undergone any substantive updates for about 14 years (until 2020).

However, the problem is not only its formal updates. We believe that it is more important to analyze and understand the circumstances of what strategic direction and vision the Republic of Armenia had as an independent and sovereign state until 2007, the experience of the first NSS. This is especially important for conducting a substantive assessment and analysis of the process of developing strategic documents (Gompert et al., 2008, p. 34–35). Although this can be explained by the lack of approaches to the strategic development of the state among the military-political elites of the Republic of Armenia, and the general failure to form multi-sector elites, which was not a crisis of groupthink, but the failures of Armenia as a collective institution of the state.

At the same time, it is worth noting that during that period, the formation of the RA NSS did not have such a substantive vital perception, demand and prerequisites for implementation, as in the case of the most developed countries

of the world, for example, Great Britain or USA. Moreover, the definition of the concept of “national security of the Republic of Armenia” is given not within the framework of a strategic document, but within the framework of the law “On National Security Agencies of the Republic of Armenia”, which has a service meaning, which states that: “The national security of the Republic of Armenia is such a system of the state and society, when the security of the individual, society and the state, the territorial integrity of the country, sovereignty, constitutional order, the normal development of the economy, the protection of the material and spiritual values of society, the rights and freedoms of citizens, and the environment from internal and external threats are ensured” (the Law of the Republic of Armenia on National Security Agencies, 2002).

One of the important methodological stages of developing a national security strategy is the analysis and assessment of the NSS development process. In general, periodic review and evaluation of any process makes it possible to constantly make adjustments to the activity and not deviate from the main path that has been planned and should lead to the intended end goal. Naturally, the role of strategists is very important in terms of participating in this process, influencing it and making decisions. By the way, in connection with the widespread “tactician –strategist” differences, it can be said that “a tactician is a person who must know what to do when there is something to do, and a strategist, on the contrary, must know what to do when there is nothing to do.” (Paquette, 2002, p. 102–103). Such a statement emphasizes the importance of demonstrating creative approaches by a strategist (strategy developer), since the resolution of the problems faced depends on the solutions he offers for any, especially crisis, situations.

In the process of compiling security documents of the Republic of Armenia and especially in the development of the National Security Strategy, the issues of the presence and/or absence of methodology are emphasized. This refers to the above-mentioned security methodological components, strategic logic and the role of assessment and analysis in general. In this context, we believe that due to the lack of methodology, in the case of the National Security Strategy of 2007 and 2020, it is more correct to use the term documentation. This is also due to the fact that the documentation process may not have a methodological functional basis. The problem of the method is especially manifested in the absence of political goals and special or secondary goals aimed at their implementation. In any case, the issues related to the purpose of the two National Security Strategy of the Republic of Armenia, which are available to a wide range of public and expert circles, are open, there are a number of vague formulations, which are at least unacceptable in the case of such serious documents. The other is the absence of the institute of strategists and the problems of its establishment. By the way, by strategists, we do not mean employees of state departments who participate in the process of developing the NSS by chance or by chance, or those representatives of the expert community who have very universal professional abilities and, despite understanding everything, are unable to solve specific specialized problems.

At the same time, the absence of the role of strategists can be attributed to the absence of elements of strategic logic in the process of developing the RA NSS, the absence of strategic thinking, and in general, the inability to provide



solutions to a number of vital issues at the tactical level.

The next methodological problem is the vague and mixed formulations of the security concepts of “means”, “mode” and “ultimate goal”. In particular, it is not clearly stated what resources we have in the process of developing the RA NSS, based on which the political goals of the RA can be defined, and in general, by what methods we should achieve their implementation.

The lack of clarification of the ultimate goal within the framework of the RA NSS also carries significant risks, which allows deviation from the ultimate goal in the process of developing the NSS or their subjective interpretations by strategists, even leading to a departure from the defined political goals. Moreover, it can create fertile ground for evading responsibility in the event of any positive or negative results and maneuvering the consequences to present them as a desired result.

As already mentioned, for years (until the first attempt in 2007), ensuring the national security of the Republic of Armenia seemed to be of a subjective initiative, imitative and tactical nature. At the same time, the implementation of this process took place through other legal and legislative documents (the Law of the Republic of Armenia on National Security Agencies, 2002; the Law of the Republic of Armenia on the Formation and Activities of the Security Council, 2018). This, of course, contains a number of explosive problems, which are especially dangerous for countries that, like the Republic of Armenia, being in a de facto war, have not had a strategic development direction and vision for a long time.

### **Research Methods**

To better understand the issues of documenting strategic fundamentals, let us try to conduct a comparative analysis between the two (2007 and 2020) National Strategic Plans of the Republic of Armenia (Decree of the President of the Republic of Armenia No. NH-37-N of February 7, 2007 “On Approval of the National Security Strategy of the Republic of Armenia”, 2007; National security strategy of the Republic of Armenia: A Resilient Armenia in a changing world, 2020). Of course, there are many comparison criteria, but let us try to address the most important ones.

### **Results**

Within the framework of the 2007 RA NSS, a number of security threats are identified, which are classified as internal, external, regional, international, etc., but it is not specified where they were derived from, that is, it is not clear what assessment and analysis mechanisms were used, as a result of which, for example, the weakening of the Diaspora’s national and cultural identity or the disruption of transit routes of bordering states are considered national security threats. If such threat assessment mechanisms do not exist or have not been applied, then it can be argued that in the context of ensuring national security, perhaps they are dangers, risks or challenges. The same methodological problem is also present in the case of the 2020 RA NSS, although the main threats are not clearly indicated in separate sections here, the logic of the strategic assessment of their derivation again remains unknown. Moreover, in the context of the 2020 RA NSS, the main

threats are derived from the Republic of Azerbaijan and nothing significant is said about Turkey. We believe that this circumstance should be subjected to at least a radical review after the last 44-day war and the developments that followed. At the same time, the question arises as to why the factor of the Turkish military-political threat was not properly assessed and analyzed at the strategic level until then.

The next aspect concerns national interests. If in the case of the 2007 RA National Strategy, national interests were not clearly expressed as such and only the fundamental values of the RA were mentioned, then in the case of the 2020 RA National Strategy, national interests are enshrined in a separate section, but different substantive questions arise here. In particular, are the provisions mentioned in the 2020 RA National Strategy rightfully considered the national interests of the RA or how are they classified as vital or marginal interests? Moreover, we believe that classifying national interests in the RA National Strategy in a separate section was not only a lack of necessary expertise and professional experience, but also a purely formal fixation.

As for the concept of “fundamental national values”, which is enshrined in the two RA NSS with different approaches, this is also a wrong approach, since an objective question arises as to whether the values not included in that classification are national or not. Therefore, it would be more correct to state that the national values of the Republic of Armenia begin with, but are not limited to, the following provisions.

Another problem is that, unlike the 2007 RA NSS, in the case of the 2020 strategy, issues of democracy, human rights and peace occupy a significant part of the content. There is also a cursory reference to this in the 2007 RA NSS. However, within the framework of the 2020 RA, these approaches seem to deviate from logic, being presented as the fundamental national interests of the Republic of Armenia. Moreover, in the 2020 The RA NSS contains inappropriate formulations regarding neighboring Turkey and Azerbaijan, where it is literally stated that the regression of democracy and human rights in these states creates serious obstacles to further national and regional cooperation and security. We believe that this hypothesis is at least an unfounded approach.

The next one concerns the issues of the security and well-being of the citizens of the Republic of Armenia. In both RA NSS, these ideas are incidental and have vague formulations. In particular, in the case of the 2007 RA NSS, these issues are addressed at the end of the strategy. This is strange because the NSS of a number of developed Western countries (USA, UK, Germany, etc.) are based on ensuring the rights and well-being of the human-citizen. The reason is very simple: the second of the three levels of national security, the security of society, and the third, the security of the state, are not ends in themselves and are aimed at protecting the interests of the first level, the individual, in this case the citizen (Williams, 2013, p. 279).

As for the final provisions, there are also commonalities and peculiarities here. Both RA NSS state that the NSS, as a fundamental strategic document, should take precedence over other state documents of strategic significance, and that state officials should make statements, act at least and not contradict the

fundamental provisions of the RA NSS. The main peculiarity regarding the final provisions is the issue of updating the RA NSS. And if in the case of 2007, only the dynamic processes taking place in the world and the region are considered as prerequisites for updating, then in the case of 2020, the implementation of changes no later than every five years is added to this. We believe that both approaches are artificial and give those implementing the updates room for maneuver. Therefore, if no later than every five years is mentioned, it should not be a purely technical process, but the need to introduce substantive changes with the presence of political will.

**Conclusions**

In summary, we note that in the context of the process and final result of the development of the RA NSS, the issues of content, form and its implementation are also important. In particular, in a number of countries (USA, UK, RF), this document is a set of clearly formulated security problems and concerted efforts aimed at their solution. In other words, NSS, essentially arising from current realities and processes, should indicate the desired vision in which a number of substantive problems are more effectively resolved. In fact, the basis for the development of such documents is the idea of “form follows content” or “form complements content”. By saying this, we do not mean at all that form is not essential in the process of developing the RA NSS; in general, form is the main means of expressing content and is of very important importance. For example, in the case of the USA (The White House, 2017) and Great Britain (Cabinet Office of Great Britain, 2015), they are vivid examples of the combination of content and form of the NSS.

The problem is that the priorities included in the structure of the NSS content are fully presented with unique technical and stylistic approaches, which makes it possible to make the presented material more attractive. Of course, in such fundamental strategic documents, the actual message/content is much more important, but let’s not forget that in the implementation of the goal, how we say it (the form), what methodology and stages we choose for its perception and implementation are no less important. The latter is also an integral part of the content–form discourse. This is due to the fact that in countries of the level of the Republic of Armenia, unlike, for example, a number of Western countries, NSS were formal in terms of the practical significance of the documents, focusing purely on the idea of having a document. Therefore, it is no coincidence that until 2007. The Republic of Armenia did not have a NSS at all.

**References**

1. Brandon, D. (2017). The 5 strategic planning models that all executives should know. *Business Benefits Group*, <https://www.bbgbroker.com/strategic-planning-models/> (Retrieved from 07.01.2025)
2. Buzan, B. (1983). *People, states and fear: National security problem in international relations*. University of North Carolina Press.
3. Cabinet Office of Great Britain. (2015). *National security strategy and strategic defense and security review: A Secure and prosperous United Kingdom*, vol. 9161 of Cm (Series), Stationery Office, ISBN: 9781474125963.

4. Freedman, L. (2013). Strategy: A History. Oxford University Press.
5. Gompert, D., Davis, P., Johnson, S., Long, D. (2008). Analysis of strategy and strategies of analysis. RAND Corporation.
6. <https://www.gov.uk/government/publications/national-security-strategy-and-strategic-defence-and-security-review-2015> (Retrieved from: 10.01.2025)
7. Kugler, R. (2006). Policy analysis in national security affairs: New methods for a new era. Washington, D.C., Center for Technology and Security Policy by National Defense University Press.
8. Lincke, S. (2015). Security planning: An Applied approach. N.Y.–London.
9. Paquette, L. (2002). Political strategy and tactics: A Practical guide. N.Y.: Nova Science Publishers, Inc.
10. The White House. (2017). National security strategy of the United States of America. Washington, D.C. <https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf> (Retrieved from: 10.01.2025)
11. Williams, P. (2013). Security studies: An Introduction. N.Y.–London, Routledge, Taylor & Francis Group.
12. «Ազգային անվտանգության մարմինների մասին» ՀՀ օրենք. ՀՀ ՊՏ 2002.02.05/6 (181), <https://www.arlis.am/documentview.aspx?docID=90824> [Law of the Republic of Armenia on National Security Agencies] (Retrieved from: 28.12.2024)
13. «Անվտանգության խորհրդի կազմավորման և գործունեության մասին» ՀՀ օրենք. ՀՀ ՊՏ 2018.03.21/20 (1378), <https://www.arlis.am/documentview.aspx?docID=130647> [Law of the Republic of Armenia on the Formation and Activities of the Security Council] (Retrieved from: 29.12.2024)
14. ՀՀ Ազգային անվտանգության ռազմավարություն. Դիմակայուն Հայաստան փոփոխվող աշխարհում. (2020). <https://www.mfa.am/filemanager/security%20and%20defense/AA-Razmavarutyun-Final.pdf> [National security strategy of the Republic of Armenia: A Resilient Armenia in a changing world] (Retrieved from: 03.01.2025)
15. ՀՀ Նախագահի 2007 թվականի փետրվարի 7-ի թիվ ՆՀ-37-Ն հրամանագիրը «Հայաստանի Հանրապետության ազգային անվտանգության ռազմավարությունը հաստատելու մասին». ՀՀ ՊՏ 2007.02.15/11 (535), <https://www.arlis.am/DocumentView.aspx?docID=31189> [Decree of the President of the Republic of Armenia No. NH-37-N of February 7, 2007 “On Approval of the National Security Strategy of the Republic of Armenia”] (Retrieved from: 03.01.2025)
16. Զիլինգարյան, Դ., Երզնկյան, Ե. (2015). Պաշտպանական-անվտանգային տերմինների բացատրական հայերեն-ռուսերեն-անգլերեն մեծ բառարան, ՀՀ ՊՆ ՊԼՀՀ. [Chilingaryan, D., Erznkyan, E. (2015). Large Armenian-Russian-English explanatory dictionary of defense and security terms]

*The article has been submitted for publication: 29.01.2025*  
*Հոդվածը ներկայացվել է տպագրության. 29.01.2025*

*The article is sent for review: 18.02.2025*  
*Հոդվածն ուղարկվել է գրախոսության. 18.02.2025*

*The article is accepted for publication: 31.03.2025*  
*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# THE MAIN ACTORS OF CIVILIAN OVERSIGHT AS A MECHANISM FOR ENSURING NATIONAL SECURITY

**ANAHIT SHAHUMYAN**

National Academy of Sciences of the Republic of Armenia  
International Scientific-Educational Center  
Chief Specialist of General Department  
PhD student at the Institute of Philosophy,  
Sociology and Law of NAS RA  
*anahit.shahumyan@isec.am*

**DOI: 10.54503/2579-2903-2025.1-156**

## **Abstract**

The increase in the political significance of civilian oversight and non-governmental organizations in the life of modern states is conditioned, in particular, by the expansion of the possibility of applying the liberal model to states through international universal treaties. It reduces the state's public (especially social) responsibility, organizational and management functions, transferring them to non-state, especially public organizations, which carry out the function of protecting human rights.

In modern security processes, the greatest political (geopolitical) significance is attributed to those civilian oversight structures that are financed by international organizations and Western (particularly American and European) funds. The activities of the majority of them, within the framework of human rights protection, are also directed to ensuring the national security of states and normal life.

In the structure of the system of ensuring national security of the Republic of Armenia, non-governmental bodies, among which civil society (in particular, non-governmental organizations), including the media, can be distinguished, have their own place and role. Such participation in the system of ensuring national security speaks of the existence of an established democratic system. They are the supporting entities that force the government to take into account the diverse demands and interests of different groups of society when implementing state policy, influencing decision-making in the security sector.

Conducting systematic and consistent monitoring is also of great importance for overseeing the RA national security system, as well as ensuring the implementation of national security policy. Monitoring of the sphere of ensuring national security is the systematic collection and analysis of information on phenomena and processes (specific issues, programs) related to national security and policies aimed at ensuring it. Effective monitoring is necessary for the purpose of assessing processes taking place in areas of strategic importance for the state, predicting future developments, and making necessary decisions. As a result, this monitoring contributes to improving the policies implemented in these sectors

and increasing the efficiency of management.

Monitoring the national security structures and implemented policies of the Republic of Armenia, which is mainly coordinated by the Office of the Security Council, is of essential importance for strengthening the country's security, coordinating the activities of state government bodies, developing and effectively implementing strategic programs, as well as cooperating with other states on issues related to national security. The analytical and information base formed as a result of the monitoring, serves as a basis for both decision-making on national security and the assessment, review, and further development of the RA national security policy and the programs stemming from it.

**Keywords:** national security, civil society, well-being, knowledge, civilian, state.

## ՔԱՂԱՔԱՅԻԱԿԱՆ ՎԵՐԱՀՍԿՈՂՈՒԹՅԱՆ ՀԻՄՆԱԿԱՆ ԴԵՐԱԿԱՏԱՐՆԵՐԸ ՈՐՊԵՍ ԱԶԳԱՅԻՆ ԱՆՎՏԱՆԳՈՒԹՅԱՆ ԱՊԱՀՈՎՄԱՆ ՄԵԽԱՆԻԶՄ

### ԱՆԱՀԻՏ ՇԱՀՈՒՄՅԱՆ

ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի  
ընդհանուր բաժնի գլխավոր մասնագետ,  
ՀՀ ԳԱԱ փիլիսոփայության, սոցիոլոգիայի  
և իրավունքի ինստիտուտի հայցորդ  
*anahit.shahumyan@isec.am*

### Համառոտագիր

Ժամանակակից պետությունների կյանքում քաղաքացիական վերահսկողության և հասարակական կազմակերպությունների քաղաքական նշանակության մեծացումը պայմանավորված է հատկապես միջազգային ունիվերսալ պայմանագրերով պետությունների ազատականության մոդելի կիրառման հնարավորության ընդլայնմամբ: Այն նվազեցնում է պետության հասարակական (հատկապես՝ սոցիալական) պատասխանատվությունը, կազմակերպման-կառավարման գործառույթները՝ դրանք փոխանցելով ոչ պետական, հատկապես հասարակական կազմակերպություններին, որոնք իրականացնում են մարդու իրավունքների պաշտպանության գործառույթ:

Անվտանգային արդի գործընթացներում առավել մեծ քաղաքական (աշխարհաքաղաքական) նշանակություն ունեն քաղաքացիական վերահսկողության այն կառուցակարգերը, որոնք ֆինանսավորվում են միջազգային կազմակերպությունների, արևմտյան (մասնավորապես՝ ամերիկյան և եվրոպական) ֆոնդերի կողմից: Դրանց գերակշիռ մասի գործունեությունը մարդու իրավունքների պաշտպանության շրջանակներում ուղղվում է նաև պետությունների ազգային անվտանգության երաշխավորմանը և բնականոն կենսագործունեության ապահովմանը:

Հայաստանի Հանրապետության անվտանգության ապահովման համակարգի կառուցվածքում իրենց ուրույն տեղն ու դերն ունեն ոչ պետական կառույցները, որոնցից կարելի է առանձնացնել քաղաքացիական հասարակությունը (մասնավորապես՝ հասարակական կազմակերպությունները), այդ թվում՝ ԶԼՄ-ները: Ազգային անվտանգության ապահովման համակարգում նմանատիպ մասնակցությունը խոսում է կայացած ժողովրդավարական համակարգի առկայության մասին: Դրանք այն օժանդակող սուբյեկտներն են, որոնք ստիպում են իշխանությանը պետական քաղաքականություն իրականացնելիս հաշվի առնել հասարակության տարբեր խմբերի բազմաբնույթ պահանջներն ու շահերը՝ ազդելով անվտանգության ոլորտի վերաբերյալ որոշումների ընդունման վրա:

ՀՀ ազգային անվտանգության ապահովման համակարգի վերահսկման, ինչպես նաև ազգային անվտանգության քաղաքականության կենսագործումն ապահովելու համար կարևոր նշանակություն ունի նաև համակարգված և հետևողական դիտարկումների անցկացումը: Ազգային անվտանգության ապահովման բնագավառի դիտարկումն ազգային անվտանգությանն ու դրա ապահովմանն ուղղված քաղաքականությանն առնչվող երևույթների, գործընթացների (կոնկրետ հիմնախնդրի, ծրագրի) վերաբերյալ համակարգված տեղեկատվության հավաքագրումն ու վերլուծությունն է: Արդյունավետ դիտարկումն անհրաժեշտ է պետության համար ռազմավարական նշանակության ոլորտներում տեղի ունեցող գործընթացների գնահատման, հետագա ընթացքի կանխատեսման և անհրաժեշտ որոշումների կայացման նպատակի իրականացման համար: Արդյունքում այդ դիտարկումը նպաստում է տվյալ ոլորտներում իրականացվող քաղաքականության բարելավմանը և կառավարման արդյունավետության բարձրացմանը:

Երկրի անվտանգության ամրապնդման, պետական կառավարման մարմինների գործունեության համակարգման, ռազմավարական ծրագրերի մշակման և արդյունավետ իրականացման, ինչպես նաև այլ պետությունների հետ ազգային անվտանգությանն առնչվող հարցերով համագործակցության համար էական նշանակություն ունի ՀՀ ազգային անվտանգության կառուցակարգերի և իրականացվող քաղաքականության դիտարկումը, որը հիմնականում համակարգվում է Անվտանգության խորհրդի գրասենյակի կողմից: Դիտարկման արդյունքներով ձևավորված վերլուծական-տեղեկատվական բազան հիմք է հանդիսանում ինչպես ազգային անվտանգության վերաբերյալ որոշումների կայացման, այնպես էլ ՀՀ ազգային անվտանգության քաղաքականության և դրանից բխող ծրագրերի գնահատման, վերանայման և հետագա զարգացման համար:

**Բանալի բառեր՝** ազգային անվտանգություն, քաղաքացիական հասարակություն, բարեկեցություն, գիտելիք, քաղաքացիական անձ, պետություն:

**Introduction**

In modern political science, a special place and role is given to the study of the activities of civil society and subjects of civil control. In particular, modern scientists study the activities of the main subjects of civil control aimed at protecting national security mechanisms. In addition, in this process, an important

role is assigned to identifying the features of the idea of civil society. However, the concept of civilian oversight is often misunderstood. In this regard, it is necessary to clarify the nature of civil society and its impact on national security structures.

### **Research methods**

Based on the characteristics of the research and the scope of the problems scrutinized in it, both general and special methods, such as analysis, synthesis, deduction, induction, comparative–legal method, etc.

### **Theoretical–methodological bases**

Public oversight of national security is of great importance for the establishment and development of a modern democratic state, as it ensures transparency, accountability, and protection of citizens' rights in the security sector.

National security refers to the protection of a nation's stability and well-being from various threats, including military, economic, social, and environmental factors that can significantly impact the quality of life and choices available to the government and its people (Whyte, 2001, pp. 4663–4667).

As for the well-being of society, many current States consider ensuring the well-being of the members of this society to be also an essential component of national security (Gevorgyan S.R, et al.,2024)

For instance, the Government of the Republic of Armenia has envisaged in its national strategy the provision of equal opportunities and social and economic inclusion for various social groups, including dignified aging, equality between women and men, and the prevention of violence, as well as the effective protection of the rights of persons with disabilities and children (National Security Strategy Of The Republic Of Armenia, 2020, p.33).

It is obvious, that the breadth of threats to democratic country national security requires that the government attract, recruit, and retain a workforce equipped with the specific knowledge, skills, and behaviors necessary to meet the challenge of protecting the country and its interests (Valla, 2022). Therefore, in this case, the government engages with civil society and its representatives.

According to the universally recognized definition, civil society is a relatively independent and self–organizing system of social, economic and political relations that includes various forms of associations of people in order to meet their own material and spiritual needs (Milyan & Kazanchian, 2023; Kazanchian, 2021).

Civil society is, first of all, a structured society, which, through appropriate structures, is capable not only of self–governance, but also of effective control in those areas that remain within the scope of state functions. As a result, the scope of state functions is self–limited, and at the same time, due to civil society control, the effectiveness of state functions in other areas increases (Edwards, 2014, p.45–46).

Second, the structure of modern civil society can be represented in the form of five main systems reflecting the corresponding spheres of its life. These



are social (in the narrow sense of the word), economic, political, spiritual-cultural and information systems (Poleshchuk, 2011).

It is well known that, a strong civil society contributes to national security by ensuring democratic oversight, transparency, and accountability. Moreover, an active civil society can help prevent social conflicts and increase trust between the state and the society.

The conducted research shows, that civil society ensures citizen participation in decision-making processes, which contributes to better governance and greater stability. Moreover, civil society is fully revealed in a democratic state governed by the rule of law. In such a state, power and civil society complement each other, rather than oppose each other. Civil society influences the state through democratic institutions, for example, by adopting laws on the protection of human rights, on the openness and responsibility of officials.

As for the authoritarian regime of government, it is a kind of compromise between totalitarian and democratic political regimes. It is softer, more liberal than totalitarianism, but harsher, more anti-people than democratic. In these conditions, civil society can exist, but it depends on the state (Lewis, 2013). In other words, in authoritarian states, an active civil society can be perceived as a threat, leading to repression and restrictions on rights and freedoms.

The conducted research indicates, that in the name of national security and sovereignty, civil society organizations (CSOs) have been confronted with a tightening of legal regulations and scrutiny across various political regimes and find it increasingly difficult to obtain funding and public support, a global trend which has become known as a shrinking or closing space for civil society.

Some scholars, such as G. Chimiak, S. Toepler, A. Zimmer, K. Fröhlich, examining authoritarian policies and their impact on civil society, point out in their works that the approaches of authoritarian governments are not uniform, but rather represent a combination of measures that limit the space for politically active CSOs, while at the same time offering opportunities for service-providing and state-supportive CSOs to expand their activities.

According to the authors, in this case current selective mechanism has repercussions for the relationship between the more expressive civil society and the more service oriented nonprofit sector. While nonprofits get to be more involved in social service delivery and contracting, the advocacy function of civil society has increasingly been marginalized (Chimiak, Kravchenko, & Pape, 2024).

Based on the above, we believe that, it is important to find a balance between developing civil society and ensuring national security in order to avoid conflict and ensure stability not only in democratic but also in authoritarian state. Various national security strategies and concepts emphasize the importance of civil society in the context of security and sustainable development.

The aforementioned approaches emphasize the importance of mutual co-operation between civil society and national security, as well as the need for their harmonious coexistence.

Establishing civilian control does not mean giving civilians full authority over

all security matters. Instead, it implies the establishment of a system of checks and balances, safeguards, and oversight to ensure the accountability of the security sector. This system should ensure that the security sector serves the interests of both the state and communities and is effective in combating emerging threats.

Even with a well-managed security management system, the security sector must maintain a certain degree of autonomy in internal operational matters. This autonomy promotes specialization of the field and prevents it from being subservient to political interests. Ideally, the management and control of the security sector should be carried out with shared responsibility.

In general, civilian leadership can set general goals, policies, and policy priorities, such as identifying primary threats. However, the security sector itself decides how to organize its internal operations to implement those goals, within the framework of the law. Civilian leadership, except in emergencies, should not directly manage security operations.

An important starting point for discussions is to clarify the mandates, powers and roles of actors involved in civilian oversight. Civilian actors should be entrusted with key policy and legal design functions. In our opinion, consultations with the security sector may be included in these processes, but final decision making should remain under the jurisdiction of executive branch and parliament. For example, in various countries, laws stipulate that only parliament can approve the deployment of troops abroad. Similarly, only the executive branch has the authority to declare a national emergency situation and authorize the involvement of the armed forces in internal security matters.

Security sector oversight is organized to assess the extent to which the armed forces are applying the established rules and implementing government policies. However, this does not mean that civilian authorities should interfere in the implementation processes of operations. The power imbalance and leverage differences between civilian and security actors make it difficult to impose mandatory civilian oversight through laws or directives. The constitution and legislative framework provide an important basis for civilian oversight. However, a well-designed legislative framework alone, without adequate capacity and access in practice, does not guarantee sufficient impact. The example of neighboring Turkey shows that the power of oversight is often fully implemented years after the transition process (Kutay, 2017). During this time, civic engagement can also be promoted through simpler steps.

The importance of security sector management knowledge is crucial in this context. In this case, it is important that civilian actors acquire the necessary knowledge on key security issues. If civilian actors have sufficient knowledge, they will be able to have a more influential impact on national security policy. The lack of the necessary knowledge can lead to inappropriate proposals or policies, which can reduce the reputation of civilian actors. For example, parliamentary oversight programs in the Balkans initially focused on building general knowledge about security sector governance, then on developing parliamentarians' ability to ask the right questions (Lilyanova & Blagojevic, 2017, p. 4).

Thus, for civilian oversight to be successful, a balanced approach, a legal basis, and the development of professional knowledge are necessary.

Civilian actors have a comparative advantage due to their access to a wide range of information and analysis that is often unavailable to security institutions. In this regard, civilian actors can make a valuable contribution by providing critical information and analysis that the security sector needs to make informed decisions about political priorities, actions, and reforms.

Obviously, knowledge and information can become important tools for civilian oversight, but civic actors must prioritize data collection and analysis. Conducting research, needs assessments, or organizing consultative processes with communities can be starting points through which citizens can demonstrate the depth of their knowledge by engaging in the security policy-making process.

In addition, the media plays an important role in ensuring the dissemination of key information and promoting national political debate on security issues. The investigative work of the media can become an important tool for security sector oversight. However, it is important that this information is based on facts, well researched and analyzed.

Civilian actors can gradually gain greater influence by supporting the efficiency and cost-effectiveness of the security sector, rather than by consistently adopting punitive or controlling approaches.

This support can be expressed in the following ways:

- providing appropriate and sufficient budgetary resources,
- developing effective legislation,
- making constructive proposals for reforms that take into account the interests of both communities and the security sector.

Collaborative and constructive partnership between civilian and security agencies are often key to building trust and effective oversight. Even in contexts where political and institutional barriers limit the access and impact of civilian oversight, sustained and persistent work can yield important results. Civilian actors presenting a coordinated and coherent perspective can contribute to national policy debates and formation, directly or indirectly influencing the security sector. In countries where civilian actors have had an influential voice, there have often been multiple civilian actors working towards complementary goals.

The coherence of oversight and influence is particularly important, as polarization of views or disorganized approaches can undermine the effectiveness of civilian oversight. For example, in Nigeria (Chukwudi & Ojo, 2023) and Serbia in the initial stages of the transition processes, civil society organizations and political parties created joint platforms to exchange information and develop common recommendations. However, another important consideration is to build an oversight system without focusing on a single actor.

Effective security management systems typically involve a variety of civilian actors that exercise oversight or have key management functions. Each actor has its own unique characteristics, and only a collective and coordinated approach can ensure effective civilian oversight.

The components of the civilian oversight system include:

- Executive branch: Office of the President, Prime Minister (according to the governance model), Ministries of Defense and Interior, Ministry of Finance,
- Judicial system: prosecutor’s office, courts
- State oversight bodies: parliament, human rights defender, anti-corruption commission,
- Non-state actors: civil society, media, academy, community organizations.

The executive branch (president/prime minister, cabinet, etc.) is often the most active and direct actor in overseeing and managing the security sector. In many countries, the head of government has the authority of commander-in-chief of the armed forces to coordinate security sector activities at the strategic level, leaving tactical decision-making to the heads of security agencies.

The ministries of defense and interior typically play important roles in policy making, resource management, and administrative mediation. For example in Poland (Górska-Lazarz , 2021, pp. 5-8), Slovakia (Defense Strategy Of The Slovak Republic, 2021) and Czech Republic (The Defense Strategy of the Czech Republic, 2021) the position of Minister of Defense is entrusted to civilians to ensure the separation of military and political functions.

The conducted research shows, that Parliament has an important role in ensuring accountability in the security sector. Through its legislative and oversight functions, parliament can ensure good regulation, resource allocation, and independent assessment of the security sector. Nevertheless, equally important is the role of the civil society. As mentioned above, in the political life of modern societies, the general interests and needs of citizens are not realized only through state power institutions or political parties. In order to achieve vital goals and exercise rights and freedoms, people often unite their efforts, creating non-governmental organizations that can represent and protect the collective interests of separate groups. In this matter, various self-governing associations of citizens play a huge role: non-governmental organizations, associations, charitable associations, religious groups, trade unions, etc. They are a condition for socio-political processes and an indicator of the development of civil society.

In professional literature and in world practice, a distinction is made between the concepts of “non-profit public organization” and “non-governmental organization”. Often, all structures of the political system are likened and perceived as public organizations, which can be explained by their larger number in the raw of non-governmental organizations, by their more prominent activities, and their wider recognition in society.

The current legislation of the Republic of Armenia defines a public organization as a public association of citizens of the Republic of Armenia, citizens of foreign countries, stateless persons and (or) legal entities, which has the status of a non-commercial organization.

As of by December 31, 2024, there were 6,907 state-registered non-governmental organizations operating in the Republic of Armenia. It is noteworthy that their number has shown tendency of increasing especially over the last 5

years, for example, in 2019, 2,113 organizations were registered (Annual Report, 2024).

At the same time, it is important to pay attention to the fact that civil society’s participation in the aforementioned oversight processes is implemented not only through organizations acting in the legal form of a “public organization”. In this regard, we believe it is necessary to identify the legal possibilities for the public manifestation of a person, a participant of political science entity civil society.

A person can exercise the primary opportunity without becoming a member or joining any organization. The latter has been provided with a similar opportunity at the constitutional level. For example, the rights guaranteed by the constitution to express an opinion, demonstrate will, and present a position enable citizens to exercise their rights as a unit of society, including oversight opportunities.

However, it should be noted that the effectiveness of public participation increases even more when individuals act through associations. It is in this regard that it is important to reveal the legal nature of associations of individuals. Associations of individuals, depending on the type of public relations, are more objectively disclosed in civil law

Thus, participation in relevant public relations is carried out through non-commercial legal entities. Legal entities considered to be non-commercial organizations can be created in the form of public associations, foundations or in other forms provided for by law. The above-mentioned public organizations are classified as a type of public association non-commercial legal entity. It is noteworthy that the legislator does not limit the purpose of the activities of non-commercial organizations. In other words, they can pursue any legitimate goal unrelated to entrepreneurial activity: social, charitable, cultural, scientific, and other goals. Therefore, not only non-commercial legal entities that are public organizations have the right to act as representatives of civil society, but also other public associations, foundations or in other forms provided for by law. Therefore, limiting organizational participation in this area only to the format of public organizations is not fair.

We believe that the problem arises from international practice where representatives of this sector are described as “NGO”, which is a broader concept than a public organization in its content.

Summing up the above, it should be noted that the term “NGO” (non-governmental organization), includes, according to domestic legislation, public associations, foundations and non-profit organizations established in other forms provided for by law (The Law Of The Republic Of Armenia On Public Organizations).

No less important is the participation of civil society representatives in public relations without forming a legal entity, simply through a group of individuals gathered around a goal. Such are public movements, target groups of individuals, etc.

## Results

It is known, that civil society can play a key role in policy making and in identifying accountability gaps, through public opinion. For example, in Eastern Europe, civil society has played a leading role in anti-corruption reforms. In contrast, in the United States, civil society is actively involved in national security issues through various non-governmental organizations (NGOs) that focus on human rights, monitor government actions, and ensure transparency. According to U.S. Department of States, NGOs in the United States undertake a wide array of activities, including political advocacy on issues such as foreign policy, elections, the environment, healthcare, women's rights, economic development, and many other issues. They often develop and address new approaches to social and economic problems that governments cannot address alone (Non-Governmental Organizations (NGOs) in the United States, 2025). For example, organizations such as Human Rights Watch and Amnesty International play an important role in drawing attention to human rights violations and ensuring accountability.

In Germany, civil society is actively involved in the security debate, especially in the context of migration policy and human rights. NGOs and activists play an important role in protecting the rights of refugees and ensuring compliance with international standards. Civil society in South Korea is actively involved in security issues, especially in the context of relations with North Korea. NGOs and activists work on peace and disarmament issues and participate in dialogue between the two countries.

In India, civil society plays an important role in security issues, especially in the context of human rights and the fight against terrorism. Civil society organizations are actively working to protect the rights of minorities and ensure justice. In Canada, civil society is actively involved in national security issues, including human rights, migration, and integration. NGOs play an important role in monitoring government actions and ensuring respect for human rights ( Purewal, Smit, & Nicole , 2024).

In Brazil, civil society is actively involved in security issues, especially in the context of the fight against violence and crime. Civil society organizations work towards protecting human rights and ensuring the security of vulnerable groups (Leeds, 2013).

These examples demonstrate how civil society can influence national security by ensuring the protection of human rights, promoting transparency and accountability, and engaging in public debate on important issues. International studies, even in the most developed and established contexts, show that the degree to which armed forces recognize or adhere to civilian oversight and management is often conditioned by the professional, capable, and honest approach of civilian oversight. If civilian actors fail to provide effective governance and add value to policymaking, but instead attempt to instrumentalize, mislead, or politicize the security sector, it is difficult to build the trust necessary to establish a culture and practice of civilian oversight.

Moreover, there is a risk that the transition process will lead to a cornerstone

error, from one extreme of “militarization of politics” to the other of “politicization of the security sector”.

To create an effective and professional security sector, it is necessary to:

1. Limit the military’s involvement in political processes. For example, Indonesia, during its transition period, has used legislative measures to limit the possibility of uniformed personnel to participate in politics, allowing only retired personnel to participate in elections.

2. Limit unnecessary political interference in decisions that should remain the responsibility of the military. For example, in Kenya, Nigeria, and Gambia, legislative provisions have been enacted that executive orders to the military must always be in writing, to ensure transparency in relations between the military and politicians.

In many countries, the Constitution limits the executive branch’s appointment powers to only the highest positions in the armed forces.

Transition processes in Liberia and Zambia have shown that politicization of the security sector can lead to serious consequences if the president is given unnecessary powers to appoint individuals at various levels.

In Turkey, politicians, especially the president, actively interfere in the affairs of the armed forces. After the 2016 coup attempt, there were mass dismissals and arrests of military personnel, which led to a significant politicization of the army. In Venezuela, the military is under the control of President Nicolás Maduro, who uses the army to suppress the opposition and consolidate his power. Politicians are actively involved in the management of military structures. Such interference can undermine the integrity, professionalism, and neutrality of security organizations. In Egypt, the military has traditionally played an important role in the country’s politics. Since the overthrow of President Mohamed Morsi in 2013, the army has become a key player in political life. Politicians often turn to the military to support their decisions (Marshal, 2015, p. 3).

Managing the risks of politicization of the security sector requires clear legal mechanisms and constraints to ensure both the neutrality of the armed forces and the effectiveness of civilian oversight.

One of the main objectives of the transition and security sector reform processes is to establish civilian oversight and control over the security sector, in order to contribute to the development of an effective, efficient and accountable security sector. The idea that citizens play a key oversight role in the security sector, participate in key security policy decisions, manage key national budgetary issues and regulate security sector mandates, structures and powers is a fundamental international principle of security sector governance.

However, despite the general international principles and normative standards of civilian oversight, the processes of establishing civilian oversight of the security sector, and in particular, the armed forces, are never identical, and different models and approaches may be considered to achieve the goal.

International experience has shown that this complex process requires a step-by-step (sometimes decades-long) and comprehensive approach to achieve

real results in establishing civilian oversight and improving security sector governance. The level of progress in establishing civilian oversight is likely to remain a reflection of, or a prerequisite for, the overall success of the transition process, and it is therefore necessary to maintain focus on this priority area throughout the transition process.

### Conclusion

Summing up the results of the issue, we conclude, that for the broad masses of society, civilian oversight is an important prerequisite for democratic governance. However, in addition, it is also an important prerequisite for the effective use of budgetary funds, ensuring public order, protection and assistance in emergency situations, as well as a guarantee of the protection of human rights: both in law enforcement agencies and in society in general. The above, in turn, contributes to the preservation and promotion of democratic values and the general democratic governance model, which, despite criticism, is a justifiable option.

Civil society plays an important role in strengthening and developing democratic institutions, ensuring the connection between society and the state, protecting the interests of citizens, and contributing to fair and effective governance. Therefore, civil society should participate in law-making activities by proposing legislative reforms that make public administration more open and responsive to the needs of society. In addition, studying the essence of civil-military relations in democratic conditions, we can confirm that civilian oversight over the armed forces is a complex mechanism of management (supervision), which is carried out by the people, both through state institutions and through their own informal independent associations. It is aimed at ensuring that the state and use of the armed forces correspond to the needs and interests of society.

### References

1. Annual Report. (2024). *The State Register of Legal Entities of the Ministry of Justice of RA*.
2. Chimiak, G., Kravchenko, Z., & Pape, U. (2024). Civil Society and the Spread of Authoritarianism: Institutional Pressures and CSO Responses. *Voluntas*, Volume 35, 221–225. DOI: <https://doi.org/10.1007/s11266-024-00641-y>
3. Chukwudi, C. E., & Ojo, S. S. (2023). Civil Society Organisations and Sustenance of Democratization in Nigeria. *African Journal of Politics and Administrative Studies (AJPAS)*, Volume 16(1), 18–33.
4. Defense Strategy Of The Slovak Republic. (2021). Bratislava. URL: <https://goo.su/UVfa> (accessed at 12.01.2025)
5. Edwards, M. (2014). *Civil Society* (3rd. ed.). Cambridge.: Polity pub.
6. Gevorgyan, S., Hakobyan, N. R., Kazanchian, L. A., & Khachatryan, A. G. (2024). Counseling Psychology and Psychotherapy. Study of Well-Being and Assertivness Variables Among Young People, Volume 3(no.3), 116–118. DOI: <https://doi.org/10.17759/cpp.2024320307> (accessed at 12.01.2025)
7. Górska-Lazarz , K. (2021). Defense Strategy Of The Republic Of Poland. Sector strategy of the National Security Strategy of the Republic of Poland. Warsaw.
8. Kazanchian, L. (2021). Features of Interaction Between The State and Civil Society in the Context of the Philosophy of Law. *WISDOM*, 114–119. DOI:<https://doi.org/10.24234/>



wisdom.v18i2.532/(accessed 05.01.2025).

9. Kutay, A. (2017). From Guardianship to Civilian Control: How did the Turkish Military get here? *Outlines of Global Transformations: Politics, Economics, Law*, 10(3), 68–82.
10. Leeds, E. (2013). *Civil Society and Citizen Security in Brazil: A Fragile but Evolving Relationship*. Washington.
11. Lewis, D. (2013). Civil Society and the Authoritarian State: Cooperation, Contestation and Discourse. *Journal of Civil Society*, Volume 9(Issue 3),325–340.
12. Lilyanova, V., & Blagojevic , J. (2017). *Western Balkans: Parliamentary Oversight of the Security Sector*. Strasbourg: European Parliament Pub.
13. Marshal, S. (2015). *The Egyptian Armed Forces And The Remaking Of An Economic Empire*. Washington: Carnegie Middle East Center pub.
14. Milyan, G., & Kazanchian, L. (2023). Characteristics Of Mutual Responsibility And Obligations Between The State And The Individual In A Legal Democratic State. *Katchar Scientific Periodical*, 2, 58–69. DOI: 10.54503/2579–2903–2023.2–58
15. National Security Strategy Of The Republic Of Armenia. A resilient Armenia in a changing world. (2020).Yerevan. URL: <https://goo.su/hpgiAm> (accessed 05.01.2025)
16. Non–Governmental Organizations (NGOs) in the United States. (January 2025). Fact Sheet of the U.S. Department of States, 2–4. URL:<https://goo.su/WBro> (accessed 15.01.2025)
17. Poleshchuk, A. S. (2011). To The Issue About Subjects Of Public (Civil) Control And Its System In Russia Federation. *Bulletin of the Moscow University of the Ministry of Internal Affairs of Russia*, Volume 6, pp. 122–127 (In Russian)
18. Purewal, S., Smit, J., & Nicole , A.–M. (2024). The role of civil society organizations (CSOs) as community–based knowledge brokers: A qualitative study with CSOs during the first year of the COVID–19 pandemic in Canada. *Qualitative Health Communication*, Volume 3(Issue 2), 3–24.
19. The Defense Strategy of the Czech Republic. (2021). URL: <https://goo.su/oFGEM6W>(accessed 05.01.2025)
20. The Law Of The Republic Of Armenia “On Public Organizations” (adapted on 16.12.2016). URL:<https://cis-legislation.com/document.fwx?rgn=105568> (accessed 05.01.2025)
21. Valla, L. G. (2022). Citizens’ Perceptions of Security Issues: New and Old Actors in the National Security Framework. *Journal of Human Security*, Volume 18(Issue 1), 18–28. DOI:10.12924/johs2022.18010018 (accessed 05.01.2025)
22. Whyte, A. V. (2001). *International Encyclopedia of the Social & Behavioral Sciences*. Amsterdam: Elsevier pub.

*The article has been submitted for publication: 27.01.2025*

*Հոդվածը ներկայացվել է տպագրության. 27.01.2025*

*The article is sent for review: 14.02.2025*

*Հոդվածն ուղարկվել է գրախոսության. 14.02.2025*

*The article is accepted for publication: 31.03.2025*

*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

# PARLIAMENTARISM AS A LEGAL PHILOSOPHY SUBJECT OF ANALYSIS

MARTIN MANUKYAN

Chamber of Advocates of the Republic of Armenia  
Monitoring Officer for the Office of the Public Defender, Attorney, PhD in Law

*martin\_manukyan\_1955@mail.ru*

DOI: 10.54503/2579-2903-2025.1-169

## Abstract

Today, questions about what factors and conditions, legal and political institutions, and structures make this or that system democratic and the relationship between parliamentarism and the executive power continues to be the subject of heated debate. Without a truly functioning parliament and parliamentarism, it is impossible to build a democratic state governed by the rule of law, create an effective system of legislation and law, or form and develop the main elements of civil society, primarily political parties.

In the article, the author puts forward the idea that understanding parliamentarism only as a form of government is insufficient. Referring to numerous definitions of parliamentarism that have existed to date and highlighting the principles of parliamentarism, the author of the article proposed his definition of parliamentarism, according to which parliamentarism is a special system of organization and functioning of state power, based on the principle of separation of powers and the rule of law, with a formally privileged position of parliament, which is elected in free elections with the participation of political parties.

**Keywords:** parliamentarism, democracy, constitutionalism, political parties, electoral system, judicial power.

## ՊԱՌԼԱՄԵՆՏԱՐԻԶՄԸ՝ ՈՐՊԵՍ ԻՐԱՎԱՓԻԼԻՍՈՓԱՅԱԿԱՆ ՎԵՐԼՈՒԾՈՒԹՅԱՆ ԱՌԱՐԿԱ

### ՄԱՐՏԻՆ ՄԱՆՈՒԿՅԱՆ

Հայաստանի Հանրապետության փաստաբանների պալատի  
հանրային պաշտպանի գրասենյակի մոնիտորինգի պատասխանատու,  
փաստաբան, իրավաբանական գիտությունների թեկնածու

*martin\_manukyan\_1955@mail.ru*

### Համառոտագիր

Այսօր էլ սուր բանավեճերի առարկա են շարունակում մնալ այն հիմնահարցերը, թե ինչպիսի գործոններ ու պայմաններ են, իրավական և քաղաքական ինստիտուտներ ու կառուցվածքներ են, որ այս կամ այն համա-

կարգը դարձնում են ժողովրդավարական: Դրանցից է պառլամենտարիզմի և գործադիր իշխանության հարաբերակցությունը: Առանց իրապես գործառող պառլամենտի և պառլամենտարիզմի՝ անհնար է ժողովրդավարական իրավական պետության կառուցումը, օրենսդրության և իրավունքի արդյունավետ համակարգի ստեղծումը, քաղաքացիական հասարակության հիմնատարրերի, հատկապես քաղաքական կուսակցությունների ձևավորումն ու զարգացումը:

Հողվածում հեղինակն առաջ է քաշում այն գաղափարը, որ պառլամենտարիզմը՝ միայն որպես կառավարման ձևի տարատեսակ հասկանալը ակնհայտորեն բավարար չէ: Անդրադարձ կատարելով պառլամենտարիզմի վերաբերյալ մինչ այժմ եղած բազմաթիվ սահմանումներին և առանձնացնելով պառլամենտարիզմի սկզբունքները, հողվածի հեղինակն առաջադրել է պառլամենտարզմի իր սահմանումը, ըստ որի՝ պառլամենտարիզմը պետական իշխանության կազմակերպման և գործառման հատուկ համակարգ է՝ հիմնված իշխանությունների տարանջատման սկզբունքի և օրենքի գերակայության վրա, խորհրդարանի ձևական առումով արտոնյալ դիրքով, որն ընտրվում է ազատ ընտրություններով՝ քաղաքական կուսակցությունների մասնակցությամբ:

**Բանալի բառեր՝** պառլամենտարիզմ, ժողովրդավարություն, սահմանադրականություն, քաղաքական կուսակցություններ, ընտրական համակարգ, դատական իշխանություններ:

**Introduction**

Even today, the issues of what factors and conditions, legal and political institutions, and structures make this or that system democratic, such as the ratio of parliamentarism and executive power, continue to be the subject of sharp debates. Without a truly functioning parliament and parliamentarism, it is impossible to build a democratic legal state, create an effective system of legislation and law, and form and develop fundamental elements of civil society, especially political parties.

In this article, we put forward the idea that understanding parliamentarism only as a variety of forms of government is not enough. Referring to the many definitions of parliamentarism that have existed so far and distinguishing the principles of parliamentarism, we put forward a definition of parliamentarism, according to which parliamentarism is a special system of organization and operation of state power, based on the principle of separation of powers and the rule of law, with a privileged position of parliament in formal terms. which is elected by free elections with the participation of political parties.

**Theoretical and Methodological Bases**

The sovereignty of the people is certainly the essence of parliamentarism. The sovereign principle of the people is organically connected and implemented through the principles of “majority” and “representation.”

The idea of “majority,” which is one of the components of parliamentarism, has its roots in ancient times; we see it as early as the Gospel of Luke, where the trial of Jesus is described (Schoenbeck, 2023). Pilate said to the chief priests and

the multitudes. And he said to them: “You brought this man to me as one who misleads the people, and now, judging him before you, I find no guilt in this man.” (Hill, 2019). However, the gathered shouted and said, “Crucify him, crucify him!” And he addressed them a third time: “What wicked thing has he done? I found no mortal crime in him...” (McReynolds, 2016). But they forced and asked him to be crucified with a loud voice, and their and the chief priests’ cry grew stronger... And Pilate decided that it would be their problem... And Jesus was delivered up to the will of the clamoring mob (Waqas, 2019).

Famous American sociologist W. Rostow (2009) believes that the essence of democracy is manifested in such a state, which is implemented by the rule of the majority. However, the sphere of applicability of the “majority” principle is not unlimited. The Russian philosopher N. Berdyaev rejected the possibility of confirming the truth with a mere steep majority. Often the truth is revealed by a minority, and more often by individuals. Despite this, it becomes a public fact if it is recognized by a significant part of society. Democracy is the rule of the majority which respects the rights of the minority (Berdyaev, 2012).

The famous philosopher of the 20th century, K. Popper, stated: “Democracy cannot lead to the rule of the majority... Can’t the majority rule with authoritarian methods? In a democracy, the power of the ruling power must be limited” (Popper, 2011).

Representation, powers, the formation of intermediate power structures, constitutionalism, political parties, and elections are integral elements of modern representative democracy.

Despite the negative aspects, the representative system is undoubtedly one of the fundamental elements of the people’s government, because it is the most important way of expressing the people’s will and power.

The mechanism of the process of delegation of power for the implementation of the representative principle is elections, and more precisely, the electoral system. The latter is so important to the exercise of the power of the people that democracy often leads to the selection of those entrusted with the administration of public affairs. Elections of subjects of power constitute the procedure of democracy, which ensures the existence of democracy. However, it is not true that elections can be considered ideal. American political scientist M. Parenti (2007) points out the irony in the fact that the institution which is supposed to register the will of the majority serves to legitimize the rule of the privileged minority and often ignores the interests of the most needy. Parenti’s conclusion is confirmed by the results of the parliamentary elections.

The sovereignty of the people is unthinkable without freedom. Freedom is realized through human rights. Freedom is that one can do anything that is not against the law. The concept of law allows people to decide what is permissiveness and arbitrariness and what is order. In the words of A. de Tocqueville (1835), “Law allows us to be independent without being arrogant, to obey without being humiliated.”

In our opinion, one of the main merits of democracy is that it brings the

concept of civil rights to the consciousness of every citizen. At the same time, the real life of political rights and politics is possible if there are democratic freedoms in the country. Freedom is possible only under democracy, that is, in the case of participation in political life through free expression of will. We agree with Tocqueville’s statement (1835): “It can be said without exaggeration, the art of free living can do wonders, but at the same time, there is nothing more difficult than learning to live freely.”

Since democracy is characterized by the competitive struggle between subjects for status and roles in the power system, pluralism becomes one of its extremely important principles. The concept of pluralism entails the recognition of the diversity of various interconnected and at the same time autonomous social and political groups, parties, and organizations, whose positions are in constant competition in social and political life. The following essential features of political pluralism can be distinguished:

1. the variety of social and political interests of political entities, and their contradictions, is the source of pluralism;
2. the diversity of power centers (decentralization of power), diversity, autonomy, free competition between political entities, the system of “checks and balances,” separation of powers;
3. the exclusion of the monopoly of political power of any party or other government group, or of one leader; a multi-party or two-party system;
4. diversity of channels of expression of interests, their availability for all, publicity of information, freedom;
5. free struggle between political forces, competition between elections, the possibility of their change;
6. The unity of pluralism and political consolidation, the alternative of political views and actions within the framework of values and legitimacy recognized by all.

Discussing the mechanisms of realization of political pluralism, 20th century philosopher K. Jaspers formulated the fundamental proposition according to which pluralism, freedom, and politics are impossible without unfettered, unconditional political dialogue and debate. For such a debate to be carried out on a wide scale, based on full awareness, freedom and pluralism require that people are familiar with the information available to them, the data, and the argued opinions of all sides. Moreover, this requirement applies to the entire population. It is necessary to raise the level of people’s enlightenment, to lead from partial knowledge to comprehensive knowledge, so that every person can rise above the frozen patterns and achieve freedom (Jaspers, 2011).

It is no coincidence that Jaspers speaks of the growing tendency to discredit the free spirit of the people. It seems that the spiritual life, education, political enlightenment, and initiative potential of society are dying. Jasper talks about the peculiar sterilization of the creative qualities of the people. People everywhere achieve some result in political life not so much through their intelligence, and high moral qualities of determination, but through the necessary connections.

Touching on the issue of developing people's civic qualities, Jaspers notes that the country's political elite does everything to prevent them from developing and manifesting themselves. This is where the helplessness of the masses comes from when people's vital energy is directed to simple work or spent on idle talk and swearing. Karl Jaspers (2011) states that the democratic form of government is always in the process of either developing or decaying. Its ups and downs depend on many factors, including the activities of the opposition. Jaspers' position here is unequivocal: the opposition contributes to the formation of a common political will. If there is no opposition, then the political struggle – the competition between different views and principles – disappears from the consciousness of the people.

The meaning of the opposition lies in the revitalization of political life and politics through debate, public scrutiny, and assuming the responsibility of forming a government. A creative, morally inspiring force is summed up in the political opposition. If the opposition is not formed as a creative and liberating force, if it does not form a government–opposition complementary “ensemble” on a common basis, then there is a temptation or a real tendency to form an all-party government or a grand coalition. There are cases when the seeming democracy dissolves and disappears in the government made up of the oligarchy of parties (Tran, 2024). Everyone (that is, none) is responsible for this. Party figures are often interested not so much in the political wrinkles facing a specific society, but in the task of finding their “niche” in the government and thereby ensuring political longevity, no matter what and how. They have a common goal: to come to power by any means. When there are no concepts and political programs, preference is given to the interests of the parties rather than the people in the political struggle. Often this oligarchy does not realize the nationally dangerous nature of its political arrogance. Moreover, it requires a respectful attitude towards the Prime Minister, the President, and persons holding ministerial positions. After all, these people conclude that they are the representatives of the people and cannot turn their backs on their people. They have become living saints because they have been chosen by the people. Whoever offends them will offend the people. Because of the positions they hold, they enjoy the power and glory available to them.

Jaspers observes that there are too few people in government circles who are capable and ready to take full-scale responsibility for the state of affairs in the country. Everyone tries to hide behind someone's back, does not want to be responsible for anything, and does not dare to act according to his principles. As a result of all this, the political thinking of the governing circles, as well as a large part of the population, simply becomes paralyzed, because the government officials pursue only ephemeral goals that no longer concern the masses. According to Jasper, these realities testify to the discrediting and debasement of the free spirit of the people (Jaspers, 2011).

Foremost of these is the representative function, the political expression of the interests of the social groups and classes of the population, and the institutionalization of those interests. The guarantor of the implementation of the representative function is the electoral system, together with the competition

between political entities. Competition between political forces is an effective way of forming selections and choosing decision options.

The power function of the Parliament, which derives from the sovereignty of the people, is constitutionally guaranteed. Its most important component is legislative activity. The official function includes political control over the activities of governing entities and holding them accountable if they have violated constitutional principles and norms.

Regime legitimacy function: the Parliament is the most important institution for the legalization (legitimization) of state power because it represents the majority of the society and expresses its political will. Political legitimacy is realized through the adoption of political decisions in which the given society is interested. The decisions made by the representatives of the people become binding for all state and public institutions, which is the basis of the legitimacy of the activities of the governed.

In the frames of the function of solving social and political conflicts, the Parliamentary democracy institutionalizes public conflicts. Parliament has become an open square for conflict settlement.

As a result of legal-philosophical studies of the problem of parliamentarism, various theories have emerged as a response to this or that stage of the development of society. In modern jurisprudence and philosophy, we can talk about two main ways of interpreting the phenomenon of parliamentarism. The first one can conventionally be called “pro-state”, within which parliamentarism is seen as a form of state administration. In our opinion, such an approach simplifies the essence of parliamentarism. Since ancient times, the form of government has been understood as the way of exercising power, either by many or by one person (monarchy), or by a group of persons (nobility), or by the people (democracy). Parliaments have existed and still exist under different forms of government.

The second interpretation, which we agree with, understands parliamentarism as a certain system of organization and operation of state power, which is based on the separation of powers, the diversity of interests of different social groups in civil society, political pluralism, and the provision of human and citizen rights and freedoms.

Therefore, it is not surprising that the picture of opinions on the question of the nature and principles of parliamentarism is quite wide. For example, as Kelly noted (2004), the famous German researcher G. Jellinek, who considers the parliament the heart of parliamentarism, does not rank the parliament among the most important bodies of the state. In his opinion, the Parliament is one of those secondary bodies, the coming together, functioning, and dissolution of which does not lead to the disintegration or radical transformation of the state. In his opinion, the parliament is not an independent body, because its voluntary act does not have a direct effect on the state and the persons subordinate to the state. We strongly disagree with this view and find it arbitrary.

English researcher A. Dicey defends and develops a completely different opinion. Parliamentarism under the conditions of the English state order has the

right to adopt or abolish any law, and no person or institution has the right to ignore or not to execute the legislative acts of Parliament. Parliament's rights are limited by only two factors: moral law and public opinion (Kirby, 2018).

French political scientist G. Burdeau (1949) has a more moderate opinion. According to him, Parliamentarism is based on three principles: firstly, there needs to be equality of executive and legislative powers, cooperation, existence of means of interaction with each other; Secondly, neither the government nor the parliament should have a significant degree of dominance over each other; thirdly, their balance should be guaranteed in public with opinion control. Therefore, the parliamentary system is sometimes called an expression of public opinion. However, this balance is more convenient to establish on paper than in practice.

As noted by Tomkins (2004), American researcher Jennings emphasized that the function of the parliament is not to rule, but to criticize. Jennings' criticism is aimed not only at the significant change in the government's policy but at the formation of public opinion. The main importance of the Parliament is that the speeches made there echo in society, therefore the power of the Parliament is not in the powers, but in the public opinion, which echoes the parliamentarians. Full and mass public opinion is a unique credit of confidence that allows for avoiding electoral crises or weakening their impact.

Of particular interest is German researcher P. Lösche's opinion that there are two understandings of parliamentarism: narrow and broad. In the first understanding, parliamentarism means the presence of the parliament, which is the expression of the people's interests. The broad interpretation is related to parliamentary parliamentarism, which is based on certain institutions, certain public structures, and socio-political culture. At the same time, it characterizes the impossibility of transferring the mentioned system of parliamentarism to other systems and political cultures.

It is noteworthy that there are also judgments that are identified with the democracy of parliamentarism. Aleman and Yang (2011) expressed an opposite point of view, stressing that if the popular representation does not play a central role in politics, then one can speak of authoritarianism or even "totalitarian parliamentarism."

Even in post-Soviet political and legal science, the concept of "parliamentarism" is interpreted in different ways, although it is generally about the parliamentary system of organization and operation of the supreme state power. In the narrow sense of the word, parliamentarism refers to the supremacy of the parliament, its privileged position, the government's responsibility to it, and in the broad sense, its essential role, that is, its natural functioning as a representative and legislative body endowed with supervisory powers.

In the current complex and controversial phase of post-Soviet transformations and developments, many definitions have been proposed. Some Russian authors characterize parliamentarism as an exclusive state regime, the main distinguishing feature of which is the political responsibility of the government for its activities before the parliament or its lower house.



According to some authors, parliamentarism is a system of political organization of the state, in which the functions of the legislative and executive powers are separated, with the presence of the privileged position of the parliament (Tomkins, 2004; Oleynik, 2020; Yang, 2023; Newman, 2024). The famous American political scientist Juan Linz (1998) defines parliamentarism as a structure with its roots in the medieval form of representation of the people when an assembly was elected, endowed with certain rights and powers, in making decisions within the framework of a specific government and state order. More precisely, parliamentarism is a system in which the only democratic institution is the parliament, and the power of the government is completely dependent on the confidence vote of the parliament.

The aforementioned definitions allow us to distinguish the principles of parliamentarism, the most important of which are: expressing and protecting the interests of all social groups within the population, the primacy of the legislative bodies of the government over others, the subordination of the parliament to the people and its control, the cooperation of the parliament with other bodies of the government.

The Parliament acts as the highest representative body of the government, not formally, but in reality. It includes the parliament itself and, in addition, a whole system of political, legal, and moral factors of different levels, with the help of which societal life is essentially regulated. There is no doubt that democratization is impossible without the development and improvement of representative forms of exercise of power by different social strata of society, that is, without parliamentary democracy.

Democracy, if we do not mean only its specific form, is a rather variable phenomenon that takes various concrete forms in different periods of its development. For example, J. Madison, one of the founders of American democracy, considered it a compromise of majority rule to minority rule, which can be achieved by the equality of all adult citizens in the political process, on the one hand, and the limitation of their autonomy, on the other (Morgan, 1988).

Such expressions as “presidential government system” and “parliamentary government system” are often used in scientific circulation. In our opinion, it would be more correct to talk about presidential, semi-presidential, and parliamentary forms of government. Parliamentarism is a variety of forms of government, but not a form of government in the political and jurisprudential sense of the word. It is characteristic that in several countries the parliamentary system is fully compatible with such a form of government as a constitutional monarchy, and is often called “parliamentary monarchy.”

In our opinion, it is not enough to understand parliamentarism only as a variety of forms of government. Parliamentarism is a multidimensional concept with a complex internal structure consisting of interrelated elements. Although quite often one can come across the expanded interpretation of parliamentarism, its identification with parliamentarian in general, and parliamentarism without parliament – with representative democracy – it is sometimes interpreted as the

ability of a representative body of state power to freely discuss and adopt political decisions in the form of laws (Krylov, 1963). One can agree with this classification or dispute it, however, one thing is indisputable: there is no democracy without parliamentarism, and parliamentarism without parliament.

### **Research Methods**

The investigation of the phenomenon of parliamentarism was conducted using the general scientific methods of comparison and analysis. The main theoretical and methodological foundations of the development of parliamentarism were studied. The main results of the study are given below.

### **Results**

The existence of the parliament itself in the system of state power bodies does not mean the existence of parliamentarism with solid foundations, that is, for parliamentarism the people's representative body must be endowed with certain characteristics, among which are:

- 1) the election of parliament members in free general elections, which is the main guarantee of the high level of representativeness of the given state body,
- 2) autonomy and independence in the system of separation of powers,
- 3) the high level of powers of the parliament in solving issues of state administration and in the law-making process.

Parliaments of all countries have similar functions within known limits, their main role in the system of state power is as follows:

- firstly, the parliament is the national supreme state body for popular representation and institutionalization of the interests, political orientations, and sentiments of the people. It performs the most important function of uniting the sovereignty of the people with the state power, it points to the real source of power. It is the people's representation that gives the state administration system a democratic character, and the parliament itself a wide social reach and openness;

- secondly, the parliament performs a legislative function. It is with this function that the principles of popular sovereignty and democratic parliamentarism are realized. It is the parliament that creates the foundation for the normative-legal provision of the legal state, human activity, and society in general;

- thirdly, as a representative body, the parliament is an important institution in the trinity of the separation of powers and has real opportunities to influence each component of the trinity, and at all levels of state power. Bringing up social demands, concentrating and classifying public interests, and expressing them freely make the parliament a public platform for mitigating the contradictions between different bodies of power, the state, and civil society. Parliament is the only place in the system of state power for public protection of the interests of different classes, social strata, and groups of society;

- fourthly, the parliament is the most important element of the formation, legal provision, and practical implementation of the state's foreign policy. The active foreign political activity of members of the parliament is a necessary condition for effective and authoritative parliamentarism.

- fifthly, it is important to take into account that the parliament has certain powers to control the activities of the government and other higher bodies of state power, to course-correct them. Of course, the supervisory functions of the parliaments of different countries are not the same. However, they necessarily exist. Without parliamentary control as the most important form of social control, it is difficult to talk about the legal nature of the state and democracy,

- and lastly, the ideological function. Legislatures, acting as a pillar of democracy, convince citizens of the advantages of the existing order or vice versa; these goals are served by parliamentary media publications, campaign speeches and visits in the country and abroad, transformation of public opinion by mass media, work with voters, etc.

In addition to performing certain functions, the parliament, as a key element of parliamentarism, must also possess certain qualitative characteristics without which parliamentarism as a system cannot take place. These are the rule of law, the relative independence of the parliament, the clear division and balancing of the powers of all branches of government, the existence of a system of mutual checks and balances, representativeness, a fairly high level of legislative legality, the ability to ensure the rights and freedoms of citizens.

Judging the nature of representative government, which is the essence of parliamentarism as a political system, the famous English philosopher-jurist J. Mill emphasized the importance of the people's direct participation in law-making activities, posing the representative principle as an alternative to bureaucracy (Selinger, 2019). The liberal principle of representative government is conditionally connected with the formation of parliamentarism and provides the possibility of public control over the governing bodies by the powers of the parliament.

The most common and best system is elective representation. This representation provides a real opportunity to reflect all changes in public interests and sentiments within the state institutions. Only elected popular representation can guarantee that the right granted by the state always corresponds to popular jurisprudence, the social origin of any right.

Elective representation should be understood in broad and narrow senses. In the first case, the system of representation will include all state bodies and officials in whose election the population of the republic participates in one way or another. Such an interpretation is based on the feature of the electability of state power bodies by citizens. In the second case, representation means the creation of collegial bodies, which are composed of representatives elected by the people, that is, bodies that belong to the legislative arm of the government. It is the elective representation that is at the basis of the modern parliamentary (party) system, the starting point of which is the idea that the people's representatives, being more authoritative and more correct than anyone else, express the people's needs and desires, can more thoroughly solve state problems and affairs, as well as claim the election of the persons to whom direct management is assigned (Yang, 2023). Moreover, society expects from their representatives not abstract, fruitless philosophical judgments, but concrete knowledge and skillful, calculated

rational actions; not crowd-pleasing appeals and slogans, but impartiality and clear confirmation of facts. By the way, this requirement completely refers to the language of parliamentary speeches, which should be brief, concise, proportionate, and without excessive sensitivity.

In the professional literature, three key meanings of the fundamental principles of parliamentarism are distinguished:

- 1) delegation of powers,
- 2) representation,
- 3) being a symbol.

Fully agreeing with this point of view, we believe that people's representation as a true symbol of democracy should include not only the right to free choice of representatives and the delegation of powers but also the real public possibility to control the activities of their representatives.

It is known that the composition of the parliament is formed by the will of the people. It means that the supreme power belongs to the people and that the parliamentary power acts as the power authorized by the people. Accordingly, the parliament embodies the sovereignty of the people – it is meant to express the will of the people and rank the interests. As for “characteristics,” there is the fact that the parliamentary representation, in general, should represent a unique model of society. Therefore, only with this type of representation is the parliament able to adequately reflect the interests of the people, to take into account the entire diversity of people's moods and opinions, the entire spectrum of cultures and traditions, especially when the electorate is multi-ethnic.

To deeply understand the essence of democracy, it is equally important to correctly interpret representation as a “symbol.” Parliament symbolizes democracy, and in the event of a threat to the democratic order, it is the parliament, as a symbol of that order, that is the first to be hit.

Thus, political participation is only an “external” characteristic of parliamentarism, while its main components are primarily the functioning of representative institutions and the nature of their interaction with other elements of the political system, as well as civil society. We can talk about the existence of parliamentarism only in the conditions of the existence of a special system, when it has the opportunity to perform its functions, not formally, but in fact, thereby occupying its adequate place in the country's political system (Oleynik, 2020).

In our opinion, many of the modern definitions of parliamentarism lack the requirement of the existence of a system of parliamentary-type parties as an independent essential characteristic of this phenomenon.

In political science, a party means an organizationally united group of people whose main goal is to fight for political power and achieve it. To fulfill their main task, the party structures actively participate in the elections, and their representatives form the composition of the parliament, essentially delegated by the electorate. During their parliamentary activities, parties contribute to the performance of one of the main functions of that body of power, which is combined with their immediate task, which is to represent interests. In other

words, it can be said that the parliament performs its function through the practical activities of political parties, and this indicates their close interdependence. Apart from that function, the parliament is endowed with governmental authority. It also becomes a reality in the case of direct participation of parties, whose political programs are transformed into parliamentary decisions, which define the tactics of the state's further development, at the same time preparing the ground for adopting a law (Newman & Robins, 2024).

Without detailing the nature and classification of parties, we should mention that according to M. Duverger (1977), parliament and government are like two machines that are operated by one engine, the party. The executive and legislative authorities are a constitutional veil the party manages all the power.

The concept of “parliamentarism,” as mentioned above, is extremely comprehensive. Only in the presence of the inseparable unity of such characteristics and conditions, such as the institution of representative (legislative) power, which is formed with the participation of political parties based on free elections and expresses the interests of the entire society, the constitutionally fixed principle of separation of powers, mastery of the principle of the rule of law, the existence of civil society characterized by democracy and a high legal and political culture of citizens, we can talk about the existence of parliamentarism as a state of solidarity between the parliament, society, the people's representative and executive power (Newman & Robins, 2024).

According to our definition, parliamentarism is a special system of organization and operation of state power, based on the principle of separation of powers and the rule of law, with a formally privileged position of the parliament, which is elected by free elections with the participation of political parties.

We highlight the most important elements of parliamentarism.

- following the principle of separation of powers,
- unconditional supremacy of law,
- the existence of a legislative and representative institution in the society, the parliament,
- the democratic process of forming the parliament and its publicity.

In that context, the problems of the separation of powers are seen again and again today.

### **Conclusion**

Thus, based on the research, the following main conclusions can be drawn:

1. Without a truly functioning parliament and parliamentarism, it is impossible to build a democratic legal state, create an effective system of legislation and law, and form and develop the fundamental elements of civil society, especially political parties.

2. The principle of representation, the electoral system, through which this principle is implemented, will embody the spirit and essence of democracy only when their equality is recognized and implemented in the field of participation of citizens in political processes.

3.. The most important principles of parliamentarism are expressing and

protecting the interests of all social groups of the population, the primacy of the legislative bodies of the government over others, the subordination of the parliament to the people and its control, the cooperation of the parliament with other bodies of the government.

4. It is not enough to understand parliamentarism only as a variety of forms of government. Parliamentarism is a multidimensional concept with a complex internal structure consisting of interrelated elements.

5. The existence of the parliament itself in the system of state power bodies does not mean the existence of parliamentarism with solid foundations. For parliamentarism, the people's representative body must have the following characteristics:

- 1) the election of parliament members in free general elections, which is the main guarantee of the high level of representativeness of the given state body,
- 2) autonomy and independence in the system of separation of powers,
- 3) the high level of powers of the parliament in solving issues of state administration and in the law-making process.

### References

1. Alemán, J., Yang, D. D. (2011). A Duration Analysis of Democratic Transitions and Authoritarian Backslides. *Comparative Political Studies*, 44(9), 1123-1151. <https://doi.org/10.1177/0010414011405460>
2. Burdeau, G. (1949). *Traité de science politique*. Paris,: Librairie générale de droit et de jurisprudence.
3. Duverger, M. (1977). Political institutions and constitutional law. *Anthology of World Political Thought*, 2, 64-65.
4. Hill, D. (2019). The Gospel of Luke. <https://www.gracenotes.info/luke/luke.pdf> (Retrieved: 25.02.2025).
5. Jaspers, K. (2011). *The origin and goal of history*. Routledge, ISBN: 9780415578806.
6. Kelly, D. (2004). Revisiting the Rights of Man: Georg Jellinek on Rights and the State. *Law and History Review*.22(3),493-529.doi:10.2307/4141687
7. Kirby, J. (2018). A. V. Dicey and English constitutionalism. *History of European Ideas*, 45(1), 33-46. <https://doi.org/10.1080/01916599.2018.1498012>
8. Linz, J. J. (1998). Democracy's Time Constraints. *International Political Science Review / Revue Internationale de Science Politique*, 19(1), 19-37. <http://www.jstor.org/stable/1601292>
9. McReynolds, K. (2016). "The Gospel of Luke: A Framework for a Theology of Disability". *Christian Education Journal*,13(1),169-178.doi:10.1177/073989131601300111
10. Morgan, R., J. (1988). *James Madison on the Constitution and the Bill of Rights*. New York: Greenwood Press.
11. Newman, D, Robins, J. (2024). Access to justice and the role of parliamentarians: what happens to those who fall through the justice gap? *Legal Studies*, 44(2), 221-241. doi:10.1017/lst.2023.19
12. Parenti, M. (2007). *Democracy for the few*. Cengage Learning, 8th edition, ISBN: 9780495007449
13. Popper, K. (2011). *The Open society and its enemies*. Routledge, ISBN: 9780415610216.
14. Rostow, W. (2009). *Politics and stages of growth*. Cambridge University Press. <https://doi.org/10.1017/CBO9780511562778>

15. Schoenbeck, A. (2023). The Gospel of Luke: Major Themes, Narratives, and Theology. Biblical Studies Student Projects, 7. <https://pillars.taylor.edu/biblical-studies/7>
16. Selinger, W. (2019). Parliamentarism: From Burke to Weber. Cambridge University Press.
17. Tocqueville, A. (1835). Democracy in America. Vol 1. London: Saunders and Otley, <https://www.gutenberg.org/files/815/815-h/815-h.htm>. (Retrieved from: 21.01.2025).
18. Tomkins, A. (2004). “Talking in Fictions”: Jennings on Parliament. The Modern Law Review, 67(5), 772–786. <http://www.jstor.org/stable/3699225>
19. Tran, T. T. (2024). Unveiling the Essence of University Education: A Critical Analysis of Karl Jaspers’ Existential Approach. European Journal of Social Sciences Studies, 9(6), 232–252. 10.46827/ejsss.v9i6.1720
20. Waqas, S. (2019). Life Story of Jesus in Luke’s Gospel. 10.13140/RG.2.2.28691.30241.
21. Yang, M. (2023). The Perils of Parliamentarism in Contrast to Presidentialism in Democratic Transition. Lecture Notes in Education Psychology and Public Media, 21(1), 20–24. <http://dx.doi.org/10.54254/2753-7048/21/20230035>.
22. Бердяев, Н. (2012). Философия неравенства. Москва, Институт русской цивилизации. [Berdyaev, N. (2012). Philosophy of inequality, Moscow. Institute of Russian civilization, in Russ.].
23. Крылов Б.С. (1963). Парламент буржуазного государства. Политическая сущность и формы парламента и парламентаризма на современном этапе, Москва: Изд-во ИМО. [Krylov, B. S. (1963). Parliament of the bourgeois state. Political essence and forms of parliament and parliamentarism at the present stage, Moscow. in Russ.]
24. Олейник, И. И. (2020). Соотношение парламентаризма и конституционного принципа народовластия: теоретико-правовой аспект. Право и политика., 1, 1–24. DOI: 10.7256/2454-0706.2020.1.27662, URL: [https://nbpublish.com/library\\_read\\_article.php?id=27662](https://nbpublish.com/library_read_article.php?id=27662) [Oleynik, I. I. (2020). Correlation between parliamentarism and the constitutional principle of democracy. Law and Politics, 1, 1–24. <http://dx.doi.org/10.7256/2454-0706.2020.1.27662>. In Russ.]

*The article has been submitted for publication: 22.01.2025*

*Հոդվածը ներկայացվել է տպագրության. 22.01.2025*

*The article is sent for review: 13.02.2025*

*Հոդվածն ուղարկվել է գրախոսության. 13.02.2025*

*The article is accepted for publication: 31.03.2025*

*Հոդվածն ընդունվել է տպագրության. 31.03.2025*

ՀԱՅԱՍՏԱՆԻ ՀԱՆՐԱՊԵՏՈՒԹՅԱՆ ԳԻՏՈՒԹՅՈՒՆՆԵՐԻ ԱԶԳԱՅԻՆ ԱԿԱԴԵՄԻԱ  
NATIONAL ACADEMY OF SCIENCES OF THE REPUBLIC OF ARMENIA

ԳԻՏԱԿՐԹԱԿԱՆ ՄԻՋԱԶԳԱՅԻՆ ԿԵՆՏՐՈՆ  
INTERNATIONAL SCIENTIFIC-EDUCATIONAL CENTER

**ԿԱՃԱՌ / ԱԿԱԴԵՄԻԱ**  
**ՀԱՍԱՐԱԿԱԳԻՏԱԿԱՆ ՊԱՐԲԵՐԱԿԱՆ**

**1**

**KATCHAR / ACADEMIA**  
**SOCIAL SCIENCE PERIODICAL**

Համարի թողարկման պատասխանատու  
և գլխավոր խմբագիր՝ ՆԱԻՐԱ ՀԱԿՈԲՅԱՆ

Չափսը՝ 70X100 1/16  
Ծավալը՝ 11.5 պայմ. տպ. մամուլ  
Գինը՝ պայմանագրային

Համակարգչային ձևավորումը՝ «Ալվարդ Օհանջանյան Վ.» ԱԶ  
Տպագրվել է՝ «ՆՈՒՍ» տպագրատանը («Գեղամ Հովհաննիսյան» ԱԶ)



