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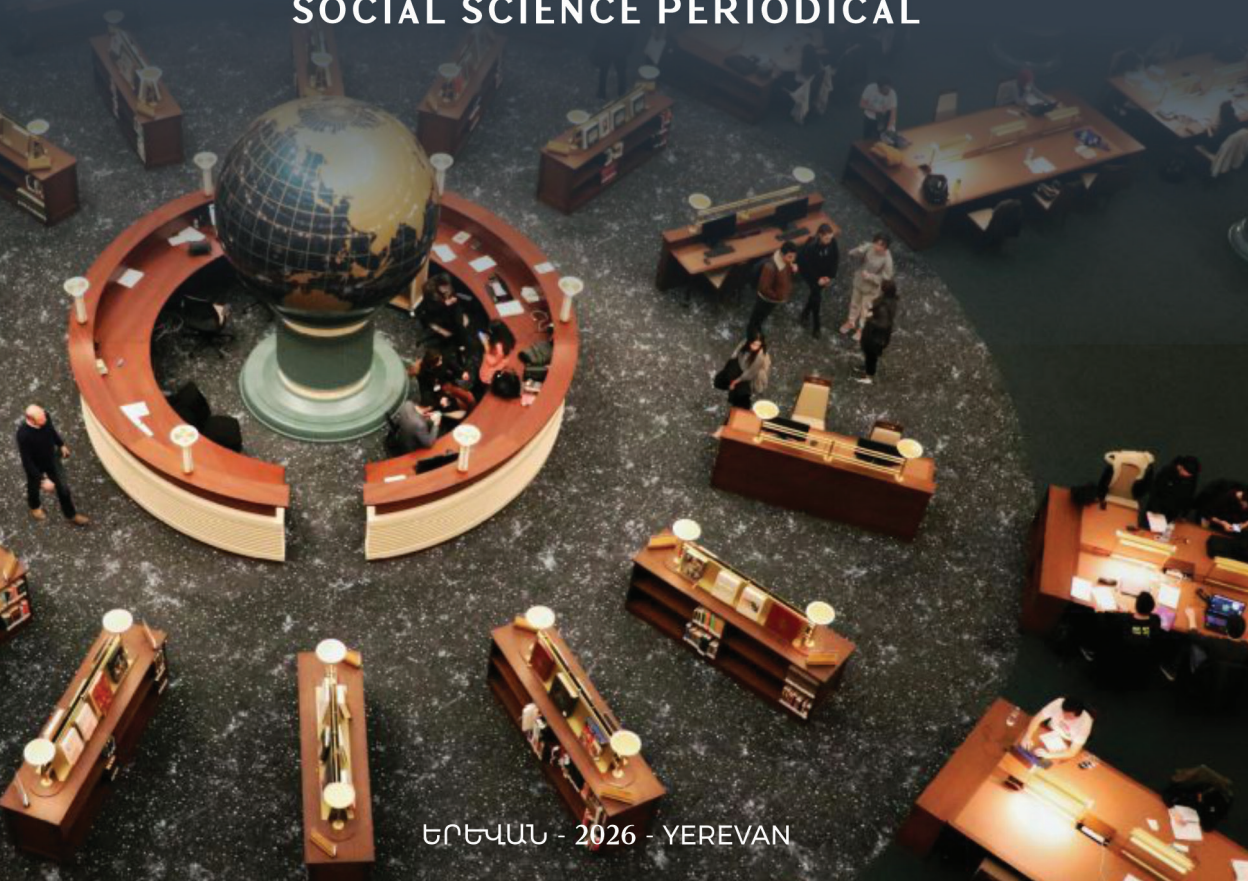
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Abstract

The article discusses the problem of a person's innovative behaviour in the context of social sustainability assessments. The article presents the history of the study of innovative behaviour and its development prospects. Innovative behaviour is characterised by an accidental feature and is presented as an integral part of a person's value system. The innovative features and characteristics of behavior are considered when studying the processes of intra-team interaction of a person in the work environment. The opinions of a number of authors on the functional definitions of innovative behaviour are analysed. Among the intra-team characteristics of innovative behaviour presented in the article, a number of features stand out, such as goal-orientedness, creativity, flexibility, independence in decision-making and the use of alternatives. The study considered innovative behaviour in the context of social sustainability characteristics, such as quality of life, social cohesion, a sense of belonging, intra-team trust, and career development. The characteristics of innovative behaviour and social sustainability

were studied in two age groups of employees. The results of the experimental study indicate a high level of interdependence of the phenomena under study, which is especially evident in the expression of positive correlations between the characteristics of social sustainability in the quality of life and career development and the characteristics of innovative behaviour. The results of the study allow us to assess the fundamental problem of social sustainability in a new way, considering it in the context of the development of modern society and the value transformations of individual needs manifested in innovative behaviour.

Keywords: Innovative behaviour, social sustainability, values, accidental feature, social cohesion, goal-orientedness, quality of life

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Համառոտագիր

Հոդվածում քննարկվում է անձի իննովացիոն վարքագծի հիմնախնդիրը սոցիալական կայունության գնահատումների համատեքստում: Հոդվածում ներկայացված են իննովացիոն վարքագծի ուսումնասիրման պատմությունը

և զարգացման հեռանկարները: Իննովացիոն վարքագիծը բնութագրվում է դիպվածայնությամբ և ներկայացվում՝ որպես անձի արժեհամակարգի բաղկացուցիչ մաս: Վարքագծի իննովացիոն հատկանիշներն ու բնութագրերը դիտարկվում են աշխատանքային միջավայրում անձի ներթիմային փոխգործակցության գործընթացներն ուսումնասիրելիս: Վերլուծվում են մի շարք հեղինակների կարծիքները իննովացիոն վարքագծի գործառույթային սահմանումների վերաբերյալ: Հոդվածում ներկայացվող իննովացիոն վարքագծի ներթիմային բնութագրերից առանձնանում են մի շարք հատկանիշներ, ինչպիսիք են նպատակադրվածությունը, ստեղծագործականությունը, ձկունությունը, որոշումներ կայացնելու անկախությունը և այլընտրանքների օգտագործումը: Իննովացիոն վարքագիծը դիտարկվել է սոցիալական կայունության բնութագրերի համատեքստում, ինչպիսիք են՝ կյանքի որակը, սոցիալական համախմբվածությունը, պատկանելիության զգացումը, ներթիմային վստահությունը և կարիերայի զարգացումը: Իննովացիոն վարքագծի և սոցիալական կայունության բնութագրերն ուսումնասիրվել են աշխատակիցների երկու տարիքային խմբերում: Փորձարարական հետազոտության արդյունքները վկայում են ուսումնասիրվող երևույթների փխկապվածության բարձր մակարդակի մասին, որն հատկապես երևում է կյանքի որակի և կարիերայի զարգացման սոցիալական կայունության բնութագրերի և իննովացիոն վարքագծի հատկանիշների դրական կորելացիոն կապերի արտահայտվածությամբ: Հետազոտության արդյունքները թույլ են տալիս նորովի գնահատելու սոցիալական կայունության հինալսնդիրը՝ այն դիտարկելով իննովացիոն վարքագծում դրսևորվող ժամանակակից հասարակության զարգացման և անձի պահանջմունքների արժեքային տրանսֆորմացիաների համատեքստում:

Բանալի բառեր՝ իննովացիոն վարքագիծ, սոցիալական կայունություն, արժեքներ, դիպվածային հատկանիշ, սոցիալական համախմբվածություն, նպատակադրվածություն, կյանքի որակ:

Introduction

It is no secret that in a transforming society, along with the restructuring of social relations and institutions, the behaviour of the individual is also transformed. In the current conditions of the development of society and the individual, innovative behaviour is characterised not only as a structural component of the psyche of the individual, but is also considered an important value factor of social sustainability. To understand it, it is necessary to present the social environment in which such characteristics of the individual's behaviour as initiative, situational understanding, and the ability to find solutions become required. Modern studies of innovative behaviour are mainly interdisciplinary and span the full spectrum of social sciences. Through the behavioural component of a person's vital activity, it is possible to reveal the level of intragroup cohesion in the sphere of interpersonal communication, the value factors of the social sustainability of the

communication field, and, more generally, the individual's external communication areas in the social environment. Modern studies of innovative behaviour are largely concerned with the transformations of value factors of behaviour. Of these factors, the most important are behavioural models and norms aimed at shaping the forms of interpersonal communication of employees in the workplace and social sustainability.

Theoretical and Methodological Bases

Although the term innovative behaviour began to circulate at the beginning of the 20th century, it has only recently been introduced into the psychological sciences. As is known, Schumpeter considered innovative behaviour at the beginning of the previous century within the framework of economics (Alsayegh et al., 2020; Abad-Segura et al., 2019; Mensah, 2019). Gradually, the emergence of new market relations and economic entities allowed the term to take on broader social interpretations and make sense from the perspective of individual behaviour. Thus, Akmal and Mehmood (2020) developed an interpretation of innovation as the result of acquiring new knowledge and innovative activity applied in various social spheres. According to Lukes and Stephan (2017), individuals and groups master innovation processes, depending on numerous socio-psychological factors. And according to Parveen and Vasudeva (2024), innovative behaviour, and, in general, the appreciation of innovations, is considered a determining factor in the character, activity and direction of a person's activity.

In the process of forming social sustainability in the field of interpersonal communication, the issues of legal and social support for innovative behaviour and the development of technologies for organising innovative activity are of greater importance (Pusparini & Aryasa, 2021; Wamsler et al., 2017). Value factors of social sustainability of the communication field and, more generally, the external communication field of a person's external communication within the social environment (Han, 2021; Hakobyan et al., 2024; Bysted, 2013).

We share Hutchison's (2018) view that psychological, pedagogical, and social sciences have not yet developed a unified understanding and interpretation of innovative behaviour. In scientific forums, this term is mainly examined as an initiative type of individual or collective behaviour, which is associated with the systematic mastery and application of new means of activity.

The process of identifying values and forming a value system contributes to the clarification of a person's attitudes, needs and expectations. The identified and realised values become preferable and acquire a stable, consistent nature. The long-term process of forming a value system includes the study and evaluation of existing values, a new perception and appreciation of self-expression at the workplace. A necessary condition is the presentation and circulation of a person's newly formed positions and opinions of a person in society so that they become socially important, stably manifested, and acceptable (Hakobyan & Khachatryan, 2022a; 2022b).

Thus, a person's value system is formed under social relations and is mutually conditioned by them. It does not at once turn into abstract ideas about society and the world, but rather appears as a certain structure based on the principle of the primacy of values. This principle is the most important characteristic of the formation of a person's value system and social sustainability. The acceptance of any value by a person already implies the classification of the entire system according to the principle of primacy in a given situation. In such conditions, innovative ways of orienting themselves in a given situation are formed (Ebrahim et al., 2023; Bawuro et al., 2019).

The multi-layered structure of the value system allows for the implementation of various functions. Values, being the basis for the formation and classification of a person's positions, help a person to occupy a certain social position and are formed during the socialisation of a person, the formation of social sustainability (Ashrafi et al., 2020). Innovative behaviour expresses certain social relations. Looking at them from the point of view of social functions, it can rightly be concluded that the manifestation of innovative behaviour is expressed in changing and developing relationships between people (AlEssa & Durugbo, 2021).

The nature of innovative behaviour cannot be revealed in depth unless the value functions of its social sustainability are investigated and, accordingly, the systematic analysis is supplemented with a functional analysis. This need arises because innovative behaviour is socially valued and therefore has a systemic-functional nature. Because the concept of "function" is ambiguous, we conventionally understand it as the systemic designation that appears in a person's social roles (Al-Omari et al., 2020).

Thus, innovative behaviour can be characterised as a phenomenon that is expressed in social systems, since it does not exist outside of society. For this reason, it is necessary to distinguish between general (typical) and specific (innovative) functions of behaviour, or between certain innovations of typical behaviour.

General functions are associated with systemic patterns expressed in parallel with the socialisation of a person. The following important functions of innovative behaviour can be distinguished, which are also important in the context of the formation of a person's value system:

1. Integrative function: by integrating the behaviour and activities of individuals, their thoughts and feelings, and directing the efforts of social groups and institutions, behaviour aimed at integration can support the social sustainability of a given society.
2. Regulatory function: national cultural ideas, stereotypes and traditionally repeated activities act as regulators of people's behaviour. In this context, innovative behaviour contributes to the creation of new stereotypes or the reinterpretation of old ideas.
3. Communicative function: innovative behaviour serves as a means of

communication between individuals. Driven by the need to modernise social values, it can be strengthened within a society and transmitted across generations, ensuring the sustainability of the value system adopted by society (Tolić et al., 2022).

Innovative behaviour can also be considered in the “accidental” type. It can become relevant in certain social conditions. In our time, these are, for example, emergency or conflict situations. Such behaviour can also be periodically updated. However, the process of forming innovative behaviour is not unambiguous. Innovative behaviour is understood as having numerous functions: the function of stabilising social ties, the translation of social experience, the transfer of information, the constructive and constitutional functions, the functions of culture-forming and regulating social relations, in general, the multi-layered functions of forming a value system (Kharima et al., 2023; Javed et al., 2019; De Vos et al., 2018).

Institutional forms of innovative behaviour are encountered in the process of communication, as a result of which public opinion is formed regarding the phenomenon. When studying it, it is possible to distinguish the ideas of different gender-age, educational and social groups around the problem. Thus, it becomes possible to identify the various functions of the innovative activity of individuals in society and give a socio-psychological assessment of this phenomenon. Therefore, the framework of the functions of innovative behaviour is outlined by the conceptual and symbolic system of the individual, which is expressed in the «person – society» relationship (Mutmainnah et al., 2022; Panda et al., 2020; Saracevic & Schlegelmilch, 2021).

Under these interpretations, innovative behaviour is characterised by such features as contingency and situational orientation. Such behaviour appears in the context of a problem of vital importance, and is valued by both the individual and society as innovative in its style and method of solving the problem. In other words, behaviour can be characterised as innovative if the contingency and innovation present in the behaviour become recognisable (Stanitsas et al., 2021; Yu et al., 2018; Stanitsas et al., 2021).

Methodology and Methods

To study the characteristics of innovative behaviour, such as the ability to quickly navigate, adapt to the pace of change, flexibility, and determination, we conducted a study among two age groups of service industry employees (20–35 years old and 40–55 years old). Employees from 15 companies operating in the Republic of Armenia participated in the study. The total sample size was 84 employees (N=40 in the first age group and N=44 in the second age group). The aim of the study was to classify work behaviour as innovative and highlight the social sustainability functions of innovative behaviour within employees’ value systems.

The study was based on classifying the formation of an employee's value system by core and instrumental values. The first group includes universal, moral norms that are clearly valued in any culture. These include human dignity, love, friendship, equality, etc. The second group includes values with specific behavioural significance, primarily expressed in the form of behavioural characteristics; they are more flexible and changeable, depending on the specific social situation. These include values expressed in terms of «loyalty,» «politeness,» «awareness,» and other characteristics. The development of this group of values largely depends on the assimilation of new experiences and is subject to change.

Results

At the end of the study, the results obtained showed a positive correlation between the manifestation of innovative behaviour and social sustainability in the context of the formation and development of a person's value system (Figures 1-2).

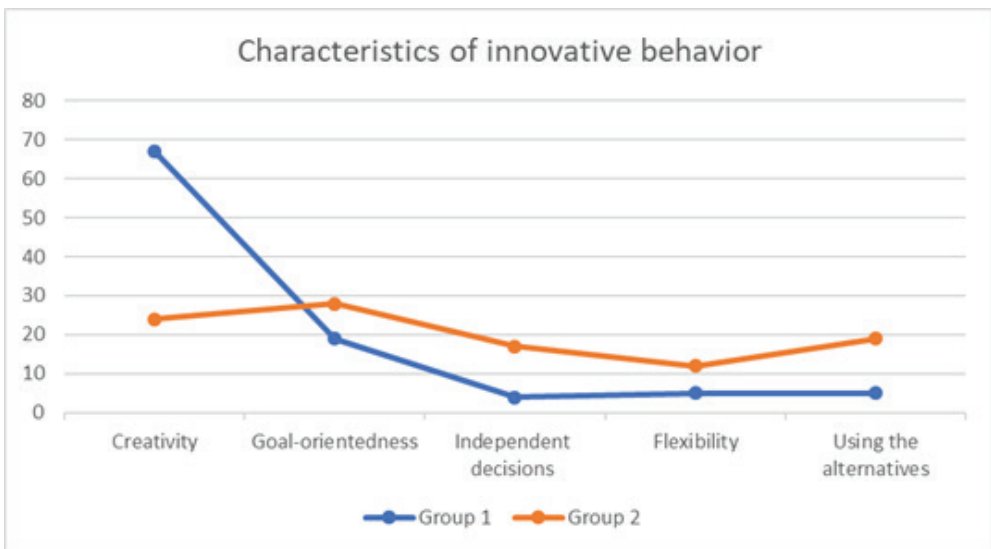


Figure 1. Per cent characteristics of innovative behaviour

If, in the first age group, only the characteristic of creativity dominated the behaviour of employees, then in the second age group, goal-orientedness, the ability to make independent decisions and follow through on those decisions, as well as flexibility in decisions made in response to changes in the situation and the use of alternatives were more pronounced.

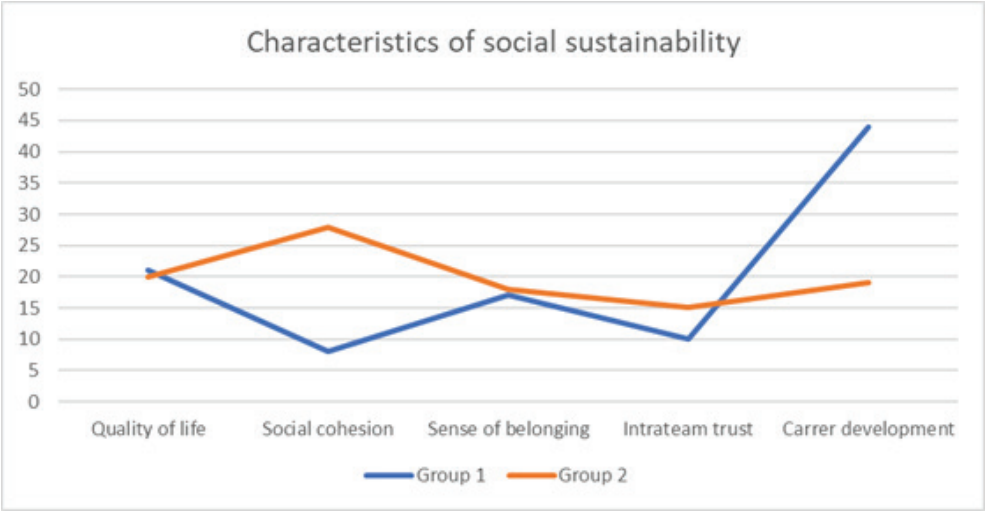


Figure 2. Per cent characteristics of social sustainability

Among the social sustainability characteristics, the largest age differences were observed in the percentage scores for social cohesion and career development. In the second age group, the social cohesion score increased compared to the first age group. Conversely, the career development score was most pronounced in the first age group.

Correlation ties between characteristics of innovative behaviour and social sustainability were revealed using the Spearman rank correlation coefficient (Table 1).

Table 1.

Correlation ties between characteristics of innovative behaviour and social sustainability

Characteristics	Quality of life	Social cohesion	Sense of belonging	Intra-team trust	Carrer development
Creativity	.230*	.356	.114	.206	.589***
Goal-orientedness	.768***	.402*	.461*	.771**	.698***
Independent decisions	.684*	-.414*	-.510*	-.122*	.599**
Flexibility	.587**	.381*	.320*	.558*	.784***
Using the alternatives	.739***	.265	.381	.340	.801***

As Table 1 shows, all characteristics of innovative behaviour show positive correlations with social sustainability indicators such as quality of life and career development. The characteristic of independent decision-making negatively impacts the level of social cohesion, sense of belonging, and intra-team trust. The obtained results allow us to draw the following conclusions.

Conclusion

We examined the process of forming the value factors of social sustainability from the perspective of the vital activity of innovative behaviour. The results of the above-mentioned study document the more vivid expression of innovative behaviour along with the development of a person's social sustainability and value system. It can also be assumed that the manifestation of innovative behaviour is so highly valued personally and accepted socially that it has become a prerequisite for socialisation and an integral part of a person's social sustainability.

From a socio-psychological perspective, the forms and methods of employee interaction with colleagues are part of a value system that takes on the connotation of innovative mediation. This characterises the specific influence of innovative behaviour on the formation of an individual's value system, the regulation of labour relations, and the perception of social sustainability. Thus, studying the functions of innovative behaviour aimed at social development serves as the basis for further in-depth research into the individual's value system.

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CREATIVITY AND MOTIVATIONAL ORIENTATIONS: SEX DIFFERENCES AMONG MANAGEMENT PROFESSIONALS¹

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Abstract

The article is devoted to the study of creativity, its criteria, the personality traits facilitating its manifestation, and the interrelationships between creativity and motivational orientations among female and male professionals in the field of management. Of the study participants, 52 were women, and 40 were men. The findings showed that, compared with men, women demonstrated higher scores in fluency, flexibility, originality, elaboration, overall creativity, complexity, risk-taking ability, and creativity self-assessment. The study also found that the structure of the interrelationships between creativity and motivational orientations differ between women and men. Among women, the creativity indicators are positively correlated with the motivational orientations of altruism and power. In contrast, among men, they are negatively correlated with result orientation, work orientation, and process orientation.

Keywords: Creativity, sex differences, motivation, interrelationships, management.

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ՍՏԵՂԾԱՐԱՐՈՒԹՅԱՆ ԵՎ ՄՈՏԻՎԱՅԻՈՆ ՈՒՂՂՎԱԾՈՒԹՅՈՒՆՆԵՐԻ ՍԵՌԱՅԻՆ ԱՌԱՆՁՆԱՀԱՏԿՈՒԹՅՈՒՆՆԵՐԸ ԿԱՌԱՎԱՐՉԱԿԱՆ ՈԼՈՐՏԻ ՄԱՍՆԱԳԵՏՆԵՐԻ ՄՈՏ²

ՍՈՆԱ ՊՈԳՈՍՅԱՆ

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Համառոտագիր

Հոդվածը նվիրված է ստեղծարարության, դրա չափորոշիչների, դրսևորմանը նպաստող անձնային որակների և մոտիվացիոն ուղղվածության փոխկապվածությունների ուսումնասիրությանը կառավարման ոլորտի կին և տղամարդ մասնագետների շրջանում: Հետազոտությունը մասնակցել են 52 կին և 40 տղամարդ: Հետազոտության արդյունքները ցույց տվեցին, որ կանանց շրջանում, ի տարբերություն տղամարդկանց, ավելի բարձր են արագության, ձկունության, յուրօրինակության, մշակվածության, ստեղծարարության, բարդության, ռիսկի հակվածության, ինքնագնահատման ցուցանիշները: Պարզվել է նաև, որ կանանց և տղամարդկանց շրջանում ստեղծարարության և մոտիվացիոն ուղղվածությունների փոխկապվածությունների կառուցվածքը տարբերվում է: Կանանց շրջանում ստեղծարարության ցուցանիշները դրական են՝ փոխկապված ալտրոիզմի և իշխանության մոտիվացիոն ուղղվածության հետ: Տղամարդկանց շրջանում բացասական են՝ փոխկապված արդյունքի, աշխատանքի և գործընթացի հետ:

Բանալի բառեր՝ Ստեղծարարություն, սեռային տարբերություններ, մոտիվացիա, փոխկապվածություն, կառավարչական ոլորտ:

Introduction

Modern managerial activity requires not only professional knowledge but also creative thinking, the ability to make unconventional decisions, and an effective motivational system. Creativity is an important characteristic of the modern professional, enabling them to respond to continuous changes, adapt creatively, and thereby increase the effectiveness of their professional activity. However, creativity often enables an individual not only to adapt quickly and

2 Աշխատանքն իրականացվել է ՀՀ ԿԳՄՍ նախարարության Բարձրագույն կրթության և գիտության կոմիտեի աջակցությամբ՝ 25RG-5A220 գիտական նախագծի շրջանակում «Անձի ստեղծարարության հոգեֆիզիոլոգիական առանձնահատկությունները և դրա զարգացման հոգեբանական մոդելները»

easily to changes and overcome uncertainty, but also to develop new methods and new tools. Despite the relevance and necessity of studying individual creativity, and the existence of various theoretical approaches, the relationships among the structural components of creativity, creative personality traits, and motivational orientations among male and female professionals remain insufficiently explored. In particular, there is a limited number of studies that combine the different components of creativity and the individual's motivational system within the context of managerial activity. This circumstance determines the relevance of the present study.

Theoretical Basis

Creativity is examined within the framework of various theoretical approaches. However, in the context of managerial activity, the most widely recognised theories include T. Amabile's Componential Model, Sternberg and Lubart's Investment Theory, as well as M. Csikszentmihalyi's Systems Model. The following observation on creativity is noteworthy, according to which Creativity plays a fundamental role in the advancement of society. It emerges from the dynamic interaction of individual abilities, cognitive processes, and environmental conditions, resulting in products or ideas that are considered both novel and useful within a given social context (Plucker et al., 2004). Consequently, scientific innovation and cultural development are largely driven by the creative efforts of individuals and groups. (Taylor, 2025).

Baer and Kaufman consider creativity a multifactorial phenomenon, the manifestation of which is determined not only by an individual's creative abilities but also by intelligence, motivation, professional knowledge, and the social environment in which creative activity develops and is evaluated. According to the authors' proposed APT (Amusement Park Theory) model, the manifestation of creativity requires general prerequisites (intelligence, motivation, and a supportive environment), as well as domain-specific and specialised knowledge that enables creative potential to become actual creative outcomes. (Baer J., Kaufman J. C., 2008) This theory is consistent with R. Sternberg's investment approach, which identifies six factors necessary for creativity: knowledge, thinking style, personal characteristics, intelligence, motivation, and environment. (Sternberg, R. J., 2009)

Nakano and colleagues define creativity as the result of the interaction between an individual's abilities, cognitive processes, and the environment, resulting in an outcome that is both novel and useful for a given society. The authors note that creativity is a multidimensional construct that is characteristic of every individual, although it varies in its degree of expression and across different domains of activity. (Nakano T. de C., Oliveira K. da S., Zaia P., 2021)

At the same time, the authors emphasise the role of external conditions, highlighting that the social and cultural environment can both facilitate and constrain the manifestation of creativity.

In models of creativity, particularly in the context of managerial activity, T. Amabile's approach is of particular importance, according to which creativity is the unity of three components: domain-relevant skills (expertise), creativity-relevant processes (the ability to think creatively), which depend on specific personal characteristics and determine the flexibility and originality of problem solving, and motivation. The third component is motivation, which may be either intrinsic or extrinsic. T. Amabile stated that employees are more creative when they possess intrinsic motivation. (Amabile, T. M. 2012)

In our proposed model of creativity, creativity is viewed as a systemic quality and includes criteria of creativity, personality traits, factors that facilitate and hinder creativity, and motivation.

Regarding sex differences in creativity, one of the earliest approaches to explaining them is the biological and neuropsychological approach. According to this approach, differences in the creative achievements of men and women may be explained by hormonal characteristics, structural and functional differences in the brain, as well as the characteristics of cognitive processes (Taylor, 2025). In particular, it is assumed that sex hormones, especially different levels of testosterone, may influence brain development and, consequently, the formation of certain mechanisms of creative thinking.

Some authors note that women show a relatively higher degree of cognitive specialisation, that is, more targeted activation of specific brain regions and suppression of others when performing a particular task. In addition, some researchers assume that women have more developed interhemispheric connectivity, which may contribute to more integrated information processing (Abra & Valentine-French, 1991, as cited in Taylor, 2025). Some researchers also suggest that men and women may use different cognitive strategies when performing creative tasks.

However, contemporary studies indicate that these explanations still lack sufficient empirical support. As Taylor (2025) notes, knowledge of the neurobiological mechanisms of creative thinking remains incomplete, and the causal relationship between sex differences in the brain and creativity has not been convincingly demonstrated. Therefore, observed differences in the creative achievements of men and women cannot be explained solely by biological factors.

Another approach to explaining sex differences in creative achievement focuses on personality characteristics and motivation. According to this approach, differences between men and women may be determined less by creative ability than by personality traits and motivational factors that contribute to the realisation of creative potential (Taylor, 2025).

The central premise of these theories is that creative achievement is determined not only by creative ability but also by such personality traits as goal orientation, perseverance, competitiveness, self-confidence, independence, and willingness to take risks (Abra & Valentine-French, 1991; Eagly, 1987). These

characteristics are assumed to contribute to the realisation of creative ideas and their recognition by society.

At the same time, contemporary studies do not confirm that women have lower creative motivation than men. On the contrary, it is assumed that women often realise their creative potential in fields or forms of activity that are less valued by society or receive less public recognition (Reis, 2002; Taylor, 2025).

Baer and Kaufman, having analysed numerous studies conducted over several decades, conclude that no consistent sex differences have been identified in the results of creativity tests between men and women. Moreover, when a certain advantage has been observed, it has more often been in favour of women.

At the same time, the authors note that, in real life, men are more represented in terms of creative achievements across many fields. According to the authors, this contradiction cannot be explained solely by differences in innate creative abilities. It is more likely to be determined by the social environment, educational opportunities, societal expectations, professional barriers, and the characteristics of the evaluation of creative activity.

The authors particularly emphasise that an insufficiently supportive environment, social expectations associated with motherhood, and the fact that many professional fields were long managed and controlled by men have played an important role in limiting women's creative achievements. (Baer J., Kaufman J. C., 2008)

Nakano and colleagues argue that sex differences in creativity cannot be explained solely by the fact of being male or female. Cultural characteristics, age, educational level, the methodologies employed, and factors such as motivation, attitudes, opportunities, and social support also influence the results. (Nakano T. de C., Oliveira K. da S., Zaia P., 2021)

Different patterns may also be observed across specific types of creativity. For example, in several studies, women have demonstrated higher performance on verbal creativity tasks, whereas men have shown higher performance on certain indicators of visual-spatial or mathematical creativity. However, these findings have not been replicated across all studies, further confirming that sex differences depend on the type of creativity assessed and the methodology used.

In contemporary research, the sociocultural approach has received the broadest support, arguing that social and cultural influences primarily determine sex differences in creative achievement. Society-shaped gender roles and expectations often direct women to devote more attention to family and interpersonal relationships, which may limit their opportunities for professional creative activity. (Taylor, 2023, 2025)

Although manifestations of explicit discrimination have significantly decreased in contemporary societies, studies indicate that women still often receive less support, recognition, and encouragement for creative activity. This phenomenon is shaped not only by external constraints but also by gender

stereotypes and unconscious bias about creativity, which may influence the evaluation of creative outcomes are evaluated (Taylor et al., 2020; Proudfoot et al., 2015).

According to Conti and colleagues (2001), the manifestation of creativity is significantly influenced by the relationship between extrinsic and intrinsic motivation, which is also associated with the degree of expression of gender role stereotypes. Studies indicate that intrinsic motivation plays a more significant role in the realisation of creative abilities among women, whereas men's creative performance is more often stimulated by competitive situations (Geary, 1998; Hall, 1990). (Ильин Е. П., 2009, pp.191-192)

The analysis of the above-mentioned studies indicates that a unified perspective on sex differences in creativity has not yet been established. At the same time, contemporary research more frequently emphasises the importance of personality, motivational, and sociocultural factors rather than creative abilities. However, the sex differences in creativity and motivational orientations among professionals working in the field of management remain insufficiently studied, which determines the relevance of the present research.

This article aims to identify sex differences in creativity, creative personality traits, and motivational orientations, as well as the interrelationships among them, among management professionals.

The study's scientific novelty of the study lies in the fact that, for the first time in an Armenian sample, it identifies not only sex differences in creativity, creative personality traits, and motivational orientations, but also the different structures of the interrelationships among these variables in male and female management professionals.

Research Methodology and Methods

The methodological basis of the study was the principle of the unity of personality and activity, as well as the systems approach. The study used a psychometric approach to creativity, which holds that creativity can be measured and has specific criteria. The present study is based on T. Amabile's Componential Model of Creativity, as well as S. Poghosyan's model for the study of creativity (Poghosyan, 2024).

The study used testing and interviews. The following instruments were administered: F. Williams' Divergent Thinking Test, the Creative Personality Traits Test (Tunik, 2003), and O. Potyomkina's Test of Socio-Psychological Attitudes in the Motivational-Need Sphere. The purpose of the interview aimed to determine how important professionals considered creativity in their work, how they used it, and how it helped them.

One hundred middle-level managers participated in the study; however, the data of 92 participants were considered valid. Of the participants, 52 were women, and 40 were men.

The results of the interviews revealed that although all participants consid-

ered creativity important in their professional activity, they used it less frequently. Many of them regarded themselves as not creative; however, the test results indicated a high level of creativity. The most frequently encountered statements during the interviews were: *“I cannot be creative,” “Who needs my creativity?”* and *“It is a luxury that I can afford.”* The interview findings indicate a contradiction between professionals’ positive attitude toward creativity and their assessment of their own creative potential, which is also confirmed by the results of the Creativity Self-Assessment Test results also confirm.

Results and Discussion

The comparison of creativity and its criteria between women and men shows that women demonstrate higher scores in fluency, flexibility, originality, elaboration, and overall creativity (Table 1).

Table 1.

Mean Creativity Scores Among Women and Men

Variable	Female n=52	Male n=40	t	Cohen’s d
Fluency	12	11	2.90	0.61
Flexibility	7	6	3.12	0.66
Originality	27	23	2.89	0.61
Elaboration	16	13	2.61	0.55
Naming	16	16	–	–
Creativity	78	68	3.05	0.64

Higher fluency scores indicate that they generate a greater number of ideas and are able to propose not just one but several appropriate responses to a given question. Flexibility scores indicate that women generate a large number of ideas and a wide variety of ideas, shifting from one category to another, and being capable of approaching problems through unconventional paths. Flexibility enables individuals to avoid repetition and stereotypical thinking. Originality refers to the generation of new, unexpected, and unconventional ideas. Through originality, an individual moves beyond what is common and obvious and proposes something new. Higher elaboration scores among women indicate that they develop, enrich, and deepen their ideas, making them more interesting. The Student’s t-test shows these differences are statistically significant ($p < .001$). Among the criteria, Creative Use of Words had the lowest score, indicating that they use language creatively to a lesser extent. According to Cohen’s d, all statistically significant

differences demonstrate a medium effect size ($d = 0.55\text{--}0.66$), with the highest values observed for flexibility and overall creativity.

Thus, women’s overall creativity score is higher, indicating they generate a large number of diverse, unexpected, and novel ideas, propose alternative solutions to problems, and further develop their ideas. If the findings obtained in the present study are compared with the views of other authors, studies based on the results of creative task performance indicate that gender differences in creative potential and creative abilities are minimal (Taylor et al., 2024). Although the findings of different studies vary to some extent, theoretical reviews and meta-analyses (Abdulla Alabbasi et al., 2025; Abraham, 2016; Baer & Kaufman, 2008; Runco et al., 2010; Taylor et al., 2024) indicate that, on average, women and girls perform slightly better than men and boys on **divergent thinking** tasks. Divergent thinking assesses an individual’s ability to generate multiple original responses to a task or stimulus (Guilford, 1956). (Christa & Taylor, 2025)

The comparison of creative personality traits and creativity self-assessment scores shows that both women and men have high levels of curiosity but low imagination (Table 2).

Table 2.

Mean Scores of Creative Personality Traits Among Women and Men

Variable	Female n=52	Male n=40	t	Cohen’s d
Curiosity	15	15	–	
Imagination	10	10	–	
Complexity	14	12	2.34	0.49
Risk-taking ability	16	13	4.47	0.95
Self-assessment of creativity	55	51	3.81	0.80

Women demonstrate a higher complexity score. According to Student’s *t*-test, this difference is statistically significant ($p < .01$). Compared with men, women also have higher risk-taking and creativity self-assessment scores. According to Student’s *t*-test, these differences are statistically significant ($p < .001$).

High curiosity scores indicate that both women and men are interested in and reflect on the hidden meaning of phenomena and enjoy working with different ideas. Low imagination scores indicate that they visualise and construct mental images less frequently and rely less on intuition. Particularly noteworthy are women’s higher complexity scores than men’s, indicating that women are more likely to consider multiple alternatives, question the existence of a single correct solution, and explore new phenomena and solve complex problems.

Compared with men, women show significantly higher risk-taking ability scores, indicating that women are courageous, accept criticism constructively, anticipate the possibility of failure, formulate assumptions and predictions, act under unstructured conditions, and defend their own ideas. Our findings contradict those of Kim et al. (2024), according to whom men’s creativity is more closely associated with risk-taking propensity, whereas women’s creativity is more closely associated with empathic tendencies (Christa L. Taylor, 2025)

Women’s creativity self-assessment score is significantly higher, indicating they evaluate their own creativity more highly than men do. According to Cohen’s *d*, the effect sizes for the differences in creative personality traits range from medium to large ($d = 0.49\text{--}0.95$). The largest effect sizes were observed for Risk-taking Ability ($d = 0.95$) and Self-assessment of Creativity ($d = 0.80$), while Complexity showed a medium effect size ($d = 0.49$).

The comparison of motivational orientation scores shows that both women and men are oriented toward results, altruism, and freedom, whereas they are less oriented toward power and money (Table 3.).

Table 3.

Mean Motivational Orientation Scores Among Women and Men

Variable	Male n=40	Female n=52	t	Cohen’s d
Process	6	5	2.87	0.60
Result	7	7	–	
Altruism	7	7	–	
Egoism	4	4	–	
Work	6	6	–	
Freedom	8	7	2.96	0.62
Power	4	4		
Money	2	2		

Differences between women and men were found only in the process and freedom scores, and according to Student’s *t*-test, these differences are statistically significant ($p < .01$). According to Cohen’s *d*, both differences demonstrate a medium effect size (Process: $d = 0.60$; Freedom: $d = 0.62$). Men are more oriented toward the process and freedom, indicating that, for them, the activity itself should be interesting, and they are less concerned with the outcome.

If these findings are compared with those of other studies, a similar view has been reported, according to which women often pay greater attention to the creative process. In contrast, men place greater emphasis on its outcome and social recognition (Ruth & Birren, 1985). (Taylor, 2025)

For both women and men, result orientation indicates a willingness to achieve results despite obstacles. Individuals with this orientation are the most reliable employees. Altruistic orientation among both women and men indicates a willingness to act for the benefit of others, even at their own expense. Altruism is a valuable motivational orientation characteristic of a mature personality. In the case of freedom orientation, freedom represents the primary value, and this orientation is more pronounced among men. The motivational orientations of both women and men are not harmonious, since some orientations (results, altruism, and freedom) are strongly expressed. In contrast, others (power and money) are expressed at a low level.

We conducted a correlation analysis between creativity results, creative personality traits, and motivational orientations among women and men.

Table 4.

Correlations Between the Results of Creativity and Motivational Orientations Among Women

P<0,05* p<0.01** p<0.001***

Naming	Egoism	-0.286**
Flexibility	Power	-0.234*
Elaboration	Altruism	0.254*
creativity	Altruism	0.267*
Curiosity	Result	0.269*
	Altruism	0.281**
	Power	0.451***
Risk-taking ability	Power	0.334**
Imagination	Power	0.332**
Self-assessment of creativity	Power	0.430***

The correlation analysis showed that, among women, flexibility is negatively correlated with power orientation, indicating that the more diverse the ideas women generate, the less they strive to exert influence over other people (Table 4.). Elaboration is positively correlated with altruism, indicating that the more women develop and refine their ideas, the more they tend to act for the benefit of others. A negative correlation was found between Creative Use of Words (Title) and egoism, indicating that the more creatively women use language, the less they are focused on their own interests. The positive correlation between creativity and altruism indicates that the more women generate new and unexpected ideas, the more inclined they are to act for the benefit of others.

Curiosity is positively correlated with the results. The results show that curiosity, result orientation, altruism, and power orientation are positively correlated, indicating that the more women demonstrate curiosity and discover new phenomena, the more they are oriented toward achieving results, acting for the benefit of others, and striving to influence other people in their professional activity. Risk-taking ability, imagination, and creativity self-assessment are positively correlated with power orientation, indicating that the more courageous women are, the more capable they are of defending their ideas, constructing mental images, trusting their intuition, and evaluating their own creativity highly; the more they strive to have influence over other people. Thus, among women, the manifestations of creativity manifest as altruism, egoism, result orientation, and power orientation. Among women, the creativity indicators and creative personality traits are positively correlated with the motivational orientations of altruism and power.

Table 5.

Correlations Between the Results of Creativity and Motivational Orientations Among Men		
P<0,05* p<0.01** p<0.001***		
Originality	Result	-0.275*
	Work	-0.322*
Complexity	Result	-0.322*
	Freedom	-0.304*
Flexibility	Work	-0.295*
creativity	Work	-0.309*
Curiosity	Power	0.306*
	Process	-0.352**
Imagination	Altruism	-0.343**
Self-assessment of creativity	Power	0.317*
	Process	-0.330**

As shown in the table, fluency, flexibility, and originality are negatively correlated with work orientation, indicating that the more men generate a large number of diverse, unexpected, and novel ideas, the less they are oriented toward work, and the less satisfaction work may bring them (Table 5). Particularly noteworthy are the negative correlations of originality and complexity with result orientation, indicating that the more men generate new and unexpected ideas, solve complex problems, and propose alternative solutions, the less they are oriented toward achieving results. When solving complex problems, they are also less oriented toward freedom.

Among men, curiosity and creativity self-assessment are positively correlated with power orientation and negatively correlated with process orientation, indicating that the more curious they are, the more they strive for novelty, and the more highly they evaluate their own creativity, the more they strive to influence other people and the less they are oriented toward the interest of the process itself. This suggests they are more concerned with outcomes. Among men, imagination is negatively correlated with altruism, indicating that the more they construct mental images and trust their intuition, the less inclined they are to act for the benefit of others.

Thus, among men, creativity, originality, complexity, flexibility, imagination, and creativity self-assessment are associated with result orientation, work orientation, freedom orientation, process orientation, and altruism.

Comparing the correlation results for creativity and motivational orientations among women and men, curiosity and creativity self-assessment are positively correlated with power orientation for both women and men. In the remaining cases, among women, creativity is more strongly associated with altruism, egoism, result orientation, money orientation, and power orientation. In contrast, among men, it is associated with result orientation, work orientation, freedom orientation, process orientation, and altruism. Among women, creativity indicators and creative personality traits are positively correlated with the motivational orientations of altruism and power orientation. Among men, they are negatively correlated with result orientation, work orientation, and process orientation.

Conclusions

Women score significantly higher than men in fluency, flexibility, originality, elaboration, and overall creativity. They generate a greater number of diverse, original, and unconventional ideas, propose alternative solutions to problems, and elaborate on their ideas more extensively.

Women also report significantly higher creativity self-assessment scores, indicating they perceive themselves as more creative than men. Both women and men demonstrate high levels of curiosity but relatively low levels of imagination. In addition, women score higher on complexity and willingness to take risks.

The comparison of motivational orientations indicates that both women and men are primarily oriented toward results, altruism, and freedom, whereas ori-

entations toward power and money are relatively weak. Significant gender differences are observed only in process orientation and freedom orientation. Overall, both groups' motivational profiles of both groups are unbalanced, with some orientations (results, altruism, and freedom) strongly expressed, while others (power and money) remain weak.

Among both women and men, curiosity, creativity self-assessment, and power orientation are positively correlated, suggesting that individuals who are more curious, more open to novelty, and who perceive themselves as more creative also show a stronger tendency to influence others. Among women, creativity is more closely associated with altruism, egoism, result orientation, and power orientation. Among men, it is associated with result orientation, work orientation, freedom orientation, process orientation, and altruism. Furthermore, among men, fluency, flexibility, and originality are negatively correlated with work orientation, indicating that the more able they are to generate numerous, diverse, and original ideas, the less strongly they are oriented toward work and the less satisfaction they derive from it.

The pattern of relationships between creativity and motivational orientations differs by gender. Among women, creativity indicators and creative personality traits are positively associated with altruism and power orientation. In contrast, among men, these indicators are negatively associated with result orientation, work orientation, and process orientation.

The findings of the study can inform creativity development programs for management professionals by considering the relationships between creativity and motivational orientations.

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ANXIETY IN THE CONTEXT OF THE EXPRESSION OF COGNITIVE STYLES

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Abstract

Anxiety is one of the key problems of a person's mental health, which retains its relevance along with the development of society. It is no coincidence that in recent years, psychologists, philosophers, historians, and researchers in other social science disciplines have been paying increasing attention to the issue of anxiety.

Within the framework of this study, psychological and anthropological theoretical approaches to the characterisation of anxiety were presented, and directions for revealing the level of anxiety were emphasised. The characteristics of anxiety were presented within the framework of the methodology for applying cognitive styles.

The article examines anxiety levels—specifically trait and state anxiety—among individuals aged 20 to 40. These anxiety levels were compared with the cognitive styles of impulsivity and reflexivity. The study revealed links between high levels of trait anxiety and impulsivity, which resulted in distorted decision-making and non-constructive solutions. The findings may be applied in cognitive psychotherapeutic interventions aimed at reducing anxiety levels.

Keywords: anxiety, cognitive styles, impulsivity, reflexivity, decision-making, trait anxiety, state anxiety.

ՏԱԳՆԱԿԱՅՆՈՒԹՅՈՒՆԸ ԿՈԳՆԻՏԻՎ ՈՃԵՐԻ ԴՐՍԵՎՈՐՄԱՆ ՀԱՄԱՏԵՔՍՏՈՒՄ

ԱՆԺԵԼԻԿԱ ԱՅՎԱԶՅԱՆ

ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի դոցենտ,
հոգեբանական գիտությունների թեկնածու

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Համառոտագիր

Տագնապայնությունը անձի հոգեկան առողջության առանցքային հիմնախնդիրներից է, որը պահպանում է իր արդիականությունը հասարակության զարգացման հետ զուգընթաց: Պատահական չէ, որ վերջին տարիներին հոգեբանները, փիլիսոփաները, պատմաբանները և հասարակագիտական այլ դիսցիպլինների հետազոտողներ ավելի ու ավելի մեծ ուշադրություն են դարձնում տագնապայնության խնդրին:

Այս ուսումնասիրության շրջանակում ներկայացվել են հոգեբանական և մարդաբանական տեսական մոտեցումները տագնապայնության բնութագրման վերաբերյալ, շեշտադրվել են տագնապայնության մակարդակի վերհանման ուղղությունները: Տագնապայնության բնութագրումները ներկայացվել են կոգնիտիվ ոճերի կիրառման մեթոդաբանության ներքո:

Հոդվածում 20–40 տարեկան անձանց շրջանում վեր են հանվել տագնապայնության մակարդակներն՝ ըստ անձնային և իրավիճակային տագնապայնության տեսակների: Տագնապայնության բացահայտված մակարդակները համեմատվել են իմպուլսիվության, ռեֆլեքսիվության կոգնիտիվ ոճերի հետ: Հետազոտության արդյունքում ի հայտ են եկել կապեր անձնային տագնապայնության և իմպուլսիվության բարձր մակարդակների միջև, որոնք հանգեցնում էին որոշումների կայացման ձևախեղումներին և ոչ կոնստրուկտիվ լուծումներին: Հետազոտության արդյունքները կարող են կիրառելի լինել կոգնիտիվ հոգեթերապևտիկ աշխատանքներում՝ ուղղված տագնապայնության մակարդակի նվազեցմանը:

Բանալի բառեր՝ տագնապայնություն, կոգնիտիվ ոճեր, իմպուլսիվություն, ռեֆլեքսիվություն, որոշումների կայացում, անձնային տագնապայնություն, իրավիճակային տագնապայնություն:

Introduction

The issue of anxiety is a key point not only for psychologists but also for philosophers, anthropologists, sociologists, and other specialists in the humanities and social sciences. Scholars deeply interested in the themes of anxiety and fear generally did not seek to create abstract systems; instead, they were more concerned with the existential conflicts and crises that accompany human life. It is no coincidence that philosophical ideas and concepts have shaped the modern understanding of anxiety. Since many philosophers could not overlook the prob-

lem of anxiety, it is logical that the most profound insights into this issue come from those who, alongside philosophy, were also interested in its psychological dimensions. The contemporary understanding of anxiety increasingly focuses on the study of behavioural patterns and their associated cognitive processes. Consequently, a key issue in the study of individual anxiety has become the examination of decision-making mechanisms under anxious conditions. To identify trends in decision-making, it is essential to determine the various cognitive styles an individual employs when experiencing anxiety.

We need to examine psychological theoretical approaches—including an analysis of philosophical and phenomenological perspectives on anxiety—for two reasons:

1. First, it is evident that a profound understanding of the nature of anxiety is made possible by a philosophical perspective on the forms of personality development in modern society. For instance, Kierkegaard not only anticipated many of Freud's concepts but, in a sense, even foresaw the future evolution of his ideas.
2. This enables us to consider the problem of anxiety within a methodological context. An individual's experience of anxiety is determined by their position at a specific stage of personal development; consequently, to understand the manifestations of anxiety—as well as the development and transformation of the associated cognitive styles—it is essential to consider the fundamental concepts of anxiety that remain relevant today.

Theoretical and Methodological Bases

Anxiety, from a philosophical point of view, arises when a person realises that he exists in the condition of the inevitable possibility of non-existence. This, as we can see, is similar to Kierkegaard's (1985) idea that anxiety is «the fear of nothingness.» «Non-existence» is not simply the fear of physical death, although death is perhaps the most common object and symbol of anxiety. The threat of non-existence belongs to the religious and spiritual sphere of life, since it is the fear of the meaninglessness of existence. Usually the threat of meaninglessness is perceived as a threat to the Self. But when a person accepts the challenge of this anxiety, when he sees the threat of the meaninglessness of existence and resists this threat, he feels his own Self more strongly. This sharpens the perception of the person, which is directed towards himself, towards his own being, which is different from the world of non-being or the world of objects.

As noted by Kabat-Zinn (1990), anxiety as a character trait differs from anxiety in that he who sometimes experiences a feeling of fear is not necessarily always anxious, and the anxious person is necessarily afraid. Thus, an individual who is characterised by the excitation of the sympathetic nervous system and anxiety (anxietas) will not experience sympathetic excitation under certain circumstances (a quiet home environment, calm, etc.). Conversely, someone who is not characterised by anxiety will exhibit strong anger in situations that cause

strong fear; i.e., he responds to certain situations with the excitation of the sympathetic nervous system. These two variables are interrelated, and the presence of *anxietas* predisposes to the manifestation of anger (Craske & Barlow, 2007; Barlow & Craske, 2006).

In the work of Horwitz (2010), we see that fear can be overcome through reason. Horwitz considered fear to be a purely subjective matter, a matter of a person's mental state or attitude. He contrasts fear with hope, both of which, according to him, characterise a person in doubt, and he believed that an emotion can be overcome only by an opposing emotion stronger than the first.

In Kierkegaard's book (1985), anxiety appears only in connection with human freedom. Freedom is the goal of human development; from a psychological point of view, "well-being is freedom." He states that anxiety is the state of a person who has faced his freedom. He even claims that anxiety is "the possibility of freedom. As he wrote " Every time a person imagines possibilities, anxiety is present at the same time (Kierkegaard, 1985).

Individuation is achieved by facing one's own anxiety. And anxiety inevitably arises in situations where it is necessary to confront the external world, and not just to conform to one's surroundings. According to Hallam (1992), anxiety is always accompanied by a feeling of guilt, since both are connected with the realisation of possibilities, and the higher the creative potential of a person, the more capable he is of experiencing anxiety and guilt.

Developments in psychological approaches have led to the formation of descriptions and definitions of anxiety in the psychological sciences. According to the Explanatory Dictionary of the Armenian Language (Gyurjinyan, 2022), anxiety is explained as follows:

1. Anxiety, excitement, unrest;
2. The most dangerous, decisive moment of an illness, followed by death or recovery, crisis;
3. Tense, dangerous situation, difficult situation;
4. Terror, horror;
5. Panic, commotion, confusion;
6. Overproduction of goods that periodically appears in capitalist countries, crisis;
7. A warning signal of impending danger;
8. Joy, doom;
9. Excitement, rush, haste;
10. Grief, pain;
11. Danger, disaster;
12. An acute lack of something.

The Cambridge English Dictionary (Cambridge Online Dictionary) defines anxiety as follows:

1. an uncomfortable feeling of nervousness or worry about something that

- is happening at the moment or that may happen in the future.
- 2. something that causes a feeling of fear and anxiety.
- 3. a medical condition in which a person feels constant fear and anxiety.

American Psychological Association (2021) presented anxiety as a psychological state of a person that arises in a dangerous situation. Some authors (Rosenberg & Rosenberg, 2015; Kroenke et al., 2001) wrote about three types of anxiety: objective, neurotic, and moral. Objective anxiety arises under the influence of real threats to a person’s psychological well-being. Neurotic anxiety arises from the awareness of dangers arising from the It. Moral anxiety arises as a result of the fear of earning moral condemnation from someone. Moral anxiety is associated with feelings of guilt and shame. The term anxiety is close to the meaning and concept of the word anxiety. However, in the latter case, it is not only a mental state, but also a corresponding trait of a person’s temperament (Tucker & Warr, 1996; Löwe et al., 2008).

Fear and anxiety are fundamental aspects of human existence. Anxiety is a state of mind that is directed toward the future and is caused by mental processes that cause worry. When we worry, our minds focus on the future and what could go wrong. This is, in a sense, an adaptive response that helps us prepare for possible future undesirable situations.

In his book “Counselling for Anxiety Problems,” Hallam (1992) presents the commonalities surrounding the word “anxiety,” which are presented in Table 1.

Table 1.

Anxiety statements

1	Components of negative experience described in a terminological sequence with the poles “tension” – “horror”
2	Awareness of imminent danger or harm, regardless of whether it is possible to actually identify their sources
3	An experience of physical sensations, primarily associated with activation of the autonomic nervous system
4	Urgent need for safe haven
5	Decreased fine motor control
6	Disturbing or unpleasant thoughts that are difficult to control
7	Inability to think logically or act systematically in unusual, conflictual, or dangerous situations

Almost all areas of theoretical psychology – theories of innate biological defences, stress models, self-awareness, social evaluation, behaviour, cognitive abilities, problem solving, learning, etc. – can be used to describe anxiety. Anxiety is a negative mood state, often accompanied by physical symptoms, called physiological tone, characterised by nervousness, apprehension, and

gloomy ideas about the future, as well as emotional (fear, sadness, anger) and behavioural (avoidance of anxiety-provoking situations and objects) reactions (Rollins & Genser, 1977; Pennebaker, 2012). According to Hofmann and Smits (2008), fear is considered a basic and independent emotion, and anxiety is a combination of several emotions: sadness, guilt, fear, shame. The authors also note that the combination of interest and fear produces anxiety. There are three broad categories of diagnosable anxiety disorders, all of which are treatable:

- Anxiety: specific phobias, social anxiety disorder, panic disorder, agoraphobia, and generalised anxiety disorder
- Obsessive-compulsive and related disorders
- Traumatic and stress-related disorders (Hofmann & Smits, 2008).

Horney (1950) noted the importance of childhood in a person's emotional development and linked it to the pathological conditions of life in the family, where the child does not feel safe, loved, and appreciated. As a result, the child develops a "base anxiety," a sense of helplessness in the face of a hostile world, which he tries to alleviate by developing defensive strategies such as the desire for love, the desire for power, or alienation. Because these strategies are incompatible, they are doomed to fail: they create a vicious circle, as the means we use to alleviate anxiety, on the contrary, intensifies it. From Horney's point of view, if the child's desire for love and attachment is not satisfied by adults, the child feels unloved, lonely, unnecessary, and helpless in the cold and hostile world around him and experiences anxiety. Anxiety develops in him, which turns into a stable personality quality. To overcome this anxiety, Horney identifies three possible ways: trying to earn adults' love and approval; trying to force adults to love him, or at least be wary of him; and isolating himself from his surroundings. However, these options are not effective and lead to the formation of neurotic personalities: submissive, aggressive, or isolated (Horney, 1950).

Horney (1950) offers a list of needs that are seen as solutions to the problem of broken relationships. She calls these needs "neurotic" because they represent an irrational solution to the problem.

1. Neurotic need for love and approval. This need is characterised by a strong desire to please others and meet their expectations.
2. Neurotic need for a "partner-caretaker". A person with this need is a parasite. He overvalues love and is extremely afraid of being abandoned and left alone.
3. Neurotic need for a narrow limitation of life. Such a person is not demanding, is content with little, prefers to remain inconspicuous and values modesty above all.
4. Neurotic need for power. This need is manifested by the desire for strength for the sake of strength, expressed in disrespect for others, indiscriminate praise of strength, and contempt for weakness.

5. A neurotic desire to exploit others.
6. A neurotic need to be significant. In this case, a person's self-esteem depends on the level of public recognition.
7. A neurotic need to be an object of admiration. People with this type of need have an "inflated" image of themselves and want to be admired in accordance with this image.
8. A neurotic desire for personal achievement. Such people want to be the best.
9. A neurotic need for self-sufficiency and independence. Having lost faith in the possibility of warm, satisfying relationships with others, a person isolates himself and refuses to be attached to anyone or anything. He becomes a "loner."
10. Neurotic need for perfection and perfectionism. Fearing mistakes and criticism, they try to become invulnerable and infallible, constantly looking for flaws in themselves in order to hide them before they become obvious to others.

Each of these groups represents a basic orientation towards others and towards themselves. Horney finds the basis of internal conflict in the differences between these orientations. Normal and neurotic conflicts differ in their degree. From her point of view, we are endowed with the potential for development, the desire for self-improvement, and this is the fundamental aspiration of man (Horney, 1950).

May (1983) offers his own point of view on this issue, adding that it is connected to the nature of the parent's "love" for the child. If their "love" is essentially a desire to use the child for personal gain, then the child will identify with strength or, conversely, with weakness. May (1981) defines anxiety as the subjective state of a person who understands that his existence can be destroyed, that he can turn into "nothingness". He believed that anxiety can take different forms, manifesting itself in different degrees of intensity, since it is a person's basic response to a threat to his existence or to some value that he associates with his existence. Anxiety also arises when we encounter obstacles in the way of realising our plans and possibilities. This resistance can cause stagnation and decline, but it can also stimulate change and growth. Freedom cannot exist without anxiety, just as anxiety cannot exist without the realisation of the possibility of freedom. Becoming freer, a person inevitably experiences anxiety. May quoted Kierkegaard as saying that "anxiety is the dizziness caused by freedom" (May, 1981; May, 1983). He presented certain definitions of types of anxiety.

Normal anxiety: May (1981) defined normal anxiety as a non-stressful, non-compromising anxiety that can be consciously confronted constructively. As long as normal anxiety is proportionate to the threat, it is constructive. Otherwise, anxiety becomes a painful, neurotic type.

Neurotic anxiety: May (1981) defined neurotic anxiety as a disproportionate

response to threat that produces depression and other types of intrapsychic conflict and various types of controlled blocking-off of actions and concepts. Neurotic anxiety visits us if the values we question are in fact dogmas, the rejection of which would lead to the loss of meaning in our existence.

Guilt: The feeling of anxiety increases when we are faced with the problem of realising our potential. When we deny opportunities, fail to recognise the needs of our loved ones, or ignore our dependence on the world around us, the feeling of guilt increases (May, 1981). Thus, according to May's theory, anxiety is a fear that is expressed as a threat to some values that an individual considers important for his personality.

As we can see, most researchers tend to consider anxiety as a human response to uncertainty, and fear as a signal that represents a clear danger. Thus, we can associate anxiety with general excitement, in particular, with the activation of the sympathetic nervous system, and fear with the inhibition of actions and the activation of the parasympathetic nervous system, in the case of a large dose of which a person can become paralyzed. Below we will present the features of anxiety from the point of view of psychological theories, since it is one of the main problems of human existence and by understanding it, we will come closer to understanding the causes of anxiety and neurosis (Beck & Emery, 2005; Davidson & McEwen, 2012). Rozencwajg (2003) saw the essence of neurosis in the contradiction between the feeling of inferiority and the desire for self-assertion, the thirst for power. In the neurotic state, he saw a feeling of weakness and helplessness, which he presented as an "inferiority complex."

Methodology and Methods

The study of anxiety levels and cognitive styles of impulsivity/reflexivity was conducted based on the methodological approaches of Kagan (1966) and Spielberger (1989). Kagan's Matching Familiar Figures Test measures an individual's tendency to make decisions quickly or slowly. The subject is presented with 2 training sheets, then 12 main sheets, each with an image of an object at the top and 8 almost identical images of the same object arranged in two rows below, of which only one is completely identical to the reference image. The subject must find and mark the image that is completely identical to the reference image. This trait is most pronounced in situations of uncertainty and anxiety, when a person must make the right choice from a set of defined alternatives. A high level of impulsivity reflects an individual's tendency to react quickly in situations with multiple options, coming up with a solution without analysing all possible alternatives. Individuals with a reflective cognitive style are characterised by a slow reaction time in such situations; they test and repeatedly analyse solution options, and make the final decision based on a thorough preliminary analysis of the alternatives.

Research on impulsivity and reflexivity shows that a reflective cognitive style is characterised by a long reaction time when making decisions and a low

error rate, meaning the individual carefully considers available alternatives before deciding. As a result, the individual reacts slowly but makes the most appropriate decision in a given situation. An impulsive cognitive style, by contrast, is characterised by a short reaction time when making decisions and a high error rate. This means that when faced with a decision between available alternatives, the individual acts quickly without properly evaluating the potential of alternative solutions. As a result, the individual reacts quickly but makes the least appropriate decision in a given situation (Zhang, 2002; Borkowski et al., 1983).

The Spielberger Anxiety Scale (*State-Trait Anxiety Inventory*, STAI) identifies two types of anxiety: state anxiety and trait anxiety. The scale ranges from 20 to 80 points, calculated based on the sum of respondents' responses. The higher the score, the greater the level of state anxiety and trait anxiety. The classification of anxiety levels in both types is based on grouping scores into three levels, where low anxiety is defined as a score of up to 30 points, moderate anxiety is defined as a score of 31–44 points, and high anxiety is defined as a score of 45 points or higher.

Research on impulsivity/reflexivity, along with anxiety level, allows us to identify ties between a particular cognitive style and the level and nature of anxiety. Therefore, we conducted an empirical study of cognitive styles that considered not only the individual's anxiety level but also how of manifests. Based on this assumption, a scientific hypothesis was put forward about the dependence of the manifestation of the cognitive style of impulsivity/reflexivity on the level of severity of situational (state)/personal (trait) anxiety.

The study's hypothesis was that there are certain connections between the level of trait anxiety and impulsivity. Under conditions of high levels of both trait and situational anxiety, impulsivity is expressed not only by a quick reaction to a troubling situation but also by a low rate of correct, adequate decisions. With high levels of trait anxiety and low levels of situational anxiety, a high level of impulsivity persists, but with a higher proportion of correct decisions.

To examine anxiety levels and impulsivity/reflexivity, we conducted an empirical study among a general sample of 20–40-year-olds (N=90). The study's goal was to identify connections between anxiety levels and the cognitive style of impulsivity.

Results

Empirical results obtained using the Spielberger method made it possible to identify subgroups within the total sample of respondents characterized in Table 1.

Table 2.

Levels of trait anxiety, %

Subgroups by levels of trait anxiety	Percentage figures
Subgroup 1: High level of trait anxiety	35%
Subgroup 2: Moderate level of trait anxiety	45%
Subgroup 3: Low level of trait anxiety	20%

The level of state anxiety was analysed and determined within each of these subgroups. Thus, respondents in each subgroup—categorised by trait anxiety levels—exhibited varying levels of state anxiety. Percentage figures of Subgroup 1 sample are presented in Table 2.

Table 3.

Levels of state anxiety in Subgroup 1, %

Levels of state anxiety in Subgroup 1	Percentage figures
High state anxiety level	50%
Moderate state anxiety level	45%
Low state anxiety level	5%

Percentage figures of Subgroup 2 sample are presented in Table 3.

Table 4.

Levels of state anxiety in Subgroup 2, %

Levels of state anxiety in Subgroup 2	Percentage figures
High state anxiety level	25%
Moderate state anxiety level	65%
Low state anxiety level	10%

Percentage figures of Subgroup 3 sample are presented in Table 4.

Table 5.

Levels of state anxiety in Subgroup 3, %

Levels of state anxiety in Subgroup 3	Percentage figures
High state anxiety level	35%
Moderate state anxiety level	35%
Low state anxiety level	30%

As can be seen from the data presented in Tables 1–4, the percentages indicating a high level of situational anxiety rise in tandem with the indicators of trait anxiety. In other words, the higher the level of trait anxiety, the more pronounced the level of situational anxiety.

To identify the relationship between anxiety levels and the cognitive styles of impulsivity and reflectivity, the results of the Spielberger inventory were compared with empirical data obtained using the Kagan test (Figures 1–3).

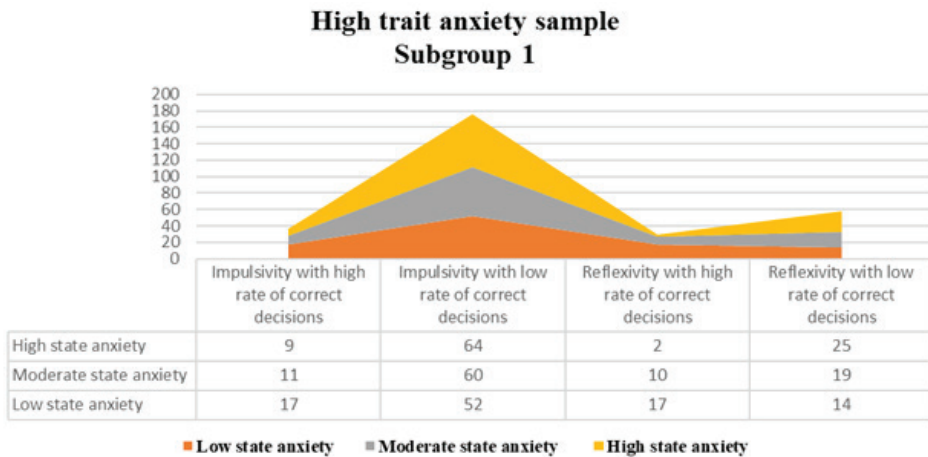


Figure 1. Percentage figures of state anxiety in Subgroup 1

The results presented in Figure 1 indicate a high level of impulsive cognitive style associated with a low rate of correct decisions in a specific situation. This points to a link between high personal anxiety and an individual's ability to respond adequately in the given situation.

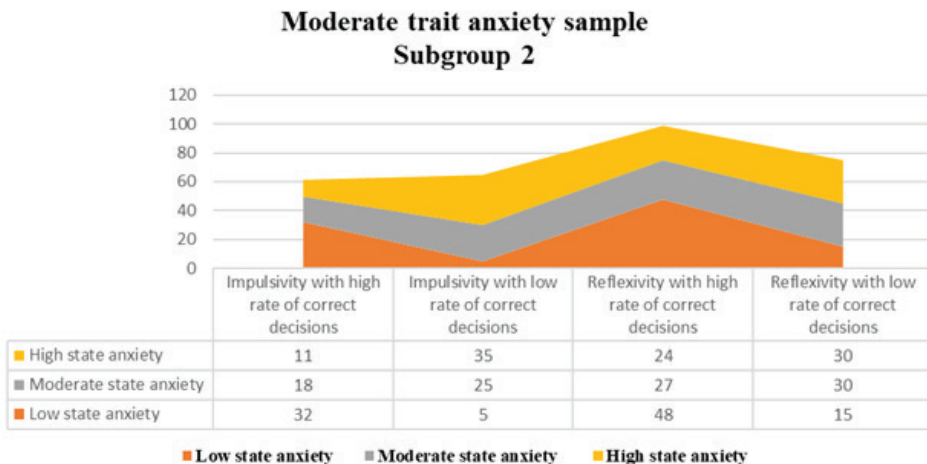


Figure 2. Percentage figures of state anxiety in Subgroup 2

As shown in Figure 2, the reflexivity factor is notably enhanced in the subgroup with a moderate level of trait anxiety, particularly among respondents with a low level of state anxiety. As the level of state anxiety increases, a weakening of the reflexive cognitive style is observed, alongside an increase in impulsivity and a concomitant low rate of correct decision-making.

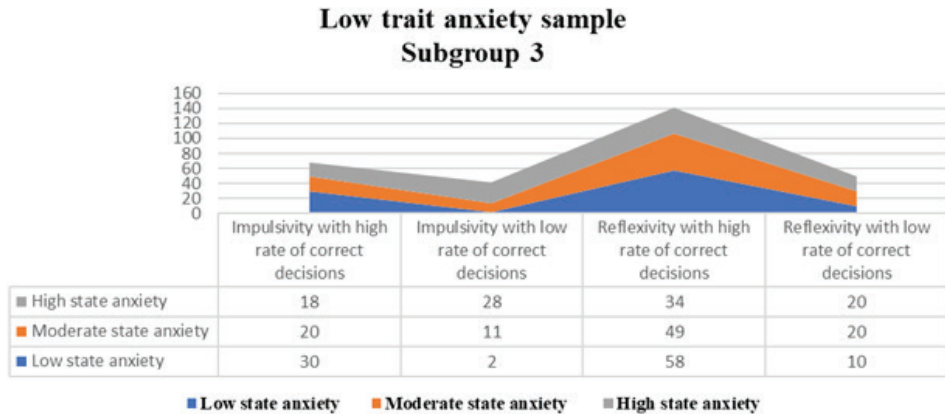


Figure 3. Percentage figures of state anxiety in Subgroup 3

As shown in Figure 3, respondents in the subgroup with low levels of trait anxiety predominantly employ a reflective cognitive style, which intensifies as the level of state anxiety within this subgroup decreases.

The results of the empirical study revealed certain trends in the manifestation of the impulsivity/reflexivity cognitive styles, leading to the following conclusions.

Conclusion

The phenomenon of anxiety is a psychological concept encompassing issues of personal self-control, the realisation of personal potential, and personal growth. The wide range of definitions for anxiety stems from the diversity of theoretical approaches to studying this phenomenon. Contemporary understanding of anxiety aligns with Rollo May's definitions regarding normal and neurotic levels of anxiety, suggesting that anxiety is viewed as an integral part of human life.

Research into anxiety within the context of cognitive styles has revealed certain contemporary trends in the understanding of this phenomenon. First, it should be noted that the study results showed a predominantly high level of trait anxiety among respondents aged 20 to 40. This finding suggests a shift in modern society regarding what constitutes a normal or positive level of anxiety; neurotic manifestations of anxiety are becoming so widespread that they are taking on the characteristics of the norm. This is evidenced by the prevalence of high trait anxiety, which, in turn, manifests as an emphasis on state anxiety. This transfor-

mation in the perception of anxiety is occurring alongside developments in the understanding of cognitive styles. Specifically, the study examined the impulsivity/reflectivity cognitive styles, comparing their modes of expression with levels of trait and state anxiety. The study also concluded that the impulsive cognitive style predominates, leading to decisions that are incorrect or inappropriate for the given situation. This pattern is particularly pronounced in conditions of high trait and state anxiety. A limitation of this study relates to age factors; including other age groups in future research would make it possible to identify anxiety levels and trends in the transformation of cognitive styles across different age demographics.

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PSYCHOLOGICAL MECHANISMS OF OBSESSIVE-COMPULSIVE DISORDER AND CONTEMPORARY INTEGRATIVE PSYCHOTHERAPEUTIC APPROACHES

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Abstract

Obsessive-Compulsive Disorder (OCD) is one of the most prevalent and socially significant mental disorders in contemporary clinical psychology and psychiatry, characterised by intrusive obsessive thoughts and compulsive behavioural or mental acts aimed at reducing anxiety. The disorder significantly affects psychological adaptation, social functioning, and quality of life.

The aim of this article is to examine the psychological mechanisms of OCD, the cognitive, emotional, and behavioural characteristics of individuals with OCD, and to analyse the effectiveness of contemporary evidence-based and integrative psychotherapeutic interventions.

The study used a theoretical-analytical framework based on the DSM-5-TR and ICD-11 diagnostic systems, international clinical guidelines, and a systematic review of peer-reviewed scientific literature. Cognitive-behavioural,

neurobiological, metacognitive, and third-wave psychotherapeutic approaches to the development and maintenance of OCD were examined.

Findings indicate that distorted threat appraisal, inflated responsibility, intolerance of uncertainty, and the temporary reduction of anxiety through compulsive behaviours play a central role in the maintenance of OCD. Cognitive Behavioural Therapy (CBT) and Exposure and Response Prevention (ERP) are considered the most effective interventions, while Acceptance and Commitment Therapy (ACT), mindfulness-based approaches, Eye Movement Desensitisation and Reprocessing (EMDR), and other integrative approaches may be applied as complementary or combined therapeutic strategies.

The findings emphasise the complex nature of OCD and the importance of individualised psychotherapeutic interventions for improving psychological flexibility, emotional regulation, and social adaptation.

Keywords: Obsessive-compulsive disorder, cognitive distortions, psychological flexibility, emotional regulation, social adaptation, psychotherapy.

ՕՐԵՆՏԻՎ-ԿՈՄՊՈՒԼՍԻՎ ԽԱՆԳԱՐՄԱՆ ՀՈԳԵԲԱՆԱԿԱՆ ՄԵԽԱՆԻԶՄՆԵՐԸ ԵՎ ԺԱՄԱՆԱԿԱԿԻՑ ՀԱՄԱԼԻՐ ՀՈԳԵԹԵՐԱՊԵՎՏԻԿ ՄՈՏԵՑՈՒՄՆԵՐԸ

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Համառոտագիր

Օբսեսիվ-կոմպուլսիվ խանգարումը (OCD) ժամանակակից կլինիկական հոգեբանության և հոգեբուժության առավել տարածված և սոցիալական նշանակություն ունեցող հոգեկան խանգարումներից է, որը բնութագրվում է ներխուժող օբսեսիվ մտքերի և տագնապին վազեցմանն ուղղված կոմպուլսիվ վարքային կամ մտավոր գործողությունների առկայությամբ: Խանգարումը զգալի ազդեցություն է ունենում անձի հոգեբանական աղապտացիայի, սոցիալական գործունեության և կյանքի որակի վրա:

Սույն հոդվածի նպատակն է ուսումնասիրել օբսեսիվ-կոմպուլսիվ խանգարման հոգեբանական մեխանիզմները, OCD ունեցող անձանց կոգնիտիվ, հուզական և վարքային առանձնահատկությունները, ինչպես նաև վերլուծել ժամանակակից ապացուցահեն և համալիր հոգեթերապևտիկ միջամտությունների արդյունավետությունը:

Հետազոտությունն իրականացվել է տեսական-վերլուծական մեթոդաբանության շրջանակում՝ հիմնված DSM-5-TR և ICD-11 ախտորոշիչ համակարգերի, միջազգային կլինիկական ուղեցույցների և գրախոսվող գիտական գրականության համակարգված վերլուծության վրա: Ուսումնասիրվել են կոգնիտիվ-վարքային, ներյոկենսաբանական,

մետակոգնիտիվ և երրորդ ակիքի հոգեթերապևտիկ մոտեցումները OCD-ի ձևավորման և պահպանման համատեքստում:

Արդյունքները ցույց են տալիս, որ OCD-ի պահպանման մեջ կարևոր դեր ունեն վտանգի աղավաղված գնահատումը, պատասխանատվության գերազնահատումը, անորոշության հանդեպ անհանդուրժողականությունը և կոմպուլսիվ վարքի միջոցով տագնապի ժամանակավոր նվազեցումը:

Առավել արդյունավետ միջամտություններ են համարվում CBT և ERP մեթոդները, մինչդեռ ACT, MBCT, EMDR և այլ ինտեգրված մոտեցումները կարող են կիրառվել որպես լրացուցիչ կամ համակցված թերապևտիկ ռազմավարություններ:

Հետազոտության արդյունքներն ընդգծում են OCD-ի փոխկապակցված բնույթը և անհատականացված հոգեթերապևտիկ միջամտությունների կարևորությունը՝ հոգեբանական ձկունության, հուզական կարգավորման և սոցիալական ադապտացիայի բարելավման համար:

Բանալի բառեր՝ օբսեսիվ-կոմպուլսիվ խանգարում, կոգնիտիվ աղավաղումներ, հոգեբանական ձկունություն, հուզական կարգավորում, սոցիալական ադապտացիա, հոգեթերապիա:

Introduction

Obsessive-Compulsive Disorder (OCD) is one of the most prevalent and socially significant mental disorders in psychiatry and clinical psychology. It is characterised by intrusive obsessive thoughts and repetitive compulsive behavioural or mental acts that significantly affect psychological functioning, social adaptation, and quality of life (American Psychiatric Association, 2022; World Health Organisation, 2019).

According to cognitive-behavioural models, the maintenance of OCD is associated with distorted threat appraisal, inflated responsibility, excessive need for control, and intolerance of uncertainty (Salkovskis, 1985; Rachman, 2002). These characteristics are frequently accompanied by elevated anxiety, self-criticism, and heightened sensitivity to intrusive thoughts (Clark, 2004).

Research indicates that biological, cognitive, and behavioural factors are involved in the development of OCD. Neurobiological studies emphasise dysfunction of the cortico-striato-thalamo-cortical (CSTC) circuitry and the role of serotonergic mechanisms, whereas psychological theories highlight cognitive distortions and behavioural reinforcement processes (Abramowitz, 2006; Franklin & Foa, 2011).

Among the most effective treatment approaches for OCD are Cognitive Behavioural Therapy (CBT) and Exposure and Response Prevention (ERP) (Foa & Kozak, 1997; NICE, 2005). At the same time, the application of third-wave psychotherapeutic interventions has increased significantly, particularly Acceptance and Commitment Therapy (ACT), mindfulness-based approaches, and other integrative interventions (Hayes et al., 2012; Kabat-Zinn, 2003).

The purpose of the article is to examine the psychological mechanisms of OCD, to describe the psychological and behavioral characteristics of individuals with

OCD, and to analyze the effectiveness of the main contemporary psychotherapeutic approaches.

Theory And Methodology

Theoretical and Methodological Foundations

The presented theoretical and methodological analyses are based on cognitive-behavioural, neurobiological, and third-wave psychotherapeutic approaches to the study of Obsessive-Compulsive Disorder (OCD), as well as on international diagnostic systems and clinical guidelines. The theoretical foundation of the study includes A. T. Beck's cognitive theory (Beck, 1976), P. Salkovskis's cognitive-behavioral model of OCD (Salkovskis, 1985), the cognitive-behavioral and ERP approaches presented in the works of Foa and Abramowitz (Abramowitz, 2006; Foa & Kozak, 1997), Hayes's Acceptance and Commitment Therapy (ACT) and Relational Frame Theory (RFT) (Hayes et al., 2001; Hayes et al., 2012), as well as Wells's metacognitive approach (Wells, 2009).

According to DSM-5-TR and ICD-11 classifications, OCD is considered an independent nosological entity characterised by obsessions and compulsions accompanied by pronounced anxiety, internal tension, and impairment in social or occupational functioning (American Psychiatric Association, 2022; World Health Organisation, 2019).

In scientific literature, OCD is most commonly interpreted within the framework of the biopsychosocial model (Beck, 1976; Salkovskis, 1985; Abramowitz, 2006), according to which the disorder develops through the interaction of biological, cognitive, behavioural, and social factors. This approach allows OCD to be understood as a condition shaped by the interaction of neurobiological vulnerability, cognitive distortions, behavioural reinforcement mechanisms, and social stressors.

According to cognitive-behavioural theories, the maintenance of OCD is associated with distorted interpretations of intrusive thoughts, inflated responsibility, catastrophization of danger, thought-action fusion, excessive need for control, and intolerance of uncertainty (Salkovskis, 1985; Rachman, 2002). These models explain the reciprocal reinforcement mechanisms between obsessive thoughts, anxiety responses, and compulsive behaviour.

Neurobiological approaches emphasise the dysfunction of the cortico-striato-thalamo-cortical (CSTC) system and disturbances in serotonergic mechanisms in OCD. Genetic and neuropsychological studies suggest that both hereditary vulnerability and environmental and psychological factors contribute to the development of the disorder (Franklin & Foa, 2011).

The theoretical and methodological framework also includes third-wave psychotherapeutic approaches such as Acceptance and Commitment Therapy (ACT), mindfulness-based approaches, Metacognitive Therapy (MCT), Compassion-Focused Therapy (CFT), and Eye Movement Desensitisation and Reprocessing (EMDR). These

approaches emphasise not only symptom reduction but also the development of psychological flexibility, emotional regulation, and mindful acceptance of personal experiences.

Within ACT, Relational Frame Theory (RFT) is particularly important, as psychological suffering is often associated with excessive identification with thoughts and their meanings (Hayes et al., 2001).

Methodologically, the study draws on theoretical-analytical, comparative, and integrative approaches. A systematic review and comparison of scientific literature on OCD, DSM-5-TR and ICD-11 diagnostic systems, and psychotherapeutic models were conducted. The study applied systematic literature review, comparative analysis, and content analysis methods to examine the cognitive, behavioural, emotional, and neurobiological mechanisms of OCD, as well as the common and distinctive features of different psychotherapeutic approaches.

Thus, the presented theoretical and methodological foundations make it possible to interpret the development and maintenance of OCD within the context of the interaction of biological, cognitive, behavioural, and social factors.

Research Methods

Research Methods and Methodological Approach

The present study was conducted within a theoretical-analytical and qualitative framework based on a systematic review of the scientific literature related to Obsessive-Compulsive Disorder (OCD). The theoretical and methodological foundation of the study included DSM-5-TR (American Psychiatric Association, 2022), ICD-11 (World Health Organisation, 2019), Beck's cognitive theory (Beck, 1976), and Salkovskis's cognitive-behavioural model of OCD (Salkovskis, 1985).

The study examined theoretical and clinical approaches addressing the cognitive, behavioural, neurobiological, and emotional mechanisms of OCD. The analysis also incorporated peer-reviewed international scientific publications focusing on the psychological mechanisms of OCD and the effectiveness of psychotherapeutic interventions.

The theoretical analysis included evidence-based approaches to OCD treatment, namely Cognitive Behavioral Therapy (CBT), Exposure and Response Prevention (ERP), Acceptance and Commitment Therapy (ACT), mindfulness-based interventions, Metacognitive Therapy (MCT), Compassion-Focused Therapy (CFT), and Eye Movement Desensitization and Reprocessing (EMDR). Particular attention was given to ERP, which is regarded in international clinical guidelines as one of the most empirically supported interventions for OCD (Foa & Kozak, 1997; NICE, 2005).

The analysed literature was selected according to its relevance to OCD mechanisms, diagnostic classifications, and evidence-based psychotherapeutic approaches.

Nature of the Study

The study is theoretical–analytical and based on the examination, comparison, and interpretation of secondary scientific sources. The present study collected no primary empirical data; instead, it analysed scientific and clinical literature through a systematic review of scientific and clinical literature.

The analysis used a combination of deductive and inductive approaches. At the deductive level, established theoretical models and diagnostic criteria served as the conceptual foundation of the analysis, whereas at the inductive level, findings from different authors were integrated in order to provide a more comprehensive interpretation of the psychological mechanisms of OCD.

Methods Applied in the Study

The following methodological approaches were applied in the study:

Systematic literature review – scientific sources related to OCD were analysed to identify the main mechanisms involved in the development and maintenance of the disorder.

Comparative analysis – different theoretical and psychotherapeutic models of OCD were compared, including biological, cognitive–behavioural, psychodynamic, and third-wave approaches.

Content analysis – the main thematic components of OCD were identified and systematised, including obsessive thoughts, compulsive behaviours, cognitive distortions, and psychotherapeutic interventions.

Integrative analysis – OCD was examined as a disorder resulting from the interaction of cognitive, emotional, behavioural, and neurobiological mechanisms.

Research Limitations

The study is based on the analysis of secondary scientific sources and does not include primary empirical data. The analysis primarily relies on international, predominantly English-language studies, whereas local studies addressing the sociocultural characteristics of OCD remain limited. In addition, the effectiveness of certain psychotherapeutic approaches continues to be investigated and requires further clinical research.

Psychological and Behavioural Characteristics of Individuals with Ocd

The psychological and behavioural characteristics of individuals with Obsessive–Compulsive Disorder (OCD) are shaped by the interaction of cognitive, emotional, and behavioural mechanisms that contribute to the maintenance and exacerbation of the disorder. Within clinical psychology, OCD is conceptualised as a self-perpetuating system in which intrusive thoughts, emotional tension, and compulsive behaviours mutually reinforce one another (Abramowitz, 2006).

Individuals with OCD frequently exhibit cognitive distortions, elevated levels

of anxiety, controlling behaviors, and reduced psychological flexibility. These features may lead to difficulties with social adaptation, impaired interpersonal relationships, and reduced efficiency in daily functioning.

Cognitive Characteristics

The cognitive functioning of individuals with OCD is characterised by distortions in threat appraisal, responsibility attribution, and attitudes toward uncertainty. Intrusive thoughts are often interpreted as dangerous, morally unacceptable, or as posing a threat to the individual's self-concept or identity (Salkovskis, 1985; Clark, 2004).

The most prominent cognitive characteristics include:

- catastrophization of threat,
- inflated responsibility,
- thought-action fusion,
- intolerance of uncertainty,
- perfectionism,
- excessive need for control.

In catastrophization of threat, even low-probability negative events are appraised as serious and highly consequential threats. Inflated responsibility involves the belief that the individual is responsible for preventing any possible negative outcome, regardless of its actual probability.

In thought-action fusion, intrusive thoughts are perceived as morally equivalent to actual actions or as increasing the likelihood of their occurrence. Consequently, a persistent state of internal monitoring and “threat surveillance” develops, which contributes to the maintenance of compulsive behaviours (Rachman, 2002).

Emotional Characteristics

In the emotional domain, individuals with Obsessive-Compulsive Disorder (OCD) commonly experience heightened anxiety, internal tension, guilt, and shame. Excessive sensitivity to intrusive thoughts often results in persistent vigilance and difficulties in maintaining emotional stability.

Feelings of guilt and shame are particularly pronounced when obsessive thoughts conflict with the individual's moral, religious, or social values. In many cases, intrusive thoughts are interpreted as reflections of genuine desires or personality traits, which further intensifies self-criticism and emotional distress.

Under conditions of prolonged emotional tension, depressive symptoms, psychological exhaustion, and tendencies toward social withdrawal may develop.

Behavioral Characteristics

The behavioural manifestations of OCD are primarily expressed through repetitive compulsive acts and avoidance strategies. Compulsive behaviours temporarily reduce internal tension; however, in the long term, they contribute to the maintenance of obsessive thoughts (Foa & Kozak, 1997).

The most common compulsive manifestations include:

- repetitive checking,
- excessive washing and cleaning,
- ordering and symmetry rituals,
- mental counting or repetitions,
- reassurance seeking,
- avoidance behaviour.

Avoidance behaviour represents one of the key maintenance mechanisms of OCD, as individuals attempt to avoid situations that may trigger obsessive thoughts or emotional distress. Consequently, social functioning becomes restricted, and overall adaptation is impaired.

Structural Psychological Characteristics

Individuals with OCD often demonstrate elevated self-criticism, psychological rigidity, and a pronounced need for control. They are characterised by heightened sensitivity to mistakes, persistent self-monitoring, and difficulties in emotional self-regulation.

Reduced psychological flexibility impairs the acceptance of uncertainty and adaptation to stressful situations, resulting in compulsive behaviours becoming one of the primary strategies for regulating internal tension (Hayes et al., 2012).

Thus, the psychological and behavioural characteristics of individuals with OCD form an interconnected system in which cognitive distortions intensify emotional tension, while compulsive behaviours temporarily reduce anxiety but contribute to the long-term maintenance of the disorder.

Contemporary Psychotherapeutic Approaches

Contemporary approaches to the treatment of Obsessive-Compulsive Disorder (OCD) are based on evidence-based psychotherapeutic models aimed at reducing obsessive thoughts, emotional tension, and compulsive behaviours. According to international clinical guidelines, cognitive-behavioural and third-wave psychotherapeutic approaches are considered the most effective interventions for OCD (NICE, 2005).

Cognitive Behavioural Therapy (CBT)

Cognitive Behavioural Therapy (CBT) is among the most extensively studied and empirically supported approaches for the treatment of OCD. According to CBT models, distorted interpretations of intrusive thoughts and the resulting behavioural responses contribute to the maintenance of the disorder (Beck, 1976; Salkovskis, 1985).

The primary goals of CBT include the modification of cognitive distortions, the development of tolerance for uncertainty, and the reduction of controlling behaviours. Therapeutic techniques commonly include cognitive restructuring, behavioural experiments, and the analysis of cognitive schemas.

Exposure and Response Prevention (ERP)

Exposure and Response Prevention (ERP) is considered one of the most effective interventions for OCD and represents a core component of CBT (Foa & Kozak, 1997). This method involves gradual exposure to anxiety-provoking situations or intrusive thoughts without engaging in compulsive behaviours, thereby promoting tolerance of anxiety and reducing avoidance strategies.

Third-Wave Psychotherapeutic Approaches

In recent years, the application of third-wave psychotherapeutic approaches in the treatment of OCD has increased significantly. These approaches focus on changing the individual's relationship with intrusive thoughts, enhancing psychological flexibility, and improving emotional regulation.

The most commonly applied third-wave approaches in OCD treatment include Acceptance and Commitment Therapy (ACT), mindfulness-based approaches, Metacognitive Therapy (MCT), and Compassion-Focused Therapy (CFT).

Acceptance and Commitment Therapy (ACT)

ACT is based on the development of psychological flexibility and the cultivation of a non-reactive stance toward intrusive thoughts. Within ACT, particular importance is attributed to Relational Frame Theory (RFT), according to which psychological suffering is often associated with excessive identification with thoughts and their meanings (Hayes et al., 2001).

The core processes of ACT include acceptance, cognitive defusion, present-moment awareness, and values-based behavioural change. ACT appears to be particularly effective in cases of OCD accompanied by elevated anxiety and pronounced self-criticism (Hayes et al., 2012).

Mindfulness-Based Approaches

Mindfulness-based approaches are grounded in non-judgmental awareness of present-moment experience and contribute to reducing emotional reactivity to intrusive thoughts while promoting emotional self-regulation (Kabat-Zinn, 2003).

Metacognitive Therapy (MCT)

Metacognitive Therapy (MCT) focuses not on the content of obsessive thoughts, but rather on the individual's metacognitive relationship to those thoughts. According to this approach, excessive need for thought control and beliefs regarding the dangerousness of thoughts are among the central mechanisms involved in the maintenance of OCD (Wells, 2009).

Compassion-Focused Therapy (CFT)

Compassion-Focused Therapy (CFT) emphasises the reduction of self-criticism, shame, and guilt while fostering self-compassion and emotional safety (Gilbert, 2010).

Eye Movement Desensitisation and Reprocessing (EMDR)

Eye Movement Desensitisation and Reprocessing (EMDR) was originally developed for the processing of traumatic experiences; however, it has also been applied in certain forms of OCD, particularly in cases involving elevated emotional tension or traumatic experiences. In OCD treatment, EMDR is primarily used as a complementary intervention integrated with other evidence-based approaches (Marr, 2012; Marsden et al., 2018; Shapiro, 2018).

Results

The conducted theoretical and comparative analysis indicates that cognitive-behavioural mechanisms play a significant role in the development and maintenance of Obsessive-Compulsive Disorder (OCD). The integration of the analysed sources allows OCD to be conceptualised as a system of mutually reinforcing psychological processes in which intrusive thoughts, internal tension, and compulsive behaviours intensify one another.

The findings demonstrate that individuals with OCD commonly exhibit distorted threat appraisal, inflated responsibility, intolerance of uncertainty, and controlling behaviours. These characteristics contribute to the development of compulsive actions and avoidance strategies.

The reviewed studies confirm that compulsive behavior primarily functions as a mechanism for the temporary reduction of internal tension; however, in the long term, it contributes to the maintenance of the disorder. These findings are consistent with cognitive-behavioural models, according to which negative reinforcement and avoidance behaviours represent central mechanisms in the persistence of OCD.

Comparative analysis demonstrates that Cognitive Behavioural Therapy (CBT) and Exposure and Response Prevention (ERP) have the strongest empirical support among contemporary psychotherapeutic approaches for OCD treatment. ERP appears to be particularly effective in reducing compulsive behaviours and avoidance strategies.

At the same time, the findings suggest that interventions focused exclusively on symptom control do not always ensure long-term adaptation. In this context, the importance of third-wave psychotherapeutic approaches has increased, particularly Acceptance and Commitment Therapy (ACT), mindfulness-based approaches, Metacognitive Therapy (MCT), and Compassion-Focused Therapy (CFT), which contribute to adaptive emotional responding, emotional self-regulation, and reduction of self-criticism.

The findings further indicate that the effectiveness of OCD treatment largely depends on the individualisation of psychotherapeutic interventions. In this regard, integrative approaches combining CBT and ERP with third-wave psychotherapeutic interventions appear to be the most effective.

Thus, the conducted analysis demonstrates that contemporary approaches to OCD treatment are gradually shifting from exclusively symptom-focused

interventions toward more integrative and individualised therapeutic models.

Conclusion

The conducted analysis demonstrates that Obsessive–Compulsive Disorder (OCD) significantly affects emotional stability, behavioural adaptation, and quality of life. Intrusive thoughts, internal tension, and compulsive behaviours form mutually reinforcing psychological processes that impair social adaptation and overall functioning.

Based on the findings of the present study, the following conclusions may be drawn:

1. Significance of Cognitive Distortions

Individuals with OCD commonly demonstrate distorted threat appraisal, inflated responsibility, intolerance of uncertainty, and controlling behaviours, all of which contribute to the maintenance of compulsive responses.

2. The Role of Compulsive Behaviour

Compulsive behaviour primarily functions as a temporary way to reduce internal tension; however, in the long term, it contributes to the maintenance and chronicity of the disorder.

3. Effectiveness of Evidence–Based Approaches

The findings indicate that Cognitive Behavioural Therapy (CBT) and Exposure and Response Prevention (ERP) possess the strongest empirical support and contribute significantly to the reduction of obsessive–compulsive symptoms and avoidance behaviours.

4. Significance of Third–Wave Approaches

Acceptance and Commitment Therapy (ACT), mindfulness–based approaches, Metacognitive Therapy (MCT), and Compassion–Focused Therapy (CFT) play an important role in improving emotional self–regulation, enhancing psychological flexibility, and reducing self–criticism.

5. Necessity of Individualised Interventions

Effective treatment of OCD requires an integrative and individualised approach that takes into account symptom severity, psychological characteristics, and accompanying emotional difficulties. Combined interventions integrating cognitive–behavioural and third–wave psychotherapeutic approaches appear to be the most effective.

The concluding observations suggest that contemporary treatment strategies for OCD should focus not only on symptom reduction but also on improving emotional stability, psychological adaptation, and quality of life.

The article highlights that an integrative approach may be particularly important in cases where obsessive–compulsive symptoms are accompanied by emotional rigidity, shame, or reduced psychological flexibility.

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ERGOTHERAPY IN SUPPORTING CHILDREN WITH PSYCHOPHYSICAL DEVELOPMENTAL DISORDERS

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Abstract

This article examines the significant role of occupational therapy in child development and how it can help children facing physical, cognitive, or emotional challenges. It focuses on developing self-care skills, increasing independence, and improving children's quality of life. The article emphasises the importance of early intervention, ongoing assessment, and active family involvement in the therapeutic process.

The article keeps the spotlight on the ideology of occupational therapy: helping people live as self-sufficiently as possible. Occupation is a general term providers use to refer of any daily tasks you do.

Occupational therapy for children is a modern approach that helps children not only restore or refine skills but also acquire new ones for everyday life. Thanks to this therapy, children adapt more easily to society, feel more confident at school, and become more independent in their daily activities.

Occupational therapy intervention for children promotes engagement and participation in children's daily life roles. Children's roles include developing personal independence, becoming productive and participating in play or leisure

pursuits. Inability to participate because of disease, disability or skill deficits can cause marginalisation, social isolation and lowered self-esteem. Occupational therapists select interventions for children based upon an analysis of the child's performance of daily life roles, how their performance is affected by their disability, and how their environment supports or constrains their performance (Mandich, A., & Rodger, S., 2006, pp. 115–135).

Through occupational therapy, children gradually acquire:

- self-confidence;
- independence in daily activities;
- better attention and learning ability;
- effective communication skills;
- preparation for kindergarten or school without unnecessary difficulties.

Since play is children's main occupation, occupational therapists often use it to improve playfulness.

Play is spontaneous, intrinsically motivating, and autonomous. Active involvement and a focus on the process, not the end product, are key aspects of play. Play, according to occupational therapists, is considered the main occupation of the child, since it is the vehicle for learning and contributes so significantly to optimal development. Play could also be a milestone to achieve functional or performance-based goals, such as enhancing activities of daily living (G. Rautenbach et al., 2024).

Although many factors influence a child's development, occupational therapy plays a crucial role in supporting children with a variety of developmental challenges.

Keywords and phrases: Occupational therapy, sensory integration, fine and gross motor skills, adaptation, cognitive skills.

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համալսարանի հատուկ և ներառական կրթության ֆակուլտետի
էրգոթերապիայի բաժնի մագիստրանտ

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ԱՐՄԻՆԵ ԱԶՆԱՈՒՐՅԱՆ

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Համառոտագիր

Հոդվածում ներկայացվում է էրգոթերապիայի նշանակալի դերը երեխայի զարգացման, ինչպես նաև ֆիզիկական, ծանաչողական կամ հուզական դժվարությունների բախվող երեխաների աջակցման գործընթացում: Հատուկ ուշադրություն է դարձվում ինքնախնամքի հմտությունների ինքնուրույնության զարգացմանը և երեխաների կյանքի որակի բարելավմանը: Ընդգծվում է վաղ միջամտության, շարունակական գնահատման և թերապևտիկ գործընթացում ընտանիքի ակտիվ ներգրավվածության կարևորությունը: Հոդվածը ուշադրության կենտրոնում է պահում էրգոթերապիայի գաղափարախոսությունը՝ օգնել մարդկանց ապրել հնարավորինս ինքնաբավ: Էրգոթերապիան ժամանակակից մոտեցում է, որը օգնում է երեխաներին ոչ միայն վերականգնել կամ կատարելագործել հմտությունները, այլև ձեռք բերել նոր հմտություններ առօրյա կյանքի համար: Այս թերապիայի շնորհիվ երեխաներն ավելի հեշտությամբ են հարմարվում հասարակությանը, ավելի վստահ են զգում դպրոցում և ավելի անկախ են դառնում իրենց առօրյա գործունեության մեջ: Հիվանդության,

հաշմանդամության կամ հմտությունների պակասը կարող է հանգեցնել մարզինալացման, սոցիալական մեկուսացման և ինքնագնահատականի նվազման (Mandich, A. & Rodger, S., 2006):

Էրգոթերապիայի շնորհիվ երեխաներն աստիճանաբար ձեռք են բերում.

- ինքնավստահություն,
- անկախություն առօրյա գործողություններում,
- ուշադրության կենտրոնացում և ուսումնական հմտություններ,
- արդյունավետ հաղորդակցման հմտություններ,
- նախապատրաստում մանկապարտեզին կամ դպրոցին՝ առանց ավելորդ դժվարությունների:

Քանի որ խաղը երեխաների հիմնական զբաղմունքն է, էրգոթերապիստները հաճախ օգտագործում են խաղը՝ որպես խաղային ակտիվությունն ու խաղալու կարողությունը զարգացնելու միջոց: Հատկանշական է, որ խաղը ունի ինքնաբերական բնույթ, հիմնված է ներքին դրդապատճառների վրա և ինքնավար է: Ակտիվ ներգրավվածությունը և գործընթացի, այլ ոչ թե վերջնական արդյունքի վրա կենտրոնացումը խաղի հիմնական առանձնահատկություններն են: Էրգոթերապիստների կարծիքով՝ խաղը համարվում է երեխայի հիմնական զբաղմունքը, քանի որ այն ուսուցման կարևորագույն միջոց է և զգալիորեն նպաստում է երեխայի օպտիմալ զարգացմանը (G. Rautenbach et al., 2024):

Թեև բազմաթիվ գործոններ ազդում են երեխայի զարգացման վրա, էրգոթերապիան կարևոր դեր է խաղում զարգացման տարբեր խանգարումներ ունեցող երեխաներին աջակցելու գործում:

Բանալի բառեր՝ էրգոթերապիա, զգայական ինտեգրացիա, մանր և խոշոր մոտորիկա, հարմարվողականություն, ճանաչողական հմտություններ:

Introduction

Occupational therapy for children with various disabilities is driven by the need to return them to as independent and active a life as possible. Occupational therapy is a key element of modern multidisciplinary rehabilitation. Occupational therapy is highly individualised, and specialists select treatment methods based on each child's unique needs of each child. They work closely with parents, guardians, and teachers to provide comprehensive support to the child in a variety of settings. Although many factors influence a child's development, occupational therapy plays a crucial role in supporting children with various developmental challenges. Occupational therapy is a holistic approach to health aimed at helping children of all ages perform everyday activities. For children, this may include tasks such as play, learning, communication, and self-care (The Role of Occupational Therapy in Child Development, 2025).

Here are some key areas where occupational therapy plays a vital role in a child's development:

- **Fine and Gross Motor Skills:** Occupational therapists help children develop fine motor skills, such as hand-eye coordination and precise hand movements needed for activities like writing, drawing, and using utensils. They also assist in the development of gross motor skills, which involve large muscle movements and are necessary for tasks like walking, running, and playing sports. Through a variety of therapeutic activities, children can improve their motor skills and coordination.
- **Sensory Processing:** Many children experience difficulties in sensory processing, which can impact their ability to process and respond to sensory information. Occupational therapists use sensory integration techniques to help children with sensory challenges feel more comfortable. This can improve attention, self-regulation, and overall well-being.
- **Social and Emotional Development:** Occupational therapy can help children develop crucial social and emotional skills. Therapists can use play-based techniques to help children with autism, ADHD, or other developmental disabilities improve social interaction, communication, and emotional regulation.
- **Academic Success:** Children who struggle with academic tasks may benefit from occupational therapy. Occupational therapists help improve a child's ability to concentrate, organise tasks, and manage time, which are crucial for school success. They also help children overcome learning barriers, such as difficulties with handwriting, reading, and math.
- **Self-Care Skills:** Occupational therapy helps children master self-care skills such as dressing, eating, and personal hygiene. This is especially important for children with physical disabilities or developmental delays, allowing them to gain independence and confidence in everyday life.
- **Adaptation to Disability:** Occupational therapy plays a crucial role in helping children with disabilities adapt to their condition and achieve a high quality of life. Therapists support the use of assistive devices, adaptive techniques, and strategies to increase the child's independence and participation in various activities.
- **Behaviour and emotional regulation:** Some children may exhibit challenging behaviour or have difficulty regulating emotions. Occupational therapists can identify factors that trigger such behaviour and develop strategies to help children better manage their emotions and behaviour. This may include relaxation techniques, self-soothing, and improved communication (Keyes, C. L. M. et al., 2009).

Early intervention and ongoing support from occupational therapists can make a significant difference in the lives of children with developmental difficulties, enabling them to reach their full potential. This underscores the

fact that occupational therapists work with children to improve their physical, cognitive, and emotional well-being, striving to maximise their potential in all aspects of life (Health Professions Council of South Africa, 2022).

Purpose of the study. To study the role and effectiveness of occupational therapy in the development of children with various disabilities, and to determine its impact on the development of motor, sensory, social-emotional, and self-care skills to increase their level of independence and quality of life.

Methodological Basis

Delays in social skill development can stem from a variety of factors. One of the main causes is the presence of various developmental characteristics in the child, primarily a diagnosis or specific conditions. These can impact physical and cognitive development. To address this issue, occupational therapists use a variety of evidence-based methods tailored to the unique needs of each child. Therapy often includes therapeutic activities such as games, movement exercises, and sensory activities designed to be engaging and functional. The use of adapted tools also plays a key role in the learning process. For example, special pens, cutlery, or clothing with simple fasteners can significantly facilitate task completion. Occupational therapists help select the most appropriate tools to match the child's physical abilities.

Sensory integration techniques such as swings, tactile play, and deep pressure exercises help children process and respond to sensory stimuli more effectively. Adaptive strategies include modifying the daily routine or environment to remove barriers to participation.

Occupational therapists identify the key activities for each age group and begin their work with those activities. The occupational therapists work with the child based on the key activity for their age group, most often play. To develop socialisation, the following methods are used: play therapy, role-playing and social scenarios, group activities, art therapy, behaviour modelling, life skills training, and the creation of a supportive environment. Feedback plays an important role, helping the child become aware of their actions and emotions. Occupational therapy also includes active interaction with the family: specialists train parents so they can support the child's development in everyday life and facilitate their successful socialisation (Klassen et al., 2004)

For many years, specialists have used a wide range of approaches in various combinations, believing they best meet each child's individual needs of each child. Sensory and cognitive approaches are most often combined with other methods, such as visual information analysis, biomechanical, and psychosocial approaches. These methods aim to create accessible, meaningful, and age-appropriate learning environments that address the diverse needs of children with disabilities (50 occupational therapy activities for kids, 2021).

The goal isn't to "fix" a child's cerebral palsy or autism; it's to reduce the gap between what the disability makes hard and what the child needs to do. That

distinction matters. It shifts the focus from deficit to function, changing how sessions are designed and what counts as success.

Key Takeaways:

- Occupational therapy helps children with disabilities build skills for daily life, from handwriting and self-care to sensory regulation and social participation.
- Early intervention produces the strongest developmental gains; the earlier therapy begins, the greater the impact on long-term outcomes.
- Play is the primary therapeutic medium in pediatric OT, not a reward for doing the “real work.”
- Parents and caregivers are active participants in the therapy process, not observers; family carry-over is essential to lasting progress.
- Occupational therapy is tailored to each child’s specific diagnosis, strengths, and functional goals, with no single approach fitting every case.

Examples include modelling with play dough to strengthen hands, completing sensory obstacle courses, using tweezers to develop fine motor skills, and playing with textured materials to improve sensory tolerance. In their work with children with cognitive and physical disabilities, occupational therapists use engaging, hands-on activities to help children learn to regulate their emotions, improve fine motor skills, and reach other developmental milestones. But occupational therapists aren’t the only ones who can use occupational therapy with children. Parents can also integrate therapeutic methods into their child’s daily life through games and crafts that engage all the senses.

For example, tracing letters is a great way for children just beginning to write in print to gain confidence in handling writing instruments. This activity also helps develop hand-eye coordination and strengthen the fine hand muscles. Furthermore, after tracing, children can colour the entire printed drawing, which further develops fine motor skills and is a fun activity. Drawing on a grid helps children develop observation skills and drawing skills. Breaking the drawing down into smaller sections helps them understand how shapes fit together and how to notice details. Colouring the picture, in turn, helps strengthen hand muscles.

During these activities, children manipulate objects and tools (such as scissors and crayons), developing fine motor skills of the hand, wrist, and fingers. This helps children improve manual dexterity and motor coordination, as well as their ability to regulate their emotions (Psychology and Behavioural Science International Journal, 2018).

Special attention is paid to the process of functional, continuous assessment, a key component of intervention planning. The assessment identifies children’s cognitive abilities, communication styles, adaptive behaviour, sensory characteristics, and emotional state. Based on these data, individualised educational and therapeutic programs are developed, including clearly defined

goals, appropriate strategies, and measurable outcomes. It is also noted that the continuous nature of the assessment allows for timely revision of the methods used and their adaptation to the child's developmental dynamics (Barton, E. E., et al., 2015).

Research Methods

Occupational therapy methods help enhance children's self-awareness and focus, facilitating better task completion and skill development. The methods include visual information analysis, which leverages children's cognitive skills, enabling them to extract visual information from the environment and integrate it with other sensory input. This approach is based on developmental approaches, sensory integration, and cognitive analysis.

Occupational therapy methods also help enhance children's self-awareness and focus, supporting better task completion and skill development.

Occupational therapy methods are tailored to the specific needs of children with diverse disabilities. Here are some of the methods used to assist children:

- **Play-Based Learning:** Play helps children with sensory processing disorders better integrate and respond to sensory information.
- **Sensory Integration Therapy:** This therapy helps children with sensory processing disorders to manage sensory input and improve their ability to participate in daily activities.
- **Fine Motor Skill Development:** Occupational therapists work on improving fine motor skills, which
- are essential for self-care and daily living activities.
- **Social Skills Training:** Group activities and play-based learning teach children with autism spectrum disorder how to interact with peers and develop social skills.
- **Visual Perceptual Skills Training:** This training helps children with visual impairments to improve
- their visual perception and cognitive abilities.
- These methods are designed to address the unique challenges faced by children with disabilities,
- promoting their overall well-being and development (Occupational Therapy for Children with Disabilities: Empowering Special Needs Kids, 2024)

Results

Analysis of ergotherapy methods shows that they play a significant role in the development of children's independence. In particular, the development of fine and gross motor skills, the promotion of sensory integration, and the formation of self-care skills contribute to improving the quality of a child's daily life. The use of sensory integration methods is effective both from the point of view of regulating the child's behavioural reactions and from the point of view of the development of attention and self-regulation skills. The use of deep

tactile contact, regulated light and sound environment, as well as appropriate motor exercises helps to maintain the child's emotional balance and increase his involvement in the educational process (Scottish Educational Review, 2015).

These ergotherapy methods help increase the child's self-awareness and focus attention, contributing to better performance of assigned tasks and skill development of skills in the process of performing them. Some therapists also believe that the cognitive approach promotes respect for the child's ideas, increases his sense of control and motivates him to achieve his goals. These methods include the analysis of visual information, which uses children's cognitive skills to extract visual information from the environment and integrate it with other sensory methods. This approach is based on the approaches of development, sensory integration and cognitive analysis. Although only five occupational therapists in the scientific world have mentioned the use of the approach of visual information analysis, in the framework of occupational therapy it is observed that almost all methods are based on aspects of this approach. Some therapists indicate that they used the approach of visual perception as opposed to the analysis of visual information, describing similar methods (Richtlinie über die Verordnung von Heilmitteln in der vertragsärztlichen Versorgung, 2023).

Ergotherapy methods aim at developing the child's independence and everyday life skills. Ergotherapy focuses on fine and large motor skills, sensory integration, self-care skills and adaptation to the environment. Various exercises and activities are selected according to the level of development of the child and encourage active participation. In the case of sensory difficulties, special methods are used to regulate the child's reaction to external stimuli.

Conclusion

Thus, the analysis shows that ergotherapy is an important and effective component of the complex rehabilitation of children with various developmental characteristics. The application of individualised approaches based on the child's age, cognitive and physical characteristics contributes to the formation of key skills – motor, sensory, social-emotional and self-care skills (National Institute of Mental Health, 2025).

The use of games, sensory and cognitive methods, as well as adaptation of the environment, allows for a significant increase in the level of independence of the child and his involvement in everyday and educational activities. Of particular importance are early intervention and systematic assessment, which ensure timely correction of programs and the achievement of sustainable results. Research shows that an in-depth assessment of the developmental characteristics of each child allows for the development of targeted and effective individual programs aimed not only at the development of academic skills, but also at the promotion of independence, communication skills and social adaptation.

The introduction of functional and continuous assessment ensures the flexibility of interventions and their adaptation to the dynamics of the child's

development. In addition, an important component of ergotherapy is the active inclusion of the family in the rehabilitation process, which increases the effectiveness of the activities and promotes consolidation of skills in the natural environment (Effectiveness of ergotherapeutic and occupational therapeutic program implemented for children and youths with disabilities in family-type residential centres, 2021)

Finally, cooperation between specialists and parents is of special importance, since it is one of the pillars of the child's continuous development and the effective implementation of inclusive education. One of the key elements contributing to the effectiveness of the cooperation model is that, by working together, team members gain a shared understanding of each other's experience. This generates new ideas, which are incorporated into joint assessment, planning, implementation, and ongoing monitoring of progress in relation to results for the child and the family.

Thus, ergotherapy acts as a holistic, multifunctional tool aimed at improving children's quality of life of children, revealing their potential, and supporting their successful integration into society (Maltseva, M. N. et al., 2017).

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OPPORTUNITIES AND CHALLENGES FOR SELF-ESTEEM DEVELOPMENT IN THE CONTEXT OF FAMILY VICTIMIZATION

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Abstract

This article examines self-esteem as an important mechanism of an individual's psychological stability and social adaptation within the complex context of marital relationships and victimhood. From this perspective, the family is regarded as the primary environment that shapes an individual's existential identity and self-efficacy.

The theoretical framework of the study combines the classical concepts of W. James, C. Cooley, and C. Rogers with contemporary empirical evidence, highlighting a possible negative association between dysfunctional family dynamics and the individual's system of self-evaluation. Within this framework, prolonged experiences of victimisation are considered in relation to the internalisation of the social role of the "victim," the weakening of internal psychological resources, and changes in the "looking-glass self."

Alongside the theoretical analysis, we also conducted an empirical study. Using the Rosenberg Self-Esteem Scale (RSES), we conducted a comparative analysis of self-esteem levels among women with a self-perception of victimhood and women in favourable marital relationships (N = 60).

The inclusion of only female participants was intended to provide a more focused examination of self-esteem within the context of interpersonal and family relationships and to maintain greater consistency within the sample. This approach made it possible to examine differences in self-esteem associated with different experiences and perceptions of victimhood more clearly.

The findings show that low self-esteem predominated among women with a self-perception of victimhood (65%). This pattern may relate to theoretical notions of reduced access to personal resources and a lower perceived sense of control. The empirical findings also highlight the importance of self-esteem as a factor associated with psychological resilience and adaptation.

The findings of the study suggest that higher levels of self-evaluation and self-esteem may function as protective resources that support psychological stability. They may also be associated with a stronger sense of personal autonomy

and independence, thereby providing a potential basis for the development of targeted psychological intervention programs.

Keywords: Self-esteem, family victimisation, internalisation, psychological resilience, marital relationships, personal resources.

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ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի հայցորդ,
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Համառոտագիր

Սույն հոդվածում ինքնագնահատականը դիտարկվում է որպես անհատի հոգեբանական կայունության և սոցիալական հարմարման կարևոր մեխանիզմ՝ ամուսնական հարաբերությունների և վիկտիմության բարդ համատեքստում: Այս տեսանկյունից ընտանիքը դիտարկվում է որպես անհատի գոյաբանական ինքնության և ինքնարդյունավետության ձևավորման առաջնային միջավայր:

Ուսումնասիրության տեսական շրջանակը համադրում է Ու. Զեյնսի, Զ. Քուլիի և Կ. Ռոջերսի դասական հայեցակարգերը ժամանակակից էմպիրիկ տվյալների հետ՝ ընդգծելով դիսֆունկցիոնալ ընտանեկան դինամիկայի ու անհատի ինքնագնահատման համակարգի միջև հնարավոր բացասական կապը: Վերլուծության շրջանակում երկարատև վիկտիմացման փորձառությունը դիտարկվում է «զոհի» սոցիալական դերի ներքնայնացման, ներքին հոգեբանական ռեսուրսների թուլացման և «հայելային Ես»-ի ձևափոխումների համատեքստում:

Տեսական վերլուծությանը զուգահեռ իրականացվել է էմպիրիկ հետազոտություն (N = 60). Ռոզենբերգի ինքնագնահատականի սանդղակի (RSES) կիրառմամբ կատարվել է համեմատական վերլուծություն՝ վիկտիմության ինքնընկալում ունեցող և բարենպաստ ամուսնական հարաբերություններում գտնվող կանանց ինքնագնահատականի մակարդակներն ուսումնասիրելու նպատակով: Միայն կին մասնակիցների ընդգրկումը նպատակ ուներ միջանձնային ու ընտանեկան հարաբերությունների համատեքստում ապահովելու ինքնագնահատականի առավել կենտրոնացված ուսումնասիրություն, ինչպես նաև պահպանելու ընտրանքի առավել մեծ համասեռությունը: Այս մոտեցումը հնարավորություն տվեց առավել հստակ ուսումնասիրել ինքնագնահատականի տարբերությունները, որոնք կապված են վիկտիմության տարբեր

փորձառությունների և դրանց ընկալումների հետ:

Հետազոտության արդյունքները ցույց են տալիս, որ զոհի ինքնընկալում ունեցող կանանց շրջանում գերակշռում է ցածր ինքնագնահատականը (65%), ինչը կարելի է դիտարկել անձնային ռեսուրսների սահմանափակվածության և վերահսկողության ցածր սուբյեկտիվ զգացման վերաբերյալ տեսական պատկերացումների համատեքստում: Էմպիրիկ արդյունքները նաև ընդգծում են ինքնագնահատականի կարևորությունը՝ որպես հոգեբանական դիմակայունությանն ու հարմարմանը նպաստող գործոն:

Ուսումնասիրության արդյունքները թույլ են տալիս ենթադրել, որ ինքնաթուղարման և ինքնագնահատականի բարձր մակարդակները կարող են հանդես գալ որպես հոգեբանական կայունությունը պահպանող պաշտպանական ռեսուրսներ: Դրանք կարող են նաև պայմանավորել անձնական ինքնությունությանն ու ինքնավարության ավելի բարձր մակարդակ՝ հիմք ստեղծելով հոգեբանական միջամտության նպատակային ծրագրերի մշակման համար:

Բանալի բառեր՝ ինքնագնահատական, ընտանեկան վիկտիմություն, ինտերիորիզացիա, հոգեբանական ռեզիլիանս, ամուսնական հարաբերություններ, անձնային ռեսուրսներ:

Introduction

Understanding the psychological factors that shape well-being and personal development in interpersonal relationships has become an important focus of contemporary psychological research. As the primary setting of socialisation, the family plays a fundamental role in the development of self-perception, self-worth, and personal competence.

However, when family relationships become dysfunctional, psychological functioning and emotional well-being may also be negatively affected. Under these circumstances, lower self-esteem may leave individuals more vulnerable to internal conflicts and negative self-evaluation, reducing its potential protective role.

The study of self-esteem becomes particularly relevant in the context of traumatic experiences and victimisation. Beginning with William James's classical conceptualisation of self-esteem as the relationship between personal achievements and aspirations (James, 1890, p. 696), and extending to contemporary psychological approaches, self-perception has been viewed as a dynamic construct that develops through ongoing social experiences. Feedback from significant others plays an important role in this process. According to Cooley's concept of the "looking-glass self," close relationships provide the basis through which individuals form perceptions of themselves (Cooley, 1902, p. 184). When these relationships involve victimisation, emotional pressure, or persistent devaluation, the reflected self-image may become increasingly negative, affecting the development of healthy self-esteem and self-respect (Mead, 1934, p. 121).

The relevance of the present study stems from the need to re-examine victimisation not only as an external experience but also as a process closely

related to the individual's internal psychological functioning. Within this process, the "victim role" may gradually become internalised, while lower self-esteem and difficulties in social adaptation may emerge alongside this experience. At the same time, individuals may experience a growing sense of disconnection from their personal resources and capacities. As confidence in their own emotional and cognitive judgments weakens, individuals may become increasingly reliant on external evaluations and influences. As a result, a self-reinforcing pattern may emerge in which low self-esteem and subjective perceptions of victimhood become closely intertwined over time.

The scientific novelty of this research lies in its systematic analysis of the link between victimisation and changes in self-esteem. Specifically, it redefines the "alienation of personal resources" as a key factor in identity breakdown. This study theoretically and empirically examines how the internalisation of the "victim role" may be reflected in changes in self-esteem, including patterns that appear to extend beyond a temporary emotional reaction. From a methodological standpoint, the link between the erosion of self-esteem and the loss of personal autonomy is essential. According to Morris Rosenberg, healthy self-esteem is the cornerstone of mental health (Rosenberg, 1965, p. 31). Under the conditions of victimisation, personal achievements are devalued, while failures are generalised into permanent negative traits.

The goal of this research is to conduct a comparative analysis of self-esteem levels among women who perceive themselves through the lens of victimhood versus those in healthy family relationships.

This study focuses on women in the "Middle Adulthood" stage, as defined by Erik Erikson's theory of psychosocial development (Erikson, 1950, pp. 266–268), because their self-valuation is especially sensitive to the quality of interpersonal feedback (Miller, 1976, p. 156). Using a single-gender sample ensures high internal validity by controlling for gender-role variables. These findings will provide a foundation for future studies involving male samples and help develop targeted interventions to restore personal agency and promote psychological resilience.

Theoretical and methodological bases

Self-esteem constitutes a part of the central structures of an individual's psychological life and social functioning. Its systematic investigation begins with the classical work of William James, who conceptualised self-esteem as the ratio of an individual's actual achievements to their aspirations, framing it as a dynamic, comparative construct (James, 1890, p. 310). This conceptualisation is particularly relevant for the analysis of family relationships, as marital cohesion and a supportive environment may contribute to a stronger sense of personal self-worth, whereas relational dysfunction may be accompanied by lower self-valuation. Social-psychological approaches have further expanded this perspective by emphasising the role of interpersonal interaction. Charles Cooley (1902)

introduced the concept of the “looking-glass self,” proposing that self-esteem is shaped by individuals’ perceptions of how “significant others” evaluate them (Cooley, 1902, p. 184). Within the family context, the spouse often fulfils this role, and their evaluations become a primary source of an individual’s self-worth.

This idea was further elaborated by George Herbert Mead (1934), who emphasised that self-esteem is shaped under the influence of the “generalised other,” that is, the internalised social norms and expectations of society (Mead, 1934, p. 154). The process of social comparison is likewise central to the formation of self-esteem. Leon Festinger argued that individuals continuously compare themselves with others to assess their own value (Festinger, 1954, p. 117). In marital contexts, such comparisons may be either affirming or devaluing, and may be reflected in more positive or more negative patterns of internal self-image.

In the measurement and conceptual organisation of self-esteem, Morris Rosenberg’s global model (1965) remains foundational, defining self-esteem as a relatively stable attitude toward the self (Rosenberg, 1965, p. 31). Rosenberg further described how devaluing interactions and chronically critical environments are linked to greater instability and lower levels of self-esteem (Rosenberg, 1965). This position closely aligns with the humanistic perspective of Carl Rogers, who argued that “unconditional positive regard” is essential for personal growth, whereas control and criticism may be accompanied by profound internal conflict (Rogers, 1961). From a cognitive-behavioural standpoint, Albert Bandura highlighted the role of self-efficacy as a structural foundation of self-esteem (Bandura, 1986, p. 391). Family victimisation may be accompanied by reduced confidence in one’s abilities, which can also be reflected in lower self-efficacy. This process can also be understood in light of Martin Seligman’s (1975) model of learned helplessness, which describes how repeated adverse experiences may be accompanied by diminished self-worth and a reduced sense of control (Seligman, 1975, p. 74).

According to Erik Erikson’s psychosocial theory, the quality of marital relationships in adulthood is closely related to identity stability and a sense of trust (Erikson, 1968). Later research on victimisation explored these assumptions, linking prolonged emotional or physical pressure to difficulties in self-concept formation and greater dependence on external evaluations (Walker, 1979; Dutton & Painter, 1981).

Scientific understanding of the developmental trajectory of self-esteem and its functional significance advanced substantially with the seminal work of Orth and Robins. The authors showed that self-esteem follows normative developmental patterns across the lifespan while also serving as a key predictor of social adaptation and psychological well-being (Orth & Robins, 2014). These insights were further elaborated in systemic studies of intimate relationships, where victimisation is conceptualised as an interconnected process in which difficulties in one partner’s self-esteem may coexist with patterns of emotional dominance and changes in the family’s psychological dynamics (Lampis et al., 2019).

Contemporary research continues to refine this reconceptualisation by foregrounding resilience as a protective factor against negative family dynamics (Frontiers in Public Health, 2023). Recent studies have documented the detrimental effects of parental psychological control on children's self-esteem (Tang et al., 2024), as well as identified novel mechanisms of self-esteem regulation and psychological self-regulation in adulthood (Solheim et al., 2024).

Thus, contemporary psychological research views self-esteem as a complex construct that reflects both the quality of interpersonal relationships and the influence of the broader social environment.

Accordingly, a broad range of psychological theories converge on the view that self-esteem functions as a complex, multidimensional structure and a sensitive psychological indicator, reflecting both relational quality and the axiological content of the surrounding social context.

Research methods

Building on the theoretical analysis and recognising the importance of a healthy family environment for individual and societal well-being, and given self-esteem's role as a key psychological factor, an empirical study was conducted. The purpose of the study was to examine differences in self-esteem levels between women who perceive themselves as victims and women who describe their family relationships as favourable.

The primary target group for the research consists of women in the “Middle Adulthood” stage, according to Erik Erikson's theory of psychosocial development. To maintain socio-demographic comparability and reduce the influence of age-related factors, the study included 60 women between the ages of 25 and 45, all of whom had been married for at least three years. At the initial stage of the study, participants completed a preliminary self-report assessment of their perceptions of family and marital experiences. Based on their responses and self-classification, participants were divided into two equal groups. The grouping reflected the participants' own perceptions of their experiences and was not based on a clinical diagnosis or an externally assigned assessment of victimisation.

The first group consisted of women who self-perceived of victims ($n = 30$). These participants tended to describe recurring difficulties in their family life and to attribute negative experiences primarily to external circumstances or the actions of others, reflecting a predominantly external locus of control. The second group consisted of women in favourable marital relationships ($n = 30$). They described their marital relationships as harmonious and supportive and tended to attribute both positive outcomes and difficulties to their own efforts and personal agency, reflecting a predominantly internal locus of control. This initial grouping was used to form the two comparative groups. Self-esteem was subsequently assessed independently in both groups using the Rosenberg Self-Esteem Scale (RSES). To keep the groups comparable, we maintained socio-economic homogeneity by aligning educational backgrounds, socio-economic status, and the characteristics

of participants’ daily social environments.

To assess the global level of self-worth, the Rosenberg Self-Esteem Scale (RSES) was utilised. This instrument consists of 10 statements that reflect an individual’s general level of self-acceptance and the valuation of their personal merits. Each statement is rated on a four-point Likert scale, with responses ranging from “Strongly Agree” to “Strongly Disagree.”

During data processing, we reverse-scored negatively phrased items to ensure a comprehensive and reliable self-esteem index. The use of a four-point response scale was intentional, as it eliminated a neutral midpoint and encouraged respondents to make a clear choice regarding their self-evaluation.

The inclusion of only women in this study is justified by gender-specific roles and differences in the subjective attribution of victimhood. Scientific data indicate that women’s self-esteem is more sensitive to interpersonal interactions and is often characterised by a predominance of external attributions (Rosenberg, 1979; Orth & Robins, 2022)

Results

The comparative analysis of the findings indicates clear differences in self-esteem levels between women who perceive themselves of victims and those in favourable family relationships. This pattern becomes particularly evident in the quantitative results presented below (Table 1).

Table 1.

Distribution of Self-Esteem Levels by Group (%)

Self-Esteem Level (Scores)	Women with Self-Perception of Victimhood (n=30)	Women in Successful Relationships (n=30)
Low (10–25 points)	65%	10%
Average (26–29 points)	25%	43%
High (30–40 points)	10%	47%

The statistical analysis was based primarily on the percentage distribution of self-esteem levels across the two groups. As individual-level scores were not available for further inferential analysis, we present the findings descriptively and interpret the observed differences in relation to the distribution of self-esteem levels.

The comparative analysis of the data identifies several key patterns. The predominance of low self-esteem (65%) among women with a self-perception of

victimhood suggests that experiences perceived as externally influenced may be reflected in relatively stable patterns of self-evaluation over time. This finding is consistent with the view that the “victim role” can become deeply internalised, with individuals gradually experiencing themselves as less autonomous and less valuable.

At the same time, the low proportion of high self-esteem (10%) observed in this group indicates a profound alienation from personal resources. Women who perceive themselves as subjects of victimisation demonstrate reduced confidence in their own cognitive and emotional capacities. In this context, low self-esteem can be viewed as a psychological correlate of learned helplessness, characterised by a diminished sense of control over one’s own life and a greater tendency to attribute control to external forces.

In contrast, women who evaluate their relationships as successful demonstrate predominantly high (47%) and average (43%) levels of self-esteem, accounting for 90% of the group. This finding suggests that a supportive family environment may function as a reliable “psychological mirror,” in which positive interpersonal feedback is accompanied by greater psychological resilience and self-acceptance.

Discussion

The empirical findings of the present study reveal clear differences in self-esteem levels between women with a self-perception of victimhood and women who described their marital relationships as favourable. In the group with a self-perception of victimhood, 65% of participants demonstrated low self-esteem, while only 10% demonstrated high self-esteem. In comparison, 90% of women in favourable relationships demonstrated either average (43%) or high (47%) levels of self-esteem. These findings describe differences in the distribution of self-esteem levels between the two groups, without implying a causal relationship between family experiences and self-esteem.

From a theoretical perspective, the observed predominance of low self-esteem among women with a self-perception of victimhood can be considered in relation to Charles Cooley’s concept of the “looking-glass self.” According to this perspective, individuals’ perceptions of themselves are shaped partly through their interpretations of how significant others perceive and evaluate them. Within the context of the present findings, repeated experiences of devaluation or negative interpersonal feedback may therefore be theoretically relevant to the formation of a less favourable self-perception. This interpretation is consistent with the broader theoretical position that the social environment can become reflected in an individual’s system of self-valuation.

Another empirical finding concerns the very small proportion of participants with high self-esteem in the group with a self-perception of victimhood (10%). Within the conceptual framework of the present study, this pattern is considered in relation to the notion of “alienation” from personal resources. Theoretically,

reduced confidence in one's own cognitive and emotional capacities may be associated with a greater reliance on external evaluations and influences. This interpretation can be further examined in light of Seligman's concept of learned helplessness, which describes a reduced sense of personal control following repeated adverse experiences. In this context, low self-esteem and an externalised sense of control may represent related psychological characteristics, although the present study does not establish the direction of this relationship.

The empirical findings for women in favourable marital relationships showed a different distribution: 47% demonstrated high self-esteem, and 43% demonstrated average self-esteem, together accounting for 90% of the group. These results indicate that higher and average levels of self-esteem were more prevalent in this group. Theoretically, this pattern may be interpreted in relation to the role of supportive interpersonal relationships in the formation and maintenance of positive self-evaluation. Cooley's concept of the "looking-glass self" is relevant here as well, since positive interpersonal feedback may contribute to more favourable perceptions of the self. From this perspective, a supportive family environment may represent an important psychological resource associated with resilience, self-acceptance, and personal autonomy.

The relatively high proportion of women with average self-esteem (43%) also deserves consideration. Empirically, this result demonstrates that nearly half of the participants in the favourable-relationship group were characterised by a moderate level of self-esteem rather than a high level. From a theoretical standpoint, an average level of self-esteem may be compatible with realistic self-evaluation, adequate self-criticism, and emotional balance, which are commonly considered important components of psychological well-being. However, the present study did not directly measure these characteristics and therefore should regard them as theoretical interpretations rather than direct empirical findings.

Overall, the findings of the present study demonstrate an association between self-perception of victimhood and differences in self-esteem levels. The theoretical analysis provides possible explanations for this pattern by drawing on concepts such as the "looking-glass self," learned helplessness, personal resources, and the role of supportive interpersonal relationships. Thus, the empirical results provide a basis for considering victimhood as a psychological phenomenon related to self-concept and self-valuation, while the theoretical perspectives help contextualise the observed differences without implying causal conclusions.

Conclusion

The theoretical analysis and empirical findings of the study indicate that self-esteem is an important psychological indicator associated with the quality of the family environment. The findings show clear differences in self-esteem levels between women with a self-perception of victimhood and those in successful relationships, highlighting the relevance of family context to patterns of self-valuation and psychological well-being.

The findings indicate differences in self-esteem levels between women with a self-perception of victimhood and women in favourable relationships, which may be considered in relation to the theoretical concept of the “victim role”. The low levels of self-valuation identified among women with a self-perception of victimhood are also associated with a reduced sense of control over personal experiences and emotional reactions. In this context, patterns of learned helplessness and greater psychological dependence on external influences may be observed alongside lower self-esteem.

The findings suggest that victimisation may be understood not only as an external adverse experience but also as a phenomenon closely related to the individual's internal psychological functioning. The observed patterns may be accompanied by difficulties with self-regulation, reduced personal agency, and less adaptive coping.

These findings highlight the importance of psychological interventions that support the development of personal autonomy and a positive self-concept. Such programs may focus on strengthening self-esteem and self-efficacy, while supporting individuals in developing greater confidence in their ability to manage life challenges.

Several limitations should be considered when assessing the findings of the present study. The limited sample size ($N = 60$) restricts the generalizability of the findings to broader populations. The exclusive inclusion of women provides a more focused perspective on the relationship between self-esteem and perceived victimhood, but also limits the applicability of the findings to men. In addition, the reliance on self-report and self-classification means that the grouping of participants reflects their subjective perceptions and personal interpretations of their family and marital experiences. Finally, the nonexperimental, cross-sectional methodological approach of the study allows for the identification of associations between the studied variables but does not permit conclusions regarding causal relationships. Despite these limitations, the findings provide an important empirical basis for further research on the psychological dimensions of family victimhood and self-esteem, including studies with larger and more diverse samples, comparative gender-based approaches, and longitudinal research.

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HOW ADOLESCENTS IN GERMANY DESCRIBE, JUSTIFY, AND CRITICALLY REFLECT ON HISTORICAL AND CONTEMPORARY ETHNIC STEREOTYPES

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Abstract

Ethnic stereotypes in Germany remain a persistent challenge, shaped by history, migration, and everyday interactions. This exploratory qualitative study examines how 15 participants aged 11–20 describe, justify, and reflect on these biases. Participants took part in two semi-structured group interviews: six identified as native German, and nine as first-generation immigrants. Thematic analysis drew on theories of implicit and explicit bias, social identity, in-group favouritism, and authoritarian personality. Within this sample, participants morally rejected ethnic stereotypes while acknowledging their persistence through media representations, intergenerational transmission, and everyday interactions. The findings should not be interpreted as representative of adolescents in Germany as a whole.

Keywords: Ethnic stereotypes; adolescence; Germany; minority groups.

ԻՆՉՊԵՍ ԵՆ ԳԵՐՄԱՆԻԱՅԻ ԴԵՌԱՀԱՄՆԵՐԸ ՆԿԱՐԱԳՐՈՒՄ, ՀԻՄՆԱՎՈՐՈՒՄ ԵՎ ՔՆՆԱԴԱՏԱՐԱՐ ՎԵՐԱԻՄԱՏՏԱՎՈՐՈՒՄ ՊԱՏՄԱԿԱՆ ԵՎ ԺԱՄԱՆԱԿԱԿԻՑ ԱԶԳԱՅԻՆ ԿԱՐԾՐԱՏԻՊԵՐԸ

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Համառոտագիր

Գերմանիայում ազգային կարծրատիպերը շարունակում են մնալ պատմության, միգրացիայի և առօրյա փոխազդեցությունների ազդեցությամբ ձևավորված կայուն մարտահրավեր: Այս հետազոտությունը, որն ունի հետախուզական բնույթ և իրականացվել է որակական մեթոդաբանությամբ, ուսումնասիրում է, թե ինչպես են 11–20 տարեկան 15 մասնակիցներ

նկարագրում, հիմնավորում և քննադատաբար անդրադառնում այդ կարծրատիպերին: Մասնակիցները մասնակցել են երկու առանձին կիսակառուցվածքային խմբային հարցազրույցների. նրանցից վեցը ինքնանույնականացվել են որպես բնիկ գերմանացիներ, իսկ ինը՝ որպես առաջին սերնդի ներգաղթյալներ: Թեմատիկ վերլուծությունն իրականացվել է բացահայտ և թաքնված կանխակալության, սոցիալական ինքնության, ներխմբային նախապատվության և ավտորիտար անհատականության տեսությունների հիման վրա: Այս ընտրանքի շրջանակում մասնակիցները բարոյական տեսանկյունից մերժում էին ազգային կարծրատիպերը՝ միաժամանակ ընդունելով դրանց շարունակական գոյությունը մեղիա ներկայացումների, միջսերնդային փոխանցման և առօրյա փոխազդեցությունների միջոցով: Ստացված արդյունքները Գերմանիայի դեռահասների ամբողջության համար ներկայացուցչական կամ վիճակագրորեն ընդհանրացվող չեն կարող համարվել:

Բանալի բառեր՝ ազգային կարծրատիպեր, դեռահասություն, Գերմանիա, փոքրամասնությունների խմբեր:

Introduction

Ethnic stereotypes remain a persistent, socially influential form of mental categorisation in Germany, deeply rooted in a socio-political history shaped by National Socialism, post-war migration, and ongoing debates over national identity. Following the 1960s Gastarbeiter (guest worker) program and post-1990 migration waves, public discourse shifted from biological racism to stereotypes that emphasise cultural differences and societal integration (Butterwegge, 2005; Zick et al., 2011). Today, while explicit racism is widely condemned in Germany, subtle, implicit biases continue to operate unconsciously and influence everyday interactions (Greenwald & Banaji, 1995). Understanding these dynamics is critical during adolescence—a vital developmental stage marked by advanced moral reflection, heightened salience of social identity, and vulnerability to rigid categorisation under perceived social threats (Adorno et al., 1950; Tajfel & Turner, 1979).

Importantly, adolescents' engagement with these biases varies by social position. While majority-group ethnically German youth often perceive stereotypes abstractly, first-generation immigrant youth frequently experience them as a concrete, emotional, lived reality.

This qualitative study uses group interviews to examine how adolescents in Germany describe, justify, and critically reflect on historical and contemporary ethnic stereotypes. It addresses four central research questions:

1. **How** do adolescents describe ethnic stereotypes and their perceived origins?
2. **How** do they justify, normalise, or reject these stereotypes?

3. **To what extent** do they critically evaluate the accuracy, fairness, and consequences of stereotypes?
4. **How** do these processes differ between ethnically German and first-generation immigrant adolescents?

Methodology

The study comprised fifteen participants living in Germany: six participants identified as native German and nine as first-generation immigrants. The sample included male and female participants aged 11–20. The age distribution was as follows: two participants were 11, two were 14, three were 15, five were 16, one was 17, and two were 20. Because this range spans important developmental differences, the study does not treat participants as developmentally homogeneous and does not make robust age-based claims. Participants took part in two separate interview groups, one consisting of the six native German participants and the other of the nine first-generation immigrant participants.

- Group 1: Ethnically German adolescents whose parents were born in Germany.
- Group 2: First-generation Germans whose parents had immigrated to Germany.

This arrangement enabled a cautious comparison of participants occupying different social positions within the study context. It should not be understood as a comparison of homogeneous majority and minority populations. After voluntary, anonymised, guardian-approved informed consent, we collected data through semi-structured group interviews. Participants aged 18–20 participated with parental awareness and approval. No institutional ethics approval was obtained. We conducted interviews separately for the two groups. Interviews were conducted in German and English, audio-recorded, and transcribed verbatim. Interview responses were translated from German to English using translation software; during the interviews, a 16-year-old participant fluent in both languages also translated questions and responses as needed. This process may have influenced nuances of meaning and is acknowledged as a limitation. Thematic prompts covered definitions of stereotypes, origins, historical and contemporary examples, media influences, lived experiences, and moral evaluations. Reflexive thematic analysis combined iterative, inductive coding with theory-informed interpretations of explicit versus implicit bias, in-group/out-group constructions, justificatory strategies, and social-position differences.

Data Analysis involved repeated readings of the interview transcripts, identification of relevant passages, and iterative development of codes covering stereotype definitions, perceived origins, justification and rejection, media influence, historical memory, lived experience, and group differences. The author conducted the coding. The author then reviewed the codes in relation to the research questions and organised them into five overarching themes. Theoretical

perspectives informed the interpretation of the coded material. No qualitative analysis software or a second coder was used. Because the sample was small and the interviews were conducted separately, the themes are treated as interpretive patterns within this dataset rather than as evidence of population-level differences.

Results

Five overarching themes were identified.

1. Stereotypes as Cognitive Responses to Fear and Uncertainty

Participants in both groups described stereotyping as a mental shortcut rooted in fear, uncertainty, and limited or no knowledge. This aligns with Tversky and Kahneman's (1974) representativeness heuristic, in which individuals make rapid social judgments by comparing people to mental prototypes rather than evaluating individual traits.

However, the underlying drivers of these cognitive shortcuts differed by group: Group 1 participants highlighted fear stemming from unfamiliarity and from linking every out-group member to a mental prototype shaped by history and/or past experiences, whereas Group 2 participants linked uncertainty to social segregation and limited intergroup contact.

2. Historical Transmission and Intergenerational Narratives

In the late 19th and early 20th centuries, German society institutionalised pseudo-scientific racial hygiene theories and *Völkisch* nationalism, establishing moral hierarchies that paved the way for Nazi ideology (Mosse, 1985). This ideology peaked during the Nazi regime, embedding ethnic stereotypes into the education system (Koonz, 2003) and fostering an authoritarian personality type marked by rigid thinking, obedience, and out-group hostility (Adorno et al., 1950). Consequently, German stereotyping is deeply rooted in historical political ideologies and national identity narratives.

Reflecting this history, participants used the Holocaust and National Socialism as central reference points. They connected propaganda, economic crises, and authoritarian leadership to ethnic scapegoating (Adorno et al., 1950). However, the groups differed in application: Group 1 focused on condemning the historical events and their severe social consequences, while Group 2 linked this history directly to current migration debates.

3. Contemporary Stereotypes and Their Targets

Immigrants, refugees, Muslims from Turkey, Syria, and other Muslim countries, and individuals with Eastern European backgrounds are identified as primary targets of stereotyping in contemporary Germany.

Group 1 participants recognised these biases and forms of discrimination. However, they discussed them in abstract, detached terms. In contrast, Group 2 participants described these stereotypes as lived experiences that illustrate how implicit bias influences everyday interactions as aversive racism, producing subtle, unintentional biases that lead to miscommunication and distrust in multiethnic or

interracial interactions, resulting in negative outcomes for minorities despite intentions to be non-prejudiced (Gaertner & Dovidio, 1986).

4. Media, Confirmation Bias, and Implicit Processes

Participants noted that media coverage reinforces ethnic stereotypes, particularly by linking ethnicity to crime. This reporting triggers the framing effect by shaping perceptions (Entman, 1993) and activating confirmation bias, where individuals interpret news to validate existing beliefs (Nickerson, 1998). Ultimately, these narratives fuel implicit stereotyping among German youth, driving automatic, unconscious judgments.

5. Collective Memory, Moral Evaluation, and Resistance

Collective memory strongly shapes these implicit schemas. Families pass down intergenerational narratives of war, guilt, and victimhood, shaping younger generations' moral boundaries and social empathy (Assmann, 2012). One participant from the native German group stated:

“But you cannot say it out loud, even if there is hatred towards others; no, don’t say it out loud, it’s not okay.”

This statement suggests that the participant distinguished between the possibility of hostile feelings and the social and moral prohibition against expressing them openly. It also indicates awareness that public norms may discourage explicit prejudice, even when negative attitudes persist. Participants from the first-generation immigrant group described stereotyping and exclusion as more direct, personal, and emotionally significant. One participant explained:

“I can feel the way they look at us. No matter how good my German is, no matter that I was born here, I am still regarded as the child of an immigrant, and it is frustrating because you don’t know which world you belong to.”

This account connects ethnic stereotyping with questions of belonging, language, and national identity. The participant’s statement also suggests that being born in Germany and speaking German fluently did not necessarily protect them from being perceived as an outsider.

At the same time, participants did not necessarily view cultural identity and German belonging as mutually exclusive. One participant explained:

“See, but I want to hold on to my roots, what’s wrong with that but I also want to be German, I can do both.”

Together, these accounts show that participants connected ethnic stereotypes with moral responsibility, political anxiety, and the negotiation of multiple identities. However, these patterns should be understood as interpretations of the accounts provided by participants in this study and not as characteristics of either group as a whole.

Discussion

The coexistence of historical guilt and modern prejudice shapes a unique psychological landscape in Germany, demonstrating that stereotyping is a deeply ingrained cultural phenomenon rather than a mere individual cognitive bias. This study highlights a clear gap between adolescents' explicit rejection of stereotypes and their persistent implicit bias. This discrepancy suggests that although social norms successfully encourage explicit egalitarianism among German youth, subconscious biases continue to operate and subtly influence peer interactions and decision-making, despite conscious intentions to act without prejudice (Greenwald & Banaji, 1995).

Experimental reactions differed significantly by group. Majority-group adolescents displayed composure and abstraction, whereas minority-group adolescents expressed raw emotion and frustration, describing stereotypes as a painful lived reality that induces self-doubt and defensiveness. Social Identity Theory explains these dynamics, noting that individuals derive self-esteem from group affiliations, thereby splitting social behaviour into personal traits and group-influenced interactions (Tajfel & Turner, 1979).

Historical consciousness remains a central interpretive framework. Participants frequently invoked Germany's Nazi past and the Holocaust as moral reference points, linking historical exclusion to contemporary migration debates. This framing (Ad: what's wrong with that? But I also want to be German) strongly shapes current social understanding. However, modern digital landscapes complicate this legacy; participants in both groups confirmed that social media platforms rapidly amplify and reinforce ethnic biases. Online media serves as a structural anchor for implicit bias through the framing effect (Entman, 1993), shaping how youth perceive social problems and solutions.

Ultimately, these adolescents demonstrated significant moral agency and critical thinking. Education, historical consciousness, and media literacy emerged as vital protective factors, positioning youth as potential agents of democratic resilience when equipped with the proper tools.

Limitations

This study primarily focuses on two context-specific categories: participants who identified as native German and those who identified as first-generation immigrants. While this division enabled separate group interviews and a cautious comparison, it oversimplifies Germany's contemporary diversity. The categories do not capture key intersections, such as religious background, socioeconomic status, regional setting, language, mixed or hybrid identities, and migration histories. The age range of 11–20 also spans important developmental differences; the sample was too small to support robust age-based comparisons. Furthermore, the small qualitative sample limits statistical generalizability. The findings therefore concern the participating individuals and should not be generalised to adolescents in Germany.

as a whole. Software-assisted translation and in-interview translation by a bilingual participant may have affected the wording or nuance of the translated material. The author conducted the coding alone, and no institutional ethics approval was obtained; readers should consider these factors when evaluating the study.

Conclusion

Within this qualitative sample, participants linked stereotyping to historical memory, evolving identities, media representations, and contemporary multicultural challenges. The findings offer exploratory insight into how these fifteen participants discussed and evaluated ethnic stereotypes; they should not be interpreted as representative of adolescents in Germany as a whole. Participants demonstrated a capacity for critical reflection on bias, though the extent and form of this reflection varied across accounts and social positions.

Importantly, participants drew on historical knowledge and moral reasoning when discussing bias, belonging, and resistance. The interview data suggest that education, historical consciousness, and media literacy may merit further investigation, but the present study does not establish the effectiveness of interventions. Future research with larger, more age-diverse, and more intersectionally diverse samples could examine these possibilities more systematically.

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THE TERMINOLOGY OF ETHNIC IDENTITY IN THE CONTEXT OF SOCIO-ADAPTIVE PROCESSES

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Abstract

The study explores the conceptual nature of an individual's ethnic identity within the context of interconnected socio-adaptive processes. In contemporary psychological science, the relevance of this issue stems from ongoing processes of globalisation—spanning the socio-psychological, economic, and cultural spheres—which create new socio-adaptive conditions for an individual's life and activity. Under these circumstances, as societal processes become volatile and perceptions of one's environment are shaped by diverse information flows, specific transformations in the manifestations of an individual's ethnic identity are emerging. Moreover, alongside the formation and consolidation of ethnic identity, an individual's tendencies and mechanisms for adapting to the social environment also begin to change; this underscores the importance of conducting socio-psychological research into the interaction between ethnic identity and the processes of adapting to the social environment, as well as clarifying the terminology surrounding ethnic identity.

Keywords: Ethnic identity, terminology, socio-adaptive processes, primordialist approach, instrumentalism, constructivist approach.

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Համառոտագիր

Հետազոտությունը բացահայտում է անձի էթնիկ ինքնության եզրութաբանությունը սոցիալ-ադապտիվ գործընթացների փոխկապակցվածության մեջ: Ժամանակակից հոգեբանական գիտության մեջ այս հիմնախնդրի արդիականությունը պայմանավորված է ներկայիս գլոբալիզացիոն սոցիալ-հոգեբանական, տնտեսական և մշակութային գործընթացներով, որոնք նոր սոցիալ-ադապտիվ պայմաններ են ստեղծում անձի կենսագործունեության համար: Այս պայմաններում, երբ հասարակական բոլոր գործընթացները դառնում են բավականին փոփոխական և անկայուն, իսկ պատկերացումները սեփական միջավայրի մասին ձևավորվում են տեղեկատվական տարաբնույթ հոսքերի ներքո, առաջ են գալիս անձի էթնիկ ինքնության դրսևորումների որոշակի փոխակերպումներ: Ավելին, էթնիկ ինքնության ձևավորման և ամրակայման հետ զուգընթաց սկսում է փոփոխությունների ենթարկվել նաև սոցիալական միջավայրին անձի ադապտացիոն հակումները և մեխանիզմները, ինչն առավել կարևորում է էթնիկ ինքնության և սոցիալական միջավայրին անձի ադապտացիոն գործընթացների փոխազդեցությունների սոցիալ-հոգեբանական հետազոտության իրականացումն ու էթնիկ ինքնության եզրութաբանության վերհանումը:

Բանալի բառեր՝ էթնիկ ինքնություն, եզրութաբանություն, սոցիալ-ադապտիվ գործընթացներ, պրիմորդիալիստական մոտեցում, ինստրումենտալիզմ, կոնստրուկտիվ մոտեցում:

Introduction

Each ethnic group is characterised by a complex of unique traits that, collectively, are expressed through the term “ethnic identity.” Ethnic identity is a crucial component of an individual’s consciousness. In modern psychology, the concept of ethnic identity is examined within the context of socio-adaptive processes, driven by the search for orientation and stability in a changing world and the intensification of interethnic interactions. Interactions with other ethnic groups bring an individual’s ethnic identity to the fore, as the perception and formation of ethnic identity are most clearly manifested through comparison. In contemporary social psychology, ethnic identity is viewed as a key component of an individual’s social adaptation—one around which their perceptions of their place in the social world are centred and structured. The significance of addressing the concept of ethnic identity also depends on the role this phenomenon plays within the individual’s overall “Self-structure.” Many authors emphasise that identity (including ethnic identity) shapes the psychological basis of conscious behaviour and manifests in the social environment through various mechanisms of adaptation. The conceptual framework of this phenomenon encompasses the terminology and categorical apparatus of ethnopsychology, cross-cultural psychology, the social psychology of ethnic interaction, and developmental psychology. Despite the wide range of studies dedicated to various aspects of the terminology surrounding ethnic identity, many questions concerning the specific features of ethnic identity formation and the dynamics of ethnic identity within an individual’s social adaptation processes remain under-researched.

Theoretical and Methodological Bases

The concept of «ethnic identity» implies the existence of social markers or traits that serve as accepted means of differentiating between groups. These can be designated as components of ethnic identity; collectively, they serve as both representative characteristics of a given ethnic group and a basis for recognising and distinguishing other ethnic groups. Such markers include physical appearance, geographical origin, economic patterns, religion, language, and so forth. Consequently, depending on the specific theoretical and methodological approach of a study, the concept of «ethnic identity» may be understood through various components. The conceptualisation of ethnic identity has primarily evolved within the framework of three theoretical approaches. First, the primordialist approach posits that an individual’s ethnic identity is rooted in fundamental ties to a specific group or culture—ties that can be viewed as primarily biological or historical-cultural. Evolutionary influences are evident here, shaped by biological, genetic, and geographical factors. While ethnic groups are primordial in nature, they function as social rather than biological communities, given that ethnic ties are subject to historical change. The formation of an ethnic group is a long-term historical process. Within the framework of primordialism, «ethnos» is a general concept—a scientific term—intended to characterise human communities as they

manifest within a specific historical context. A shared language and territory are considered key prerequisites for the formation of an ethnic group. In effect, these characteristics can be viewed as stable ethnic components from which other traits derive. Thus, territorial commonality creates the conditions for the existence and reproduction of the ethnos and also manifests itself in economic and cultural activities (Cheryan & Tsai, 2007).

Furthermore, proponents of the primordialist approach place ethnic territory at the foundation of the formation of ethnic self-awareness, even though history records instances of spatially separated ethnic groups that continue to preserve their cultural distinctiveness and self-designation. Another enduring characteristic identified—as previously mentioned—is language, which serves as a crucial factor in the formation of an ethnos. Alongside language, elements of material and spiritual culture also matter; these include features characterised by tradition and stability, such as customs, rituals, religion, norms of behaviour, and so forth. In conclusion, it can be said that all primordialist schools of thought interpret ethnic communities as objectively existing groups characterised by biological reproduction and shared cultural values—manifested through common external cultural forms—and by the creation of shared spheres of interaction; this facilitates identification among group members and their recognition by other groups as a distinct community (Epstein & Heizler, 2015). In contrast to the primordial approach, the instrumentalist perspective on ethnic identity focuses on rational considerations. According to this view, ethnic identity can enhance the social activity of a given ethnic group, help it navigate competition, counter control by other groups, and foster greater intra-group mutual aid. The instrumentalist approach views ethnic identity as the product of political myths aimed at attaining power. Brass (1985) has conducted such studies.

Unlike the primordialist approach, instrumentalism does not examine the objective foundations of the emergence of ethnic identity; instead, it treats it as a given and focuses on the functions it serves for individuals and ethnic groups. Thus, while it shows how ethnic identity satisfies the needs of individuals or groups, instrumentalism does not investigate the objective bases of an ethnic group's existence (such as a common origin linked to a geographic territory and a shared language). In summary, from an instrumentalist perspective, the primary components of ethnic identity are the pragmatic goals of the group's existence and the means that address an individual's specific interests, thereby shaping their life within society. The constructivist approach regards consciousness as the central component of ethnic identity. Group membership depends on how an individual perceives themselves within that group. From a constructivist perspective, an ethnos is a community of people formed through socio-psychological and cultural self-identification vis-à-vis other communities—a process expressed through a national “self-image.” The ethnic community is not defined by the enumeration of specific traits inherent to the community (such as a shared historical past,

language, or origin), but by the perception of those traits. Borinca et al. (2021) cite shared origin as an example of an ethnic community characteristic; they emphasise that origin itself is not the marker of ethnic identity, but rather the perception or myth of the community's shared historical past. In this context, the concept of the "boundary" can be considered a crucial category of ethnic identity; this concept, in turn, stems from an individual's ethnic self-identification and is therefore driven by each person's motivations. In other words, individuals sharing a common geographical origin may identify with different ethnic groups, depending on which ethnic community's socio-psychological and cultural "boundaries" they regard as their own and within which "boundaries" they perceive themselves to exist. In contemporary literature, a widely adopted definition of an ethnic group and ethnic identity holds that members share a common ethnonym and a complex of characteristics—including cultural commonalities, a myth of common origin, and a collective historical memory linked to a specific territory—while also sharing a sense of solidarity. It also emphasises the subjective psychological dimension of the issue—manifested through the national "self-image," collective consciousness, and mythology—in contrast to the components of objectively defined territory and shared historical processes found in earlier theoretical approaches. It is worth noting that the theoretical approaches to ethnic identity outlined above can be synthesised and examined in conjunction, as they complement one another. This approach will allow for the maximum utilisation of the achievements of all the various approaches while simultaneously avoiding their extreme formulations (Borinca, I., Guerra, R. & Uka, 2025).

The constructivist approach to ethnic identity can also serve as a foundation for integrating other theories. The premises for this conclusion are as follows: first, a key element of the constructivist approach is its historical perspective, which allows examination of the phenomenon of ethnicity across different time periods and, consequently, through various analytical lenses. Second, a distinctive feature of the constructivist approach is the role of blood ties in the formation of ethnic identity. This factor is also emphasised, to varying degrees, in the other two theoretical approaches. Thirdly, the constructivist interpretation of ethnicity makes it possible to examine the manifestations of shifting ethnic identity—specifically, how an individual perceives themselves within a given group and how the national "self-image" is formed and transformed—aspects that are increasingly significant in research on integration trends in modern societies. Consequently, various approaches to ethnic identity need not be viewed as mutually exclusive; the constructivist perspective tends to consider these approaches in conjunction and to examine the insights gained from different schools of thought. By emphasising the role of the national self-image within the complex structure of an ethnos, the constructivist approach directs scholarly inquiry toward the study of ethnic identity. Modern psychological science identifies several major types of ethnic identity; their specific characteristics are briefly outlined below. Most individuals

possess a mono-ethnic identity that aligns with their national affiliation. Heath et al. (2023) examine this issue by exploring the interconnections between positive ethnic identity and inter-ethnic tolerance. Particular importance is placed on the ethnic nuances involved in perceiving “the other”; furthermore, the combination of a mono-ethnic identity with a different ethnic group leads to assimilation—that is, the adoption, to varying degrees, of that group’s traditions, values, and language (Hakobyan & Khachatryan, 2022). A bi-ethnic identity category is also identified, wherein an individual consciously associates with two interacting ethnic communities. In such cases, manifestations of ethnicity are linked to both ethnic groups. Such complex, cross-cultural forms of ethnic identity can have either favourable or unfavourable consequences for the individual. In the first case, it is assumed that an individual is capable of applying the experience gained from one group when interacting with another ethnic group, thereby facilitating their adaptation processes. In the second case, a weakly expressed sense of ethnic identity may be observed during interactions with both one’s own and other ethnic groups. Such borderline identification—manifesting as a marginal form of ethnic identity—can be characterised by a lack of proficiency in the languages and values of both ethnic groups, as well as by incomplete adaptation processes. In this case, the individual’s psychological manifestations of ethnicity would downplay the significance of the ethnic factor in favour of personal factors. Lee and Ahn (2013) have addressed the study of ethnic identity, identifying two primary components within its structure: the cognitive (or intellectual) and the affective (or emotional). The first component encompasses an individual’s knowledge and perceptions regarding the distinct characteristics of their own group—features that serve to differentiate the group and shape the overall image of its ethnicity. The second component involves the emotional dimension of belonging to that ethnic group, including one’s attitude toward the group and the evaluation of its characteristics.

Valcke et al. (2020) single out ethnic awareness and ethnic self-designation as constituent elements of the cognitive component. As previously noted, the foundation of ethnic identity lies in an individual’s ability to distinguish “one’s own” from “outsiders.” This distinction is possible only if the individual possesses sufficient knowledge regarding the characteristics of both their own and other ethnic groups. The forms of such distinctions—and, in a broader sense, the manifestations of ethnic identity—are determined by the level of ethnic awareness. The affective component of ethnic identity, as mentioned, is expressed through one’s attitude toward one’s own ethnic community; this attitude can be either positive or negative. In the first case, the individual derives satisfaction from the awareness of belonging to a specific ethnic group. In contrast, in the second, they seek to disassociate from their own ethnic identity and prefer to integrate into other ethnic groups.

Thus, when discussing the socio-psychological manifestations of ethnic identity, it is essential to highlight both the cognitive and emotional aspects

of an individual's ethnic self-identification. Verkuyten et al. (2024) have also addressed this issue; in addition to the aforementioned components, they identify a behavioural component within the complex of ethnic identity. In this context, it is understood as a mechanism of self-expression through which the individual affiliates with a specific ethnic group. This manifests in the structuring of systematic actions within various situations of inter-ethnic contact. In psychology, it is customary to distinguish two components of ethnic identity: one—the cognitive component—has a rational basis, while the second—the affective component—is emotional. Notably, the affective component is often grounded in the cognitive element (Tajfel & Turner, 1986).

Phinney (2000; 2003), for his part, clearly distinguishes between the concepts of ethnicity and ethnic identity. She classifies ethnicity as a purely sociological category, defining it based on objective or ascriptive characteristics of ethnic affiliation—namely, parental ethnicity, place of birth, language, and culture. In contrast, she views ethnic identity within the context of subjective identity, which is not reducible to ethnic identity **per se**. Several authors interpret ascription as an expression of a passive stance—one in which the individual does not strive for independent achievements but instead accepts the conditions “offered” to them and is content with them (Roth et al., 2023; Schwartz et al., 2009). By excluding the existence of an active, agentic “Self,” these authors shift the concept of ascription into the social realm, transforming it into a matter of socially prescribed behavioural norms. From this perspective, an individual manifests their ascriptive nature to the extent that they unconditionally accept the behavioural rules proposed and imposed by society. Therefore, while it is valid to include ascriptive traits of ethnic identity in the list of objective characteristics of ethnic affiliation, we believe we must broaden the conceptual framework around them and examine them from a socio-psychological perspective as well. A trend in contemporary socio-psychological literature is to examine an individual's ascriptive characteristics—while understood within the context of ethnic identity—in isolation. This leads to the marginalisation of the ascriptive component of ethnic identity in the socio-psychological study of personal identity. Yet, ascriptive and content-based characteristics are interconnected; they reflect the integrity of the individual's national “Self-image” and, when situated within the concept of ethnic identity, cannot be fully understood in isolation. Therefore, we propose a comprehensive examination of the phenomenon, avoiding the separation of the individual's ascriptive “Self” as a purely sociological phenomenon from ethnic identity as a purely psychological one. From this perspective, an individual's ascriptive characteristics can be subsumed under the concept of ethnic identity, as a key component of the national “self-image.” Let us elaborate on this view. While partially agreeing with T.G. Stefanenko, we can rightly view ethnic identity as a form of social ascription. First and foremost, an individual becomes aware of their ethnic affiliation based on the fact of their origin—fixed both geographically

and socially—expressed through an ascriptive self-image. We can designate this as the formal or ascriptive component of an individual's ethnic identity—a social reality objectively given to the person. However, depending on the extent to which the individual accepts this reality—or, in other words, depending on the specific nature of their ethnic identity—they may either accept or reject this ascriptive reality (Umaña-Taylor, 2011; Weber, 1922/1955).

Methodology and Methods

The study's methodological basis draws of theoretical approaches proposed by Tajfel and Turner (1986), Schwartz et al. (2009), and Bornica et al. (2025). The main results of the study highlight key findings through scientific methods of comparison and analysis of the terminology of ethnic identity, ethnicity, mono- and dual ethnic identity, and an individual's "Self-image" in the context of socio-adaptive processes.

Results

Thus, the concept of ethnic identity becomes the substantive component of ethnicity, which may either coincide with or differ from the formal component. In the first instance, we observe a mono-ethnic identity, where an individual acknowledges and accepts their ascriptive status and identifies with that specific ethnic group; here, the substantive component of ethnic identity aligns with the formal component. In the second instance, a dual-ethnic identity emerges when an individual, driven by specific motivations, rejects their ascriptive status and affiliates—to varying degrees—with a different ethnic group. This implies a lack of alignment between the individual's ethnic identity component and the formal component. In such cases, the study of the substantive component of ethnic identity—or ethnicity itself—assumes particular significance. The mechanisms of this study can be examined through the lens of ethnic stereotypes of adaptation, by means of which an individual characterises both their own ethnic group and others. A range of factors shaped by the social environment, and specifically by the dynamics of intergroup relations, influences the formation of an individual's ethnic identity. In this context, the development and perception of interethnic relations play a significant role, potentially fostering an individual's awareness of their ethnic identity. A fundamental prerequisite for the existence of ethnic identity is the "us-them" dichotomy. This distinction allows discussion of the ethnic identities of groups with different ethnic characteristics—identities whose boundaries originate in individuals' self-identification based on anthropological traits. Thus, characteristics of genetic and social unity serve to distinguish "us" from "others." Ethnic identity does not exist in isolation from comparison and communication; one's ethnic distinctiveness can be expressed only through interaction with another ethnic group. In other words, the "us-versus-others" comparison inherent to an ethnic group manifests as a stable attribute, yet takes on varying characteristics—such as religious or linguistic ones—depending on the

interactions between different ethnic groups. For this reason, ethnic identity can be preserved even in the absence of a shared language or territory; the Roma people, for instance, maintain their ethnic identity through comparison with other peoples and an awareness of their own distinctiveness. Ethnic identity also includes an aspect of identity that individuals consciously experience (Schwartz et al., 2009; Phinney, 2000).

The expression of the national (or ethnic) “Self” depends on how an individual defines themselves; consequently, ethnic identity occupies a significant place in the structure of personal characteristics. Moreover, the significance of the national “Self” increases substantially during critical or unstable situations, whereas under conditions of social stability, it diminishes, giving way to purely social characteristics. Ethnic identity also encompasses cultural and symbolic dimensions. Modern society is composed of various cultural spheres, the boundaries of which are defined not by territory or the existence of a state, but by the capabilities of communication systems. As a society advances, it becomes more complex; social differentiation deepens, and distinctions come to outweigh similarities. In this context, culture serves as the foundation for a shared system of signs and symbols. The establishment of a sign system that all members of an ethnic group universally understand fosters cultural cohesion within that group and reinforces the members’ awareness of their belonging to it. Thus, from a socio-psychological perspective, ethnic identity is distinguished by its formal and substantive components. The first component is understood as an individual’s ascriptive reality, while the second is the individual’s national “self-image”; when these two coincide, they form a mono-ethnic identity characterised by manifestations of positive ethnic identification. Based on the foregoing, ethnic identity can be defined as a characteristic of an individual that consists of a sense of belonging to a specific ethnic group or community and is shaped by the genetic and social foundations of that group’s social commonality. It manifests through comparisons of “us” with “others” in interactions and relationships with other ethnic groups (Borinca et al., 2025; Valcke et al., 2020).

Conclusion

The expression of the national (or ethnic) “Self” depends on how an individual defines themselves; consequently, ethnic identity occupies a significant place in the structure of personal characteristics. Moreover, the significance of the national “Self” increases substantially during critical or unstable situations, whereas under conditions of social stability, it diminishes, giving way to purely social characteristics. Ethnic identity also encompasses cultural and symbolic dimensions. Modern society is composed of various cultural spheres, the boundaries of which are defined not by territory or the existence of a state, but by the capabilities of communication systems. As a society advances, it becomes more complex; social differentiation deepens, and distinctions come to outweigh similarities. In this context, culture serves as the foundation for a shared system of signs and

symbols. The establishment of a sign system that all members of an ethnic group universally understand fosters cultural cohesion within that group. It reinforces members' awareness of their belonging. Thus, from a socio-psychological, socio-adaptive perspective, ethnic identity is distinguished by its formal and substantive components. The first component is understood as an individual's ascriptive reality, while the second is the individual's national "self-image"; when these two coincide, they form a mono-ethnic identity characterised by manifestations of positive ethnic identification. Based on the foregoing, ethnic identity can be defined as a characteristic of an individual that consists of a sense of belonging to a specific ethnic group or community and is shaped by the genetic and social foundations of that group's social commonality. It manifests through comparisons of "us" with "others" in interactions and relationships with other ethnic groups.

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CAPACITY NEEDS FOR PROJECT MANAGEMENT IN ARMENIAN HIGHER EDUCATION: FINDINGS FROM THE ERASMUS+ EU-BRIDGE MULTI-STAKEHOLDER ASSESSMENT

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Abstract

The deepening internationalisation and Europeanisation of higher education requires Armenian higher education institutions not only to expand international cooperation but also to develop the individual and institutional capacities needed to design and manage European educational and research projects. This study aims to identify the main capacity needs and gaps in Armenia's higher education sector and assess their alignment with the components envisaged by the EU-BRIDGE project ("Strengthening Higher Education for European Project Management in Armenia"), implemented under the Erasmus+ Capacity Building in Higher Education action.

The study uses a mixed-methods approach, combining data from three complementary components: a quantitative survey of 180 participants, a survey of 14 experts in higher education and quality assurance, and the results of a focus group discussion with representatives of 23 organisations, along with six in-depth interviews. The integration of data from different sources enabled a comparative analysis of the perspectives of different stakeholder groups and thematic triangulation of the findings.

The results demonstrate a high level of interest in participation in European programmes within the Armenian higher education sector; however, this interest is not always accompanied by sufficient practical experience and institutional support. The main capacity needs include identifying funding opportunities; developing project ideas and applications; budgeting and financial management; identifying international partners and building consortia; and project planning, monitoring,

evaluation, and reporting. At the same time, limited access to information and advisory support, financial and time constraints, insufficient English-language proficiency, and a lack of institutional support mechanisms were identified as significant barriers.

The study shows that capacity development cannot be limited to short-term training activities. Stakeholder assessments highlight the need for practice-oriented learning, mentoring, simulation of real projects, international networking, experience sharing, and the development of a digital professional community. These findings broadly align with the EU-BRIDGE project's components on training, experiential learning, social innovation, project simulation, and professional networking. The findings can contribute to the development of evidence-based mechanisms for capacity building and sustainable participation in European projects in Armenian higher education, as well as inform the design and implementation of similar Erasmus+ initiatives.

Keywords: higher education, internationalisation, Europeanisation, project management, capacity building, needs assessment, Erasmus+ EU-BRIDGE.

ՀԱՅԱՍՏԱՆԻ ԲԱՐՁՐԱԳՈՒՅՆ ԿՐԹՈՒԹՅԱՆ ՈԼՈՐՏԻ ԾՐԱԳՐԵՐԻ ԿԱՌԱՎԱՐՄԱՆ ԿԱՐՈՂՈՒԹՅՈՒՆՆԵՐԻ ԿԱՐԻՔՆԵՐԸ. ERASMUS+ EU-BRIDGE-Ի ԲԱԶՄԱՇԱՀԱԿԻՑ ԳՆԱՀԱՏՄԱՆ ԱՐԴՅՈՒՆՔՆԵՐԸ

ՆԱՐԻՆԵ ՎԱՐԴԱՆՅԱՆ

ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի դոցենտ,
բանասիրական գիտությունների թեկնածու

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ՀՀ ԳԱԱ գիտակրթական միջազգային կենտրոնի դեկան,
ֆիզիկամաթեմատիկական գիտությունների թեկնածու,
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Համառոտագիր

Բարձրագույն կրթության միջազգայնացման և եվրոպականացման խորացումը Հայաստանի բուհերից պահանջում է ոչ միայն միջազգային համագործակցության ընդլայնում, այլև եվրոպական կրթական և հետազոտական ծրագրերի մշակման և կառավարման համապատասխան անհատական ու ինստիտուցիոնալ կարողություններ: Սույն հետազոտության նպատակն է բացահայտել այդ կարողությունների հիմնական կարիքներն

ու բացերը Հայաստանի բարձրագույն կրթության ոլորտում և գնահատել դրանց համապատասխանությունը Erasmus+ «Բարձրագույն կրթության կարողությունների զարգացում» գործողության շրջանակում իրականացվող EU-BRIDGE («Strengthening Higher Education for European Project Management in Armenia») նախագծի նախատեսվող բաղադրիչներին:

Հետազոտությունն իրականացվել է խառը մեթոդներով՝ համադրելով երեք փոխլրացնող բաղադրիչների տվյալները՝ 180 մասնակիցների քանակական հարցման, բարձրագույն կրթության և որակի ապահովման ոլորտների 14 փորձագետների հարցման, ինչպես նաև 23 կազմակերպությունների ներկայացուցիչների ֆոկլուս-խմբային քննարկման և 6 խորացված հարցազրույցների արդյունքները: Տվյալների համադրումն ապահովել է տարբեր շահակիցների տեսակետների համեմատական վերլուծություն և արդյունքների թեմատիկ տրիանգուլյացիա:

Արդյունքները ցույց են տալիս, որ Հայաստանի բարձրագույն կրթության ոլորտում առկա է եվրոպական ծրագրերին մասնակցելու բարձր հետաքրքրվածություն, սակայն այն միշտ չէ, որ ուղեկցվում է համապատասխան գործնական փորձով և ինստիտուցիոնալ աջակցությամբ: Հիմնական կարողությունների կարիքները վերաբերում են ֆինանսավորման հնարավորությունների բացահայտմանը, նախագծերի գաղափարների և հայտերի մշակմանը, բյուջետավորմանն ու ֆինանսական կառավարմանը, միջազգային գործընկերների որոնմանն ու կոնսորցիումների ձևավորմանը, նախագծերի պլանավորմանը, մոնիթորինգին, գնահատմանը և հաշվետվողականությանը: Միաժամանակ, որպես կարևոր խոչընդոտներ առանձնացվել են տեղեկատվության և խորհրդատվության սահմանափակ հասանելիությունը, ֆինանսական և ժամանակային սահմանափակումները, անգլերենի ոչ բավարար իմացությունը և ինստիտուցիոնալ աջակցության մեխանիզմների պակասը:

Հետազոտությունը ցույց է տալիս, որ կարողությունների զարգացումը արդյունավետ չի կարող սահմանափակվել կարճաժամկետ վերապատրաստումներով: Շահակիցների գնահատականները վկայում են գործնական ուսուցման, մենթորության, իրական նախագծերի սիմուլյացիայի, միջազգային ցանցային համագործակցության, փորձի փոխանակման և թվային մասնագիտական համայնքի ձևավորման անհրաժեշտության մասին: Այս արդյունքները ընդհանուր առմամբ համապատասխանում են EU-BRIDGE ծրագրի՝ ուսուցման, գործնական փորձառության, սոցիալական նորարարության, նախագծերի սիմուլյացիայի և մասնագիտական ցանցավորման բաղադրիչներին: Հետազոտության արդյունքները կարող են կիրառվել Հայաստանի բարձրագույն կրթության ոլորտում կարողությունների զարգացման և եվրոպական նախագծերին կայուն մասնակցության փաստահեն մեխանիզմների ձևավորման, ինչպես նաև նմանատիպ Erasmus+ նախաձեռնությունների նախագծման և իրականացման համար:

Բանալի բառեր՝ բարձրագույն կրթություն, միջազգայնացում,

եվրոպականացում, նախագծերի կառավարում, կարողությունների զարգացում, կարիքների գնահատում, Erasmus+ EU-BRIDGE:

Introduction

The internationalisation and Europeanisation of higher education have become important dimensions of higher education reform over the past two decades. The expansion of international academic cooperation, institutional capacity, research collaboration, and universities' competitiveness is increasingly linked to the ability of higher education institutions (HEIs) to operate effectively within European and international academic networks. Within the European Higher Education Area (EHEA), the Bologna Process and European Union initiatives, particularly the Erasmus+ programme, have reinforced these processes by supporting academic mobility, institutional development, innovation, and international cooperation.

For HEIs participating in European cooperation and funding programmes, effective engagement involves more than access to external financial resources. It requires individual professional competences and institutional capacities in project development and management, strategic and financial planning, quality assurance, partnership building, and organisational support. The ability to initiate, coordinate, implement, monitor, and sustain European projects is therefore increasingly important for meaningful and continuous international engagement. Participation in European programmes should consequently be understood not only as project activity but also as part of broader institutional development and internationalisation.

This issue is particularly relevant in the Armenian higher education context. Internationalisation and alignment with European principles and practices have become important directions of higher education reform in Armenia. Armenian HEIs have gradually expanded their participation in Erasmus+ and other European cooperation programmes, contributing to academic mobility, curriculum modernisation, inter-institutional cooperation, and quality improvement. However, participation remains uneven, and engagement in competitive European funding programmes is still relatively limited. HEIs continue to face institutional, organisational, financial, and human-resource constraints that affect the scale and quality of their European engagement.

Research on higher education internationalisation indicates that successful participation in European programmes depends not only on institutional willingness or access to funding, but also on qualified human resources, project development and management experience, international networks, digital competences, effective governance, and quality assurance mechanisms. Capacity development is therefore essential for translating interest in international cooperation into practical project activities and sustainable institutional practices. Capacity-building interventions are more relevant and effective when informed by systematic needs assessments involving multiple stakeholder groups. Such an approach can identify both individual skills gaps and institutional barriers that may limit the application

of acquired competences. Combining evidence from different stakeholder groups also helps identify areas of convergence and divergence and align capacity-building measures with institutional and sectoral priorities.

Against this background, the Erasmus+ Capacity Building in Higher Education project EU-BRIDGE – “Strengthening Higher Education for European Project Management in Armenia” seeks to strengthen the capacity of Armenian HEIs and relevant stakeholders to participate more effectively in European educational and research programmes. The project combines interconnected components, including a specialised curriculum in European project management, a Pilot Academy, Social Innovation Labs, project simulation activities, and a digital community platform and professional network. Their relevance and effectiveness depend largely on alignment with the Armenian higher education ecosystem’s actual needs and capacity gaps of the Armenian higher education ecosystem.

To establish this evidence base, EU-BRIDGE conducted a comprehensive needs assessment involving different stakeholder groups*. The assessment combined quantitative and qualitative evidence from students, academic staff, young researchers and youth representatives; higher education leaders, quality assurance specialists and sectoral experts; and representatives of organisations, employers, the private sector, and civil society. This design enables the examination of capacity needs from multiple perspectives while connecting individual competence requirements with institutional and organisational conditions for successful European project participation. Despite growing research on the internationalisation of Armenian higher education, limited attention has been given to the systematic assessment of the individual and institutional capacities required for participation in European educational and research funding programmes through the simultaneous involvement of multiple stakeholder groups. There is also limited research directly connecting identified stakeholder needs with the design of capacity-building interventions within Erasmus+ projects. Addressing this gap matters because effective capacity building depends not only on identifying learning needs but also on understanding the institutional conditions, support mechanisms, and practical opportunities needed to apply acquired competences. Accordingly, the aim of this study aims to identify the main individual and institutional capacity needs and gaps affecting participation in European educational and research programmes in Armenia and to assess how well the planned components of the EU-BRIDGE project respond to these needs.

The study addresses the following research questions:

RQ1. What individual and institutional capacity gaps constrain the participation of Armenian higher education institutions and relevant stakeholders in European educational and research programmes?

RQ2. What knowledge, skills, and institutional support mechanisms are considered priorities for strengthening participation in European projects?

RQ3. To what extent do the identified needs and expectations of different

stakeholder groups converge, and how do they inform the planned outputs and components of the EU-BRIDGE project?

By addressing these questions, the study contributes to the discussion on capacity development and the internationalisation of higher education in Armenia. Its particular contribution lies in combining quantitative and qualitative evidence from multiple stakeholder groups and linking identified capacity needs to the design of a specific Erasmus+ capacity-building intervention. Beyond identifying skills gaps, the study examines how individual competences, institutional support, and opportunities for practical engagement relate. The findings provide an evidence base for strengthening sustainable participation in European projects and designing more practice-oriented and institutionally embedded capacity-building initiatives in Armenian higher education.

Literature Review and Research Background

Internationalisation and Europeanisation of Higher Education

Internationalisation has become a major dimension of higher education development and reform. Although scholars interpret it differently, Knight (2004) defines it as the process of integrating international, intercultural, or global dimensions into the purpose, functions, and delivery of post-secondary education. This perspective moves internationalisation beyond individual activities, such as mobility or international agreements, and frames it as a process affecting the core functions of higher education institutions (HEIs). Subsequent scholarship has expanded this understanding. De Wit, Hunter, Howard, and Egron-Polak (2015) relate internationalisation to teaching and learning, research, institutional strategies, partnerships, and the development of students' and staff competences. They emphasise that internationalisation should be assessed not merely through quantitative indicators, such as mobility numbers or international agreements, but also through the quality and strategic relevance of international engagement.

The concept of comprehensive internationalisation provides a broader institutional perspective. Hudzik (2011) conceptualises internationalisation as an institution-wide process involving leadership, governance, teaching, research, services, partnerships, and institutional culture. It therefore cannot be confined to international relations offices or selected staff members; it requires the involvement of academic, administrative, and support units, and the integration of international dimensions into institutional strategies and practices. The European context has provided a particularly strong policy framework for these developments. The Bologna Process and the establishment of the European Higher Education Area (EHEA) have promoted convergence through reforms in degree structures, quality assurance, recognition, mobility, and international cooperation. However, as the Bologna Process Implementation Report demonstrates, the pace and depth of implementation vary across countries and institutions. Europeanisation, therefore, involves not only formal policy convergence but also the institutional capacity to

translate European principles and instruments into sustainable practices.

This broader perspective is also reflected in the literature on internationalisation at home. Beelen and Jones (2015) argue that international and intercultural dimensions should not be limited to participants in international mobility but can also be embedded in domestic teaching, learning, curricula, and institutional environments. Internationalisation consequently depends on both institutional capacity and the competences of a broad range of actors. For this study, these approaches suggest that participation in European projects should be understood as part of broader processes of institutional internationalisation and Europeanisation. The capacity to initiate and manage European projects therefore depends not only on individual administrative competences but also on institutional strategy, human-resource development, partnership capacity, quality assurance, digital readiness, and organisational learning.

Institutional Capacity and Competences for European Project Management

The growing role of externally funded European cooperation has increased the importance of project-related competences within higher education institutions. Participation in competitive European programmes requires staff to manage a complex project cycle, from identifying funding opportunities and developing project concepts to consortium building, proposal writing, budgeting, implementation, monitoring, evaluation, dissemination, and reporting. These activities require technical knowledge, practical experience, interpersonal skills, and institutional support. The project-management literature increasingly conceptualises competence as multidimensional. In a systematic literature review, Papp-Horváth, Tóth, and Tóth (2024) show that project-management competence encompasses multiple dimensions and cannot be reduced to knowledge of methodologies. Similarly, Ochoa Pacheco et al. (2023) highlight personal and social competences, particularly leadership, communication, and emotional intelligence, in research on project-manager competences and project success. Winiarska (2026), reviewing 90 publications from 2000–2024, further highlights the growing importance of leadership, communication, stakeholder management, digital competences, flexibility, and adaptive approaches. Overall, project management increasingly requires a combination of technical, interpersonal, strategic, and adaptive competences.

These findings are directly relevant to European higher education projects. Successful participation in Erasmus+ and similar programmes requires competences extending beyond conventional administrative project management, including interpreting programme priorities, developing coherent proposals, building international partnerships, designing work packages and budgets, defining measurable outcomes, managing intercultural collaboration, and communicating results. Project-management capacity in higher education should therefore be understood at both individual and institutional levels. At the individual level,

relevant competences include proposal development, project planning, financial management, monitoring and evaluation, communication, teamwork, negotiation, leadership, and digital collaboration. At the institutional level, capacity involves structures and procedures that enable staff to access information, obtain methodological support, identify partners, prepare applications, manage projects, and retain and disseminate knowledge generated through project participation.

The distinction between individual competence and institutional capacity is critical for sustainability. Staff training alone may have limited effects where institutions lack organisational support, incentives, time allocation, appropriate procedures, or mechanisms for sharing expertise. Conversely, institutional structures cannot be fully effective without staff possessing the competences to use them. Capacity development should therefore be understood as an interaction between people, organisational structures, institutional strategies, and opportunities for practical learning. The literature on project-management education further supports a practice-oriented approach. Rather than focusing primarily on the transmission of explicit knowledge, research emphasises experience, behavioural competences, and workplace application. Project-management education should therefore combine knowledge, skills, attitudes, and experience. This is particularly relevant to Erasmus+ project development, where the ability to apply knowledge to real proposals and partnerships is as important as familiarity with programme rules.

Erasmus+ and Capacity Building in Higher Education

Within the European policy environment, Erasmus+ is a major instrument for international cooperation and capacity development in higher education. Although widely associated with mobility, the programme also supports cooperation projects that strengthen institutional capacities, modernise educational provision, develop partnerships, and promote structural change. The Capacity Building in Higher Education (CBHE) action is particularly relevant to this study because it explicitly connects international cooperation with institutional capacity development. The Erasmus+ Programme Guide emphasises strong participation and shared ownership among partner institutions, particularly those from countries not associated with the Programme, as conditions for responsibility, sustainability, and effective outcomes. It also identifies needs assessment as a key first step in CBHE project development, aimed at identifying areas requiring improvement and the underlying reasons for existing gaps. This orientation has important implications for capacity-building design. Needs assessment should address not only knowledge and skills gaps but also the institutional and organisational conditions that generate or reinforce them. A systematic assessment involving multiple stakeholder groups can therefore provide a stronger basis for project design than one limited to a single institutional category. Shared ownership is equally important. When capacity-building projects are designed externally, training and other interventions may remain disconnected

from institutional priorities. In contrast, involving partner institutions and stakeholders in identifying needs and shaping activities can better align capacity development with institutional strategies and longer-term organisational change. CBHE projects can also generate impacts beyond individual training outcomes, including curriculum development, quality assurance, governance, institutional strategies, international partnerships, and new organisational practices. In this sense, they reinforce the broader understanding of internationalisation developed above: European projects can function as mechanisms of institutional learning and change rather than merely as externally funded activities.

Internationalisation and Erasmus+ Capacity Building in Armenia

Armenia's engagement with the European higher education policy space has developed substantially since its accession to the Bologna Process in 2005. Erasmus+ has become a key mechanism for Armenian HEIs to cooperate with European institutions, develop educational initiatives, participate in mobility schemes, and undertake capacity-building projects. Recent research provides empirical evidence of the contribution of Erasmus+ Capacity Building in Higher Education (CBHE) projects to the internationalisation of Armenian higher education. Fljyan (2024/2025) analysed ten EU-funded CBHE projects implemented in Armenia between 2015 and 2020, focusing on curriculum development, the social dimension of higher education, and institutional internationalisation strategies. The study found contributions to new study programmes and innovative pedagogies, stronger institutional approaches to internationalisation, academic partnerships, and the adoption of European practices, while also identifying institutional and policy challenges to sustainability. The National Impact Study of Erasmus+ CBHE projects in Armenia likewise examined ten projects implemented during 2015–2020 in relation to curriculum and policy development, inclusiveness, and internationalisation. By assessing impact at individual, institutional, and national levels, it highlighted the multidimensional nature of capacity development. These studies provide an important foundation for understanding Erasmus+ in Armenian higher education. However, they primarily examine the impact and outcomes of completed projects rather than systematically identifying the capacity needs that should inform new interventions. Existing research therefore tells us more about what previous Erasmus+ projects have achieved than about the barriers and competences currently perceived as most important by different stakeholder groups. This distinction is important for Armenia's continued engagement with European higher education programmes. Sustainable participation requires not only accumulated project experience but also broader access to project-development competences, information, mentoring, international networks, and institutional support. Previous participation may remain concentrated among experienced institutions, departments, or individuals, leaving other potential participants with limited opportunities to develop the capacities required for effective engagement.

Research Gap and Analytical Framework

The literature reviewed above reveals three interconnected strands. First, internationalisation and Europeanisation scholarship increasingly conceptualises international engagement as an institution-wide process involving strategy, governance, teaching, research, partnerships, and human-resource development. Second, project-management research shows that successful project implementation depends on a broad combination of technical, interpersonal, strategic, digital and adaptive competences. Third, research on Erasmus+ and CBHE demonstrates that European cooperation projects can contribute to institutional development and internationalisation, including in Armenia. However, these strands have been integrated through a systematic, multi-stakeholder assessment of the capacities required for participation in European educational and research programmes. In Armenia, empirical evidence remains limited on the simultaneous assessment of individual competence gaps, institutional support needs, practical barriers, and stakeholder expectations and their direct connection to the design of a specific Erasmus+ capacity-building intervention. The present study addresses this gap by conceptualising capacity development as a multidimensional phenomenon at the intersection of individual competences, institutional support, practical experience, international networks, and collaborative learning opportunities. Capacity building is therefore understood as more than training: it involves the conditions enabling stakeholders to move from interest in European cooperation towards sustained and institutionally supported project participation. This perspective provides the conceptual basis for the EU-BRIDGE needs assessment and for examining how its planned components—project-management training, the Pilot Academy, Social Innovation Labs, Project simulation, and digital professional networking—will be implemented. The study thus seeks not only to document capacity gaps but also to show how multi-stakeholder evidence can inform a more practice-oriented, institutionally embedded capacity-building intervention in Armenian higher education.

Methodology of the Study

This study used a mixed-methods approach to assess the capacity needs, challenges, and support requirements affecting the participation of Armenian higher education institutions' (HEIs) and related stakeholders' participation in European educational, research, and grant programmes. Conducted within the Erasmus+ EU-BRIDGE project, the study combined quantitative evidence with expert and organisational perspectives to provide a comprehensive assessment of capacity needs. The needs assessment comprised three complementary components targeting distinct stakeholder groups. The **first** component was a quantitative survey of 180 respondents, including Bachelor's and Master's students, doctoral candidates, young researchers, researchers, academic staff, and civil society representatives. We used purposive sampling to target potential beneficiaries of EU-BRIDGE activities. Respondents were based in Yerevan and nine other

regions of Armenia; 69.4% were based in Yerevan, 77.8% were women, and they represented different age groups. The **second** component was an expert survey involving 14 specialists with professional and/or research experience in higher education, quality assurance, international cooperation, research management, and Erasmus+/EU programmes. Selected for the relevance of their expertise, they represented Armenian universities, research institutions, and sectoral organisations, including the National Centre for Professional Education Quality Assurance and the National Erasmus+ Office in Armenia. This component provided an institutional and strategic perspective complementing the views of potential beneficiaries. The **third** component used qualitative methods and focused primarily on external stakeholders. An online focus-group discussion involved representatives of 23 organisations, followed by six in-depth interviews with representatives of additional organisations. Thus, the qualitative component incorporated perspectives from 29 organisations, including civil society organisations, employers, private-sector actors, and other relevant stakeholders. It explored organisational experiences, perceived barriers, capacity needs, and expectations regarding participation in European projects. Together, the three components provided a multi-stakeholder evidence base for identifying capacity gaps at individual and institutional levels. Combining quantitative, expert, and qualitative evidence also enabled comparison across stakeholder groups and identification of areas of convergence and divergence regarding European project participation.

Data Collection and Research Instruments

Data were collected through three complementary research instruments: a quantitative questionnaire, an expert questionnaire, and a qualitative component comprising a focus-group discussion and in-depth interviews. The instruments examined capacity, experience, barriers, and support needs related to participation in European programmes. The quantitative survey was administered online via Google Forms and included 13 thematic sections, with closed and multiple-response questions, rating scales, and open-ended items. It addressed previous experience with European programmes, awareness of funding opportunities, perceived competences and training needs, digital readiness, participation barriers, and expectations concerning the main EU-BRIDGE activities, including curriculum development, the Pilot Academy, Innovation Lab, grant-management simulations, and the professional community platform. The expert questionnaire comprised 11 thematic sections and used closed and multiple-choice questions, rating scales, and open-ended items. It examined the development needs of Armenian higher education development needs, implementation of European Higher Education Area principles, internationalisation, participation in European programmes, and institutional capacity development. Experts also assessed the relevance, feasibility, and sustainability of planned EU-BRIDGE activities and outputs. The qualitative component comprised a focus-group discussion and in-depth interviews with relevant stakeholders. It explored organisational experiences, participation

barriers, and priority areas for capacity development, particularly proposal development, fundraising and financial management, international partnership building, project management, monitoring and evaluation, communication, and digital skills. Participants also discussed expectations regarding the Pilot Academy, Innovation Lab, and digital platform. Online data collection facilitated participation across institutions and geographic areas and supported systematic collection of responses. The three instruments were designed as complementary tools, enabling examination of key themes from the perspectives of potential participants, experts, and stakeholder organisations.

Data Analysis and Triangulation

We analysed quantitative survey data using descriptive statistics, primarily frequencies and percentages, to identify patterns in participants' previous experience, competencies, training needs, perceived barriers, and preferences. Given the purposive sampling approach, the analysis describes patterns within the respondent group rather than making population-level statistical inferences. The analysis thematically examined open-ended responses from the quantitative and expert questionnaires, along with focus-group and interview data. We coded recurring issues and grouped them into broader categories reflecting capacity needs, organisational challenges, and stakeholder expectations. The three sources were then integrated through thematic comparison and triangulation, examining both convergence and divergence across stakeholder groups. The analysis focused on recurring themes, including European programme experience, knowledge and skills gaps, participation barriers, training priorities, international networking, mentoring, digital collaboration, inclusion, and institutional sustainability. Triangulation enabled interpretation of quantitative patterns alongside expert assessments and the practical experiences of stakeholder organisations. Convergent findings were treated as evidence reinforcing common conclusions, while divergent findings were considered in relation to differences in institutional position, experience, or expectations. This approach supported a more nuanced assessment of capacity needs and helped distinguish individual competency gaps from broader organisational and institutional factors affecting participation in European programmes.

Ethical Considerations

Participation in all study components was voluntary and based on informed consent. Respondents and participants were informed about the study's purpose, scope, and intended use of the collected information. We maintained confidentiality and anonymity throughout data collection, analysis, and reporting. Individual participants were not identified, and findings were reported in aggregated form. Qualitative evidence was synthesised thematically to avoid attribution to identifiable individuals or organisations unless explicit identification was appropriate and consent had been provided. The collected information was used solely for the needs assessment and the development of evidence-based recommendations for the EU-BRIDGE project.

Limitations of the Study

Several methodological limitations should be considered. First, the quantitative survey used purposive rather than probability sampling; therefore, its findings are not statistically representative of the Armenian higher education sector and primarily reflect participating stakeholders' experiences and perceptions. Second, the expert survey provided informed professional and contextual assessment rather than population-level estimates and should not be interpreted as representative of all higher education experts or institutions in Armenia. Third, the qualitative component was designed to provide contextual depth rather than measure the prevalence of particular views. The focus group and interviews therefore complemented the quantitative findings by exploring the experiences and organisational conditions underlying identified needs and challenges. Despite these limitations, the combination of 180 survey respondents, 14 experts, and representatives of 29 stakeholder organisations provided a broad multi-stakeholder evidence base. The mixed-methods design strengthened the analysis by integrating quantitative patterns with expert perspectives and organisational experiences, enabling a more comprehensive understanding of the individual, organisational, and institutional conditions shaping participation in European programmes.

Research Findings

Overall Pattern: Strong Interest in European Programmes but Limited Practical Experience

The combined findings from the three EU-BRIDGE needs-assessment components reveal a consistent pattern: Armenian stakeholders demonstrate strong interest in European educational, research, and grant programmes, but this interest has not yet translated into sustained practical participation and institutional capacity. The quantitative survey of 180 respondents, including students, doctoral candidates, early-career researchers, academic staff, and other stakeholders, illustrates this gap. Only 32.2% reported previous participation in an EU-funded educational, research, exchange, or grant programme, while 67.8% had no such experience. Direct involvement in grant development or management was even more limited, with only 22.8% reporting such experience. At the same time, motivation to overcome this gap is substantial. Almost 69% of respondents expressed clear interest in training on European grant applications and project management, while a further 29% indicated possible interest. Limited participation therefore appears to reflect a capacity and opportunity gap rather than a lack of motivation, particularly in access to knowledge, practical experience, international networks, and support mechanisms. Qualitative evidence reinforces this interpretation. Focus-group participants reported that access to European programmes often depended on individual initiative, informal professional networks, and support from experienced colleagues rather than systematic institutional mechanisms. Such reliance on individual capacities may create uneven participation opportunities,

particularly for smaller or less experienced organisations. Overall, the first major finding is that interest in European cooperation is substantial, but participation remains constrained by limited practical experience and insufficient institutional support capacity. For EU-BRIDGE, this points to the need to move beyond awareness-raising toward structured learning-by-doing, mentoring, networking, and institutional capacity development.

Key Knowledge and Capacity Gaps

A second major area of convergence concerns the knowledge and skills required for effective participation in European programmes. Across all three sources, stakeholders appear more confident in their interest and motivation than in the technical and procedural competences needed to move from an initial idea to a successfully implemented project. Quantitative findings indicate important gaps in identifying relevant funding opportunities, developing competitive proposals, preparing budgets, establishing international partnerships, and planning and managing projects. Qualitative evidence adds depth by highlighting difficulties in developing project concepts, defining objectives and expected results, constructing logical frameworks, and preparing proposals aligned with European programme requirements. Participants also identified a need for practical knowledge of Erasmus+, Horizon Europe, and other funding schemes, including programme structures, evaluation criteria, Work Packages, and application procedures. Financial management emerged as another significant area of need, including fundraising, budgeting, financial planning, project finance management, and financial sustainability. Financial capacity was viewed not only as a technical competence but also as a structural condition affecting organisations' ability to participate in European programmes. International partnership development was also identified as critical. Stakeholders reported difficulty finding reliable partners, joining international consortia, and building sustainable professional relationships with European institutions. Needs therefore extend to partner identification, international communication, consortium building, negotiation, and intercultural cooperation. Capacity needs also extend beyond grant acquisition. Participants identified project implementation, monitoring and evaluation, impact assessment, reporting, and quality assurance as areas requiring further development. This points to the need for a full-project-cycle approach that covers opportunity identification and partner search, proposal development and budgeting, implementation, monitoring, reporting, impact assessment, and sustainability. Overall, the findings suggest that EU-BRIDGE should not treat proposal writing as an isolated competence. Capacity building should instead develop an interconnected set of competences enabling stakeholders to identify opportunities, build partnerships, formulate projects, secure funding, manage implementation, and demonstrate sustainable results.

Barriers to Participation: From Individual Skills to System-Level Constraints

The findings show that limited participation in European programmes cannot be attributed solely to individual knowledge or skills. Barriers operate simultaneously at individual, organisational and system levels, often reinforcing one another. The quantitative survey identified lack of information, financial constraints, limited time, insufficient English-language skills, lack of mentoring and advisory support, limited organisational support, complex administrative procedures, and lack of international partners as major barriers. In the multiple-response question, 46 respondents (25.4%) identified lack of mentoring or advisory support, 31 (17.1%) insufficient institutional support, 28 (15.5%) complex administrative procedures, and 26 (14.4%) lack of international partners. As multiple responses were allowed, these percentages are not mutually exclusive. Qualitative evidence provided further context. Respondents frequently identified the lack of reliable international partners as an obstacle to joining European consortia. At the same time, financial and co-financing requirements were particularly challenging for smaller organisations with limited financial and human resources. Information gaps, insufficient English-language capacity, staff shortages, and limited time were also recurring concerns. These barriers often interact: an organisation may identify a relevant funding opportunity but lack the time, language capacity, expertise, or institutional support to prepare a competitive application. Thus, an apparent individual skills gap may reflect a broader organisational capacity constraint. The qualitative data also revealed system-level barriers less visible in structured surveys, including difficulties with visa procedures for international mobility, extensive documentation requirements, and the absence of clear institutional mechanisms for advice, mediation, and problem resolution during project implementation or international partnerships. Overall, the evidence indicates that capacity building cannot be reduced to training alone. Effective participation requires an enabling environment that combines skills development with mentoring, accessible information, networking, institutional support, and ongoing professional guidance. For EU-BRIDGE, this supports an integrated support model that links training with practical application, expert mentoring, international networking, and accessible digital resources, rather than treating training as a stand-alone intervention.

From Theory to Practice: Demand for Experiential Learning

A clear area of convergence concerns not only what stakeholders want to learn, but how they expect to learn it. Across all three components, participants strongly preferred practical, experiential and immediately applicable learning over predominantly theoretical instruction on European programmes. In the qualitative findings, grant proposal writing and European project development were the most frequently requested areas for the Pilot Academy. Participants sought practical understanding of Erasmus+, Horizon Europe, Creative Europe

and other programmes, including evaluation criteria, Work Package structures and the development of competitive applications. Other priorities included fundraising, financial management and budgeting, international partnership development, project management, monitoring and evaluation, and impact assessment. The needs also included transversal competencies such as digital and AI tools, intercultural communication, negotiation, teamwork, strategic and critical thinking, leadership, and human-resource management. These skills are increasingly important in international, digitally mediated and multidisciplinary project environments. The learning format was considered nearly as important as the content. Participants valued working with real project ideas, proposals and practical cases that allow immediate application of knowledge. Face-to-face and blended formats were preferred, while fully online learning was generally seen as complementary. Mentoring, simulations and guided practical exercises were repeatedly identified as effective approaches. These findings directly support the design of WP2 Curriculum Development, WP3 Pilot Academy and WP5 Grant Management Simulations, while indicating that their effectiveness will depend not only on curriculum content but also on the pedagogical approach. Accordingly, the evidence supports a learning-by-doing model based on authentic calls, case studies, simulations and participants' own project ideas, combined with structured feedback from experienced practitioners. Such an approach can help bridge the gap between strong interest in European cooperation and the practical capacity required for successful and sustainable participation.

Innovation Lab: Moving from Learning to Collaborative Problem-Solving

Findings concerning the Innovation Lab show that stakeholders view it not simply as a training environment, but as a space for collaboration, experimentation, practical problem-solving and socially relevant innovation. Quantitative priorities included education and youth development, youth employability, entrepreneurship, digital innovation and social inclusion. Qualitative findings further highlighted community development, youth engagement, social innovation, local problem-solving and cross-sectoral cooperation. Participating organisations expressed willingness to contribute actively as local partners, intermediaries connecting the Lab with communities and target groups, and co-creators and implementers of project ideas. This indicates the potential for the Lab to operate as a genuinely multi-stakeholder environment rather than a conventional training facility. Participants also emphasised that idea generation should be followed by small-scale testing, supported by experienced mentors and subject-matter experts. Participants considered continuous guidance particularly important during early experimentation, enabling organisations to manage risks, learn from implementation, and gradually build independence. The findings therefore suggest a clear operational logic for WP4: idea → mentoring → pilot → learning → scaling. Under this model, the Innovation Lab can bridge capacity development

and practical implementation, helping participants transform knowledge and ideas into tested solutions with potential for further development and replication.

Digital Engagement and the Need for a Professional Community

Digital engagement is one of the more positive baseline findings of the needs assessment. More than 92% of quantitative respondents reported regular use of digital tools in their professional or academic activities, including AI-based tools such as ChatGPT and Copilot, as well as Zoom, Microsoft Teams, Google Workspace and Moodle. This high level of digital engagement creates favourable conditions for the digital component of EU-BRIDGE. However, qualitative findings indicate that stakeholders expect more than a static repository of information and training materials. A particularly strong expectation is the ability to identify international partners and establish contacts with relevant organisations, allowing the platform to support networking and consortium formation directly. Quantitative findings reinforce this expectation: respondents associated the professional and alumni platform with access to training opportunities, funding information, networking, mentoring and experience sharing. Thus, the platform is expected to facilitate not only access to information but also interaction and collaboration among professionals and organisations. The value of WP6 will therefore depend less on the existence of a digital platform than on its development into an active professional community connecting people, expertise, funding opportunities, mentoring and collaboration. Sustainability will be critical, requiring continued interaction, knowledge exchange, and professional networking beyond individual EU-BRIDGE activities.

Inclusion and Accessibility of Capacity-Building Opportunities

The findings show that the effectiveness of capacity-building depends not only on content quality and relevance but also on accessibility. Focus-group participants identified limited time and heavy workloads as major barriers to training, along with limited English proficiency, financial constraints, insufficiently practical or outdated content, and limited geographical access. Geography is particularly important for stakeholders outside Yerevan, where many professional development and networking opportunities remain concentrated. Without mechanisms for regional participation, capacity-building activities may reinforce existing inequalities in access to professional networks and development opportunities. These findings have direct implications for EU-BRIDGE. High-quality content alone is insufficient; the delivery model should incorporate flexible scheduling, blended participation, meaningful regional engagement, appropriate language support, and clear practical relevance. Inclusion should therefore be understood not only as representation but as meaningful and equitable access to capacity development. Accommodating differences in geographical location, professional background, experience, and available resources will be essential to the project's reach, sustainability, and long-term impact.

Cross-Stakeholder Synthesis: From Individual Capacity Gaps to Institutional Capacity Development

The combined analysis shows that the identified challenges are interconnected, forming a capacity chain in which individual, organisational and institutional factors reinforce one another. Limited information can hinder identification of funding opportunities; insufficient proposal-development experience can reduce application competitiveness; weak international networks can constrain consortium building; and financial-management gaps can increase implementation risks. At the organisational level, limited time and human resources may further restrict the ability to apply, retain and institutionalise new knowledge and skills. At the same time, the findings reveal considerable potential. Stakeholders show strong motivation to engage with European programmes, high demand for capacity development, widespread digital engagement, and positive attitudes toward practical, collaborative learning. The challenge is therefore not limited interest in European cooperation, but a mismatch between strong demand and still-developing practical, organisational and institutional capacity. The main EU-BRIDGE components closely match these needs: WP2 addresses knowledge and project-development gaps through a structured curriculum; WP3 translates knowledge into practical competence through experiential learning; WP4 provides a collaborative environment to test innovative ideas; WP5 enables grant-management simulation and practice; and WP6 supports ongoing networking, mentoring, and information exchange. Taken together, the findings indicate that capacity development should not be approached as a series of isolated training activities, but as a continuous capacity-building ecosystem combining knowledge, practical experience, mentoring, international networking, digital collaboration and institutional support. The central empirical implication is therefore not simply the need to teach stakeholders how to prepare EU proposals, but to create conditions in which European programme participation becomes a repeatable, collaborative and institutionally embedded practice. This implies a shift from a training-centred to an ecosystem-based capacity-development model, in which learning leads to practice, practice is supported by mentoring and networks, and individual competencies are progressively transformed into organisational and institutional capacity. This provides the overarching rationale for the integrated design of EU-BRIDGE interventions and the recommendations that follow.

Conclusions

The findings of this mixed-methods needs assessment show that participation in European educational, research, and grant programmes in Armenia is shaped by the interaction of individual competencies, organisational capacities, and institutional conditions. Across the quantitative survey, expert assessment and qualitative evidence, a consistent pattern emerged: stakeholders show strong interest in European cooperation, but effective and sustainable participation is constrained by limited practical experience in project development and

management, gaps in proposal-writing and financial-management skills, difficulties establishing international partnerships, and insufficient mentoring and institutional support.

At the same time, stakeholders demonstrate strong motivation and readiness for capacity development. They consistently favour practical, experience-based learning over theoretical training alone, particularly through real project ideas, simulations, mentoring, networking and continuing professional exchange. The findings further show that individual skills development, although necessary, is insufficient for sustainable participation. Organisations need institutional strategies, internal support mechanisms, quality assurance, professional development, and sustained international networking to apply, retain, and institutionalise newly developed capacities. Capacity development should therefore connect individual learning with organisational practice and institutional development. The evidence provides a strong empirical basis for the EU-BRIDGE approach. Its components address complementary dimensions of the identified capacity gap: WP2 strengthens the knowledge base; WP3 develops applied competencies through practical training; WP4 supports collaborative experimentation; WP5 builds confidence through grant-management simulations; and WP6 sustains networking, mentoring and knowledge exchange.

The central conclusion is that the challenge is not simply to increase awareness of European programmes, but to transform existing interest into sustained capacity for participation. This requires moving beyond isolated training towards an integrated capacity-building ecosystem in which knowledge, practice, mentoring, networking, digital collaboration and institutional support reinforce one another. Such an ecosystem can help Armenian higher education institutions and their wider stakeholder communities move from occasional or individually driven engagement towards more confident, collaborative, strategic and sustainable participation in European programmes. The needs assessment therefore serves not only as a diagnosis of existing capacity gaps but also as an evidence base for interventions addressing them at individual, organisational and institutional levels.

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* The study used data from surveys conducted by the EU-BRIDGE project teams of the International Scientific-Educational Centre of the NAS RA (<https://www.isec.am/eu-bridge-info-media>) and the NGO Centre (<https://ngoc.am/programs/eu-bridge/>).

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AI-ASSISTED DIFFERENTIATED INSTRUCTION IN LEGAL ENGLISH: THE AILED MODEL

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Abstract

This article addresses one of the most important problems in the field of Legal English instruction: using artificial intelligence (AI) to organise effective, differentiated instruction for learners with diverse language skills. Legal English is a branch of English for Specific Purposes (ESP) that requires proficiency in legal terminology, legal genres, and legal discourse, as well as general language proficiency. Uniform instructional materials may be too challenging for some students and not challenging enough for others.

The article proposes the AILED (AI-Assisted Legal English Differentiation) Model, which integrates AI-assisted differentiation of legal terminology, adaptation of instructional texts, and principles of differentiated instruction. The model has been developed after an in-depth review of literature on Legal English pedagogy, AI-assisted language learning, and differentiated instruction, as well as an analysis of placement-test data from 103 Master's students enrolled in law and jurisprudence programmes at the International Scientific-Educational Center of the National Academy of Sciences of the Republic of Armenia. The placement data provide evidence of heterogeneous proficiency among law and jurisprudence students, supporting the need for differentiated Legal English instruction.

The proposed model consists of five interconnected stages. First, it evaluates students' language proficiency, prepares differentiated language-support materials, and confirms their professional and pedagogical suitability through a range of learning activities and feedback on learning outcomes. The model should operate as a cyclical process, with learning outcomes leading to choices of further materials and differentiation. It illustrates its use with a practical example, using legal

language and texts that are differentiated but have similar cognitive demands at each proficiency level.

The article concludes that the AILED Model offers a practical pedagogical approach to addressing proficiency differences in Legal English instruction, facilitating the acquisition of specialised legal terminology, and enabling the purposeful and supervised integration of AI into the teaching and learning process.

Keywords: Legal English, English for Specific Purposes (ESP), artificial intelligence, differentiated instruction, legal terminology, AILED Model, language proficiency.

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Համառոտագիր

Հոդվածը նվիրված է իրավաբանական անգլերենի (Legal English) ուսուցման կարևոր խնդիրներից մեկին՝ տարբեր լեզվական պատրաստվածություն ունեցող ուսանողների համար արդյունավետ և տարբերակված ուսուցման կազմակերպմանը՝ արհեստական բանականության (AI) հնարավորությունների կիրառմամբ: Իրավաբանական անգլերենը, որպես մասնագիտական նպատակներով անգլերենի (ESP) մասնագիտացված ոլորտ, պահանջում է ոչ միայն ընդհանուր լեզվական հմտություններ, այլև մասնագիտական տերմինաբանության, իրավական ժանրերի և մասնագիտական դիսկուրսի յուրացում: Տարբեր մակարդակներ ունեցող սովորողների համար միասնական ուսումնական նյութերի կիրառումը կարող է դժվարություններ առաջացնել ցածր լեզվական մակարդակ ունեցող ուսանողների համար՝ միաժամանակ բավարար չափով

չխթանելով ավելի բարձր մակարդակ ունեցող սովորողների առաջընթացը:

Հոդվածում առաջարկվում է AILED (AI-Assisted Legal English Differentiation) մոդելը, որը համադրում է արհեստական բանականությամբ աջակցվող իրավաբանական տերմինաբանության տարբերակումը, ուսումնական տեքստերի հարմարեցումը և տարբերակված ուսուցման սկզբունքները: Մոդելը հիմնված է իրավաբանական անգլերենի դասավանդման, արհեստական բանականության աջակցությամբ լեզվի ուսուցման և տարբերակված ուսուցման վերաբերյալ գիտական գրականության վերլուծության, ինչպես նաև Հայաստանի գիտությունների ազգային ակադեմիայի գիտակրթական միջազգային կենտրոնի իրավագիտության ամբիոնի մագիստրոսական ծրագրերի 103 ուսանողների տեղաբաշխիչ թեստերի տվյալների վերլուծության վրա: Տեղաբաշխիչ թեստերի տվյալների վերլուծությունը փաստում է «Իրավագիտություն» կրթական ծրագրով սովորող ուսանողների լեզվական պատրաստվածության տարասեռ բնույթը և հիմնավորում իրավաբանական անգլերենի տարբերակված ուսուցման անհրաժեշտությունը:

AILED մոդելը ներառում է հինգ փոխկապակցված փուլ՝ ուսանողների լեզվական պատրաստվածության գնահատում, արհեստական բանականությամբ տարբերակված ուսումնական նյութերի ստեղծում, դրանց մասնագիտական և մանկավարժական համապատասխանության ստուգում դասախոսի կողմից, տարբերակված ուսումնական գործունեության իրականացում և ուսուցման արդյունքների գնահատում՝ շարունակական հետադարձ կապի միջոցով: Մոդելը նախատեսված է որպես ցիկլային գործընթաց, որի շրջանակում ուսուցման արդյունքները հիմք են հանդիսանում հետագա ուսումնական նյութերի ընտրության և տարբերակման համար: Հոդվածում ներկայացվում է նաև գործնական օրինակ, որը ցույց է տալիս իրավաբանական տերմինաբանության և ուսումնական տեքստերի տարբերակման կիրառությունը՝ միաժամանակ պահպանելով տարբեր լեզվական մակարդակներում սովորողների համար ճանաչողական պահանջների համադրելիությունը:

Հոդվածը եզրակացնում է, որ AILED մոդելը կարող է ծառայել որպես գործնական մանկավարժական մոտեցում՝ իրավաբանական անգլերենի ուսուցման ընթացքում լեզվական պատրաստվածության տարբերությունները հաշվի առնելու, մասնագիտական իրավաբանական տերմինաբանության յուրացումը խթանելու և արհեստական բանականությունը ուսուցման գործընթացում նպատակային ու դասախոսի վերահսկողությամբ ներառելու համար:

Բանալի բառեր՝ իրավաբանական անգլերեն, մասնագիտական նպատակներով անգլերեն (ESP), արհեստական բանականություն, տարբերակված ուսուցում, իրավաբանական տերմինաբանություն, AILED մոդել, լեզվական պատրաստվածություն:

Introduction

Legal English is a unique category within ESP courses. As Grigoryan and Manvelyan (2024, p. 82) note, legal professionals use Legal English to draft contracts, present cases in court, etc. It is characterised by unique vocabulary, collocations, and sentence patterns in different legal contexts and systems; as a technical language, it has its own vocabulary and terminology that are especially challenging for EFL students. It differs from general academic or business English because it requires precision and a highly technical vocabulary, including nominalisations, Latin maxims, doublets, and terms of art, whose meanings in everyday speech differ greatly from their legal meanings (Oh, 2001, p. 71). The importance of this register to the law student cannot be underestimated: the profession of law is dependent on the ability to use the right term for the job—the terms of a contract, the names of cases, and the phraseology of legal correspondence—terms that cannot be mastered from general English teaching and learning.

Legal English classrooms are also rarely homogeneous. Placement data from our own institution illustrates the problem: across 103 law and jurisprudence Master's students tested over three intake years, scores span nearly the full 80-point scale, with no single proficiency band accounting for more than roughly a fifth of the cohort — a structural reality of legal English instruction in non-English-medium jurisprudence programs, where a single, undifferentiated syllabus is poorly suited to the classroom it must serve.

Generative AI could help solve both problems. From the terminology perspective, AI systems can create contextually relevant glossaries and provide immediate interpretations of legal expressions (Malaeva et al., 2025). On the differentiation end, AI-powered adaptive instructional systems enable teachers to personalise content for each learner, something that would be too impractical to maintain manually (Xie & Pamintuan, 2024). These abilities are interconnected: Differentiated instruction in a legal ESP context relies heavily on the capacity to customise the level of vocabulary complexity of content in a single classroom across proficiency levels.

However, the literature on these threads has developed largely in parallel. Research on AI and ESP vocabulary acquisition tends to treat terminology as a standalone skill (Bouguerba, 2025); research on AI-driven differentiation is typically pitched at a general level rather than a technical register like legal English (Asrifan et al., 2025). The classic debate over modified input for L2 reading — simplification versus elaboration (Oh, 2001) — has only recently been revisited in light of generative AI's capacity to perform both kinds of modification automatically (Aldamen et al., 2026).

The primary contribution of this article is not any single element considered in isolation — AI-assisted ESP instruction, AI-supported differentiated learning, and Legal English pedagogy are each individually

established areas of scholarship — but the combination of these three strands, together with a specific focus on legal terminology learning, into a single coherent model: the AI-Assisted Legal English Differentiation (AILED) Model. Our review of the literature did not identify prior work that integrates AI-driven terminology tiering, AI-driven text differentiation, and the specific pedagogical demands of Legal English within one applied model grounded in institutional data.

This article addresses the following research question: How can generative AI be systematically integrated into Legal English instruction to support both legal terminology acquisition and differentiated instruction in proficiency-heterogeneous classrooms? To answer this question, we propose the AILED Model as a pedagogical framework informed by institutional placement data and prior empirical research, rather than a controlled empirical study of its effectiveness—a distinction we address further in the Conclusion.

Background and Motivation

This article was inspired by our own experience of teaching Legal English over the last few years to jurist students, who, as is often the case, showed a wide distribution of proficiencies in one group per course section, and in which no one lesson could be designed to satisfy the needs of the entire group. This challenge, common to ESP instruction generally, is sharper in Legal English because of highly specialised, unfamiliar vocabulary that compounds difficulty for lower-proficiency students in particular.

In response, we have integrated supplementary content for students struggling in the core curriculum and, more recently, added generative AI solutions to produce additional work for students falling behind. While these interventions provided some relief, they were reactive and unsystematic; we had no clear framework or direction for how to use AI, for whom, or to what end. This article attempts to formalise that gap in the AILED Model: a conscious model, not a random one. The data from the placement tests below supports the observations made in years of classroom teaching: the spread of proficiencies among the Master's students in law/jurisprudence is a structural recurring phenomenon within the population ($SD = 16.0$ across 103 students across three cohorts), justifying the model proposed in the rest of this article.

Literature Review

AI-Assisted Legal Terminology Building

While there has been a rapid growth in research on AI-assisted vocabulary acquisition in ESP, there is still a lack of studies specifically targeting legal terminology. Malaeva, Volkova, and Globa (2025) argue that generative AI can teach professional vocabulary by shifting from standard glossaries to dynamically generated, learner-tailored explanations. Bouguerba (2025) views AI as a facilitator that bridges general language knowledge and domain-specific professional

knowledge, but notes that teachers must still monitor probable biases in AI-generated content.

A smaller but very specific body of research relates to legal English. In their study, Xatamova and Ashurov (2024) examined the impact of AI tools on legal vocabulary acquisition, grammar, and writing skills through a blended approach of situational and genre-based instruction in an online/offline format. Pham and Luong (2025) singled out three recurring issues among Legal English students who have used AI tools: overreliance, a risk of plagiarism, and a lack of independent thinking—issues the article is mindful of and proposes to address through bounded, instructor-supervised use of AI. Similarly, Asrifan, Cardoso, and Vargheese (2025) argue that the integration of AI is most effective when integrated into curriculum design, not when it replaces it.

AI for Differentiated Instruction

Another strand of the literature examines the use of AI to support differentiated and personalised learning in diverse language learning environments. Xie & Pamintuan (2024) found that a differentiated approach to language teaching based on the needs of the learners was associated with positive outcomes in terms of language achievement and learner satisfaction. The findings from Aldamen et al. (2026) showed that reading comprehension was significantly higher for Intermediate-Low EFL students with texts adapted using AI than with the original texts. This suggests that AI-based adaptation may benefit lower-proficiency learners of lower proficiency levels but has little impact on higher-proficiency learners. In a similar vein, Alisoy (2025) explored the effectiveness of AI-powered personalised learning for ESL university students and reported that students at the university level under AI personalised learning demonstrated higher levels of language proficiency improvement.

In ESP specifically, Asrifan et al. (2025) highlight the potential of AI-supported adaptive learning, real-time feedback, and automated assessment while also identifying issues such as translation errors, AI bias, and over-reliance on automated feedback. Roslan and Mahamod (2025) further emphasise AI's potential to customise learning content according to learners' proficiency, needs, learning styles, and interests. The results confirm the terminology-tiering aspect of the AILED Model that aims at adapting legal-language resources to the proficiency level of learners.

The concept of input modification has been around since the early days of generative AI. Oh (2001) conducted a study which showed that simple text and addition of more context to text was found to be more effective in facilitating understanding than was the case with the original text. However, the effectiveness of these methods depends on the reader's proficiency level and the type of text.

However, Aldamen, Alnemrat, Al-Deaibes, and Alsharefeen (2026) went beyond the previous paradigm to test the effectiveness of the AI-based adaptation directly, drawing their research from Krashen's Input Hypothesis, in which

acquisition is helped by input just above current competence, or “i+1” (Krashen, 1985), and Cognitive Load Theory. Their study, involving 48 EFL learners, found that Intermediate-Low students significantly improved in both inference-making and specific-information reading, while Advanced-Low students showed no significant difference. This shows that AI-based changes help lower-proficiency learners without disadvantaging higher-proficiency learners. This provides evidence that a single AI-created version of the content can help more students without altering the experience for those who are already good.

Legal English Pedagogy

The AILED Model builds of long-standing research in Legal English pedagogy. Northcott (2013) suggests that successful legal English pedagogy must focus simultaneously on context, methodologies, and the teacher’s knowledge of the legal field, which links directly to the AILED Model, since AI-generated content still requires an instructor to ensure accuracy. The AILED Model continues a pedagogical trend in Legal English textbooks, as Prinsloo (2015) notes in his textbook analysis: a shift from narrow grammar/writing instruction (roughly 1980–2002) to more comprehensive, scaffolded professional literacies in current textbooks.

The genre-analytic tradition represented by Bhatia (1993) also illustrates the special nature of the challenge of legal terminology: Legal language is not just a technical term used over and above general English; it is a genre with its own conventionalised structures and norms of interpretation. If, as the AILED Model suggests, it is to prepare students for authentic legal English rather than a less complex version of it, then it must also maintain genre-appropriate use.

Overall, this literature suggests that AI tools can serve as an independent resource for both terminology acquisition and proficiency-based differentiation. However, the literature of Legal English pedagogy shows that such instruction must also account of genre and discourse conventions, not solely simplification. Most significantly for this article’s contribution, our review found no previous research that considers these three streams of research simultaneously or brings them together into a single applied model based on institutional data, which the AILED Model seeks to fill.

The Proficiency Gap: Evidence from Placement Data

To ensure the relevance of the AILED Model to institutional reality, rather than theoretical proposals, we resort to the results of placement tests conducted with 103 students in the law and jurisprudence programs of the International Scientific-Educational Center of the National Academy of Sciences of the Republic of Armenia (ISEC NAS RA) for three consecutive years of student intake (2023–2025). We administered a standardised, 80-item English language placement test to all students at the beginning of the program, before any formal English instruction. The raw scores were scaled into seven bands corresponding to the CEFR (Beginner = 1–23, Elementary = 24–39, Lower Intermediate = 40–51, Intermediate = 52–61,

Higher Intermediate = 62-69, Advanced = 70-75, Very Advanced = 76-80). The sample includes both full-time (n = 30) and part-time (n = 73) students. These data support the model proposed below, but are not the primary focus of the study.

Table 1 shows test scores across years by mean, median, and standard deviation; average scores fall in the low to mid-50s (M = 53.6, Mdn = 55, SD = 16.0). When looking at each cohort individually, this pattern is not limited of one outlying cohort; variation is consistent across all years in this population.

Table 1.

Placement test scores by intake year and delivery format

Year	Format	N	Mean	Median	SD
2023	Full-time	9	52.7	57	13.2
2023	Part-time	28	54.8	57.5	17.2
2023	Combined	37	54.2	57	16.1
2024	Full-time	10	50.4	51.5	15.3
2024	Part-time	8	62.5	67.0	18.6
2024	Combined	18	55.8	55.5	17.4
2025	Full-time	11	48.7	50	15.6
2025	Part-time	37	53.3	55	15.7
2025	Combined	48	52.2	53.5	15.7
All years	Full-time	30	50.5	52.5	14.4
All years	Part-time	73	54.9	55	16.6
All years	Combined	103	53.6	55	16.0

The combined proficiency-level distribution (Table 2) confirms the same wide, mid-clustered spread. No single level accounts for more than 21.4% of the sample; the middle four levels (Elementary through Higher Intermediate) account for 76.7% together, while the lowest and highest bands combine for only 5.9%.

Table 2.

Proficiency-level distribution, combined three-year sample (n = 103)

Level	n	%
Beginner	1	1.0%
Elementary	22	21.4%
Lower Intermediate	22	21.4%
Intermediate	19	18.4%

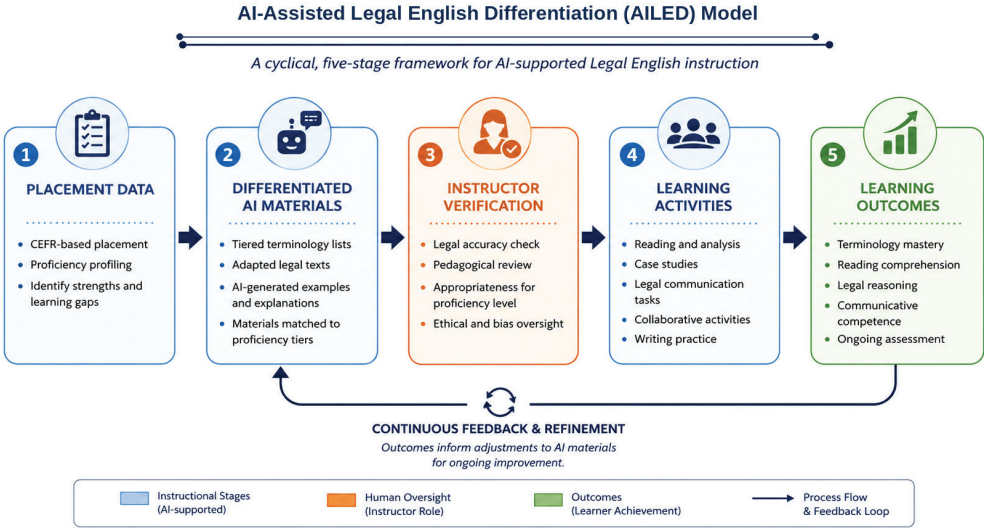
Level	n	%
Higher Intermediate	16	15.5%
Advanced	18	17.5%
Very Advanced	5	4.9%

In each cohort, part-time students ($n = 73$) had slightly higher average scores ($M = 54.9$, $SD = 16.6$) than full-time students ($n = 30$; $M = 50.5$, $SD = 14.4$). We combined these data and ran an independent-samples t-test, which showed no significant difference ($t = 1.34$, $p = .184$, $d = 0.27$). We do not consider the full-time/part-time difference a reliable effect, and any explanation of this difference is speculative because of small group sizes (e.g., $n = 8$ for the 2024 part-time groups). However, a one-way ANOVA showed no differences between the three intake years, $F = 0.37$, $p = .694$. Therefore, proficiency spread was not year-specific but characteristic of this population.

Implications for course design. These results provide the empirical rationale for the AILED Model: a Legal English course serving this population cannot be designed around a single target proficiency level. With a spread of 57 points on an 80-point scale and no level accounting for more than roughly a fifth of the cohort — recurring consistently across three intake years — a uniform syllabus risks under-challenging the 22.4% of students at Advanced/Very Advanced levels while leaving the 22.4% at Beginner/Elementary levels without adequate scaffolding. This is precisely the distribution for which AI-assisted differentiated instruction offers a scalable pedagogical response, developed below.

The Model

The above findings indicate that an English course for students of jurisprudence aimed at Legal English should be designed to cater to a spectrum of learner levels from five to six CEFR bands, with no single band dominating the group by more than about 20%, and this should be consistent between groups. The AILED Model translates this empirical reality, together with the literature reviewed above, into a practical five-stage model for AI-assisted instruction, summarised in Table 3. As Figure 1 illustrates, the AILED Model is deliberately cyclical rather than linear: learning outcomes at Stage 5 feed back into the selection and tiering of materials at Stage 2, allowing the model to be refined each time it is used rather than applied once as a fixed sequence.



Note. The AILED Model integrates AI capabilities with instructor expertise in a cyclical process to support differentiated Legal English learning.

Figure 1. AI-Assisted Legal English Differentiation (AILED) Model

Table 3 breaks down each of these five stages, specifying its purpose, the task assigned to AI, and the instructor’s corresponding role.

Table 3.

AILED Model stages, purpose, AI task, and instructor role

Stage	Purpose	AI Task	Instructor’s Role
1. Placement Data	Identify the proficiency distribution over the class	None (institutional data)	Administer and interpret placement results
2. Differentiated AI Materials	Produce tiered terminology and text materials	Create multi-level definitions, examples, and adapted texts	Select terms/texts; indicate proficiency groups
3. Instructor Verification	Check for legal and pedagogical validity prior to use	None	Review and correct AI output; approve for classroom use

Stage	Purpose	AI Task	Instructor's Role
4. Learning Activities	Deliver tiered materials with equal cognitive demand throughout tiers	Optionally generate shared comprehension/application tasks	Assign tiered materials; administer shared tasks
5. Learning Outcomes	Assess terminology acquisition and comprehension	None	Evaluate outcomes; feed back into future tiering

Table 3 illustrates a pattern that recurs throughout the AILED Model: the instructor retains an active role at every stage, while AI’s task is substantive only at Stage 2 and, optionally, Stage 4. AI does not appear in the placement, verification, or outcomes stages. This asymmetry is deliberate rather than incidental—it reflects the model’s underlying position, developed further in the Challenges and Ethical Aspects section below, that AI functions as a materials-generation tool under continuous instructor oversight, not as an independent instructional agent.

AI-Assisted Legal Terminology Building

The key point is that instead of providing a single glossary to the entire class, the instructor uses generative AI to generate a series of versions of the same legal term, each designed for a different level of class proficiency, as shown in Table 2. In contract law, an Elementary explanation of a term such as ‘consideration’ can include a simple definition, an example, and an explanation. An Advanced explanation could include how it works and how it differs from related doctrines in the context of case law. The AI tool restates the same legal notion at a complexity level appropriate to the learner, as shown by Malaeva, Volkova, and Globa (2025) and especially in the case of legal terminology, by Xatamova and Ashurov (2024).

In classroom practice, the teacher begins by selecting a specific legal term students need to learn. The teacher can then ask an AI tool to prepare explanations of that term for two or three proficiency levels, reflecting the group’s actual range of abilities. These materials should not, however, be transferred directly to students. The instructor should then check each result for legal validity before assigning the tasks to the students. The final step is not optional: Pham and Luong (2025) report that unsupervised AI use may lead students to internalise imprecise legal definitions. Legal terminology carries professional weight and can have professional consequences if not understood properly, so it is a necessary quality-control measure, not a precaution.

AI for Differentiated Instruction

The second component is a two-tiered approach to full instructional materials: one AI-adapted version of a text for lower-proficiency learners; the performance of higher-proficiency learners remains unaffected, as Aldamen et al. (2026) show that a two-tier strategy is sufficient to substantially narrow the proficiency gap.

In a Legal English course, instructors can implement this approach by using AI to prepare two versions of the same text. In one set, the texts are lexically and syntactically simpler for students at the Elementary–Intermediate proficiency levels. The second set contains the original texts for students at the Higher–Intermediate through Very–Advanced levels. The two versions contain the same facts, reasoning, and discourse structure, and both groups complete the same comprehension and analysis tasks. This aligns with Aldamen et al.’s (2026) research, which indicates that adaptation should not hinder the content of high-performing students. An immediate example of the Input Hypothesis of Krashen, at the classroom level, is when the teacher makes two levels of the same source text in order to provide “i+1” for the individual learner.

The two components work together, not in isolation: terminology tiering provides vocabulary scaffolding to make an adapted text understandable. Text differentiation, on the other hand, offers the context for learning tiered terms. They are not mutually exclusive, and neither would solve the proficiency spread above. However, together they provide a coherent answer to a problem that ad hoc AI use could not solve.

Worked Example: Terminology Building and Text Differentiation in Practice

The following example demonstrates how the AILED Model can be applied in a Legal English classroom. It focuses on three fundamental concepts from intellectual property law: patent, copyright, and infringement. The materials were developed specifically for the purposes of this article and are not taken from a published textbook. Instructors can therefore reproduce, modify, and use them as needed.

Terminology tiers

The instructor initially generated the three proficiency-level versions below using ChatGPT (OpenAI, 2026), then reviewed, revised, and validated them.

Patent — *Elementary*: “A patent is a legal document that gives an inventor the right to stop others from making or selling their invention without permission, usually for 20 years”.

Intermediate: “A patent allows an inventor to have exclusive rights over an invention for a certain period of time, usually 20 years, in return for disclosing how the invention works.”

Advanced: “A patent gives a monopoly for the exploitation of an invention, for a limited period, provided the invention can be made public by being registered. This is because patents protect ideas, not expression, unlike copyright, so you don’t need to register the invention. “

Copyright — Elementary: “Copyright is the right that protects creations such as books, music, or art. It arises automatically — the creator does not need to register it.”

Intermediate: “Copyright automatically protects an author’s original work — such as writing, music, or art — from the moment it is created, giving the author the right to control copying, distribution, and alteration.”

Advanced: “Copyright is automatic from the moment an original work is created, and it covers the specific way in which the idea is expressed, not the idea itself, and gives the creator the exclusive rights to reproduce, distribute and modify the work without having to register anything.”

Infringement — Elementary: “Infringement means using someone else’s protected work or invention without their permission.”

Intermediate: “Infringement is defined as the use, copying or exploitation of protected intellectual property without the authorisation of the rights holder or with a valid licence.”

Advanced: “Infringement occurs when someone asserts rights which are reserved to the rights holder without permission, and remedies may include injunctive relief, damages or account of profits, depending on the jurisdiction.”

Adapted text, two tiers

Original/Advanced-tier version: Unlike copyright, patents give the creator a monopoly over the commercial exploitation of the invention, and only if the invention has been disclosed to the public by the patent office; and unlike a patent, copyright does not require registration, and it protects the particular way in which the idea was expressed, rather than the idea itself. Both regimes are exclusive rights, so if someone makes something without a licence or copies something without permission, that is infringement, and available remedies include injunctive relief, damages, and/or an account of profits.

Simplified/Elementary-Intermediate-tier version: Patents and copyright are different, but both protect people’s rights. A patent protects an invention. The inventor must register it, and then no one else can copy it for about 20 years. Copyright is different. It protects things like books, music, and art. You do not need to register copyright — it starts automatically as soon as you create the work. If

someone uses a patented invention or a copyrighted work without permission, this is called infringement. The rights holder can take legal action.

Shared comprehension questions (identical for both tiers)

(1) What are the two types of intellectual property protection described in the passage? (2) What is the usual timeframe of patent protection? (3) Does copyright require registration? Does patent protection refer to people's rights or the invention? (4) What is infringement, and what could happen to someone who infringes a patent or copyright? (5) Based on the passage, which protects an idea itself, and which protects only its expression?

Shared case-application task (identical for both tiers)

“A software company creates a new computer program and also develops a unique method for compressing data. A competitor starts selling a nearly identical version of the software without permission. Which type of protection — patent or copyright — would most likely apply to (a) the computer program itself, and (b) the compression method? Has infringement occurred? Justify your answer applying terms from the text.”

Both tasks are held constant across proficiency tiers deliberately: differentiation in the AILED Model is intended to lower the linguistic barrier to legal English content, not the cognitive demand placed on students. Students working with the simplified text still identify legal differences, apply terminology to a novel scenario, and justify a legal conclusion — the same higher-order tasks expected of students working with the original text. What differs is the linguistic scaffolding required to reach that reasoning, not the reasoning itself.

Challenges and Ethical Considerations

The AILED Model is a generative AI-assisted model that relies on the generative AI system's ability to act as an instructor-supervised system and not an autonomous authority. Several risks merit discussion before the model can be adopted responsibly.

Risk of inaccuracy and hallucination. There isn't a lot of space for interpretation in legal terms, and it's possible for generative AI to generate seemingly coherent but inaccurate language explanations, especially for doctrines that are specific to a state or subject. As Pham and Luong (2025) note, Legal English learners have encountered AI-generated content that conveyed inaccurate legal ideas. The AILED Model's main safeguard is the built-in instructor-review step. It moves away from content development; however, it does not reduce the instructor's workload; it shifts it to verification.

Overreliance and academic integrity. Both overreliance and integrity issues with AI-generated content for legal writing can arise, such as students relying too heavily on AI and submitting it as their own work (Pham & Luong, 2025). The AILED Model is designed to mitigate this: AI is not a tool for students to use directly to produce gradeable output, but an instructor-controlled part of the course materials. This distinction needs to be specified in any syllabus using the model.

Equity of access and implementation burden. The pragmatic implementation of AI-supported differentiated instruction depends not only on the pedagogical design of the model but also on the availability of reliable technological access, sufficient AI literacy, and institutional support. The AILED Model assumes that instructors have access to appropriate AI tools and sufficient time and expertise to review, adapt, and verify AI-generated materials. Where these conditions are limited, the implementation of AI-supported differentiation may become more demanding, and its possible benefits may not be fully realised. Accordingly, access, teacher preparation, and verification workload should be considered important contextual factors in the implementation of the model.

Data privacy. According to Bouguerba (2025), data privacy remains an open question of concern in ESP, particularly in legal education, where source materials may include real case documents or legal scenarios with data privacy issues. Institutions utilising the AILED Model should make explicit policies on what content can be fed into third-party AI tools.

Lack of results. Studies have shown that both text adaptation (Aldamen et al., 2026) and AI's ability to support differentiation (Xie & Pamintuan, 2024) are effective, but no empirical research has integrated the two. This article presents a framework based on converging evidence and three years of institutional placement data, rather than a validated intervention with measurable outcomes. This article does not provide a validated intervention with measured outcomes, but rather a framework based on converging evidence and three years of institutional placement data.

Conclusion

This article addresses a problem we encountered over several years of teaching Legal English to jurisprudence students: a persistently wide and recurring proficiency spread within single course sections, for which our institution previously lacked a coherent, AI-informed pedagogical framework. The distribution of test scores from 103 Master's students from three intake years confirmed this spread is not incidental — in each cohort, no more than about a fifth of students were in a single band of the CEFR. No significant difference emerged across years ($F = 0.37$, $p = .694$), suggesting this population has a stable, structural characteristic.

Making use of this evidence, and of the more recent literature which has largely considered AI-assisted terminology instruction, AI-assisted differentiation and Legal English pedagogy as separate strands, this article presented the AILED

Model: AI-generated, instructor-confirmed tiered legal terminology; AI-adapted course texts differentiated by proficiency band, based on Krashen's Input Hypothesis and supported by the empirical evidence found in Aldamen et al. (2026), according to which legal English adaptation of course texts narrowed the proficiency gaps without disadvantaging more competent students. Both components rely on constant teacher supervision, not free-roam student AI, addressing the accuracy, integrity, and overreliance risks documented throughout this article.

This contribution should be seen as a supported case study and practical framework, not as a broad conclusion that refers to all situations. The data comes from one institution, and the AILED Model has not yet been tested in full as a complete intervention. Further research should examine whether classrooms using the AILED Model show improvements in learning legal terms and reading comprehension compared with traditional teaching methods.

The AILED Model's main contribution is bringing three key ideas—AI-assisted ESP instruction, AI-supported differentiated learning, and Legal English pedagogy—into one clear, unified framework. This framework is designed to help with terminology acquisition and teaching that responds to learners' proficiency levels. While earlier research has examined each of these areas on its own, and some have combined them, very little has focused on combining all three specifically within Legal English instruction. As a result, the AILED Model offers a structure for future studies that want to test these ideas in real classroom settings. So far, its real effectiveness has not been proven. Empirical studies are needed to see how well it actually works in practice.

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DIGITAL TRANSFORMATION IN LANGUAGE TEACHING: FROM TRADITIONAL METHODS TO ARTIFICIAL INTELLIGENCE

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Abstract

This article examines the digital transformation of language teaching and analyses the impact of contemporary digital technologies and artificial intelligence on the language-teaching process. It focuses on the evolution of traditional forms of instruction, the potential of digital educational technologies, and the main areas where artificial intelligence is applied in language teaching.

The advantages of using intelligent systems are examined, including the personalisation of instruction, the automation of instructional guidance, increased access to educational resources, and opportunities for online learning. The article identifies the main risks to academic integrity. It addresses issues of information reliability, the protection of learners' personal data, and the preservation of the teacher's leading role in the educational process.

Contemporary scholarly works related to the subject have been examined. Based on an analysis of the theoretical literature on the issues under investigation, the article demonstrates the need to integrate artificial intelligence technologies harmoniously into language education while preserving education's humanistic orientation of education and recognising the importance of the teacher's role as a mentor and facilitator.

It is concluded that the most promising model for the development of contemporary language education is one based on collaboration between the teacher and artificial intelligence. Such a model contributes to improving the quality of instruction, developing communicative competence, saving time and human resources, and fostering learners' digital skills.

Keywords: Language teaching, digital transformation, artificial intelligence, educator, educational process.

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ԼԻԼԻԹ ՀԱԿՈՒՅԱՆ

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Համառոտագիր

Սույն հոդվածում քննարկվում է լեզվի դասավանդման թվային փոխակերպումը, վերլուծվում են ժամանակակից թվային տեխնոլոգիաների և արհեստական ինտելեկտի ազդեցությունները լեզուների դասավանդման գործընթացի վրա: Առանձին ուշադրություն է դարձվում ուսուցման ավանդական ձևերի զարգացմանը, կրթական թվային տեխնոլոգիաների հնարավորություններին, ինչպես նաև լեզվի դասավանդման մեջ արհեստական բանականության օգտագործման հիմնական ուղղություններին:

Ուսումնասիրվում են բանական (խելացի) համակարգերի կիրառության առավելությունները՝ ներառյալ ուսուցման անհատականացումը, գիտելիքի ուղղորդման ավտոմատացումը, կրթական ռեսուրսների հասանելիության բարձրացումը, առցանց ուսուցման հնարավորությունները: Հոդվածում երևան են հանվում ակադեմիական բարեփոխության հետ կապված հիմնական ռիսկերը, տեղեկատվության հավաստիության, սովորողի անհատական տվյալների պահպանման, ինչպես նաև կրթական գործընթացում դասավանդողի առաջատար դերի պահպանմանն առնչվող հարցեր: Ուսումնասիրվել են թեմային վերաբերող ժամանակակից գիտական աշխատություններ, խնդրո առարկա հարցերի մասին տեսական գրականության վերլուծության հիման վրա ցույց է տրվում լեզվաբանական կրթության գործում արհեստական բանականության տեխնոլոգիաների ներդաշնակ ներմուծման անհրաժեշտությունը՝ պահպանելով կրթության մարդասիրական ուղղվածությունը, դասավանդողի՝ որպես մենթորի, կողմնորոշողի դերի կարևորությունը: Եզրակացություն է արվում, որ ժամանակակից լեզվաբանական կրթության զարգացման առավել հեռանկարային մոդելը դասավանդողի և արհեստական բանականության

համագործակցության մոդելն է, որն ապահովում է դասավանդման որակի բարելավում, հաղորդակցական հմտության զարգացում, ժամանակի և մարդկային ռեսուրսի խնայողություն և սովորողների մոտ թվային հմտությունների ձևավորում:

Բանալի բառեր՝ լեզվի դասավանդում, թվային փոխակերպում, արհեստական բանականություն, դասավանդող, կրթական գործընթաց:

Introduction

The Need for the Digitalization of Education

Today, it is difficult to imagine any sphere of social activity without the use of digital technologies. Over the past decade, digital technologies have advanced to the point that they have become an integral part of every domain of social life, including education (UNESCO, 2021; Holmes, Bialik, & Fadel, 2019). The development of the Internet, mobile phones, data-storage technologies, and artificial intelligence has substantially changed the learning process. Educational institutions increasingly incorporate digital tools to facilitate and deepen knowledge acquisition, enhance learning effectiveness, and make the educational process more flexible (Holmes & Tuomi, 2022; Miao & Holmes, 2023). Digital learning has gained particular significance in the field of language teaching, as modern technologies create new opportunities to develop communicative skills, promote learners' independent work, and enable autonomous engagement with linguistic material (Евтюгина & Безрукова, 2024).

Contemporary society has developed new perspectives on and expectations of language education. In the context of digital communication, language proficiency has become a key prerequisite for professional and social success. Whereas language education was previously centred on the teaching and application of grammatical structures, its current focus is on communicative competence, analytical thinking, the ability to work with information, and the appropriate use of language in a variety of specific contexts (Selwyn, 2019). Furthermore, today's learners expect more interactive, personalised, and technologically enriched forms of instruction. This necessitates a reconsideration of traditional approaches to language teaching (Tili et al., 2023).

Aim and Objectives of the Article

This article aims to analyse the digital transformation of the language-learning process and to determine the role of artificial intelligence within contemporary language-teaching methodologies.

To achieve this aim, the following objectives are addressed:

- to examine the principal traditional methods of language teaching and identify their distinctive characteristics;

- to analyse the impact of digital technologies on the development of language

teaching;

to determine the principal areas in which artificial intelligence is applied in language teaching;

to identify the advantages, disadvantages, and limitations associated with the use of artificial intelligence in the learning process;

to characterise the transformation of the educator's role in the context of the digitalisation of education;

to assess the prospects for integrating artificial intelligence technologies into language education.

Methodology

This article is based on a theoretical and analytical approach, which enables a comprehensive examination of the process of digital transformation in language teaching and the determination of the place of artificial intelligence within contemporary language-teaching practices (Miao & Holmes, 2023; OECD, 2021).

The methodological framework of the study comprises analytical, comparative, contrastive, and generalisation methods. The systematisation of the relevant scholarly literature (Holmes et al., 2019), together with the co-authors' teaching experience and classroom-based observations at the Armenian State University of Economics, provided the basis for the analysis and the conclusions presented in the study. The study examines publications from international organisations, regulatory documents, and works by specialists in digital learning and the application of artificial intelligence in the educational process (Miao & Holmes, 2023; European Commission, 2020).

We employed comparative and contrastive methods to identify the key characteristics of developments in language education. These methods allowed us to identify the advantages and disadvantages of traditional teaching methods, digital educational technologies, and artificial-intelligence assistants (Richards, 2006; Nunan, 2004). The systemic approach enabled language teaching to be considered as an integrated pedagogical system in which digital technologies and artificial intelligence function as interconnected elements influencing the content, organisation, and outcomes of education (Holmes et al., 2019; Selwyn, 2019).

The article also employs a scholarly interpretative and critical method, which has made it possible to synthesise the findings of contemporary studies and clarify promising directions for the integration of artificial intelligence and digital technologies into language teaching. It pays particular attention to the personalisation of learning, the changing role of the educator, academic integrity, and the ethical principles governing the use of artificial intelligence (Miao & Holmes, 2023; Selwyn, 2019).

The methodology enabled a comprehensive analysis of the subject and supported the formulation of scientifically substantiated conclusions about the prospects of language education in the digital age.

Traditional Methods of Language Teaching

Before the emergence of digital technologies, language teaching relied primarily on traditional pedagogical methods. Each of these methods reflected a particular understanding of the aims of language education and of the means by which linguistic material could be effectively acquired (Richards, 2006).

For a considerable period, the grammar–translation method was among the most widely used approaches. Its principal aims were the teaching of grammatical rules, the enrichment of vocabulary, and the development of translation skills. The educational process was organised around reading and the analysis of written texts and included grammatical exercises, work with new vocabulary, stylistic analysis, and generalisation. Although this method contributed to the development of analytical thinking and a profound understanding of language structure, it did not sufficiently promote the formation of oral communication skills (Nunan, 2004).

In the mid–twentieth century, the audiolingual method became considerably widespread. It emphasised repeated practice of linguistic structures and the development of automatic language habits through listening and pronunciation exercises. This approach focused particularly on the auditory and phonetic aspects of linguistic material. Learners completed numerous repetition–based exercises to reinforce language patterns. However, mechanical repetition often left learners struggling to communicate in specific real–life situations (Richards, 2006; Nunan, 2004).

From the late twentieth century onwards, the communicative approach assumed a leading position. It was founded on the principle of using language as a means of communication and interpersonal interaction. The principal aim of instruction became the development of communicative skills and the ability to understand and express oneself in various real–life situations (Richards, 2006). Within this approach, role–playing activities, dialogues, project–based assignments, and other interactive forms of work were widely employed. The communicative method remains one of the most widely adopted approaches today (Nunan, 2004; Levy & Stockwell, 2006).

Traditional methods of language teaching have played an important role in the system of language education and have provided the foundation for many contemporary pedagogical approaches. One of their principal advantages is the structured organisation of the educational process, which ensures the consistent acquisition of linguistic material. Systematic work on grammar and vocabulary contributes to the formation of a solid foundation of linguistic knowledge and makes it possible to monitor learning outcomes (Nunan, 2004).

In the traditional model of instruction, the teacher plays a significant role, serving as the principal source of knowledge and the organiser and supervisor of the educational process (Hampel & Stickler, 2015). This approach ensures a high degree of pedagogical guidance and enables learners’ errors to be corrected directly during the learning process.

At the same time, traditional methods have several limitations. The most significant problem is the insufficient individualisation of instruction. When working with a group, teachers find it difficult to account for each learner's individual characteristics, pace of learning, level of preparedness, and educational needs (Levy & Stockwell, 2006).

Furthermore, traditional teaching methods are limited by the duration of classroom time and do not always provide enough opportunities for practical work outside the classroom. Compared with contemporary digital technologies, another disadvantage is their relatively low level of interactivity. Traditional methods predominantly involve the passive acquisition of information, which may reduce learners' motivation and engagement in the educational process (Hampel & Stickler, 2015).

Despite these significant limitations, traditional methods continue to constitute important components of language education. The development of information technologies and changing societal educational needs have created a need for new approaches to instruction and have become drivers of the digital transformation of language teaching. These processes are examined in the following section of the article.

Digitalisation of Language Education

The development of information and communication technologies became a fundamental factor in the transformation of the contemporary educational environment (OECD, 2021; Miao & Holmes, 2023). In the late twentieth and early twenty-first centuries, educators began actively incorporating digital tools into the educational process, transforming how knowledge was acquired, communicated, and assimilated (European Commission, 2020).

Language education became one of the fields where new technologies found extensive application, because they offered opportunities to organise interactive instruction, communicate with native speakers without geographical limitations, and engage with authentic materials. During the initial stage of digitalisation, electronic textbooks and multimedia resources began to be used. Compared with traditional printed books, electronic materials allowed educators to integrate text, audio recordings, video materials, and interactive tasks into a single learning environment. This enabled learners to process information more effectively and to develop several language skills simultaneously (Hampel & Stickler, 2015).

The subsequent development of digital technologies led to the creation of specialised educational platforms and mobile applications. These resources let learners independently determine the intensity and duration of their work, receive immediate feedback, and practise language skills regularly. Distance learning acquired particular significance, as it enables learners to participate in educational programmes regardless of their geographical location.

The global processes of society's digital transformation provided a major impetus for the development of digital learning. As a result, digital technologies

evolved from supplementary tools into an important component of the educational process (OECD, 2021; European Commission, 2020).

Their integration substantially transformed the nature of language education. One of the major advantages of digitalisation has been the increased accessibility of educational resources. Today, learners can acquire knowledge from a variety of sources and access online libraries, electronic dictionaries, educational platforms, and multimedia materials at any time (Miao & Holmes, 2023).

Information technologies contribute to increasing the interactivity of instruction. The use of videos, virtual classrooms, simulation-based exercises, and game-based elements makes language learning more engaging and contributes to enhanced motivation. For example, multimedia resources enable learners to develop reading, writing, listening, and speaking skills simultaneously, thereby improving communicative competence (Hampel & Stickler, 2015).

Another important outcome of digitalisation is the expansion of opportunities for autonomous learning. Contemporary technologies enable learners to plan their educational activities independently, select learning materials in accordance with their own interests, and monitor their own progress. This approach promotes the development of autonomy, responsibility, and self-directed learning, all of which are highly important in contemporary society and for lifelong education (Siemens, 2005; UNESCO, 2021).

Furthermore, the digital educational environment creates favourable conditions for effective cooperation between learners and teachers. Digital means of communication allow information to be exchanged promptly and collaborative work to be organised.

However, the digitalisation of education also brings several challenges. Among these, learners' need for digital literacy and the risk of information overload require particular attention (OECD, 2021; Miao & Holmes, 2023).

Nevertheless, the advantages of digital technologies substantially expand the possibilities of language education and establish a foundation for the subsequent integration of more intelligent systems. The next stage of digital transformation was the application of artificial-intelligence tools, which open up new prospects for the individualisation of language learning and the enhancement of its effectiveness.

Artificial Intelligence in Language Education

The contemporary stage of digital learning is characterised by the active integration of artificial intelligence into the educational process (Miao & Holmes, 2023; Holmes et al., 2019). Artificial intelligence constitutes a combination of technologies that enables computer programmes to perform tasks traditionally requiring human intelligence, including information analysis, speech recognition, natural-language processing, decision-making, learning from accumulated data, and other related functions.

In the field of language education, artificial intelligence creates new opportunities to improve the effectiveness of instruction and adapt the educational

process to the needs of each learner. One of the most widespread areas of AI application is the use of intelligent tutoring systems. Such systems are capable of analysing learners' achievements, identifying difficulties and gaps in knowledge, and recommending exercises appropriate to their level of preparedness. As a result, instruction becomes more flexible and better aligned with individual needs (Holmes et al., 2019).

Chatbots and virtual assistants have also become widely used. They help learners practise the target language, improve their writing skills, and receive immediate feedback. Unlike traditional forms of instruction, virtual interlocutors are available at any time, substantially expanding opportunities for practical language use. This also reduces the teacher's workload.

By analysing task performance, the frequency of errors, the rate of material acquisition, and learning preferences, AI systems can generate individualised learning packages. For example, when a learner struggles with particular grammatical structures, the system automatically recommends exercises focused on those areas (Levy & Stockwell, 2006).

These systems also consider each learner's level of language proficiency level, allowing them to avoid tasks that are either too difficult or too elementary. AI systems are capable of monitoring the dynamics of learners' progress and predicting potential difficulties. This helps both learners and teachers promptly adapt and modify instructional materials and the learning process.

Another highly demanded area of AI application is the creation of educational materials. Artificial intelligence can generate exercises, reading texts, tests, vocabulary tasks, and discussion questions, taking into account learners' level of knowledge and the objectives of instruction. Large language models make it possible to use AI as an assistant in the development of writing skills. Learners can receive recommendations concerning textual structure, writing style, grammatical accuracy, and logical coherence. This contributes to the development of professional and academic writing skills.

Artificial intelligence also plays a particular role in the development of oral communication skills. Digital systems can analyse learners' pronunciation, identify phonetic errors, and recommend corrections. This makes it possible to practise spoken language regularly and frequently beyond the confines of classroom instruction (Levy & Stockwell, 2006).

Thus, artificial intelligence is becoming an important instrument of contemporary language pedagogy. It contributes to the accessibility of educational resources, ensures the personalisation of instruction, and expands opportunities for language practice.

Advantages and Risks of Artificial Intelligence Use

The active integration of artificial intelligence technologies into the educational process has generally received positive assessments. Nevertheless, it has also raised concerns among teachers, learners, and researchers, and these

concerns are well-founded. Despite artificial intelligence's considerable potential to improve instructional effectiveness, its application also comes with several limitations and risks that educators must consider when organising the educational process. First, educators should consider the advantages of artificial intelligence in teaching.

A major advantage of AI is its ability to personalise instruction to learners' individual needs. This makes it possible to create a more effective learning environment centred on the needs of a specific learner.

Whereas traditional assessment of written work requires considerable investment of time, AI systems can instantly analyse learners' responses and suggest strategies for correcting errors. This supports faster acquisition of material and creates opportunities for timely correction and refinement of knowledge (Levy & Stockwell, 2006).

Artificial intelligence substantially expands the opportunities for self-directed learning. Learners gain access to intelligent systems through which complex topics can be explained, and additional exercises on those topics can be provided at any time of the day and from any location. This accessibility of educational resources supports the development of self-education skills and enhances motivation (Siemens, 2005; UNESCO, 2021).

Another advantage is the reduction of the teacher's workload. The automation of assignment assessment, the preparation of educational materials, and the analysis of learning outcomes allow teachers to devote more time to creative and methodological work, as well as to individual interaction with learners.

Furthermore, artificial-intelligence technologies ensure access to diverse educational resources and contribute to the creation of an interactive learning environment. The use of chatbots, virtual advisers, and speech-recognition systems makes language learning more engaging and brings it closer to authentic communicative situations (Hampel & Stickler, 2015; Levy & Stockwell, 2022).

Despite its numerous advantages, the use of artificial intelligence in education is also associated with certain risks. One of the most widely discussed problems is the provision of unreliable information. Contemporary intelligent systems may produce factual errors, offer ambiguous formulations, and generate texts containing linguistic and semantic inaccuracies. Consequently, the outputs produced by AI require a critical approach on the part of both teachers and learners. In this context, the teacher's role becomes even more important in guiding learners appropriately.

Academic integrity is another serious concern. The accessibility of intelligent systems enables learners to use artificial intelligence to complete homework assignments, write essays, and prepare projects without undertaking sufficient independent work. This undermines the development of genuine skills and knowledge and reduces the educational value of learning activities.

Another risk is a possible decline in the level of direct human interaction.

Language education involves not only the acquisition of grammar and vocabulary but also the development of communicative skills, emotional intelligence, an understanding of cultural context, and interpersonal relationships. These skills cannot be fully developed solely through interaction with digital systems (Richards, 2006; Nunan, 2004).

The protection of personal data is also of considerable importance. To personalise learning, digital systems collect and analyse substantial amounts of information about learners. This requires compliance with information-security standards and a responsible approach to the processing and storage of personal data.

In addition, the effectiveness of AI tools largely depends on the level of digital literacy teachers and learners possess. Insufficient relevant skills may impede the introduction of new technologies and reduce their educational potential.

Thus, artificial intelligence creates extensive opportunities for improving language education. However, its integration must be supported by a pedagogically informed approach, adherence to ethical standards, and the maintenance of a balance between traditional forms of instruction and innovative technologies. Only under these conditions can artificial intelligence become an effective instrument of the educational process without in any way replacing the human factor (Selwyn, 2019; Holmes et al., 2019; Levy & Stockwell, 2006). The human factor remains, and will continue to remain, one of the most important components of language education.

Transformation of the Teacher's Professional Functions

Within the traditional model of education, the teacher performs the roles of knowledge transmitter, supervisor of the educational process, and evaluator. Contemporary technologies make it possible to automate these functions, including the assessment of assignments, the analysis of learning outcomes, and the provision of feedback. Consequently, the teacher's professional activity is increasingly shifting towards the organisation of the educational process, pedagogical guidance, and learner consultation (European Commission, 2020; Selwyn, 2019).

Today, the teacher is not merely a holder of knowledge but also a facilitator and mentor who helps learners navigate vast amounts of information, critically evaluate the information they receive, and use digital resources effectively. The teacher's ability to develop learners' skills in autonomous learning and the responsible use of artificial intelligence is becoming increasingly important (Siemens, 2005; Miao & Holmes, 2023). The teacher thus becomes an intermediary between learners and digital technologies. It is the teacher who determines the appropriateness of using a particular tool, selects the methods by which it should be integrated, and ensures that its application contributes to the achievement of educational objectives.

The effective use of artificial-intelligence technologies requires teachers to acquire new professional knowledge and skills. Contemporary teachers must have

digital literacy, understand the principles underlying the operation of intelligent systems operate, and be able to use them for educational purposes (OECD, 2021; European Commission, 2020). The development of digital competence includes working with educational platforms, automating the assessment and evaluation of assignments, creating digital materials, and analysing learning outcomes based on data provided by digital systems. Equally important are the ability to evaluate the quality of information generated by artificial intelligence and the capacity to identify errors or inaccuracies.

In the context of the continuous advancement of technology, teachers must be prepared for ongoing professional development. Mastering new digital technologies is becoming an important component of maintaining professional competitiveness and ensuring the high quality of the educational process (Hampel & Stickler, 2015; OECD, 2021).

One of the most promising directions in the development of contemporary education is the model of collaboration between human beings and artificial intelligence. Within this model, AI is regarded not as a replacement for the teacher but as a tool that expands the teacher's professional skills and capabilities. Artificial intelligence is capable of efficiently performing tasks involving large volumes of data, automating routine and repetitive activities, and personalising instruction. At the same time, the teacher retains the central role of creating an educational environment, developing learners' critical thinking, fostering motivation, and building interpersonal relationships (Selwyn, 2019; Levy & Stockwell, 2006).

Of particular significance is the fact that language education involves not merely the acquisition of grammar and vocabulary but also the study of cultural characteristics, social norms, and communicative challenges. These dimensions require human participation, empathy, and pedagogical experience, which artificial intelligence cannot fully reproduce.

Thus, the future of language education lies not in opposition between teachers and artificial intelligence but in their effective collaboration. The use of intelligent technologies makes it possible to enhance the quality of instruction, expand educational opportunities, and provide an individualised approach to every learner.

Digital transformation has therefore exerted a considerable influence on the development of language education. It has changed both teaching methods and the roles of the participants in the educational process. The shift from traditional teaching methods to digital technologies and artificial intelligence creates new opportunities to improve instructional effectiveness, individualise educational outcomes, and expand access to learning resources.

The present study has demonstrated that artificial intelligence technologies are capable of substantially improving the quality of language education through the automation of routine activities, the provision of prompt feedback, and the adaptation of educational materials to learners' individual needs. At the same time,

the use of artificial intelligence is accompanied by several challenges related to the reliability of information, academic integrity, and the importance of direct pedagogical interaction (UNESCO, 2021; Holmes et al., 2019; Selwyn, 2019).

Under these conditions, the teacher assumes a particularly important role as the organiser of the educational process and as a guide and adviser to learners within the digital educational environment. The future of language education depends on a harmonious, balanced combination of human pedagogical expertise and the capabilities of artificial intelligence capabilities. This approach lets us benefit from contemporary technologies without sacrificing education's humanistic values of education and ensures learners participate effectively in the digital age.

Conclusion

The digital transformation of education is a natural consequence of advances of information and communication technologies and substantially affects the content, methods, and organisational forms of language education (Miao & Holmes, 2023; OECD, 2021). In the context of the formation of a digital society, traditional approaches to language education are gradually being supplemented by innovative technologies aimed at enhancing the effectiveness of the educational process, expanding opportunities for interaction among its participants, and ensuring a higher degree of learning personalisation.

The analysis shows that, despite their significant contribution to language education, traditional methods often cannot always fully meet learners' contemporary needs or the demands of a rapidly changing information environment (Richards, 2006; Nunan, 2004). The development of digital technologies has contributed to the emergence of new instructional tools that provide access to educational materials, enhance the interactivity of learning, and expand opportunities for learners' autonomous work.

Artificial intelligence plays a significant role in contemporary system of language education and is becoming one of the most promising areas of educational technology. The application of AI systems can personalise education, automate the processes of knowledge assessment and monitoring, analyse learning achievements, and provide rapid feedback. Consequently, more favourable conditions are created for the development of language skills and the improvement of educational outcomes (Holmes et al., 2019; Miao & Holmes, 2023).

The findings of the study indicate that several organisational, pedagogical, and ethical challenges accompany the integration of artificial intelligence into the educational process. Of particular importance are the reliability of generated information, adherence to the principles of academic integrity, the protection of learners' personal data, and the prevention of excessive dependence on artificial intelligence within the educational process. These circumstances necessitate the development of a scientifically grounded approach to the integration of AI into educational practice, as well as the establishment of a regulatory and methodological framework for its use.

The study has also confirmed that the dissemination of intelligent technologies does not lead to a decline in the significance of the teacher within the educational process. On the contrary, under conditions of digital transformation, the teacher's role as an organiser, facilitator, adviser, and coordinator between learners and the digital educational environment becomes increasingly important. The effectiveness of AI use largely depends of the teacher's digital competence, their ability to critically evaluate how digital systems operate, and their capacity to ensure these systems are used pedagogically appropriately.

Thus, the future development of language education is not about replacing the teacher with artificial intelligence, but about creating an effective model of collaboration between them. The most effective approach combines AI's analytical and adaptive capabilities with professional expertise and pedagogical mastery. Such a model can balance technological innovation with education's humanistic orientation of education (Holmes et al., 2019; Levy & Stockwell, 2006).

The digital transformation of language education is a complex, multidimensional process that requires further scholarly examination. Promising directions for future research may include evaluating the effectiveness of integrating different artificial-intelligence models into language teaching, developing methodological guidelines for their use, and analysing the long-term impact of intelligent technologies on learners' language proficiency.

As digital society continues to develop, the rational and pedagogically grounded use of artificial intelligence may become one of the principal factors shaping contemporary language education.

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ADVERTISING AS A FORM OF SOCIAL AND CULTURAL COMMUNICATION IN HAYKANUSH MARK'S MAGAZINE TSAGHIK (1905–1907)

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Abstract

The Armenian press of the late nineteenth and early twentieth centuries served not only as a platform for disseminating literary, political, and social ideas, but also as an important medium for reflecting social life, economic relations, and cultural transformations. Within this context, advertising sections constitute valuable historical sources for the study of consumer culture, social perceptions, and systems of values.

This study examines the advertising section of *Tzaghik* (Constantinople, 1905–1907), edited by Hayganush Mark, to identify the functions of advertising as a form of social and cultural communication. The study focuses on the communicative and persuasive strategies employed in advertisements, the mechanisms through which trust and authority were constructed, and the social and cultural values conveyed through advertised goods and services.

The relevance of the study is that advertising materials have generally been treated as secondary components in the history of the Armenian press. In contrast, their analysis provides valuable insights into the consumer culture, educational perceptions, and processes of modernisation within the Armenian community of Constantinople. Particularly significant are advertisements for educational institutions, health-related services, household goods, fashion, and commercial services, which reflect contemporary perceptions of the educated woman, family life, and urban lifestyles.

The scholarly novelty of the study lies in examining the advertising section of *Tzaghik* as an integrated system of social and cultural communication. The study approaches advertising texts as cultural messages that construct and disseminate consumer behaviour, perceptions of social prestige, and notions of modern lifestyles. At the same time, these advertisements provide evidence of the expansion of the urban market, the circulation of new goods and services, and transformations in women's social and educational roles.

The methodological framework combines historical-comparative, content, discourse, and structural analysis. The primary sources consist of advertisements published in *Tzaghik* for educational institutions, books, medical services, household products, fashion, and commercial services. The study demonstrates that the advertising section of *Tzaghik* should be regarded not merely as a commercial supplement, but as an important historical and cultural source for understanding the value systems, social perceptions, and processes of modernisation within the Armenian community of Constantinople at the beginning of the twentieth century.

Keywords: Magazine *Tsaghik*, Haykanush Mark, advertising, press history, cultural capital, Armenian community of Constantinople.

ԳՈՎԱԶԴԸ ՀԱՅԿԱՆՈՒՇ ՄԱՌՔԻ «ԾԱՂԻԿ» ՀԱՆԴԵՍՈՒՄ. ՍՈՑԻԱԼԱԿԱՆ ԵՎ ՄՇԱԿՈՒԹԱՅԻՆ ՀԱՂՈՐԴԱԿՑՈՒԹՅԱՆ ՀԱՄԱՏԵՔՍՏԵՐԸ (1905–1907)

ՆԱԻՐԱ ՀԱՄԲԱՐԶՈՒՄՅԱՆ

ՀՀ ԳԱԱ Մ. Արեղյանի անվան գրականության ինստիտուտի
առաջատար գիտաշխատող,
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Համառոտագիր

19-րդ դարի վերջի և 20-րդ դարի սկզբի հայ մամուլը ոչ միայն գրական, քաղաքական և հասարակական գաղափարների տարածման, այլև սոցիալական կյանքի, տնտեսական հարաբերությունների և մշակութային փոփոխությունների արտացոլման կարևոր հարթակ էր: Այս համատեքստում գովազդային բաժինները արժեքավոր պատմական աղբյուրներ են՝ սպառողական մշակույթի, սոցիալական պատկերացումների և արժեքային համակարգերի ուսումնասիրման համար:

Սույն ուսումնասիրության նպատակն է քննել Հայկանուշ Մարքի խմբագրած «Ծաղիկ» հանդեսի (Կ. Պոլիս, 1905–1907) գովազդային բաժինը՝ բացահայտելով գովազդի գործառնությունները՝ որպես սոցիալական և մշակութային հաղորդակցության ձևեր: Հետազոտության խնդիրն է վերլուծել գովազդներում կիրառված հաղորդակցական և համոզման ռազմավարությունները, վստահության ու հեղինակության ձևավորման մեխանիզմները, ինչպես նաև դրանց միջոցով փոխանցվող սոցիալական և մշակութային արժեքները:

Ուսումնասիրության *արդյունքները* պայմանավորված է նրանով,

որ գովազդային նյութերը հայ մամուլի պատմության մեջ հիմնականում դիտարկվել են որպես օժանդակ բաղադրիչներ, մինչդեռ դրանց վերլուծությունը հնարավորություն է տալիս բացահայտելու պոլսահայ հասարակության սպառման մշակույթը, կրթական պատկերացումները և արդիականացման գործընթացները: Հատկապես նշանակալի են կրթության, առողջության, կենցաղի, նորաձևության և առևտրային ծառայությունների վերաբերյալ գովազդները, որոնք արտացոլում են կրթված կնոջ, ընտանիքի և քաղաքային կենսակերպի վերաբերյալ ժամանակի պատկերացումները:

Հետազոտության *գիտական նորույթը* «Ծաղիկ»-ի գովազդային բաժինը որպես սոցիալական և մշակութային հաղորդակցության համակարգ ուսումնասիրելն է: Գովազդային տեքստերը դիտարկվում են որպես մշակութային հաղորդագրություններ, որոնց միջոցով ձևավորվում էին սպառողի վարքագիծը, հասարակական հեղինակության ընկալումները և ժամանակակից կենսակերպի պատկերացումները: Դրանք միաժամանակ վկայում են քաղաքային շուկայի ընդլայնման, նոր ապրանքների ու ծառայությունների տարածման և կանանց սոցիալական ու կրթական դերի փոփոխության մասին:

Մեթոդաբանական հիմքը կազմում են պատմահամեմատական, բովանդակային, դիսկուրսային և կառուցվածքային վերլուծության մեթոդները: Ուսումնասիրության նյութական հիմքը «Ծաղիկ» հանդեսում հրապարակված կրթական հաստատությունների, գրքերի, բժշկական ծառայությունների, կենցաղային ապրանքների, նորաձևության և առևտրային ծառայությունների վերաբերյալ գովազդներն են:

Արդյունքում «Ծաղիկ»-ի գովազդային բաժինը դիտարկվում է՝ որպես 20-րդ դարակզբի պոլսահայ հասարակության արժեքային համակարգը, սոցիալական պատկերացումները և արդիականացման գործընթացները բացահայտող կարևոր պատմամշակութային աղբյուր:

Բանալի բառեր՝ «Ծաղիկ» հանդես, Հայկանուշ Մառք, գովազդ, մամուլի պատմություն, մշակութային կապիտալ, պոլսահայ հասարակություն:

Introduction

By the late 19th and early 20th centuries, the Armenian press in the Ottoman Empire had become not only a medium for the dissemination of literary, political, and social ideas but also an important forum reflecting everyday life, economic relations, and the broader cultural transformations taking place within Armenian society.

During this period, a distinct culture of advertising gradually emerged in the periodical press. Initially, advertisements functioned primarily as informational notices about goods and services; over time, however, they evolved into instruments for shaping social perceptions, aspirations, and patterns of behaviour.

Contemporary scholarship on advertising demonstrates that its function extends well beyond the promotion of commercial sales. More broadly, advertising

constitutes a form of cultural communication through which commodities and services become associated with particular systems of values, lifestyles, and representations of identity (Williamson, 1978, pp. 12–13). It not only presents specific opportunities for consumption but also constructs and communicates particular social meanings, deliberately guiding perceptions of how the desirable individual or family ought to be constituted within a given society (Williamson, 1978; Jhally, 1987).

From this perspective, *Tsaghik* (“Flower”), edited by Haykanush Mark and published in Constantinople between 1905 and 1907, represents a particularly significant case. The magazine played an important role in the educational and cultural life of Western Armenian women. Although *Tsaghik* has primarily been examined for its literary, educational, and socio-cultural content, its advertising section likewise constitutes a valuable subject of scholarly inquiry. It provides an opportunity to investigate not only the goods and services promoted to the Armenian readership of Constantinople but also the broader system of values within which these commercial messages were constructed and communicated.

The advertisements published in *Tsaghik* are of particular scholarly interest, as the magazine was primarily intended for educated women and their families. Consequently, its advertisements were not designed solely according to commercial principles but also reflected contemporary perceptions of women’s social roles, family organisation, education, health, and urban culture.

According to communication theory, advertising messages perform three principal functions: to inform, to persuade, and to shape attitudes (McQuail, 2010, p. 343). In this respect, the advertisements in *Tsaghik* are significant because they simultaneously fulfilled all three functions:

- a.** an *informational* function, presenting goods, services, and the conditions under which they were offered;
- b.** a *persuasive* function, intended to inspire consumer confidence and encourage purchasing decisions; and
- c.** a *socio-cultural* function, through which representations of modern life and social identity were constructed and disseminated.

Drawing on theoretical approaches to advertising and communication, this study examines the advertising section of *Tsaghik*, analysing the structure of its advertising messages, the strategies employed to establish credibility and consumer trust, the construction of target audiences, and the broader socio-cultural meanings conveyed through these advertisements.

The empirical basis of the study consists of advertisements for educational institutions, translated books and other publications, medical services, household products, fashion, and various commercial services published in the magazine. A comparative analysis of these materials demonstrates how advertising in the early 20th-century Armenian press of Constantinople functioned not merely as an expression of commercial activity and economic development but also as a

language of social reform and modernisation.

The Advertising Section of Tsaghik as a Medium of Press and Social Communication

In the periodical press published in the Ottoman Empire, advertising sections generally occupied a secondary position in comparison with editorial articles, literary works, and political commentary. From the perspective of historical and cultural research, however, these materials constitute valuable documentary evidence, revealing patterns of economic and socio-political relations, consumer culture, systems of values, and the organisation of everyday life (Williamson, 1978; Jhally, 1987).

Advertising is an especially important historical source because it reflects not only what was offered for sale but also what a given society regarded as desirable, necessary, or prestigious. As Pierre Bourdieu argues, cultural practices are closely linked to processes of social distinction and the production of symbolic prestige, while cultural goods themselves function as markers of social position (Bourdieu, 1986, pp. 17–19).

This theoretical perspective is equally applicable to the advertisements published in *Tsaghik*. The goods and services promoted in the magazine are presented not merely in terms of their practical utility but also as elements of a broader social culture associated with particular lifestyles and aspirations.

The advertisements published in the magazine may be classified into several major thematic categories.

1. *Advertisements for Educational Institutions and Educational Services*

This category includes, among others, the announcement published by the *Palagashian School* (Tsaghik, 1905, no. 6, p. 17).

a. ***The advertisement was placed by the school's principal, H. G. Palagashian***, who promoted his boarding and day school located on Muhurdar Street in Kadıkoy. The announcement provides a detailed description of the institution's advantages, emphasising both its educational standards and its modern facilities:

“Having successfully completed four productive years, sustained by the appreciation and encouragement of discerning parents, our institution has now entered its 5th academic year as a higher school for girls, complemented by a coeducational kindergarten and elementary department.

Since last year, the school has been relocated to a spacious new building whose internal organisation and well-ventilated location provide every facility required for modern education, ensuring comfortable and healthy conditions for both boarding and day students.

Alongside a sound moral education, the curriculum offers systematic instruction in languages (Turkish, Armenian, French, and English) as well as the essential branches of scientific knowledge.” (Tsaghik, 1905, no. 6, p. 17)

Educational institutions sought to present themselves not merely by providing information about their existence but also by emphasising the quality of education, modern infrastructure, hygienic conditions, multilingual instruction, and moral education. These features matched the expectations of the emerging educated Armenian urban middle class and suggest that education was gradually being presented as a key marker of cultural refinement, social advancement, and modern identity.

b. Advertisements for Textbooks and Educational Books

Advertisements promoting readers and educational books intended for girls, published under the heading *For Schoolgirls*, presented education not merely as a means of acquiring knowledge but also as an essential prerequisite for future social success and cultural advancement:

“The bookshop and stationery store located at No. 14, Khristaki Khan, opposite the Galata Saray in Pera, offers every variety of literary, scientific, and school books in French, Armenian, and other languages. Also available at very moderate prices are elegant silk and cardboard writing paper manufactured in English factories, artistic stationery boxes, visiting cards, pens, and other writing materials. Anyone who visits the establishment even once will undoubtedly become a devoted customer.” (Tsaghik, 1905, no. 6, p. 17).

Beyond promoting books, this advertisement presents reading, education, and literacy as integral components of a cultivated urban lifestyle. The combination of multilingual publications, imported stationery, and refined writing accessories suggests that educational consumption was closely associated with cultural sophistication and social prestige. In this sense, the advertisement constructs the bookstore not merely as a commercial establishment but as a space for intellectual and cultural refinement.

2. Advertisements for Professional Services

This category includes advertisements for a variety of specialised professional services.

a. The Advertisement for the Dental Practice of Khachik Jamgochian

One of the most detailed professional advertisements published in *Tsaghik* promoted the dental practice of Khachik Efendi Jamgochian, whose office was located opposite Boğacacı Han, Bahçekapı, Constantinople (Tsaghik, 1905, no. 23, p. 28).

The advertisement emphasises the dentist’s professional reputation, the use of modern equipment imported from Europe and the United States, and his ability to perform painless dental procedures:

“The renowned dentist Khachik Efendi Jamgochian, who occupies a distinguished position among the dentists of the capital, has recently imported the latest instruments from Europe and America. Owing to these modern instruments and his exceptional professional skill, he extracts de-

cayed and even the most difficult teeth instantly and without causing any pain. Instead of extracting decayed front teeth, he places screw-mounted artificial teeth upon the existing roots, making them virtually indistinguishable from natural teeth. For posterior teeth whose roots cannot be filled, he applies gold or platinum crowns. He also manufactures dentures mounted on rubber, platinum, or gold bases, achieving an appearance that closely resembles natural teeth.”

The advertisement concludes by emphasising the ethical principles upon which the practice was founded:

“Khachik Efendi Jamgochian’s guiding principles are honour, integrity, and cleanliness—qualities indispensable for every dentist. Fees are moderate, and certified poor patients are treated free of charge.” (Tsaghik, 1905, no. 23, p. 28).

It should be noted that professional credibility was constructed not only through References to technical expertise and imported medical technologies but also through the emphasis on moral values. Professional competence, honesty, cleanliness, and charitable service were presented as interconnected qualities reflecting contemporary perceptions of the ethical responsibilities of educated professionals. Thus, the advertisement functioned as both a commercial announcement and a communicative discourse aimed at promoting modern medicine, professional ethics, and the formation of public trust.

b. Advertisements for Tailoring Services

The advertisement for the tailor *Tadeos Ansourian* employs a rhetorical question as a persuasive strategy intended to inspire consumer confidence:

“Do you wish to dress elegantly and tastefully? Then visit Tadeos Ansourian, tailor, in the Rumeli Passage in Pera, where garments of superior, durable fabrics are made to measure. Jackets, suits, bonjourns, and frock coats are tailored on highly affordable terms. A single visit is sufficient to ensure complete satisfaction.” (Tsaghik, 1905, no. 6, p. 17).

The advertisement is explicitly addressed to *men* (“To Gentlemen”), indicating a clearly defined target audience. Rather than focusing exclusively on the garments themselves, the advertisement emphasises trustworthiness, professional expertise, craftsmanship, and individualised service. Customer satisfaction is presented as evidence of the tailor’s competence, while the rhetorical opening functions as an effective persuasive device inviting potential clients to identify with an ideal of elegance and respectability.

3. Advertisements for Household Goods: The Singer Sewing Machine

A particularly noteworthy example is the advertisement for the sewing machine under the heading *Singer*, which even specifies the copyright holder: *The Singer Manufacturing Co.* (Supplier to the Imperial Palace)” (Tsaghik, 1905, no. 6, p. 17).

The advertisement is remarkable because the sewing machine is presented not merely as a technical device but as a symbol of the modern household and of efficient domestic life: “This is the finest machine. Being the most advanced, durable, and easy to operate, Singer sewing machines are purchased throughout the world by everyone.” (Tsaghik, 1905, no. 6, p. 17).

To reinforce consumer confidence, the advertisement lists the company’s numerous branches and sales offices throughout Constantinople, including locations in *Pera, Galata, Stamboul, and Uskudar*, thereby emphasising the firm’s extensive commercial presence and accessibility (Tsaghik, 1905, no. 6, p. 17). It also highlights favourable purchasing arrangements by informing customers that they could acquire the machines through *weekly instalment payments*, making an otherwise expensive household technology accessible to a broader segment of consumers.

Finally, the advertisement demonstrates that, even at the beginning of the 20th century, advertisers recognised the importance of emphasising customer benefits and after-sales service:

“Instruction and repairs free of charge – complete guarantee.” (Tsaghik, 1905, no. 6, p. 17).

Taken together, these persuasive strategies reveal a sophisticated understanding of consumer marketing. The emphasis on product quality, internationally recognised branding, extensive retail accessibility, flexible payment options, and post-purchase support illustrates that commercial advertising in *Tsaghik* had already adopted many of the principles associated with modern advertising practice. The sewing machine is thus represented not merely as a domestic appliance but as an embodiment of technological progress, household efficiency, and participation in a modern urban lifestyle.

4. Cultural and Commercial Announcements

A second important category of educational advertisements consists of announcements promoting books and textbooks. In advertisements for illustrated readers intended for girls, the book is presented not merely as reading material but also as an instrument of moral and intellectual formation.

These advertisements emphasise that such publications contain valuable advice and practical guidance and are particularly beneficial for parents and teachers concerned with the education of girls. This category includes:

a. Advertisements for translated books and readers

One representative example is the advertisement for the illustrated reader “*The Well-Bred Girl*”:

An Illustrated Reader for Girls’ Schools,
Preface-Letter by R. Y. Perperian (translated from French).

This newly published reader is an outstanding contribution, containing valuable advice and carefully selected moral instruction. It deserves

the attention of school inspectors, parents, and all those devoted to the education of girls.

Price: half-cloth binding, 5 piastres; full cloth binding, 7.5 piastres; deluxe gilt-edged cloth binding, 10 piastres. Orders from the provinces are promptly fulfilled.

Main Office: Constantinople, Hacıoğlu Han, No. 24.” (Tsaghik, 1905, no. 11, p. 22).

Within this advertisement, the book is constructed and received on three interconnected levels. First, it performs an *educational* function by transmitting knowledge. Second, it fulfils a *moral* function by shaping behaviour, patterns of thought, and systems of values. Third, it serves a *social* function by contributing to the formation of girls as educated and culturally cultivated individuals (Bourdieu, 1984; Bourdieu, 1986).

More broadly, within *Tsaghik*, reading is consistently represented as a pathway to women’s intellectual self-improvement and cultural development.

b. Advertisements for bookstores and stationery shops

Another noteworthy example is the announcement published under the heading “New Publication”, advertising “A Dictionary of Rhyming and Homophonous Words” by P. Kh. Terzian:

“This new publication is an indispensable aid for all those engaged in writing verse who frequently encounter a shortage of suitable rhymes. The booklet has already appeared in elegant typography and an attractive binding and is available at the price of four medjidies in all bookstores.” (Tsaghik, 1906, no. 23, p. 28)

Rather than merely announcing the publication of a new book, the advertisement addresses a clearly defined readership of aspiring poets and writers, presenting the volume as a practical literary resource. In doing so, it reflects the growing commercialisation of literary culture and the expanding market for specialised educational publications.

c. Public and Community Announcements

The advertising section also includes announcements of a public and philanthropic character. An illustrative example is the notice entitled “The Galfayan Orphanage”, published in issue no. 11 (1905):

“On the occasion of the 29th anniversary of the establishment of the Galfayan Orphanage in Khasgyugh, His Holiness the Patriarch will celebrate the Divine Liturgy this Sunday at the Church of St. Stephen, where a memorial service will also be conducted for the soul of the orphanage’s revered founder, Mother Superior Srбуhi.” (Tsaghik, 1906, no. 11, p. 26).

Although presented in the form of an announcement, this text simultaneously functions as a public appeal for solidarity within the local Armenian community. It illustrates that the advertising pages of *Tsaghik*

were not limited to commercial messages but also served as a medium for communicating charitable, religious, and communal initiatives.

Theoretical Foundations of Advertising Communication, Message Structure and the AIDA Model

When examining advertising as a form of social communication, it is essential to consider it not merely as a means of transmitting information about products or services but also as a mechanism for persuasion, the formation of values, and the construction of social meanings. (Hobsbawm, 1994) Contemporary theories of advertising communication demonstrate that advertising messages are constructed through several interconnected elements, including message structure, target audience identification, persuasive strategies, and the formation of brand or service reputation (Kotler & Keller, 2016, pp. 580–583).

An analysis of the advertisements published in *Tsaghik* reveals that, despite the absence of contemporary advertising technologies, the Armenian press of Constantinople had already incorporated many fundamental principles characteristic of modern advertising communication at the beginning of the 20th century. These advertisements did not merely inform readers about available products and services; they also constructed a logic of trust, desire, recommendation, and consumer choice. In this respect, the advertisements in *Tsaghik* may be interpreted as early examples of branding and communication strategies, in which importance was attached not only to “what is being offered” but also to “what value this offer represents.”

Among the classical theories of advertising communication, the *AIDA model* (*Attention, Interest, Desire, and Action*) is particularly significant (*Tsaghik*, 1905, no. 11, p. 9–14).

Developed to describe the stages through which advertising influences consumer psychology and decision-making processes, the model suggests that effective advertising should:

- a. capture the consumer’s attention;*
- b. generate interest in the product or service;*
- c. create a desire for acquisition or engagement; and*
- d. motivate the consumer to take action* (Belch & Belch, 2021; Kotler & Keller, 2016, pp. 580–583).

Elements of this structure also appear in advertisements published in *Tsaghik*.

For example, the advertisement for the dental services of *Khachik Jamgochian* begins by emphasising the professional authority of the practitioner: “The renowned dentist Khachik Jamgochian” (*Tsaghik*, 1905, no. 2, p. 28).

Through this formulation, the advertisement immediately captures the reader’s attention while simultaneously establishing an atmosphere of trust and professional credibility. Significantly, the advertisement initially emphasises not the service itself but the reputation of the specialist providing it. It then describes

the range of services offered, including tooth extraction, the production of artificial teeth, gold and platinum crowns, and the use of modern dental instruments.

In the final stage, the advertisement reinforces consumer confidence by highlighting the dentist's professional and ethical principles: "Honour, integrity, and cleanliness."

This structure demonstrates that, in the case of medical services, advertising was not limited to listing available procedures; rather, its primary function was to address the fundamental challenge of establishing trust between the service provider and the potential client.

A similar communicative logic can be observed in the advertisement for the *Palagashian School*. The advertisement initially constructs the image of the institution's founder and director by emphasising the school's years of operation and the appreciation it has received from parents (*Tsaghik*, 1905, no. , p. 27). It then presents the educational program and concludes by encouraging readers to apply to the institution.

Thus, the advertising messages published in *Tsaghik* followed a persuasive communication structure that may be summarised as: *authority* → *information* → *trust* → *action*.

One of the fundamental principles of advertising communication is the accurate identification of the intended recipient. The effectiveness of an advertisement depends not only on what it conveys but also on its ability to address the expectations, values, and needs of a clearly defined target audience.

The Language of Trust and Quality: Target Audience Construction as a Marketing Strategy

Advertising becomes effective when it addresses the needs, values, and aspirations of a specific social group (McQuail, 2010; Belch & Belch, 2021).

The target audience of *Tsaghik* was clearly defined. The magazine was primarily directed toward educated Armenian women, their families, and readers belonging to the urban cultural environment of Constantinople. Accordingly, the advertisements published in the magazine were shaped by this audience's perceptions, expectations, and social aspirations of this particular audience.

The primary target group of educational advertisements consisted of parents and families. Parents were not merely the individuals responsible for financial decisions; they were also the key decision-makers responsible for ensuring their children's educational opportunities and future social advancement. In both the advertisement for the *Palagashian School* and the advertisement for girls' readers, the main recipients were parents and educators. The reader-book was presented not only as a source of knowledge but also as an instrument for cultivating education and moral character (*Tsaghik*, 1905, no. , p. 28).

The advertisement for the *Singer* sewing machine, in turn, targeted women responsible for organising household life. Here, the consumer was simultaneously represented as the manager of the domestic sphere, whose daily work could be

facilitated through the introduction of modern technology. Advertisements for tailoring services emphasised appearance, social presentation within the urban environment, and the maintenance of social prestige.

It should be noted that in the advertisements published in *Tsaghik*, the reader is never represented as an accidental or anonymous consumer. Instead, the reader is constructed as an individual with specific values: someone who values education, cares about family well-being, participates in cultural life, and embodies the ideals of the contemporary urban environment (McQuail, 2010; Belch & Belch, 2021).

A significant feature of the advertisements in Haykanush Mark's *Tsaghik* is the use of a distinctive vocabulary of trust and credibility. Advertising texts frequently employ evaluative words and expressions that construct an image of quality and reliability, such as *excellent*, *pure*, *advanced*, *durable*, *natural-looking*, and *elegant*. These terms are not merely descriptive; they simultaneously create a specific value framework and influence the audience's perception of the advertised product or service.

For example, in tailoring advertisements, clothing is presented not simply as a necessary commodity but as a means of shaping personal appearance and achieving social respectability (Dyer, 1982; Pollay, 1986). Similarly, in dental advertisements, treatment is framed not only in terms of restoring health but also as a means of preserving beauty, confidence, and social appearance.

Thus, the language of advertising in *Tsaghik* performs a dual function: on the one hand, it communicates practical information about products and services; on the other hand, it constructs values, lifestyles, and social meanings. In this sense, advertising becomes not merely an instrument of commerce but also a significant form of cultural communication (Kotler & Keller, 2016).

Aristotle's Principles of Ethos, Pathos, and Logos in the Advertisements of Tsaghik

One of the classical explanations of persuasive mechanisms in advertising is rooted in Aristotle's theory of rhetoric. Aristotle argued that the effectiveness of persuasive discourse depends on three fundamental components:

- a. Ethos** — the authority and credibility of the speaker;
- b. Pathos** — emotional appeal and affective influence;
- c. Logos** — logical reasoning and rational justification (Aristotle, 1991, pp. 112–115; Aristotle, 2005).

The advertising materials published in *Tsaghik* can be analysed through the framework of these three principles.

a. Ethos: The Construction of Authority

Authority is particularly important in areas where consumers cannot immediately evaluate the quality of a service.

In this respect, the dental advertisement of Khachik Jamgochian demon-

strates the operation of *ethos* on several levels: professional expertise, the use of European and American instruments, and the emphasis on ethical principles. The dentist is presented not merely as a technically skilled specialist but also as a trustworthy and morally responsible professional.

The same strategy appears in the advertisement for the Palagashian School, where institutional authority is built through References to the school's years of operation, parental trust, and the qualifications of teachers educated in Europe.

Thus, the advertisement implicitly answers one of the most important questions potential consumers ask: "*Why should I trust this particular service?*"

By establishing credibility before presenting the practical details of the service, these advertisements transform professional reputation into a central persuasive resource.

b. Pathos: Emotional Influence

Emotional appeal is particularly evident in advertisements associated with the concepts of family, womanhood, and the future.

For example, the *Singer* sewing machine advertisement emphasises not only the technical characteristics of the machine but also domestic comfort and the simplification of household labour. The advertisement encourages consumers to see modern technology as a way of improving family well-being and creating a more efficient, comfortable domestic environment.

In the advertisement for the *Palagashian School*, *pathos* connects to the idea of the child's future (Tsaghik, 1905, no. 6, p. 16). Parents are offered not merely an educational service but a secure and respectable path toward their child's personal and social development.

Therefore, emotional appeal in the advertisements published in *Tsaghik* is frequently constructed not around individual pleasure or personal consumption but around broader ideals of family prosperity, social advancement, and cultural improvement.

c. Logos: Logical Argumentation

The persuasive power of advertising also depends on the use of rational arguments and supporting evidence. The advertisements in *Tsaghik* employ several forms of logical justification, including detailed descriptions of services, technical information, payment conditions, and guarantees.

This strategy is particularly evident in the advertisement for the *Singer* sewing machine, which highlights practical advantages such as weekly instalment payments, free instruction, free repairs, and a guarantee of quality. These forms of information reduce uncertainty associated with purchasing decisions and make the product appear more accessible and reliable.

Consequently, the *logos* dimension of these advertisements operates through the presentation of concrete benefits and rational incentives, complementing the emotional and credibility-based strategies of *ethos* and *pathos*.

Educational Advertisements and the Construction of a New Female Identity in *Tsaghik*

Within the history of the Armenian press at the beginning of the 20th century, the theme of education occupied a particularly significant position, as it was associated not only with individual development but also with broader concepts of national, cultural, and socio-social advancement. Periodicals specifically addressed to women regarded education as one of the primary means through which a new generation could be shaped, the cultural level of the family could be elevated, and women's social roles could be expanded (Williams, 1980; Burke, 2005).

The most significant aspect of the educational advertisements published in *Tsaghik* lies in their role in constructing a particular image of the modern Armenian woman of the late 19th and early 20th centuries.

These advertisements were not merely informational notices about educational institutions or books; rather, they functioned as value-oriented texts through which the ideal of the educated and developed woman of the period was formulated.

The woman represented in these advertisements is educated, possesses linguistic ability and knowledge of foreign languages, shows an interest in literature and culture, maintains aesthetic refinement, participates in cultural life and social improvement, and embodies both family and social responsibility.

This representation of womanhood reflects the broader processes of modernisation, during which women increasingly came to be perceived not only as members of the family sphere but also as active participants in educational and cultural environments. (Ewen, 1976)

At the same time, this emerging female identity does not entirely reject national and traditional perceptions of womanhood. Education is presented as a means of becoming a better mother, a more capable manager of the household, and a more culturally developed member of the family.

The educational advertisements published in Haykanush Mark's *Tsaghik* thus reflect two parallel processes:

- a.** *the expansion of women's opportunities for social and cultural development;*
- b.** *the reinterpretation and transformation of traditional female roles within modern society.*

A distinctive feature of such educational advertisements is that the “product” being promoted is not material. Education represents a long-term investment whose outcomes become visible in the future. Therefore, these advertisements are not limited to immediate practical benefits but are constructed around notions of prestige, trust, and the promise of future advancement (Kotler & Keller, 2016, pp. 580–581).

The educational advertisements in *Tsaghik* operate precisely according to this logic: they promote not merely a school, textbook, or reader, but a particular

model of life, identity, and social participation.

Education as a Value: The Advertisement for the Palagashian Boarding School as a Representation of Educational Identity and Care

The advertisement for the *Palagashian School*, published in Tsaghik, is one of the magazine's most informative and analytically significant examples. It presents readers not merely with information about the existence of the institution but also with its comprehensive educational system, underlying values, and distinctive advantages.

The first important advertising strategy employed in the announcement is the construction of institutional authority. The school is presented as an already recognised educational environment that has earned public trust. Particular emphasis is placed on the fact that the institution has received the “appreciation and encouragement of knowledgeable parents” (Tsaghik, 1906, no. 21, p. 17). This formulation is an important persuasive mechanism because it relies on the principle of social proof.

According to Robert Cialdini, individuals tend to place greater confidence in choices and decisions already validated within their social environment (Cialdini, 2009, pp. 88–91). In this case, the persuasive logic of the advertisement may be summarised as follows: *previous and current parental trust → institutional reputation → confidence of prospective parents*.

The Palagashian School is therefore represented not merely as an educational institution but as a socially recognised, reliable, and secure environment.

Another significant feature of the advertisement is that it does not limit itself to a simple enumeration of academic subjects. Instead, it presents education as a process of forming a complete way of life and identity.

The advertisement emphasises instruction in Armenian, Turkish, French, and English, as well as scientific subjects, music, sewing, embroidery, and domestic economy. This diversity of educational opportunities highlights the dual nature of women's education during this period.

On the one hand, education sought to cultivate an intellectually and culturally developed individual. The inclusion of foreign languages, scientific knowledge, and artistic instruction demonstrates that girls were expected to acquire a broader worldview and develop intellectual and cultural capacities. On the other hand, the curriculum also incorporated domestic and family-oriented skills. Sewing, embroidery, and household management remained connected to traditional expectations regarding women's roles within the family sphere.

Thus, the educational advertisement reflects a complex and characteristic process of the period:

- a. education expanded women's opportunities for intellectual, social, and cultural development;*
- b. simultaneously, it continued to associate women's education with family responsibilities and domestic roles.*

This duality was typical of women's educational ideologies in the late 19th and early 20th centuries, when female education was frequently justified not only as a means of individual development but also as a necessary condition for improving the family and society as a whole (Leiss, Kline, Jhally, & Botterill, 2018; O'Barr, 1994, pp. 24–26).

A particularly significant element of the Palagashian School advertisement is the emphasis placed on boarding facilities. The announcement highlights the school's comfortable conditions, attention to health and hygiene, and manifestations of familial care. This aspect is especially important from the perspective of advertising psychology.

For parents, choosing an educational institution depends not only on the quality of instruction but also on concerns about the child's safety, well-being, and emotional security. Therefore, the advertisement constructs not only an educational image but also an environment of emotional trust.

The school is represented as a second home where girls receive not only knowledge but also care, protection, and personal attention.

This approach aligns with the broader logic of service advertising: when a service cannot be physically evaluated before purchase, trust is established through reputation, prior experience, and emotional connection (Zeithaml, Bitner, & Gremler, 2018; Bitner & Gremler, 2018, pp. 20–22).

Consequently, the Palagashian School advertisement demonstrates that educational advertising in *Tsaghik* functioned not merely as a means of promoting an institution but also as a cultural discourse through which concepts of education, femininity, responsibility, and social advancement were constructed.

European Education as a Symbol of Quality and Modernity

The advertisement for the *Palagashian School* places particular emphasis on the European educational model. It highlights the presence of French and English female instructors, as well as the practical teaching of foreign languages. This emphasis was not accidental, as European culture in the urban Armenian environment of Constantinople at the beginning of the 20th century was frequently perceived as a symbol of science, progress, and advanced education.

According to the logic of the advertisement, European orientation itself functions as a value. The school seeks to distinguish itself from other educational institutions by associating its identity with international educational standards. This process may also be read as an early form of institutional branding: the school constructs its distinctive identity not only through its curriculum but also through the cultural prestige and symbolic authority associated with European education.

As Benedict Anderson argues, print culture played a significant role in the formation of modern communities and collective identities (Anderson, 2006, p. 28–26; Jhally, 1987). Periodicals such as *Tsaghik* constituted an essential part of this print environment, where education, cultural identity, and social modernisation became closely interconnected.

In this context, the advertisement for the Palagashian School demonstrates how References to European education functioned as a symbolic resource, transforming educational services into representations of cultural refinement, modernity, and social advancement.

Conclusion

The study of the advertising section of *Tsaghik*, edited by Haykanush Mark, demonstrates that at the beginning of the 20th century the Armenian press had already developed many of the fundamental mechanisms characteristic of modern advertising communication. These included the targeted selection of audiences, the construction of trust and authority, the application of persuasive strategies, and the creation of symbolic meanings associated with products and services.

The advertising section of *Tsaghik* was not merely a secondary component of the periodical's structure but an important part of its ideological and cultural content. The advertising materials combined economic information with social representations, reflecting contemporary perceptions of education, utility, cultural advancement, and social prestige.

The educational advertisements, in particular, should be examined not simply as announcements concerning schools, educational institutions, or books, but as value-oriented texts through which a particular model of the modern Armenian woman's social identity was articulated. Within these advertisements, education was presented as a process of acquiring knowledge as well as a means of cultural development, social engagement, and the cultivation of familial responsibility.

In this context, the advertising representation of educational institutions extended beyond a simple description of academic programs, emphasising the role of schools as environments of socialisation and preparation for future generations. Textbook advertisements linked literacy to the transmission of knowledge, moral education, and the expansion of cultural capital. Advertisements for household goods, particularly sewing machines, presented technological innovation as a component of efficient domestic organisation and modern household culture. Meanwhile, advertisements for medical services emphasised not only professional expertise but also the social meanings connected with health, personal appearance, and individual self-confidence.

From the perspective of advertising communication, the materials published in *Tsaghik* relied on several persuasive mechanisms, including the establishment of professional and institutional authority, the creation of social trust, emotional appeal, and the construction of positive expectations regarding the future. These advertisements simultaneously performed informational and symbolic functions: on the one hand, they communicated the practical characteristics of products and services, including quality, price, conditions, and functional advantages; on the other hand, they expressed contemporary perceptions of social identities, lifestyles, family relations, and modernity.

This dimension determines the significance of the advertising section of

Tsaghik as a historical and cultural source. These advertising materials provide an opportunity to examine not only commercial relations and consumer culture but also the value systems, social expectations, and processes of modernisation that shaped the social and cultural environment of the Armenian community of Constantinople at the beginning of the 20th century.

Thus, the advertisements published in *Tsaghik* should be understood as a form of social and cultural communication through which contemporary ideas concerning education, femininity, social prestige, and modern urban identity were expressed, negotiated, and reinterpreted.

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ARTIFICIAL INTELLIGENCE IMPACT ON PRODUCTIVITY AND ECONOMIC GROWTH

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Abstract

The increasing diffusion of AI has generated considerable interest among economists and management scholars, because technological change is a fundamental source of long-term productivity and economic growth. In conventional growth theory, technological progress enables economies to produce more output from a given quantity of labour and capital. AI may influence this process by increasing the efficiency of existing production activities, augmenting workers' capabilities, accelerating research and development, and improving the allocation of organisational resources.

Unlike many earlier digital technologies, AI can perform tasks involving prediction, classification, information processing, content generation and decision support. Consequently, its potential economic effects extend beyond the automation of routine activities to include innovation, organisational transformation, human-machine collaboration and the creation of new products and business models.

AI should not be considered an automatic source of economic growth. The productivity consequences of a new technology depend on complementary investments, organisational capabilities, institutional conditions, and the ability of workers and managers to incorporate the technology into production processes.

AI can increase aggregate productivity and economic output, but the benefits may not be distributed equally. There are several risks, such as displacement of workers performing automatable tasks, wage polarisation, concentration of technological capabilities, advantages for large firms and divergence between technologically advanced and less-prepared economies.

Moreover, countries differ substantially in their digital infrastructure, human capital, research capacity, access to finance, institutional quality, and ability to adopt advanced technologies. These differences can determine whether AI becomes a source of broad-based productivity growth or primarily benefits already advanced firms and economies.

The most successful economies are likely to be those that treat AI not simply as a tool for automation, but as an opportunity to complement human capabilities. Investments in skills, infrastructure, innovation, competition and responsible

governance can help ensure that the productivity gains created by AI translate into higher living standards and more inclusive long-term economic growth.

Keywords: Artificial intelligence, productivity, economic growth, economy.

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ԿԱՐԵՆ ՍԱՐԳՍՅԱՆ

ՀՀ ԳԱՄ գիտակրթական միջազգային կենտրոնի
տնտեսագիտության և կառավարման ամբիոնի վարիչ,
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Համառոտագիր

Արհեստական բանականության (ԱԲ) աճող տարածումը զգալի հետաքրքրություն է առաջացրել տնտեսագետների և կառավարման գիտնականների շրջանում, քանի որ տեխնոլոգիական փոփոխությունը երկարաժամկետ արտադրողականության և տնտեսական աճի հիմնարար աղբյուր է: Ավանդական աճի տեսության մեջ տեխնոլոգիական առաջընթացը հնարավորություն էր տալիս տնտեսություններին արտադրել ավելի շատ արտադրանք տվյալ քանակությամբ աշխատուժից և կապիտալից: Արհեստական բանականությունը կարող է ազդել այս գործընթացի վրա՝ բարձրացնելով առկա արտադրական գործունեության արդյունավետությունը, ավելացնելով աշխատողների կարողությունները, արագացնելով հետազոտություններն ու զարգացումը, միաժամանակ բարելավելով կազմակերպչական ռեսուրսների բաշխումը:

Ի տարբերություն շատ ավելի հին թվային տեխնոլոգիաների՝ ԱԲ-ն կարող է իրականացնել կանխատեսման, դասակարգման, տեղեկատվության մշակման, բովանդակության ստեղծման և որոշումների կայացման աջակցության հետ կապված առաջադրանքներ: Հետևաբար դրա պոտենցիալ տնտեսական հետևանքները տարածվում են առօրյա գործունեության ավտոմատացումից այն կողմ՝ ներառելով նորարարությունը, կազմակերպչական վերափոխումը, մարդ-մեքենա համագործակցությունը և նոր ապրանքների ու բիզնես մոդելների ստեղծումը:

Արհեստական բանականությունը չպետք է համարել տնտեսական աճի ինքնաշխատ աղբյուր: Նոր տեխնոլոգիայի արտադրողականության հետևանքները կախված են լրացուցիչ ներդրումներից, կազմակերպչական կարողություններից, ինստիտուցիոնալ պայմաններից, ինչպես նաև աշխատողների ու մենեջերների՝ տեխնոլոգիան արտադրական գործընթացներում ներառելու ունակություններից:

Արհեստական բանականությունը կարող է մեծացնել ընդհանուր

արտադրողականությունը և տնտեսական արդյունքը, բայց դրա օգուտները կարող են հավասարաչափ չբաշխվել: Այստեղ առկա են մի շարք ռիսկեր, ինչպիսիք են՝ ավտոմատացված աշխատանքներ կատարող աշխատողների ազատումը, աշխատավարձերի բևեռացումը, տեխնոլոգիական կարողությունների կենտրոնացումը, խոշոր ընկերությունների համար առավելությունները, ինչպես նաև տեխնոլոգիայես զարգացած և պակաս պատրաստված տնտեսությունների միջև տարաձայնությունները:

Ավելին, երկրները զգալիորեն տարբերվում են իրենց թվային ենթակառուցվածքներով, մարդկային կապիտալով, հետազոտական կարողություններով, ֆինանսավորման հասանելիությամբ, ինստիտուցիոնալ որակով և առաջադեմ տեխնոլոգիաներ ներդնելու ունակությամբ: Այս տարբերությունները կարող են որոշիչ լինել այն հարցում, թե արդյոք արհեստական բանականությունը կդառնա լայնածավալ արտադրողականության աճի աղբյուր, թե դրանից հիմնականում կօգտվեն արդեն զարգացած ընկերությունները և տնտեսությունները:

Ամենահաջողակ տնտեսությունները, հավանաբար, կլինեն նրանք, որոնք արհեստական բանականությանը վերաբերվում են ոչ միայն որպես ավտոմատացման գործիք, այլև որպես մարդկային կարողությունները լրացնելու հնարավորություն: Հմտությունների, ենթակառուցվածքների, նորարարության, մրցակցության և պատասխանատու կառավարման մեջ ներդրումները կարող են օգնել ապահովել, որ արհեստական բանականության կողմից ստեղծված արտադրողականության աճը վերածվի ավելի բարձր կենսամակարդակի և ավելի ներառական երկարաժամկետ տնտեսական աճի:

Բանալի բառեր՝ արհեստական բանականություն, արտադրողականություն, տնտեսական աճ, տնտեսություն:

Introduction

Artificial intelligence (AI) has become one of the most significant technological developments shaping contemporary economies and organisations.

Artificial Intelligence (AI) opens up qualitatively new opportunities in the field of digitalisation of many management processes, increasing the efficiency of their execution and complementing limited human capabilities. Now it is obvious that widespread implementation of such advanced technological solutions in a fairly short period of time can turn into an important factor ensuring dynamic growth of the world economy (Sargsyan, 2024).

Advances in machine learning, natural language processing, computer vision, generative AI, and autonomous systems have expanded the range of activities that intelligent technologies can perform or support. Unlike many earlier digital technologies, AI can perform tasks involving prediction, classification, information processing, content generation and decision support. Consequently, its potential economic effects extend beyond the automation of routine activities to include

innovation, organisational transformation, human-machine collaboration and the creation of new products and business models.

The increasing diffusion of AI has generated considerable interest among economists and management scholars because technological change is a fundamental source of long-term productivity and economic growth. In conventional growth theory, technological progress enables economies to produce more output from a given quantity of labour and capital. AI may influence this process by increasing the efficiency of existing production activities, augmenting workers' capabilities, accelerating research and development, and improving the allocation of organisational resources.

Almost 40 per cent of global employment is exposed to AI, with advanced economies at greater risk but also better poised to exploit AI benefits than emerging market and developing economies. In advanced economies, about 60 per cent of jobs are exposed to AI, due to the prevalence of cognitive-task-oriented jobs. A new measure of potential AI complementarity suggests that, of these, about half may be negatively affected by AI, while the rest could benefit from enhanced productivity through AI integration. Overall exposure is 40 per cent in emerging market economies and 26 per cent in low-income countries. Although many emerging market and developing economies may face fewer immediate AI-related disruptions, they are also less prepared to seize AI's advantages. This could exacerbate the digital divide and cross-country income disparity (International Monetary Fund, 2024).

At the same time, AI should not be considered an automatic source of economic growth. The productivity consequences of a new technology depend on complementary investments, organisational capabilities, institutional conditions, and the ability of workers and managers to incorporate the technology into production processes. The concept of a general-purpose technology is especially relevant here. General-purpose technologies typically require complementary innovations and organisational changes before their full economic effects become visible. Recent OECD research similarly emphasises that the macroeconomic productivity effects of AI remain uncertain and depend on adoption and complementary factors (Filippucci et al., 2024).

From a management perspective, AI can transform organisations by changing how decisions are made, how tasks are allocated, how employees interact with technology, and how firms develop products and services. AI can support forecasting, customer analysis, supply-chain management, human-resource management, financial decision-making and strategic planning. Consequently, the economic contribution of AI may depend partly on managerial capabilities and organisational redesign. The literature on algorithmic management, for example, demonstrates that AI-enabled systems can perform or support functions traditionally associated with management, including coordination, monitoring, evaluation and task allocation.

The labour–market implications of AI further complicate its relationship with economic growth. AI may substitute for particular tasks while complementing workers in others. The International Monetary Fund estimates that approximately 40% of employment globally is exposed to AI, with exposure substantially higher in advanced economies (Cazzaniga et al., 2024). Exposure, however, does not necessarily imply job destruction. Where AI complements workers, it can increase productivity and potentially wages; where it substitutes for labour without sufficient creation of new activities, it may generate adjustment costs and distributional challenges.

There is a noticeable, extensive application of AI across different sectors. In finance, AI is primarily utilised for risk assessment, algorithmic trading, fraud detection, and personalised customer service. Predictive analytics and machine learning are driving efficiency and precision in financial decision-making. In industrial applications, the integration of AI into Industry 4.0 has transformed traditional manufacturing processes by enabling interconnected, smart production lines that operate with minimal human intervention. Additionally, the service sector benefits from AI through enhanced customer interaction systems, such as chatbots, and improvements in logistics and supply chain management (Schlingemann & Stulz, 2022).

Another important issue concerns differences between economies. Countries differ substantially in their digital infrastructure, human capital, research capacity, access to finance, institutional quality, and ability to adopt advanced technologies. These differences can determine whether AI becomes a source of broad-based productivity growth or primarily benefits already advanced firms and economies. OECD research on the global productivity divide emphasises that developing economies may face barriers to AI adoption related to infrastructure, skills, financing and institutional capacity.

Despite the growing literature, the relationship between AI and economic growth remains fragmented across different academic fields. Macroeconomic research generally focuses on productivity, growth, labour markets, and aggregate output, while management research tends to examine organisational capabilities, firm performance, innovation and managerial decision-making. A comprehensive understanding of AI's economic implications requires these perspectives to be considered together.

Therefore, this study aims to systematically review and synthesise the literature on the relationship between AI, productivity, innovation, management transformation and economic growth. The contribution of this study is threefold. First, it integrates economic and management perspectives that are frequently examined separately. Second, it identifies the principal mechanisms through which AI can influence economic performance. Third, it develops a conceptual synthesis in which AI adoption affects economic growth indirectly through productivity, innovation and organisational transformation, while human capital, digital

infrastructure, organisational capabilities and institutions condition the strength of these relationships.

Theory and Methodology

The economic literature increasingly conceptualises AI as a potentially general-purpose technology. General-purpose technologies have broad applications across industries, undergo continuous improvement, and stimulate complementary innovation. These characteristics distinguish them from technologies with narrowly defined applications.

AI meets many of these conditions. Machine-learning systems can be applied to manufacturing, finance, healthcare, transportation, marketing, logistics, research, and public services. Generative AI has expanded this range further by enabling text generation, programming, image generation, information retrieval, and decision support.

Artificial intelligence (AI), defined as a system's ability to correctly interpret external data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation, will likely have a deep impact on human beings and society at large (Kaplan & Haenlein, 2019).

The implications of AI for labour markets are among the most widely discussed topics. The literature emphasises both the positive and negative aspects of AI in relation to employment (PwC, 2017). On one hand, AI technologies are seen as drivers of productivity, capable of automating repetitive tasks and improving efficiency. On the other hand, concerns remain about job displacement and a widening skills gap.

Researchers also focus on the concept of job augmentation, wherein AI complements human labour rather than replaces it, especially in knowledge-intensive sectors. The labour market impacts are sector-specific, with studies indicating a higher likelihood of automation in routine-based industries such as manufacturing, while creative sectors are more resilient to AI-driven disruption (Samuelson, 2004).

The literature indicates that AI is no longer limited to a niche area within computer science; it has become a multidisciplinary subject involving economics, business, public policy and social sciences (ChunHong Yuan et al., 2024). Citation analysis further suggests that a number of influential studies have shaped the discourse by examining both the macroeconomic and microeconomic effects of AI, including its impact on productivity, job markets and industrial efficiency (Nilsson, 2010).

Productivity represents the central channel linking AI to economic growth. At the organisational level, AI can automate repetitive activities, accelerate information processing, improve forecasting, reduce errors and support resource allocation.

The empirical literature provides growing evidence that AI can improve productivity at the firm and task levels. Studies of firms have identified positive

associations between AI adoption and productivity, while experimental research on generative AI has demonstrated that AI assistance can improve the performance of workers on particular knowledge-intensive tasks. For example, Brynjolfsson, Li, and Raymond (2023) found that access to a generative AI assistant increased the productivity of customer-support agents, with particularly large improvements among less experienced workers. This finding illustrates an important characteristic of AI: its economic effect may arise not only from replacing human labour but also from complementing and augmenting human capabilities (Brynjolfsson et al., 2023).

Cockburn, Henderson, and Stern (2018) argue that AI has the potential to influence innovation, because advances in machine learning can reduce the cost of prediction and alter the organisation of research and development. This perspective suggests that AI may affect economic growth through both direct productivity improvements and longer-term technological progress.

OECD research suggests that AI could generate meaningful productivity gains, although the magnitude of these gains depends on the extent of AI exposure, adoption, and the availability of complementary inputs such as skills and digital infrastructure. Filippucci et al. (2024) estimate that AI could contribute approximately 0.25–0.6 percentage points to annual total-factor productivity growth and 0.4–0.9 percentage points to annual labour-productivity growth over a ten-year period in the United States. (Filippucci et al., 2024).

Evidence from workplace experiments directly supports productivity-enhancing effects. Brynjolfsson et al. (2023), for example, found that generative AI assistance increased the productivity of customer-support workers. The benefits were particularly pronounced among less experienced employees, suggesting that AI can facilitate knowledge diffusion by enabling less-experienced workers to perform closer to the level of more experienced colleagues.

For society, the implementation of AI, such as robotics specialists, data scientists, and deep learning experts, generates new scenarios which can benefit the public (Michailidis, 2018). One of the main challenges in this area is technological inequality within countries, because poorly developed countries cannot implement and maintain AI as developed countries do. In addition, for all countries, potential job losses in certain professions are also pressing issues in the face of these changes (Hamilton, Davison, 2022).

Despite the optimistic projections, empirical evidence at the macroeconomic level remains mixed. Acemoglu and Restrepo (2020) argue that automation may have limited net productivity effects if it primarily substitutes for labour without generating sufficient new tasks. Moreover, it will be necessary to develop a set of policies to safely leverage AI's vast potential for the benefit of humanity. This creates tension between optimistic growth projections and more conservative empirical estimates.

Research Methods

This article employs a systematic approach to comprehensively assess the literature on the impact of Artificial Intelligence (AI) on productivity and economic growth. The systematic literature review (SLR) methodology is adopted, combined with qualitative thematic synthesis. The objective is not to estimate a statistical relationship between AI and economic growth, but to identify, classify, and synthesise the mechanisms of AI impact on productivity and economic growth.

A systematic review is appropriate for this research, because the literature on AI and economic performance is multidisciplinary and rapidly expanding. Relevant contributions appear in economics, management, information systems, innovation studies, organisational behaviour and technology–management research. A structured review allows findings from these fields to be compared within a common analytical framework.

The study uses thematic synthesis because the objective is to examine and synthesise multidisciplinary evidence rather than estimate a common statistical relationship of AI and economic productivity and growth.

Results

AI affects economic performance through a combination of technological, organisational, and human mechanisms. Rather than identifying a single direct relationship between AI and economic growth, the evidence supports a multi-stage process involving productivity, innovation, management transformation and human capital.

This evidence suggests that AI's productivity effect operates through several mechanisms. The strongest and most consistently identified economic mechanism is productivity improvement. AI can reduce the time required for information-intensive tasks, automate routine processes, improve prediction, and provide decision support. Evidence from workplace experiments indicates that AI assistance can generate measurable productivity improvements, while macroeconomic studies suggest that widespread adoption could generate meaningful aggregate productivity gains.

However, productivity gains vary considerably between tasks, firms, sectors and countries. Therefore, the literature does not support the proposition that AI automatically produces the same productivity effect everywhere.

AI contributes to innovation as well as automation. Innovation represents another major mechanism through which AI can influence economic growth. AI can support innovation by accelerating research, analysing large datasets, generating hypotheses, optimising designs and reducing the cost of experimentation. In R&D-intensive industries, AI may increase the productivity of researchers and engineers and also facilitate business-model innovation. Firms may use AI to personalise products, develop intelligent services, automate customer interactions, or create entirely new digital products. This mechanism is particularly important because economic growth is not determined only by the efficiency of existing production.

Long-term growth also depends on the creation and diffusion of new technologies and knowledge.

It should be noted that Management is an important but sometimes underdeveloped dimension of the AI-economic growth relationship. AI can alter the role of managers by transferring some analytical and monitoring activities to intelligent systems. AI can support demand forecasting, employee scheduling, financial analysis, supply-chain optimisation, recruitment, performance evaluation and strategic decision-making. This creates a transition from traditional management, which relies heavily on human information processing, toward data-driven and algorithmically supported management.

AI implications for human capital are significant. The economic value of AI depends partly on the ability of workers to use, evaluate and complement intelligent systems. As AI performs more routine cognitive tasks, the relative value of skills such as critical thinking, creativity, communication, judgment, problem-solving and AI literacy may increase. This means that human capital should be treated as a complementary factor of production in the AI economy rather than as a substitute for technology.

The conceptual mechanism of AI implications on productivity and economic growth is represented below:

ARTIFICIAL INTELLIGENCE

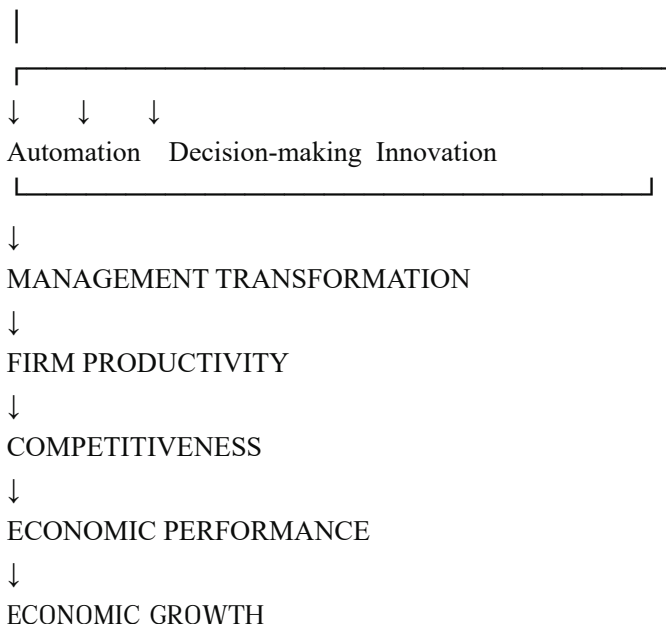


Chart 1. The Conceptual Mechanism of AI Impact on Productive and Economic Growth

The strength of this mechanism is influenced by four complementary conditions:

- Human capital, which determines whether workers can effectively use AI.
- Digital infrastructure, which determines whether AI technologies can be deployed at scale.
- Organisational capabilities, which determine whether firms can integrate AI into production and management.
- Institutional environment, which determines incentives, competition, regulation, investment and diffusion.

AI can increase aggregate productivity and economic output, but the benefits may not be distributed equally. There are several risks:

- displacement of workers performing automatable tasks;
- wage polarisation;
- concentration of technological capabilities;
- advantages for large firms;
- divergence between technologically advanced and less-prepared economies.

Given the above, the net effect of AI implementation is difficult to foresee, as AI will ripple through economies in complex ways, and this divergence highlights the importance of empirical analysis, particularly in emerging economies such as Armenia.

Conclusions

Artificial Intelligence has the potential to become one of the most important drivers of economic transformation in the coming decades. By increasing productivity, accelerating innovation, supporting entrepreneurship, and helping organisations use resources more efficiently, AI can contribute significantly to economic growth.

However, technological progress alone does not guarantee broadly shared prosperity. AI may displace some tasks and jobs, increase market concentration, and widen economic differences between highly prepared and less prepared countries. The economic outcome will therefore depend not only on the capabilities of AI but also on how governments, businesses, workers, and educational institutions respond to the transformation.

The most successful economies are likely to be those that treat AI not simply as a tool for automation, but as an opportunity to complement human capabilities. Investments in skills, infrastructure, innovation, competition and responsible governance can help ensure that the productivity gains created by AI translate into higher living standards and more inclusive long-term economic growth.

AI can increase aggregate productivity and economic output, but the benefits

may not be distributed equally. There are several risks, such as displacement of workers performing automatable tasks, wage polarisation, concentration of technological capabilities, advantages for large firms and divergence between technologically advanced and less-prepared economies.

Moreover, countries differ substantially in their digital infrastructure, human capital, research capacity, access to finance, institutional quality, and ability to adopt advanced technologies. These differences can determine whether AI becomes a source of broad-based productivity growth or primarily benefits already advanced firms and economies.

Given this, the net effect of AI implementation is difficult to foresee, as AI will ripple through economies in complex ways, and this divergence highlights the importance of empirical analysis, particularly in emerging economies such as Armenia.

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ARTIFICIAL INTELLIGENCE TRANSFORMATION IN MODERN BANKING ECOSYSTEMS: STRUCTURAL, OPERATIONAL, AND GOVERNANCE CHALLENGES

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Abstract

The objective of this study is to investigate the comprehensive integration of artificial intelligence within modern banking and financial ecosystems by analysing its profound structural, operational, and macroeconomic implications. Drawing on recent empirical literature and institutional data, the work examines how AI technologies—ranging from machine learning algorithms to agentic workflows and specialised small models—are transforming retail banking, risk management, credit scoring, and regulatory compliance. The research shows that while AI adoption significantly improves operational efficiency, default prediction accuracy, and customer personalisation, it also introduces complex governance challenges, including algorithmic bias, data privacy vulnerabilities, and shifts in profit pools. The analysis also evaluates AI's dual role in fostering sustainable green finance and corporate ESG integration, alongside its paradoxical capacity to influence shadow banking dynamics. By proposing an integrated technological and governance framework featuring zero-trust architecture and explainable artificial intelligence, this study outlines a strategic roadmap for financial institutions transitioning toward resilient, secure, and highly automated digital ecosystems.

Keywords: Artificial Intelligence, Digital Banking, Financial Stability, Risk Management, ESG Integration, Algorithmic Governance.

ԱՐՀԵՍՏԱԿԱՆ ԲԱՆԱԿԱՆՈՒԹՅԱՆ ՏՐԱՆՍՖՈՐՄԱՅԻԱՆ ԺԱՄԱՆԱԿԱԿԻՑ ԲԱՆԿԱՅԻՆ ԷԿՈՀԱՄԱԿԱՐԳԵՐՈՒՄ. ԿԱՌՈՒՑՎԱԾՔԱՅԻՆ, ԳՈՐԾԱՌՆԱԿԱՆ ԵՎ ԿԱՌԱՎԱՐՄԱՆ ՄԱՐՏԱՀՐԱՎԵՐՆԵՐ

ԱՇՈՏ ՄԱՐԳՈՅԱՆ

Հայաստանի պետական տնտեսագիտական համալսարանի
ֆինանսական շուկաներ և ինստիտուտներ ամբիոնի վարիչ,
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Համառոտագիր

Հետազոտության նպատակն է ուսումնասիրել արհեստական բանականության համապարփակ ներդրումը ժամանակակից բանկային և ֆինանսական էկոհամակարգերում՝ վերլուծելով դրա խորքային կառուցվածքային, գործառնական և մակրոտնտեսական հետևանքները: Հիմնվելով վերջին շրջանի էմպիրիկ գրականության և ինստիտուցիոնալ տվյալների վրա՝ աշխատանքում քննարկվում է, թե ինչպես են ԱԲ տեխնոլոգիաները (մեքենայական ուսուցման ալգորիթմներից մինչև գործակալային աշխատանքային հոսքեր և մասնագիտացված փոքր մոդելներ) վերափոխում մանրածախ բանկային գործունեությունը, ռիսկերի կառավարումը, վարկունակության գնահատումը և կարգավորման համապատասխանությունը: Հետազոտությունը ցույց է տալիս, որ թեև ԱԲ որդեգրումը զգալիորեն բարձրացնում է գործառնական արդյունավետությունը, դեֆոլտների կանխատեսման ճշգրտությունը և հաճախորդների անհատականացված սպասարկումը, այն միաժամանակ առաջ է բերում կառավարման բարդ մարտահրավերներ, ներառյալ ալգորիթմական խտրականությունը, տվյալների գաղտնիության խոցելիությունները և շահույթի ավագանների տեղաշարժերը: Ավելին, վերլուծությունը գնահատում է ԱԲ-ի երկակի դերը կայուն կանաչ ֆինանսների և կորպորատիվ ԲՄԿ ինտեգրման խթանման գործում՝ ստվերային բանկային դինամիկայի վրա ազդելու դրա պարադոքսալ կարողության հետ միասին: Առաջարկելով ինտեգրված տեխնոլոգիական և կառավարման շրջանակ՝ զրոյական վստահության ճարտարապետությամբ և բացատրելի

արհեստական բանականությամբ, այս ուսումնասիրությունն ուրվագծում է ռազմավարական ուղեցույց ֆինանսական հաստատությունների համար, որոնք անցում են կատարում դեպի դիմացկուն, անվտանգ և բարձր ավտոմատացված թվային էկոհամակարգեր:

Բանալի բառեր՝ արհեստական բանականություն, թվային բանկային գործունեություն, ֆինանսական կայունություն, ռիսկերի կառավարում, ԲՄԿ ինտեգրում, ալգորիթմական կառավարում

Introduction

Digital banking and financial ecosystems have rapidly transformed, shifting from traditional, branch-based operations to highly efficient, tech-driven solutions. The rise of AI-enabled mobile banking, conversational interfaces, and online platforms has made financial services more accessible, user-friendly, and responsive to growing demand for convenience, speed, and cost efficiency. Modern digital banking offers essential services—ranging from automated account management and predictive credit scoring to bespoke wealth management and hyper-personalised customer experiences—all accessible through advanced digital interfaces. This evolution has not only streamlined operations and improved default prediction accuracy but also promoted financial inclusion by bringing underserved populations into formal economic systems.

The rapid integration of artificial intelligence—including machine learning algorithms, agentic workflows, and purpose-built small language models—has served as a primary catalyst for this transformation, optimising decision-making, strengthening risk management, and elevating service maturity. Furthermore, the convergence of AI with green finance and corporate Environmental, Social, and Governance principles highlights the growing importance of sustainability in shaping contemporary banking practices. However, despite these advancements, the digital banking sector faces complex governance challenges. These include cybersecurity vulnerabilities, algorithmic bias, data privacy risks, regulatory compliance hurdles, and paradoxical dynamics such as the expansion of corporate shadow banking activities driven by speculative AI adoption.

This paper explores the structural, operational, and macroeconomic implications of integrating artificial intelligence into modern financial ecosystems. Focusing on technological advancements, risk mitigation, ESG incorporation, and robust governance frameworks featuring zero-trust architectures and explainable AI (XAI), the study outlines a strategic roadmap for financial institutions navigating the transition toward resilient, secure, and highly automated digital banking environments.

Research Methods

To rigorously investigate the structural, operational, and governance implications of artificial intelligence within contemporary financial ecosystems, this

study employs a mixed-methods research design combining qualitative thematic synthesis with quantitative secondary data analysis. Given the rapid evolution of digital banking and the expanding footprint of artificial intelligence, a systematic literature review was conducted to map out existing theoretical and empirical perspectives—ranging from AI competencies and consumer subjective well-being (Lee & Zhou, 2025) to macro-level banking stability (Sonehekpon, 2025; Siddik & Amin, 2025) and corporate shadow banking dynamics (Wu et al., 2026).

The qualitative component evaluates conceptual frameworks, governance models, and regulatory challenges, including explainable artificial intelligence (XAI), algorithmic bias, and data privacy vulnerabilities. Simultaneously, the quantitative component synthesises macro-level institutional data and empirical benchmarks, utilising structural reports and industry datasets (such as Boston Consulting Group, 2025) to examine technology spending trajectories, regional profit pool shifts, and adoption maturities across core banking operations. By triangulating empirical literature with institutional metrics, this methodological approach establishes a comprehensive analytical foundation to assess how artificial intelligence reshapes risk management, green finance integration, and the overall resilience of global financial architectures.

Literature review

The contemporary discourse surrounding the intersection of artificial intelligence and financial intermediation underscores a profound paradigm shift, transitioning from localised operational automation to systemic institutional transformation. At the forefront of this evolution, Lee and Zhou (2025) argue that cognitive, relational, and emotional AI competencies within AI-enabled mobile banking significantly enhance users' subjective financial well-being. Grounded in construal level theory, their longitudinal study demonstrates that these competencies operate through a complex sequential mediation mechanism—involving psychological distance, social presence, trust, and user satisfaction—while being moderated by financial literacy and AI familiarity.

Extending the investigation into consumer-facing digital touchpoints, Marikyan et al. (2022) and Moussawi et al. (2022) emphasise that artificial intelligence integrates advanced data processing with natural language modelling to facilitate intuitive user communication, thereby optimising task efficiency. Within consumer-facing financial domains, perceived intelligence captures how users evaluate the cognitive capabilities of AI-driven interfaces during interaction (Balakrishnan & Dwivedi, 2021). According to Lee and Chen (2022), high perceived intelligence instils user confidence in the system's capacity to resolve operational issues swiftly and streamline service delivery. Furthermore, conversational interfaces leverage contextual keyword analysis to generate targeted solution pathways, while intelligent algorithms evaluate individual risk tolerances and income profiles to curate bespoke wealth management portfolios (Lin & Lee, 2023). Nonetheless, service failures or system over-reliance can evoke psychological

friction, reminding scholars that user continuance intentions remain contingent on mitigating algorithmic opacity and managing negative consumer perceptions (Sun et al., 2022).

Beyond retail user interactions and individual well-being, macro-level and institutional adoption patterns reveal broader economic ramifications. On sustainability, Chandran M.C., Chandran, and Achuthan (2026) argue that adoption of Green AI—combining efficient artificial intelligence with sustainability governance—in the Indian banking sector is driven more by institutional factors than by individual choices. Using an extended TOE-TAM framework and structural equation modelling on empirical banking data, their study shows that organisational infrastructure, financial investment, and competitive pressure more strongly influence Green AI adoption than regulatory pressure or individual technology acceptance constructs, ultimately enhancing energy efficiency and ESG performance.

Simultaneously, at the corporate governance level, Wu, Guo, and Li (2026) demonstrate that firm-level artificial intelligence adoption significantly expands corporate shadow banking activities among non-financial enterprises. Grounded in their theory of distorted innovation, the authors illustrate that AI enhances both the capacity and tendency for speculative financial behaviour, ultimately driving up hidden financial risks beneath the veneer of intelligent digital transformation. Together, these scholarly perspectives map a multidimensional landscape where artificial intelligence simultaneously empowers consumer financial inclusion, drives sustainable institutional transitions, and introduces novel structural risks that require adaptive regulatory oversight.

Contemporary discourse on artificial intelligence extends beyond operational efficiency into the broader realms of macroeconomic stability, labour market restructuring, and corporate governance. Investigating the structural implications of these transformations, Meena, Mishra, and Raut (2024) map out the terrain of artificial intelligence in banking through a mixed-methods approach combining bibliometrics and systematic literature reviews, demonstrating that AI applications converge around four core pillars: predictive risk assessment, financial decision-making support, client service delivery, and emerging fintech innovations.

At the macro level, the rapid integration of artificial intelligence has sparked intense academic scrutiny of its labour market consequences. Early studies indicate that the deployment of AI tools profoundly restructures employment patterns, frequently inducing structural labour shifts (Acemoglu et al., 2022; Webb, 2020; Yilmazkuday, 2024). These labour market transformations inevitably reverberate through the financial ecosystem, where commercial banks increasingly deploy sophisticated machine learning frameworks to manage payroll processes and assess credit applicants. Emphasising the operational outcomes of these tools, Scott et al. (2024) highlight that advanced machine learning algorithms significantly enhance default prediction accuracy, empowering financial institutions to adopt

preemptive risk-mitigation measures. Furthermore, these predictive capabilities alleviate adverse selection and moral hazard rooted in asymmetric information—historically primary drivers of credit market distortions (Stiglitz & Weiss, 1981).

Building on these risk-mitigation dynamics, empirical banking research has increasingly focused on the impact of artificial intelligence on overarching systemic resilience has become a central focus of empirical banking research. Sonehekpon (2025) argues that artificial intelligence exerts a positive and statistically significant impact on banking stability across developed economies. Using panel data from 29 countries and a threshold regression model, the study shows that this stabilising effect is significantly amplified once the capital adequacy ratio crosses a critical threshold of 7.95%, highlighting the synergistic role of robust financial regulation in digital integration. Complementing this perspective, Siddik and Amin (2025) argue that artificial intelligence investments significantly enhance banking stability across OECD economies. Guided by Neo-Schumpeterian innovation theory, their empirical analysis utilising system GMM models demonstrates that venture capital funding in AI-focused startups reduces insolvency risk, a stabilising effect particularly pronounced in regions with advanced financial infrastructure and high technological readiness.

Alongside banking sector stability, firm-level governance and corporate finance dynamics are undergoing profound realignments. Examining the intersection of artificial intelligence and corporate financing behaviour, Tang and Yang (2026) argue that artificial intelligence applications significantly reduce corporate shadow banking activities by mitigating managerial myopia and improving financing transparency. Using data from Chinese A-share listed firms, their study shows that AI curbs reliance on informal financing, a governance effect amplified by external pressures such as analyst attention and media coverage, ultimately steering firms toward long-term value creation and real investment. Together, these diverse scholarly insights underscore how artificial intelligence acts as a dual catalyst—simultaneously fortifying institutional solvency and reshaping corporate behaviour through enhanced transparency and predictive precision.

Expanding the contemporary literature on technological integration, recent studies increasingly emphasise the multidimensional impact of artificial intelligence on financial inclusion, operational modernisation, and systemic soundness. Grounded in digital financial inclusion frameworks, Mhlanga (2020) and Mogaji et al. (2021) show that AI-driven tools effectively bring underserved populations into formal economic systems while streamlining customer engagement through advanced conversational chatbots. Addressing risk management challenges, Shukla and Nanda (2019) and Cheng and Qu (2020) show that while specialised frameworks like parallel social spider algorithms improve credit risk assessment, their operational effectiveness still depends on robust dataset validation and fintech oversight.

Building upon operational applications, commercial banking transformations

are being fundamentally reshaped by hyper-personalised service models. Sahakyan et al. (2026) examine how machine learning and natural language processing are shifting retail banking toward intelligent customisation, but emphasise that trust requires strict adherence to explainable AI and data governance. Exploring regional banking adaptation, Babayan, Yerznkanyan, and Mnatsakanyan (2026) highlight that competitive superiority in Armenia's financial sector relies on deploying intelligent frameworks for credit assessment and risk management, alongside mitigating algorithmic subjectivity. Similarly, Seranmadevi et al. (2026) confirm, through the Technology Acceptance Model, that consumer attitudes strongly mediate perceived usefulness and ease of AI integration, fostering a receptive market environment. Furthermore, Pansera, Peruzzi, and Sigilli (2026) show that commercial banks use AI to optimise back-end compliance and reduce lending losses, while Hassini et al. (2025) document how big data analytics and automated forecasting drive operational efficiency in Algeria's banking sector.

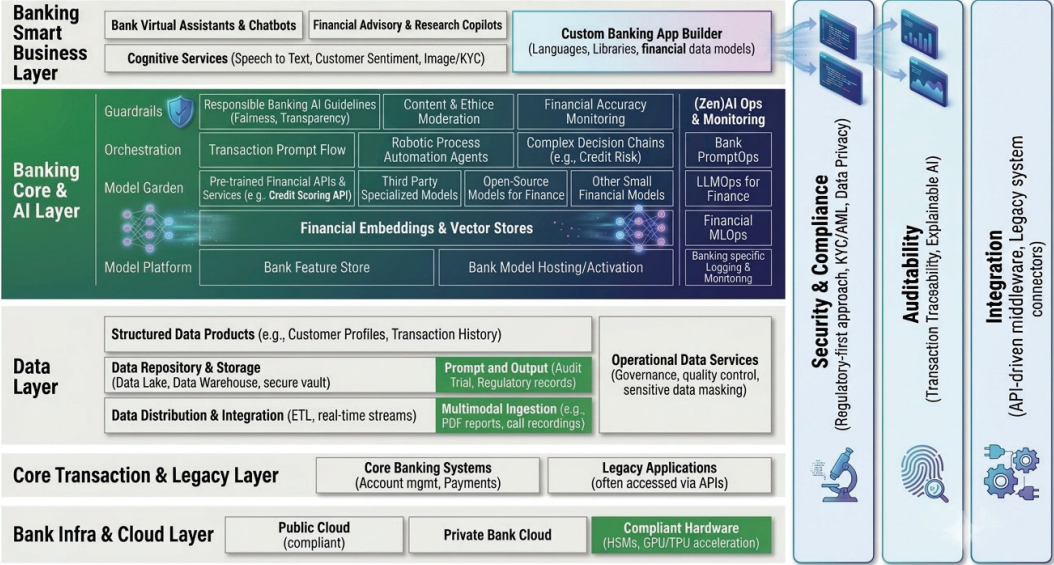
At the intersection of technological advancement and institutional stability, scholarly focus has shifted toward sustainability, cybersecurity, and macroeconomic resilience. Nurmasari and Bilad (2026) examine the growing role of artificial intelligence in sustainable green finance, showing how machine learning and natural language processing advance portfolio optimisation, ESG evaluation, and greenwashing detection, while warning about ethical governance dilemmas and carbon footprints. Complementing this, Sohail et al. (2026) show that AI adoption directly enhances ESG performance within the German banking sector through green finance mediation. In the realm of digital currency and security, Liu et al. (2025) reveal that AI significantly drives consumers' willingness to adopt Central Bank Digital Currencies (CBDCs) in China through digital awareness and privacy mitigation. Meanwhile, focusing on institutional risk, Hosain (2026) identifies persistent systemic barriers and cybersecurity prediction challenges in emerging economies; Sirothiya et al. (2024) map the bibliographic convergence of AI and blockchain technology, and Alber (2025) utilises global CAMELS framework data across 119 countries to establish that multidimensional technological readiness significantly influences asset quality, earnings, and overall financial sector soundness.

Results

Modern banking workflows demand deep architectural integration that general-purpose models cannot provide independently; as illustrated in Chart 6, the Banking Core & AI Layer operates not as a collection of isolated tools, but as a systematically orchestrated environment where mechanisms such as Retrieval-Augmented Generation, Agentic AI Workflows, and domain-specific Small Language Models harmonise real-time information retrieval with decision execution. This structural paradigm mandates a fundamental shift toward robust model governance, as evaluating AI models in isolation becomes obsolete within an interconnected ecosystem. Chart 1 reflects this imperative through cross-cutting

operational pillars—Zero Trust Security Architecture, Explainable AI, and API-driven Integration—showing that comprehensive oversight, including adversarial threat detection, data masking, and continuous regulatory auditing, is an enterprise-wide requirement. Furthermore, AI performance remains fundamentally constrained by data accessibility rather than algorithmic capabilities alone, anchoring the entire AI infrastructure upon a modernised Data Layer equipped with real-time streaming pipelines to overcome legacy technical debt. Ultimately, while Large Language Models perform a pivotal role, they are inadequate for specialised financial tasks, necessitating purpose-built SLMs, MLOps platforms, and Zero Trust security controls that optimise hybrid model deployment to eliminate data silos across financial operations.

Chart 6. Modern AI Tech Architecture for Banking and Financial Services (Author's Vision)



Author's original analysis of AI requirements for modern banking. (Self-authored diagram based on industry frameworks, including ideas from BCG, 2025)

Chart 1. Modern AI Tech Architecture for Banking and Financial Services (Author's Vision)
Source: Compiled by the author from data and conceptual frameworks in Tripathi et al. (2025).

Although the financial sector exhibits an accelerating interest in artificial intelligence, recent empirical findings reveal that industry-wide AI maturity remains heterogeneous across operational domains. As illustrated in Table 1, over half of surveyed retail banks (55%) have actively integrated AI architectures into transactions and payment services—aligning their capabilities with competitive fintech players—while simultaneously prioritising customer journey transformation (48%). Conversely, core operational domains such as credit scoring, underwriting (32%), targeted marketing (26%), and dynamic pricing (18%) demonstrate a more gradual adoption trajectory (BCG, 2025). Nevertheless, this operational disparity

is poised to shift rapidly as advancing Agentic AI workflows, hybrid cloud infrastructures, and unified data integration architectures converge to catalyse enterprise-wide deployment across retail banking ecosystems.

Table 1.

AI Adoption Maturity & Impact Across Retail Banking Domains

Function	Workflow & Description	Adoption in Banking (%)	Expected Impact in Banking (%)	Workflow Category (Author's Vision)	Maturity Assessment	Future Impact Potential
Transaction and Payment Services	AI-driven fraud risk identification and fraud risk scoring (Centralised, on-demand access to curated information for faster issue resolution)	54%	55%	AI-Driven Risk Assessment	High (Established)	Critical / Core Operational Efficiency
	AI-based transactions (Real-time system oversight to detect issues and ensure operational continuity)	52%	51%	Data Accessibility Accelerator	High (Established)	Critical / Core Operational Efficiency
Credit and Loans	Loan underwriting (Data-led budget allocation to maximise campaign efficiency and ROI)	38%	23%	Loan Underwriting Assessment	Moderate (Growing)	Substantial Revenue & Profitability
Digital Marketing	Campaign performance optimisation (Data-driven audience segmentation to maximise ad relevance and impact)	40%	39%	Performance Optimization	Moderate (Growing)	Substantial Revenue & Profitability
	Targeted outreach (Predictive insights to identify timing and signals for retention and growth opportunities)	37%	33%	Targeted Outreach	Moderate (Growing)	Substantial Revenue & Profitability

Regulatory Compliance & Risk Management	Debt collection and recovery (Predictive analytics for delinquency management and personalised repayment strategies)	26%	21%	Debt Collection & Recovery	Slow (Niche)	Operational Cost Reduction
	AI-based portfolio management (Real-time modelling of credit risks with auditable AI recommendations)	29%	32%	Portfolio Management	Slow (Niche)	Risk Mitigation & Compliance
Sales	Banking sales optimisation (Data-informed innovation to accelerate product design and market fit)	43%	25%	Sales Optimization	Moderate (Growing)	Topline Performance Boost
	Branch and digital network optimisation (Strategic levers and analytics to maximise topline performance)	42%	22%	Network Optimization	Moderate (Growing)	Topline Performance Boost

Source: Author’s representation based on empirical survey data from Boston Consulting Group (BCG, 2025).

As shown in Chart 2, global spending on artificial intelligence in the financial services sector has entered a period of rapid acceleration, growing from \$10.62 billion in 2017 to \$58.29 billion by 2025. This upward trajectory is projected to steepen dramatically through the forecast horizon, surging to \$75.19 billion in 2026, reaching \$97 billion in 2027, and ultimately surpassing the \$100 billion threshold to hit \$125.13 billion by 2028. This continuous expansion underscores the strategic transition of banking and financial institutions from exploratory technology adoption to core infrastructural integration, positioning advanced digital processing, risk modelling, and automated compliance at the centre of modern financial architectures. This staggering capital allocation reflects a fundamental industry-wide realisation that sustained competitive advantage relies entirely on deep technological integration. As financial institutions funnel billions into machine learning architectures, predictive analytics, and automated decision-

making engines, they are permanently rewriting the boundaries of operational efficiency, regulatory compliance, and risk mitigation. Consequently, artificial intelligence is no longer viewed as a peripheral IT expenditure but as the definitive cornerstone governing the future stability, profitability, and evolution of global financial markets.

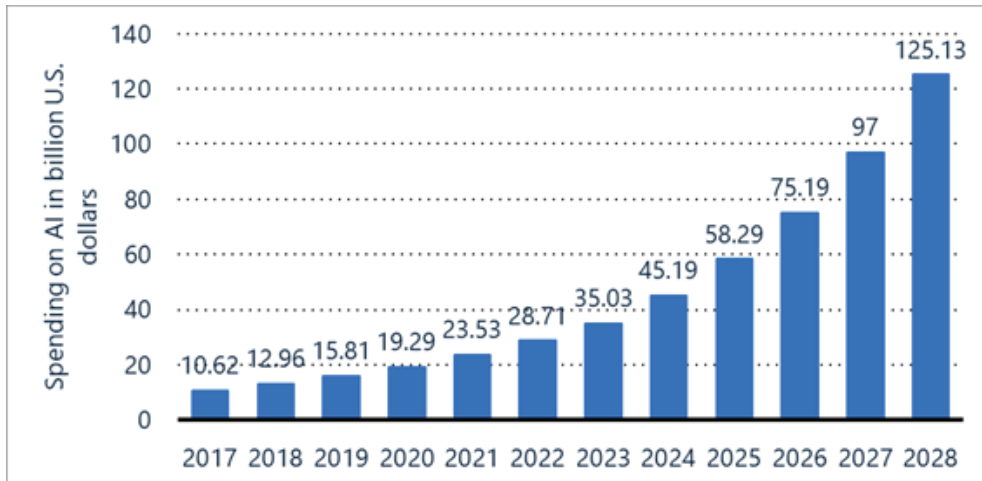


Chart 2. Estimated value of the financial sector’s artificial intelligence (AI) spending worldwide from 2017 to 2025, with forecasts from 2026 to 2028 (in billion U.S. dollars)³

As shown in Chart 3, estimated spending on artificial intelligence (AI) and generative artificial intelligence (gen AI) in the global banking sector has grown steadily, from \$14.13 billion in 2020 to \$40.78 billion in 2025. Continuing this upward trajectory as shown in Chart 2, expenditures are projected to accelerate sharply over the forecast period, rising from \$53.14 billion in 2026 and \$69.24 billion in 2027 to reach \$90.22 billion by 2028. This sustained financial commitment shows how banking institutions are shifting from initial technological experimentation to broader operational integration and agent-enabled infrastructure.

³ Statista. Artificial intelligence (AI) investment, impact, and returns in the financial services sector. <https://www.statista.com/study/213789/ai-investment-impact-and-returns-in-the-financial-services-sector/>

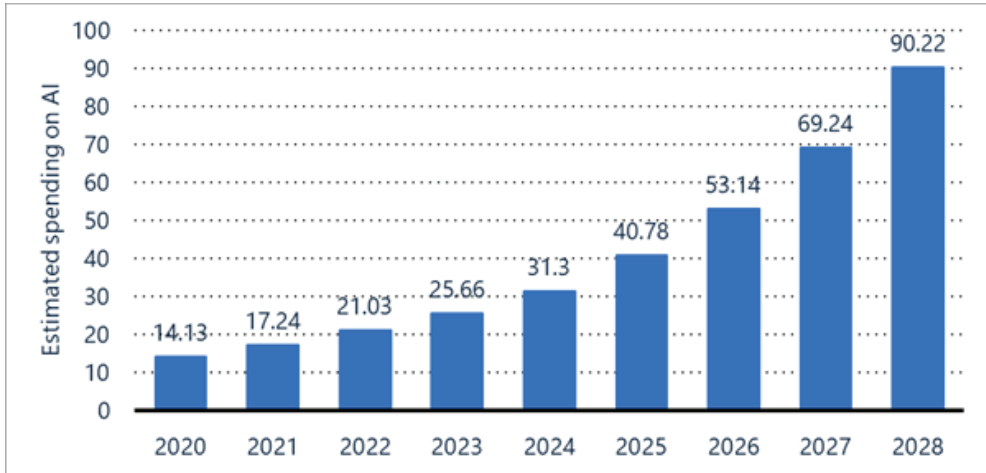


Chart 3. Estimated value of the banking sector’s artificial intelligence (AI) and generative artificial intelligence (gen AI) spending worldwide from 2020 to 2025, with forecasts until 2028 (in billion U.S. dollars)

As Chart 4 further shows, the return on investment (ROI) from artificial intelligence applications varies significantly across segments of the financial services industry. Overall, document processing (32%) and customer experience and engagement (30%) yield the highest returns, followed by document management applications like RPA and OCR (23%). Within specific verticals, fintech institutions report the greatest gains from customer experience and engagement (45%) and document processing (36%). In contrast, consumer finance focuses primarily on customer experience (36%), fraud detection and anti-money laundering (24%), and document processing (23%). Meanwhile, capital markets capitalise heavily on document processing (35%) and algorithmic trading (26%).

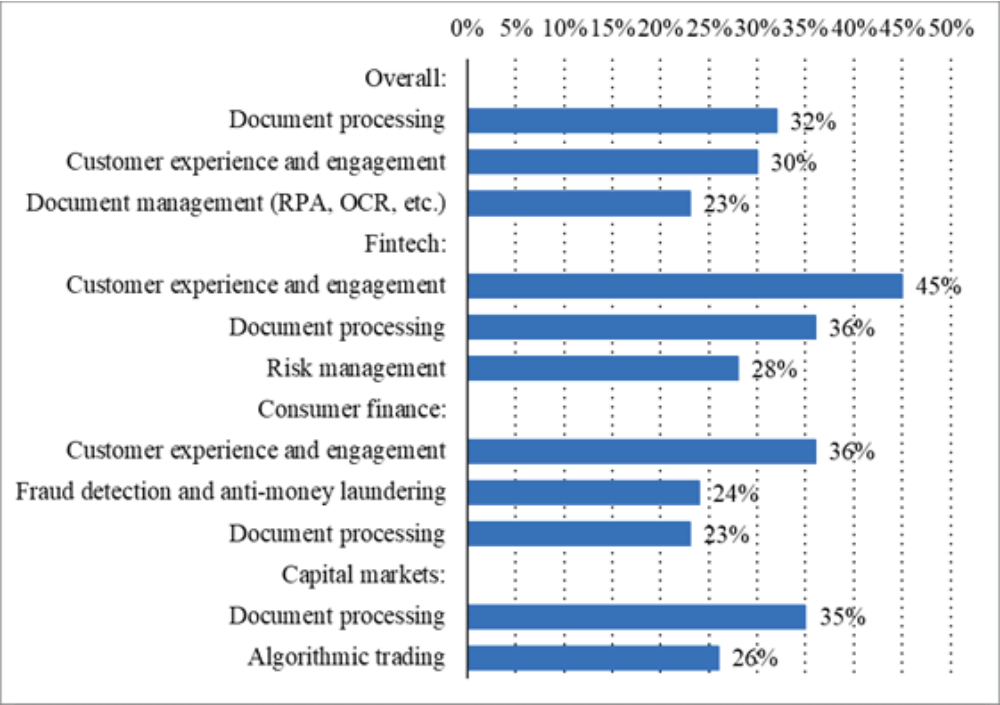


Chart 4. AI use cases with the biggest ROI in financial services 2025, by industry segment⁴

As Chart 5 highlights, the reported impact of artificial intelligence adoption varies widely across functional areas within the global banking sector. Technology leads with an 81% impact rate, followed closely by data management at 73%, digital channels at 72%, finance and treasury at 71%, and risk and compliance at 70%. Additional operational domains also capture substantial technological effects, including customer service operations at 68%, fraud and financial crime management at 67%, back-office processing at 59%, and marketing at 52%. In comparison, product management (45%), sales and coverage (38%), and human resources (25%) register more moderate impacts. This uneven distribution shows that technological integration is most concentrated in data-heavy, infrastructure-driven functions, while human-centric and relational divisions experience a more gradual transition. Ultimately, this structural asymmetry emphasises that modern financial institutions must adopt targeted, cross-functional implementation strategies to successfully bridge technical modernisation with core business operations.

4 Statista. (2026, March 2). Main artificial intelligence (AI) use cases with the largest return on investment (ROI) in financial services in 2025, by industry segment. <https://www.statista.com/statistics/1557312/ai-use-cases-with-largest-roi-in-financial-servicesby-segment/>

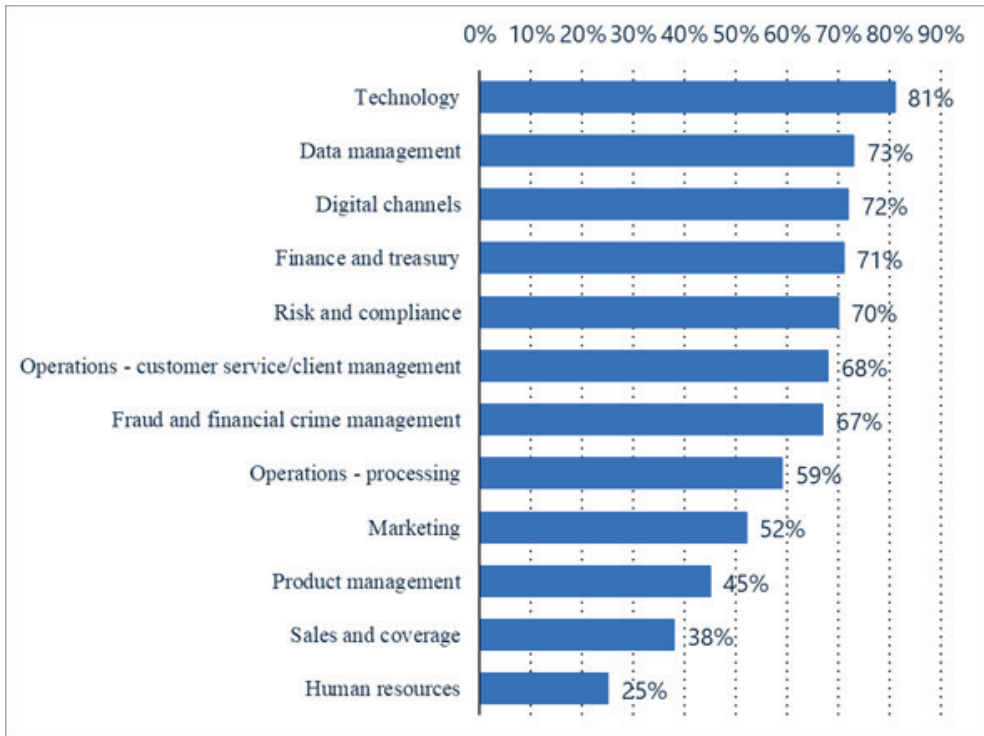


Chart 5. Impact from artificial intelligence (AI) adoption in banking worldwide in 2025, by functional area

As shown in Chart 6, the potential impact of artificial intelligence on bank profit pools across different regions and product segments generally reflects cost efficiencies, increased competition, or margin compression, leading to negative projections across major categories. Globally, the overall average impact on profit pools is estimated at -9% , driven largely by steep contractions in credit card lending (-34%) and consumer deposits (-27%). Regionally, Asia-Pacific (excluding China) and North America experience the most pronounced total profit pool adjustments at -11% each, followed by Europe (-8%) and the Rest of the World at -7% , with product-level shifts varying across personal loans, wholesale transaction banking, wealth management, and mortgages. These profound financial contractions highlight the dual-edged nature of digital transformation in modern banking. While automated algorithms and predictive models successfully streamline operational workflows, reduce overhead costs, and elevate customer personalisation, they simultaneously dismantle legacy fee structures and compress interest margins. Consequently, financial institutions worldwide face an urgent strategic imperative to diversify their revenue streams, embrace innovative digital business models,

and balance technological adoption with robust risk management frameworks to safeguard long-term economic viability.

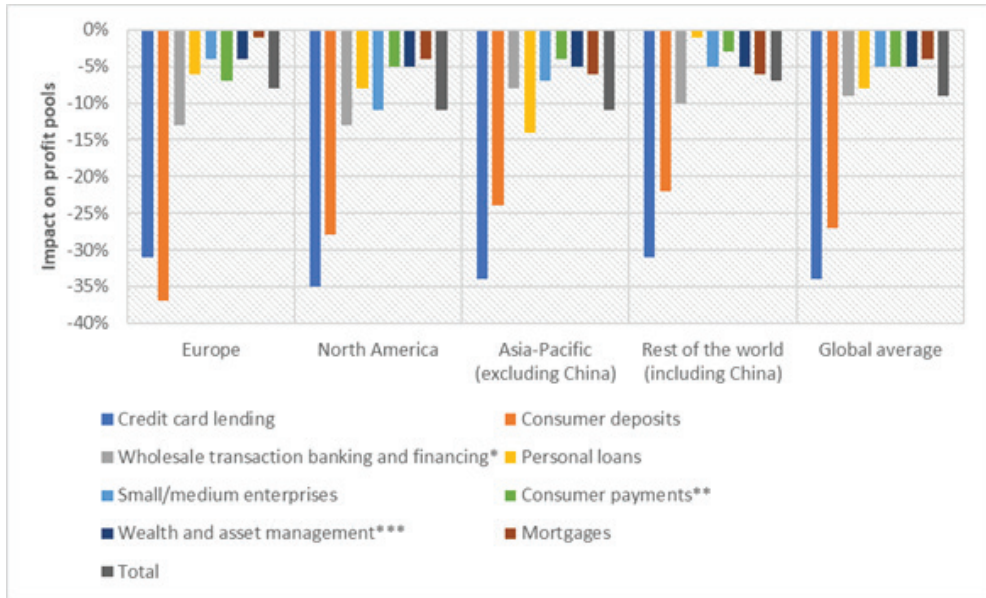


Chart 6. Potential impact of artificial intelligence on bank profit pools in 2025, by region and product (Statista, 2026)

Modern banking workflows require complex architectural frameworks that combine retrieval-augmented generation, agentic AI workflows, and domain-specific small language models atop modernised data layers, shifting the industry from isolated model usage to comprehensive enterprise-wide governance. As empirical data and multi-billion-dollar investments show, financial institutions are rapidly scaling integration across core functions—such as transaction processing and risk management—even as profit pool adjustments highlight the need of balance efficiency gains with rigorous regulatory compliance and transparent security controls. Ultimately, the core novelty of this transformation lies in the transition from standalone exploratory applications to orchestrated, agent-enabled hybrid ecosystems where data accessibility and explainable AI governance dictate market competitiveness.

Conclusions

As artificial intelligence and blockchain technologies reshape the financial services landscape, global investments are growing rapidly and exponentially. Expenditures on artificial intelligence in the global banking sector have shown consistent historical growth and are projected to surge dramatically over the

forecast period. This aggressive financial commitment reflects a strategic industry-wide transition from initial technological experimentation toward comprehensive, core infrastructural integration and agent-enabled operations. Empirical evidence indicates that artificial intelligence delivers its largest return on investment through optimised document processing, enhanced customer experience, and advanced risk management frameworks. Across functional areas, technology, data management, digital channels, and finance capture the most profound operational impacts. Scholarly evaluations also emphasise that successful deployment requires rigorous governance, explainable AI architectures, and effective bias mitigation to ensure regulatory compliance and maintain trust. Ultimately, while AI adoption introduces margin compression and shifts in bank profit pools, it remains a critical catalyst for driving efficiency, innovation, and economic development across the global financial sector.

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BUSINESS LENDING IN ARMENIA: PATTERNS, TRANSFORMATIONS AND FUTURE DIRECTIONS

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Abstract

In recent years, the financial system of the Republic of Armenia has undergone numerous structural changes, driven by both internal economic processes and prevailing macroeconomic conditions. Accordingly, corporate loans have become the main means of financing the real economy and a key driver of production expansion, investment, and job creation.

The banking sector continues to serve as an intermediary in Armenia; through economic recovery, various government support programs, and international instruments, it participates in the projects of Armenian companies' projects.

Despite all the above-mentioned advantages, getting finance may still be a problem for many organisations. High cost of borrowing, need for collateral, credit risk, and restricted ways of raising funds may create problems for businesses, especially for small firms. This becomes even more relevant for startup and innovative firms, which may not have enough collateral and credit history to borrow from banks.

Keywords: Business lending, interest rates, financial stability, commercial banks, loan portfolio.

ԲԻԶՆԵՍԻ ՎԱՐԿԱՎՈՐՈՒՄԸ ՀԱՅԱՍՏԱՆՈՒՄ. ՄԻՏՈՒՄՆԵՐ, ՓՈԽԱԿԵՐՊՈՒՄՆԵՐ ԵՎ ԶԱՐԳԱՅՄԱՆ ՀԵՌԱՆԿԱՐՆԵՐ

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Համառոտագիր

Վերջին տարիներին Հայաստանի Հանրապետության ֆինանսական համակարգում տեղի են ունեցել բազմաթիվ կառուցվածքային փոփոխություններ, որոնք պայմանավորված են եղել ոչ միայն ներքին տնտեսական գործընթացներով, այլև արտաքին մակրոտնտեսական պայմաններով: Այս համատեքստում կորպորատիվ վարկերը դարձել են իրական հատվածի ֆինանսավորման հիմնական միջոցը, ինչպես նաև արտադրության ընդլայնման, ներդրումների և աշխատատեղերի ստեղծման կարևորագույն տարրը:

Հայաստանում բանկային ոլորտը շարունակում է միջնորդի դեր կատարել. տնտեսության վերականգնման, կառավարության աջակցության տարբեր ծրագրերի և միջազգային գործիքների միջոցով այն մասնակցում է հայկական ընկերությունների նախագծերին:

Չնայած վերը նշված բոլոր առավելություններին՝ ֆինանսավորում ստանալը շատ կազմակերպությունների համար կարող է խնդիր մնալ: Փոխառության բարձր արժեքը, գրավի անհրաժեշտությունը, վարկային ռիսկը և միջոցների ներգրավման սահմանափակ հնարավորությունները կարող են խնդիրներ ստեղծել բիզնեսի, հատկապես՝ փոքր ընկերությունների համար: Սա առավել արդիական է դառնում ստարտափների և նորարարական ընկերությունների պարագայում, որոնք կարող են չունենալ բանկերից վարկ ստանալու համար անհրաժեշտ գրավ և վարկային պատմություն:

Բանալի բառեր՝ բիզնեսի վարկավորում, տոկոսադրույքներ, ֆինանսական կայունություն, առևտրային բանկեր, վարկային պորտֆել:

Introduction

In the contemporary economy, business loans constitute an essential instrument for promoting investment activity, the development of entrepreneurship, productivity growth, and economic growth. Being responsible for the mobilisation of savings into productive activities, commercial banks contribute greatly to financing business enterprises, satisfying their operational and investment needs. The provision and availability of business loans considerably affect firms' capacity to enlarge production, introduce innovations, and improve their competitiveness. The Republic of Armenia represents a country where the banking sector constitutes the main part of the financial system and serves as the primary provider of external financing of businesses. In the last ten years, the business loan market in Armenia was formed in view of such phenomena as the economic transformation in the country, changes in monetary policy, financial sector reform, the coronavirus disease outbreak, geopolitical situation, inflation, and economic uncertainty in the world.

There are several problems that still undermine the effectiveness of business lending. In particular, these involve the fairly high cost of loans, the need for collateral, the sectoral structure of credit funds, and exchange rate risks in case of foreign currency lending. Thus, to understand the role banks play in the process of economic growth and development, it is important to analyse current and prospective trends in business lending.

This study aims to analyse the recent trends, structural characteristics, and development prospects of business lending in the Republic of Armenia. To achieve this objective, the study examines the dynamics of business loan portfolios, sectorial distribution of lending, currency composition, growth patterns, and the relationship between business lending and key macroeconomic indicators.

Based on the findings, the paper identifies the main structural challenges affecting business lending. It outlines policy directions to strengthen financial intermediation, expand SME access to finance, promote AMD-denominated lending, and improve the efficiency of business financing in Armenia.

Theoretical and Methodological Bases

The paper draws of theoretical approaches to financial intermediation, credit market development, and banks' contribution to economic development. Business lending is viewed as an effective way to deliver finance to the productive parts of the economy. This process enables investment in enterprise development and employment, thereby affecting overall economic development. The paper also draws on theoretical approaches to banking, credit relations, financial stability, and risk management in lending. It also pays close attention to approaches describing the connection between business lending and investment activity, and its link to the broader process of macroeconomic development.

The methodological base of the research paper comprises a combination of quantitative and analytical methods. The research uses comparative, statistical, and systems analysis to examine the volume, structure, growth dynamics, sectoral

distribution, and currency structure of business loans in Armenia. Time-series analysis was conducted to determine the dynamics of the process, while charts and graphs helped to demonstrate the empirical results of the research. These methods enabled an evaluation of the volume, structure, growth dynamics, sectorial distribution, and currency structure of business loans in Armenia. The empirical base of the research consists of official statistical data from the Central Bank of the Republic of Armenia, the Statistical Committee of the Republic of Armenia, commercial banks, and international financial institutions. The obtained data were analysed to identify key trends, structural features, problems, and prospects of the development of business loans in the Republic of Armenia.

Literature Review

The topic of financial intermediation plays an integral part in modern economic theory. It enables the efficient allocation of financial resources between savers and investors, reduces information asymmetry, and stimulates economic growth. According to Levine (2005), the emergence of financial intermediaries leads to capital accumulation, productivity growth and economic development in general as a result of improved access to financial resources and increased efficiency in the allocation of resources. In addition, according to Beck, Levine, and Loayza (2000), financial development has positive impacts on economic growth mostly because of productivity growth and not only capital accumulation. Many scholars argue that banking activities serve as a major channel of financial intermediation, especially in a bank-based financial system. Berger and Udell (2006) emphasise that access to credit is among the most crucial factors determining SME development of SMEs, innovation, and job creation. However, financing problems are particularly acute for SMEs because of information asymmetry, the requirement of collateral and credit risks. Modern literature pays considerable attention to the importance of financial inclusion and credit accessibility for sustainable economic development. According to the World Bank (2024), economies with broad access to business finance tend to show higher levels of entrepreneurship, investment, and economic resilience. Moreover, the digitalisation of financial services has led to increased possibilities of lending as a result of improved tools of credit evaluation and lower transaction costs (OECD, 2023).

The link between financial intermediation and corporate loans is especially relevant in developing and transition economies. According to research by the European Bank for Reconstruction and Development (EBRD, 2024), an efficient banking sector can facilitate private sector development and ensure adequate provision of long-term financing for productive investments. However, uncontrolled growth in credit supply could lead to systemic risks and undermine financial stability if there is no proper system of risk management implemented (IMF, 2023). As for specific studies on Armenia, there are certain features of the credit market structure that have been established. First of all, as noted by Tavadyan (2024), the structure of bank loans has become increasingly consumer- and mortgage-

lending-oriented, whereas the proportion of business lending has become less prominent. Gasparyan and Shirkhanyan (2025) argue that high competition in the commercial banking sector positively affects lending and increases credit access.

In addition, Pakhchanyan, Prokop and Sahakyan (2018) find that abnormal loan growth is associated with lower regulatory capital ratios, higher loan-loss provisions, and reduced profitability in Armenian banks, highlighting the importance of balancing credit expansion with prudent risk management and financial stability considerations.

Overall, the literature suggests that the effectiveness of financial intermediation and business lending depends on the interaction between banking sector development, financial stability, access to finance, and the broader institutional environment. Nevertheless, empirical evidence on the recent structural transformations of business lending in Armenia remains limited. Therefore, this study seeks to contribute to the literature by examining the dynamics, sectoral structure, currency composition, and development prospects of business lending within the broader framework of financial intermediation in Armenia.

Analysis and Results

Monetary policy has also influenced lending conditions in Armenia in recent years. Changes in the Central Bank's refinancing rate have affected the cost and availability of bank financing. At the same time, inflation, global economic uncertainty, and regional developments have influenced banks' lending decisions and their approach to credit management.

Business lending in the Republic of Armenia is characterised by a degree of branch concentration, with the main flows of financial resources directed to the most active and profitable sectors of the economy. This distribution is formed under the influence of both market demand and banks' risk management strategy (Financial Stability Report, CBA, 2024).

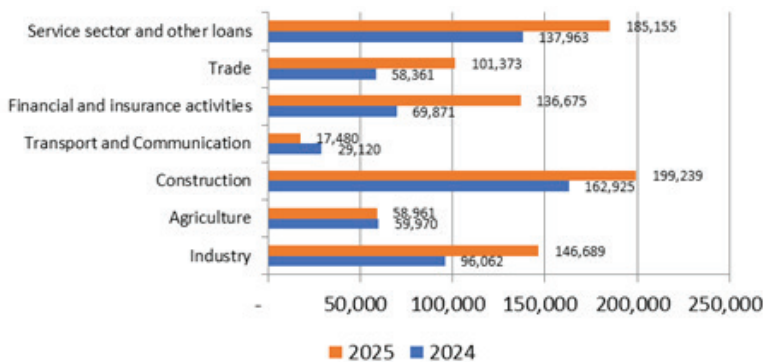


Chart 1. The structure of the credit portfolio in the RA financial system, 2020–2025, million drams

Source: Loans by sectors, Central Bank of Armenia: <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organizations-loans-by-fields-monthly/233>

Overall, the sectorial distribution of business loans is dominated by the trade, industry, construction, and services sectors. The trade sector traditionally holds a leading position because of its high turnover volume and relatively low risk. Trading organisations often have stable cash flows, which increases their creditworthiness and encourages banks to finance them actively. The industrial sector is also an important direction, especially in the sub-sectors of the processing industry. Here, lending is mainly directed to the expansion of production capacities, technological modernisation, and export promotion. However, the growth of lending in this sector is often limited by the high level of capitalisation and the need for long-term investments, which increases risks for banks.

Agriculture continues to account for a relatively small share of the overall business lending structure. The main reasons are high risk, seasonality, and income volatility. The use of state subsidies and insurance instruments is contributing to a gradual increase in lending within this sector.

Lending in the financial and insurance sectors is mainly internal and aimed at expanding financial intermediation. At the same time, emerging sectors such as green energy and innovative technologies still account for a relatively small share but have high growth potential.

As a rule, the sectoral structure of business lending in the Republic of Armenia depends on the national economy's structural peculiarities and level of development. This shows that financial resources tend to accumulate in sectors characterised by rapid turnover and predictable income flows, while long-term and risky sectors need some kind of stimulating factors. In the long term, diversification of the sectoral structure of business lending is expected as a result of structural transformation of the national economy and the development of innovation. This situation can lead to the emergence of a stable credit system that supports balanced economic development.

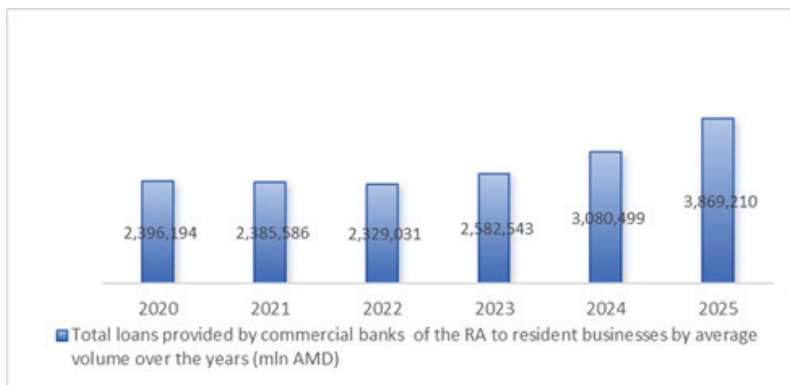


Chart 2. Total loans provided by commercial banks of the Republic of Armenia to resident businesses by average volume over the years, 2020–2025, million drams

Source: Central Bank of Armenia, <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organisations-loans-by-fields-monthly/233>

Changes in average lending volumes also reflect changes in banks' risk policies. In conditions of economic uncertainty, banks often tighten lending conditions, which can temporarily slow down lending growth rates. Still, in the long term, this is an important tool for maintaining financial stability.

Presenting the dynamics of the volume of total loans makes it possible to assess not only the growth rates of business lending, but also their real size and economic significance.

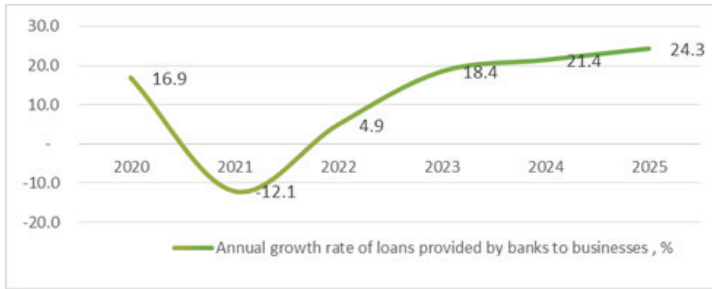


Chart 3. Dynamics of the annual growth rate of loans provided by banks to businesses in the Republic of Armenia, 2020–2025, %

Source: Central Bank of Armenia, <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organisations-loans-by-fields-monthly/233>

During 2020–2025. the dynamics of the annual growth rates of business lending in the Republic of Armenia are characterised by significant fluctuations, reflecting both the impact of external shocks and the post-crisis recovery and activation phases. In 2020, a significant increase in lending volumes was recorded – 16.9%, which is due to anti-crisis measures, state support programs and the need to maintain business working capital under the conditions of the pandemic.

Thus, in 2021, lending volume declined substantially, by 12.1%, which can be attributed to the high base of the previous year, economic uncertainty persisting at that time, and more stringent credit risk assessments by banks. Therefore, the period can be defined as the period of market adjustment following the unusual situation of the previous year.

In 2023–2025, the tendency of continuous and accelerating growth is observed in the area of business lending. For instance, the growth rate in 2023 was 18.4%, in 2024, 21.4%, and in 2025, 24.3%. Such dynamics show significant activation of the business environment, growth in credit demand, as well as readiness of the banking system for expanding lending. This acceleration may be linked to rising economic activity, the implementation of new investment programs, and of stabilising financial environment.

Features of the business lending system in Armenia include the presence of variety in terms of currency and maturity structure, which helps to determine the nature of the credit market in general and affects the stability of the national

economy. These features are quite essential in terms of risk allocation and implementation of monetary policy.

Regarding the currency structure, business lending in Armenia has long had a considerable foreign currency element. This is determined by the level of the economy's openness, its international activity, and the presence of organisations receiving income in foreign currency. However, lending in drams has recently been growing; this is linked to the strategy of strengthening financial stability and reducing exchange rate risks.

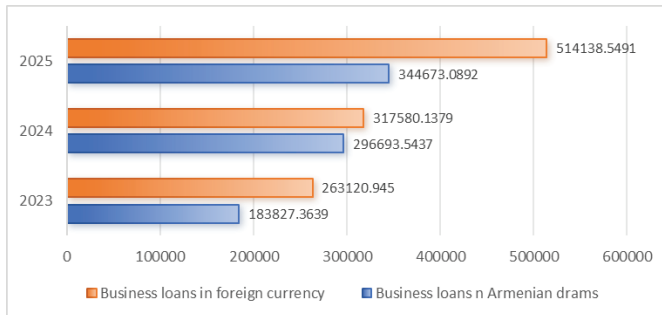


Chart 4. Dynamics of foreign currency⁵ and AMD business loans 2023–2025, million AMD

Source: Central Bank of Armenia, <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organisations-loans-by-fields-monthly/233>

The availability of foreign currency loans, on the one hand, allows businesses to take advantage of relatively low interest rates. On the other hand, it creates exchange rate risks, especially when borrowers' income is denominated in the national currency. Therefore, optimising the currency structure is one of the important tasks of the financial system.

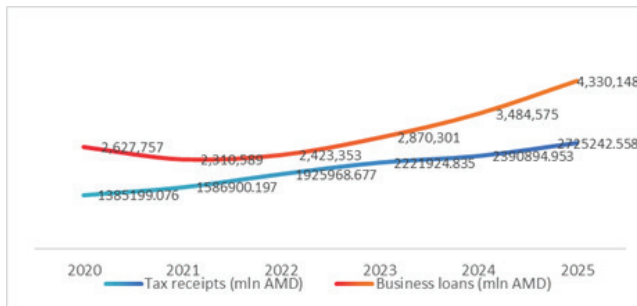


Chart 5. Dynamics of business loan balance and tax revenues in the Republic of Armenia, 2020–2025, million drams

Source: Central Bank of Armenia, volume of business loans: <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organisations-loans-by-fields-monthly/233>
 RA State Revenue Committee, tax revenues: <https://www.src.am/am/taxStatisticsPage?id=127&s>

⁵ Foreign currency business loans comprise all business loans issued in currencies other than the Armenian dram (AMD).

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The analysis included the comparison of the annual end value of loans granted to businesses with the value of tax revenues generated in the year. While these two indicators have different economic characteristics (balance sheet and flow), the analysis of both will help to evaluate changes in the level of economic activity, financial activity, and tax capacity occurring simultaneously.

According to Histogram 5, the values of both loans granted to businesses and taxes generated in Armenia grew during 2020–2025. In addition, the growth of business lending coincided with the growth of tax revenues, suggesting a positive correlation between financial intermediation and economic activity. Even though, based on the information given, it is impossible to draw any conclusions about the causality between the two mentioned processes, their parallel growth means that the development of business lending could contribute to the growth of productive and entrepreneurial activity, which resulted in increased fiscal capacity of the country.

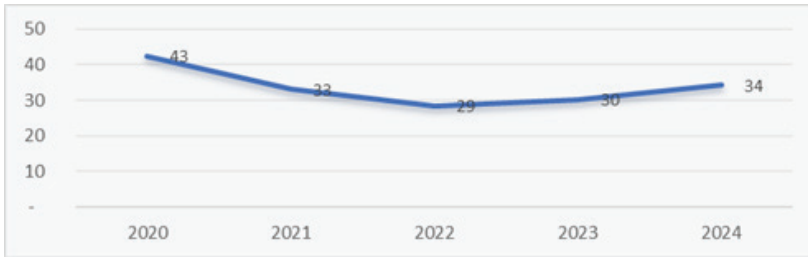


Chart 6. Share of business loans in nominal GDP in Armenia, 2020–2024, %

Source: Central Bank of Armenia, volume of business loans: <https://www.cba.am/hy/statistics/commercial-banks-and-credit-organisations-loans-by-fields-monthly/233>, Statistical Committee of the Republic of Armenia, GDP: <https://armstat.am/am/?nid=202>

The share of business loans in GDP varied notably from 2020 to 2024. In 2020, the indicator stood at 43%, which is quite high relative to the country's GDP. However, during 2021–2022, the indicator fell to 33% and 29%, respectively. Such a decline can be attributed not only to the reduction of credit expansion but also to faster nominal GDP growth alongside some economic reforms implemented following the COVID-19 crisis. The indicator began growing in 2023 and reached 34% in 2024. The positive dynamics may reflect the growing expansion of business loans and a greater role of banking in financing of economic activities. From the standpoint of financial intermediation, the business loans to GDP ratio represents an important indicator of financial deepening as well as the capability of the banking sector to direct financial resources into the productive sectors of the economy. According to the World Bank's Domestic Credit to Private Sector indicator (% of GDP), the level of credit supplied to the private sector in comparison with GDP is used to evaluate the level of financial sector development and access to

finance. In the case of developed countries, such indicators are usually above 90–160%, while in the case of developing and emerging markets, they are usually between 30% and 80% (World Bank, 2025). Thus, the business loans/GDP ratio of Armenia belongs to the range of indicators of developing countries, which means that the level of financial deepening of Armenia remains moderate. At the same time, the positive dynamics recently shown may mean that the contribution of business loans to economic development grows. Consequently, further expansion of sustainable business loans can improve financial intermediation and access to finance for productive sectors.

Conclusion

This research shows that business lending remains an important financial intermediation mechanism in the Republic of Armenia, contributing to economic processes of investment and business development. The results show that, despite the difficulties created by the COVID-19 pandemic and the resulting economic uncertainty, the banking system has maintained its ability to finance the real sector of the economy, as confirmed by the continued growth of the business loan portfolio in recent years. Thus, it can be concluded that Armenian business lending features growth in quantitative terms and structural changes. With regard to sectoral structure, it becomes clear that the credit resources remain predominantly allocated in such sectors as trade, industry, construction, and services, while sectors of greater risks and longer investment periods continue to receive relatively less financing. On the other hand, the growth of the portfolio of loans denominated in AMD reflects the country's ongoing efforts to de-dollarize.

Moreover, evidence suggests a correlation between increases in the share of business loans and tax revenue growth, indicating that financial intermediation contributes to overall economic and fiscal development. Also, the dynamics of the ratio of business loans to GDP show a slow return to financial deepening after a decline in 2021–2022, underscoring the growing importance of the banking system in allocating financial resources.

In conclusion, it can be seen that the prospects for business lending in Armenia still seem good. Yet, in order to ensure its sustainable development, it is necessary to take further steps to improve financial intermediation mechanisms, diversify credit allocation between different sectors of the economy, increase financing opportunities for SMEs, and continue improving financial stability. This will help achieve effective allocation of resources and increased investment activity.

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LEGAL AND POLITICAL ASPECTS OF THE APPLICATION OF THE PRINCIPLE OF NON-INTERVENTION IN THE INTERNAL AFFAIRS OF STATES

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Abstract

The principle of non-intervention in the internal affairs of a state is one of the fundamental principles of international law, ensuring the recognition of states' sovereignty, legal equality, and independence in the international arena. It is enshrined in the UN Charter, the Helsinki Final Act, and a number of other international instruments.

The current geopolitical situation shows that the principle of non-intervention is often used both to justify legitimate action and to justify politically motivated interference. Today we increasingly encounter cases in which states intervene in the internal affairs of other countries under various pretexts. Technological developments open new avenues for exerting external influence on systems of state governance without traditional military or physical invasion. The internet, artificial intelligence, social networks, and cyber tools are widely used to influence internal political processes. These phenomena complicate the legal-political field, compelling a reconsideration of what “interference” means and how to define the limits of its permissibility.

The study of this topic is relevant not only in theoretical political and legal terms, but also in practical terms, since it makes it possible to reassess the essence of the principle in light of current geopolitical and technological developments. A precise interpretation of the principle of non-intervention within the system of international law and the development of mechanisms for its application are important prerequisites for preserving states' sovereignty, legal equality, and international stability.

Keywords: Law, jurisdiction, principle, state, international community, internal affairs, external relations, cooperation, treaty, agreement.

ՊԵՏՈՒԹՅԱՆ ՆԵՐՔԻՆ ԳՈՐԾԵՐԻՆ ՉՄԻՋԱՄՏԵԼՈՒ ՍԿԶԲՈՒՆՔԻ ԿԻՐԱՌՄԱՆ ԻՐԱՎԱՔԱՂԱՔԱԿԱՆ ԱՌԱՆՁՆԱՀԱՏԿՈՒԹՅՈՒՆՆԵՐԸ

ԱՐԵՆ ՍԱՐԳՍՅԱՆ

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Համառոտագիր

Պետության ներքին գործերին չմիջամտելու սկզբունքը միջազգային իրավունքի հիմնարար սկզբունքներից է, որն ապահովում է պետությունների ինքնիշխանության, իրավահավասարության և անկախության ճանաչումը միջազգային հարթակում: Այն ամրագրված է ՄԱԿ-ի Կանոնադրությամբ, Հելսինկյան եզրափակիչ ակտով, ինչպես նաև մի շարք այլ միջազգային փաստաթղթերով:

Ներկայիս աշխարհաքաղաքական իրադրությունը վկայում է, որ չմիջամտելու սկզբունքը հաճախ օգտագործվում է ինչպես իրավաչափության, այնպես էլ քաղաքական նպատակներով չմիջամտության արդարացման համար: Այսօր ավելի հաճախ ենք հանդիպում դեպքերի, երբ պետությունները չմիջամտում են այլ երկրների ներքին գործերին տարբեր պատրվակներով: Տեխնոլոգիական զարգացումները բացում են նոր հարթակներ պետական կառավարման համակարգերի առջև արտաքին ազդեցություն գործելու համար՝ առանց ավանդական ռազմական կամ ֆիզիկական ներխուժման: Համացանցը, արհեստական բանականությունը, սոցիալական ցանցերը և կիբեռգործիքները լայնորեն օգտագործվում են ներքին քաղաքական գործընթացների վրա ազդելու նպատակով: Այս երևույթները բարդացնում են իրավաքաղաքական դաշտը՝ ստիպելով վերանայել, թե ինչ է նշանակում «չմիջամտություն» և ինչպես սահմանել դրա թույլատրելիության սահմանները:

Հոդվածի թեմայի ուսումնասիրությունը արդիական է ոչ միայն քաղաքական և իրավական տեսական, այլև գործնական առումներով, քանի որ այն հնարավորություն է տալիս վերաբժնորել սկզբունքի էությունը՝ հաշվի առնելով արդի աշխարհաքաղաքական և տեխնոլոգիական զարգացումները: Միջազգային իրավունքի համակարգում չմիջամտելու սկզբունքի ճշգրիտ մեկնաբանությունն ու կիրառման մեխանիզմների ձևավորումը կարևոր նախադրյալ են պետությունների ինքնիշխանության, իրավահավասարության և միջազգային կայունության պահպանման համար:

Բանալի բառեր՝ իրավունք, իրավասություն, սկզբունք, պետություն, միջազգային հանրություն, ներքին գործեր, արտաքին կապեր, գործակցություն, պայմանագիր, համաձայնագիր:

Introduction

The principle of non-intervention in the internal affairs of a state is one of the fundamental principles of international law, ensuring the recognition of states' sovereignty, legal equality, and independence in the international arena. It is enshrined in the UN Charter, the Helsinki Final Act, and a number of other international instruments.

The current geopolitical situation shows that the principle of non-intervention is often used both to justify legitimate action and to justify politically motivated interference. Today we increasingly encounter cases in which states intervene in the internal affairs of other countries under various pretexts. Technological developments open new avenues for exerting external influence on systems of state governance without traditional military or physical invasion. The internet, artificial intelligence, social networks, and cyber tools are widely used to influence internal political processes. These phenomena complicate the legal-political field, compelling a reconsideration of what "interference" means and how to define the limits of its permissibility.

The study of this topic is relevant not only in theoretical political and legal terms, but also in practical terms, since it makes it possible to reassess the essence of the principle in light of current geopolitical and technological developments. A precise interpretation of the principle of non-intervention within the system of international law and the development of mechanisms for its application are important prerequisites for preserving states' sovereignty, legal equality, and international stability.

The Concept of the Principle of Non-Intervention and Its Correlation with Other Principles of International Law

The principles of international law took shape in the second half of the 20th century.

"The fundamental principles of international law are the starting, guiding provisions underlying the conduct of subjects of international law. They represent the most general reflection of the practice that has formed in the sphere of international relations. A principle of international law is a norm of international law. The most important document enshrining the fundamental principles of international law is the UN Charter" (Tonoyan, 2014, p.1).

Since the fundamental principles are generally recognised norms, their binding force extends to all subjects of international law. However, fundamental principles are supreme, peremptory norms with a higher normative status than other rules of international law. In other words, the fundamental principles of contemporary general international law relate to norms possessing the character of *jus cogens* (peremptory norms). In such cases, two or more states may bind themselves by rules that differ from the general rules of international law currently in force on the same question. As for the peremptory norms of international

law, they contain a wholly specific requirement of conduct for the participants in the relations they regulate and, unlike dispositive (non-peremptory) norms, they do not permit derogation by agreement of the parties. This applies to both treaty-based and customary international legal norms (Ashvaskii, 2016, p. 69).

The principle of non-intervention in the internal affairs of states is one of the fundamental principles of contemporary international law. It forms part of customary international law and rests on the concept of respect for the territorial sovereignty of states. Intervention is prohibited in matters that each state may decide freely, in accordance with the principle of state sovereignty. This includes the choice of political, economic, social, and cultural systems and the formulation of foreign policy. Such conduct becomes unlawful intervention when coercive methods are applied to choices that must remain free. Actions constituting a violation of the principle of non-intervention will be regarded as a violation of the principle of non-use of force in international relations if they directly or indirectly involve the use of force (Shaw, 2008, p. 1147–1148).

The relevance of the principle of non-intervention in the internal affairs of states is growing on account of the characteristics of contemporary international relations, marked by an increase in local conflicts, transnational crime, ethnic and religious intolerance, the emergence of new principles of international law, and the strengthening of the role of protecting universal human rights and democracy (Dovgan, 2002, p. 31).

In the contemporary world, a state's actions contrary to universally recognised principles of international law cannot be regarded as matters falling exclusively within its domestic jurisdiction. Under the UN Charter, the UN Security Council may impose coercive measures on such a state by decision of the UN Security Council. Where a situation within a state's territory threatens international peace and security, or involves violations of human rights, the use of force under the auspices of the United Nations may become possible. The term "intervention" is understood differently in different contexts. In the West, the prevailing understanding of intervention is narrow, tied to the direct use of force or the threat thereof. Russian practice has traditionally held that even an attempt to place a matter on the agenda of an international organisation, and its discussion there, already constitutes intervention. On December 9, 1981, an overwhelming majority of states at the UN General Assembly supported this latter position, voting in favour of adopting the Declaration on the Inadmissibility of Intervention and Interference in the Internal Affairs of States. More broadly, the 1975 CSCE Helsinki Final Act also addresses the inadmissibility of intervention. An analysis of the Act's texts in different languages shows that the terms "interference" and "intervention" are treated as synonyms. A state itself determines whether specific actions by other subjects constitute intervention in its internal affairs; this does not, however, apply to situations of generally recognised international significance. Under the UN Charter, the Security Council may determine that a situation requires the

application of coercive measures, thereby recognising it as an international problem and, in that case, the principle of non-intervention no longer applies. The UN Charter firmly establishes that the norm of non-intervention is a basic rule governing interstate relations and demonstrates that it is a fundamental guarantee for maintaining order and peaceful coexistence among states (Leytman, 2020, pp. 468–469).

“When interpreting and applying the principles of international law, it is important to bear in mind that they are interconnected, and each of them must be considered in the context of all the other principles. The content of the fundamental principles is stable. Reflecting the essential features of the system of international relations and of international law, they are not subject to the effects of any particular change in interstate relations. Another important feature of the mechanism by which the fundamental principles operate is that the obligations arising from them are universal in character (*erga omnes*). This grants every state the right — and also obliges it — to take measures against violations of the principles even where its own interests are not directly affected by such violations. Moreover, it is essential to understand the role of the fundamental principles that, taken together, form the central subsystem of international law. The existence and operation of the fundamental principles are systemic in nature: they are all closely interwoven with, and interact with, one another.” (Kocharyan, 2002, p. 84–85).

Accordingly, the fundamental principles of international law are: the principle of the sovereign equality of states; the principle of refraining from the threat or use of force; the principle of the inviolability of state borders; the principle of the territorial integrity of states; the principle of the peaceful settlement of international disputes; the principle of non-intervention in internal affairs; the principle of universal respect for human rights (“the principle of non-intervention and humanitarian intervention: the limits of permissibility”); the principle of the equal rights and self-determination of peoples; the principle of cooperation among states; the principle of the good-faith fulfillment of international obligations; and others.

From the standpoint of contemporary law, according to the object of cooperation, the following groups of principles may be distinguished:

- Principles ensuring peace and security: refraining from the threat or use of force; the peaceful settlement of international disputes and the inviolability of borders and territorial integrity of states.
- Principles connected with international cooperation: the sovereign equality of states; non-intervention in internal affairs; cooperation among states and the good-faith fulfilment of international obligations.
- Principles for the protection of human rights, peoples, and nations: universal respect for human rights and the equal rights and self-determination of peoples (Melisoy, 2017, p. 20).

The principles of international law are binding on all subjects of international law. In studying the content of the principle of non-intervention, it is important not to lose sight of its close connection with other principles of international law. Under the 1970 Declaration on Principles of International Law of October 24, 1970, “the principles are interrelated, and each principle should be construed in the context of the other principles.” (UN Declaration on Principles of International Law, 1970). Particular emphasis is placed on the connection between the principle of non-intervention and the principles of the non-use of force and the threat of force, the sovereign equality of states, their territorial integrity, the inviolability of borders, and the fulfilment of international obligations.

of analysing the principle of non-intervention in the internal affairs of states, its connection to the concept of state sovereignty takes on particular importance. Sovereignty rests on a state’s right to supreme authority within its own territory and to act independently in international relations. This includes the full exercise of legislative, executive, and judicial functions without foreign interference. Contemporary approaches often give rise to notions of various types of sovereignty — state, ethnic, national, parliamentary, territorial, and other forms. However, this multilayered interpretation of the term appears more characteristic of political science than of jurisprudence. In some instances, a tendency can be observed to substitute legally recognised institutions — for example, the protection of human rights is examined within the framework of individual sovereignty.

At the same time, states’ conduct in the international arena places limits on a country’s freedom of action in one sphere or another (domestic jurisdiction) without affecting state sovereignty as such. Defining the concept of “domestic jurisdiction” is among the most pressing problems of contemporary international law. Article 2(7) of the UN Charter prohibits intervention in matters essentially within the domestic jurisdiction of any state. Domestic jurisdiction is a reflection of state sovereignty. States mutually recognise one another’s independence and agree that each of them has spheres in which intervention is prohibited. International law has no generally accepted definition of domestic jurisdiction in the doctrine of international law. A state’s domestic jurisdiction is usually understood to cover any matter falling within its sovereign activity in the sphere of internal or external policy. The idea of the existence of a sphere in which intervention is prohibited emerged quite early. The arbitration treaty between France and Great Britain of October 14, 1903 (UK–France Arbitration Treaty, 1903), contained provisions under which matters touching upon the vital interests, independence, and dignity of the contracting parties were not subject to arbitration. Such provisions governed the specific rights and duties of the parties and were not regarded as matters of jurisdiction. In 1919, the Covenant of the League of Nations used the term “domestic jurisdiction” for the first time, marking the emergence of a new approach to the principle of non-intervention.

The principle of non-intervention is enshrined in both universal instru-

ments and the acts of regional international organisations. Article 2(7) of the UN Charter protects matters essentially within the domestic jurisdiction of any state. The CSCE Helsinki Final Act of August 1, 1975, calls for non-intervention in internal affairs and obliges participating states not to intervene in internal or external affairs falling within another participating state's domestic jurisdiction (CSCE Helsinki Final Act, 1975). Article 2 of the Charter of the Arab League prohibits violation of "the regime of internal affairs" of each state. The Arab League Charter is the only instrument in which the term "regime of internal affairs" has been used (Charter of Arab League, 1945). For the most part, the concepts used are "domestic jurisdiction," "matters within domestic jurisdiction," and "internal and external affairs." Doctrine examines the question of domestic jurisdiction, while legal instruments prohibit intervention in matters falling within it. It must be determined whether there are grounds for the use of a particular term. A state's domestic jurisdiction is understood as the sphere within which the country may act at its own discretion.

The realisation of rights and freedoms is possible only under conditions of democracy and the rule of law. The 1992 Helsinki Document proclaims as common values human rights, the rights of national minorities, democracy, the rule of law, economic freedom, social justice, and a responsible attitude toward the environment (CSCE, 1992).

International treaties define the scope of domestic jurisdiction only in general terms. An exhaustive definition is simply impossible, given the multifaceted nature of state activity, the constantly changing scope of domestic jurisdiction—which depends directly on the development of international relations and international law—states' participation in bilateral and multilateral treaties, and their membership in international organisations. As a rule, one can determine whether a given matter falls within a particular state's jurisdiction only at a given moment. The content of domestic jurisdiction is revealed in greater detail through a range of actions that violate the principle of non-intervention.

Thus, the principle of non-intervention in the internal affairs of states is one of the fundamental principles of contemporary international law. It is closely connected with, and to a great extent determined by, other principles of international law, in particular the principle of the non-use of force or the threat of force, the principle of the sovereign equality of states, and the concept of state sovereignty. The existence of the principle of non-intervention exists only through states' mutual recognition of one another's independence. State sovereignty is an inalienable attribute of every state: it comes into being and disappears together with the state and cannot be limited (Dovgan, 2002, p. 34–35).

Specific Features of the Application of the Principle of Non-Intervention in the Domestic Sphere of States

A state's internal and external relations are interconnected processes. Inter-

nal relations can significantly affect a country's external standing, and vice versa. For example, economic success resulting from well-managed internal relations can increase a state's diplomatic influence and raise its standing in the international arena. Good external relations can attract international investment while simultaneously stimulating internal economic growth. As a result, the development of interaction between internal and external relations is important for governments seeking to strengthen their national interests (Saaida, 2023, p. 1–2).

First of all, a distinction must be drawn between a state's internal and external functions. The former covers the principal spheres of organising the country's "internal" life; the latter covers the international arena — relations with the "external" world, that is, with other states and with international and regional organisations. The system of internal functions is shaped by the fact that every contemporary state addresses numerous important economic, social, political, oversight, and protective tasks, and actively participates in protecting the environment within its own territory. The internal functions of states are addressed in the UN Charter. Chapter I of the UN Charter provides: "To achieve international co-operation in solving international problems of an economic, social, cultural, or humanitarian character, and in promoting and encouraging respect for human rights and for fundamental freedoms for all without distinction as to race, sex, language, or religion" (UN Charter, 1945). Within the country, the state primarily serves an economic function. The economic function is the most important, original direction of its activity, consisting of diverse influences on economic processes — from the organisation of property relations to the distribution of financial, credit, and other material resources accumulated at the disposal of the state and its territorial units. In carrying out the economic function, various methods of influencing economic processes are used; however, both the tasks associated with the economic function and the methods for addressing them fall within the state's competence only under conditions of market relations based on the diversity and equality of forms of ownership, the freedom and initiative of producers, sellers, and consumers, and competition among them. The practice of developed Western countries shows that, in countries with established market relations, the state carries out these economic functions fully.

Another central function of a democratic state is the social orientation of its activity, consisting of comprehensive support for and improvement of people's lives, which is its principal aim. This function is multifaceted and is expressed in the organisation of family, demographic, and migration relations; in improving people's health, education, and protection systems; in improving their living, working, and leisure conditions; and in the state's efforts to support the unemployed, persons with disabilities, the sick, pensioners, and other persons in acute need of state assistance. Not only the state's own social character but also the general standard of living of the people and their present and historical future depend on the attention given to this function and on its successful implementation.

No state, in influencing particular social relations, can fail to monitor how the policies it develops, the targeted programs it adopts, laws and regulations, and so forth, are being implemented; the state must therefore carry out an oversight function. The essence of the oversight function lies in the systematic and targeted monitoring of law enforcement processes.

Also important is the state's protective function, which consists of ensuring the inviolability of its borders and the integrity of its territory, maintaining constitutional order, law and order, and discipline, preventing and suppressing any deviant conduct, and taking measures of restoration and accountability on the grounds and in the manner established by law (Zinnurov, 2012).

In sum, states have the right to choose their political, economic, and social systems without external pressure. In the context of states' economic, political, and social systems, the principle of non-intervention means that every country independently determines its form of government, economic policy, and social arrangements, without external interference. Non-intervention in the economic sphere means that external forces do not impose economic reforms. Non-intervention in political systems underscores states' right to shape their government independently, without external pressure or attempts at regime change. Interference in elections, support for revolutions, or diplomatic pressure can limit this sovereignty. Non-intervention in social systems means every state determines its social arrangements, cultural policy, and protection of rights.

Specific Features of the Application of the Principle of Non-Intervention in States' Foreign Relations

External relations are a key component of a country's strategic framework, embodying goals aimed at protecting its interests and increasing its influence in the international arena. Foremost among these is the protection of national sovereignty — that is, the protection of the state's geographic integrity, political autonomy, and decision-making authority from foreign invasion or intervention. Alongside this, foreign policy seeks to advance economic interests by promoting trade ties, attracting foreign investment, and securing access to resources and markets in a globalised world.

In the international arena, a state performs two principal functions: the function of maintaining peace and the function of international cooperation. Article 1 of the UN Charter clearly sets out the functions of maintaining peace and of international cooperation. The peacekeeping function is intended to secure an international atmosphere in which, on the one hand, the national interests of members of the international community are respected and, on the other hand, armed conflicts among them are prevented, and wars and bloody conflicts are avoided.

In the 20th century, the world experienced two world wars and hundreds of regional military conflicts, in the course of which tens of millions of innocent people perished. The present state of international relations makes it possible to successfully combat this bloody scourge, which brings hardship and suffering to

entire peoples. Sovereign states, as is well known, maintain foreign affairs departments, embassies, and representative offices in other countries, where they hold consultations, conclude bilateral treaties and agreements, and promote mutual communication.

In the contemporary world, distinct centres of “power” have taken shape, such as the United States, Western Europe, the Russian Federation, China, and others. The tendency toward global hegemony has not disappeared, and it is evident in certain U.S. foreign-policy actions. As the most economically powerful state, the United States applies the norms and principles of international law exclusively in pursuit of its own interests, employing instruments such as human rights, humanitarian intervention, the responsibility to protect, and others. V. Leytman has concluded that an attempt has been made in international law to introduce a new norm — a right of external intervention in the internal affairs of a sovereign state where the international community finds that the government of that country is unable to discharge its duties properly and that this poses a threat to international security (Leytman, 2020, p. 467). Indeed, this is precisely the pretext that was used to justify the invasion of Libya.

These developments show that other states must further strengthen their exercise of the function of maintaining peace and protecting national interests. External relations encompass the economic, social, cultural, and other spheres of life of both each country and the international community as a whole. The international division of labour objectively determines economic cooperation, the necessity of specialisation and cooperation, the exchange of technologies, the development of credit and financial relations, and the coordination of trade exchanges. It finds expression in the creation of favourable conditions for external economic relations, the formation of joint ventures, mutual investment, loans, and coordinated rules for the import and export of goods, raw materials, and capital, as well as in banking payment procedures and taxation. To this end, bilateral and regional treaties, agreements, or conventions are concluded. Substantial work in the economic sphere is carried out by specialised UN agencies (for example, the World Trade Organisation, the Economic and Social Council, the International Monetary Fund, and the International Bank for Reconstruction and Development), as well as by regional organisations such as the European Union, which has eliminated all restrictions on the free movement of trade, entrepreneurs, capital, and services among its member states.

Cooperation in the social, cultural, and scientific and technological spheres takes place through the mutual training of students, postgraduate students, and interns; the exchange of information; the sharing of achievements in the arts, music, and stage culture; the sending of professionals in science, education, health-care, and culture; the organisation of exhibitions, festivals, and symposia; and the provision of humanitarian assistance. This occurs both based on intergovernmental agreements and through numerous international organisations — the IAEA, the

IOC, and others. Of no small importance, too, are contacts among businesspeople, scientists, cultural figures, and workers in education and healthcare, supported by all democratic states.

The effective pursuit of a state's external relations goals is inextricably linked to its internal relations and dynamics. A stable, well-governed nation is more likely to command trust and influence in its diplomatic dealings. Conversely, internal problems and political instability can limit a state's capacity to pursue its external relations goals effectively.

A state's external relations initiatives are intertwined with its internal relations, and vice versa. These spheres of policy must be coherent with one another to ensure a comprehensive and successful strategy for securing national interests in an increasingly interconnected world (Saaïda, 2023, p. 3–4). Internal affairs function as a synonym for matters within domestic jurisdiction and, accordingly, are not a territorial concept. Accordingly, the term “internal affairs” may serve as a synonym for the concept of matters within domestic jurisdiction, or of internal and external affairs generally, without carrying any distinguishing feature of its own. At the same time, the distinction between the categories of internal and external affairs appears justified, since a state's powers differ in these two spheres. The principle of non-intervention, accordingly, applies to both internal and external affairs.

Thus, external affairs are those areas governed by the general rules of international law, whether treaty-based or customary. The subject matter of bilateral treaties is excluded from the domestic jurisdiction of the states party to them only for the duration of the treaty. States are prohibited from undertaking actions that endanger international peace and security. Matters of concern to the entire international community likewise fall outside the sphere of domestic jurisdiction. It is impossible to draw clear boundaries around domestic jurisdiction. Domestic jurisdiction does not extend to spheres governed by the general rules of international law or affecting the international community as a whole. Internal and external affairs constitute the content of domestic jurisdiction. Its scope cannot be fixed, since it changes together with the development of international relations and differs from state to state.

Conclusion

In summary, the principle of non-intervention in the internal affairs of states remains one of the cornerstones of international law. However, under the conditions of contemporary globalisation and multifaceted challenges, it now requires reinterpretation and clearer delimitation of its boundaries. The principle of non-intervention has retained its central position in the international legal system, yet the field of its practical application has become considerably more complex. The realities of the contemporary world — including global security risks, information warfare, and the growing emphasis on the protection of human rights — compel us not to regard this principle as an inviolable dogma.

At the same time, some states use the principle of non-intervention as a pretext to keep their internal problems out of the international community's attention. In such situations, a serious question arises: should the international community remain a "silent observer," or are there situations in which intervention is justified for the sake of protecting universal values?

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ANALYTICAL ASSESSMENT OF THE CONTEMPORARY SECURITY VISION IN THE SOUTH CAUCASUS REGION

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Abstract

This article examines the evolving geopolitical and security dynamics of the South Caucasus within the context of contemporary regional transformations and the intensification of competition among regional and extra-regional actors. The study analyses the strategic significance of the South Caucasus as a communicative and geopolitical crossroads linking Europe, the Middle East, and Asia. It pays particular attention to the shifting balance of power following the launch of the “Trump Route for International Peace and Prosperity” (TRIPP) project and the broader consequences of the Russo-Ukrainian war and the escalating conflict surrounding Iran. The article explores the security interests and foreign policy priorities of regional powers—namely Russia, Turkey, and Iran—as well as the strategic approaches of extra-regional actors such as the United States, the European Union, China, and India. It also examines contemporary security challenges affecting Armenia, Azerbaijan, and Georgia, including unresolved conflicts, communication projects, military-political alliances, and shifting regional security complexes. The research concludes that the South Caucasus is gradually becoming a strategic arena of multipolar competition, where communication routes, geopolitical sovereignty, and the regional balance of power take on decisive importance. The activation of extra-regional actors creates both new opportunities and new security risks for the states of the South Caucasus.

Keywords: Region, foreign policy, actor, power centre, international organisation, state, conflict, peace, stability, unity.

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Համառոտագիր

Սույն հոդվածը ուսումնասիրում է Հարավային Կովկասի զարգացող աշխարհաքաղաքական և անվտանգային դինամիկան՝ ժամանակակից տարածաշրջանային վերափոխումների և տարածաշրջանային ու արտատարածաշրջանային դերակատարների միջև մրցակցության սրման համատեքստում: Ուսումնասիրությունը վերլուծում է Հարավային Կովկասի ռազմավարական նշանակությունը՝ որպես հաղորդակցական և աշխարհաքաղաքական խաչմերուկ, որը կապում է Եվրոպան, Մերձավոր Արևելքը և Ասիան: Հատուկ ուշադրություն է դարձվում «Թրամփի միջազգային խաղաղության և բարգավաճման երթուղի» (TRIPP) նախագծի մեկնարկից հետո ուժերի փոփոխվող հավասարակշռությանը և ռուս-ուկրաինական պատերազմի ու Իրանի շուրջ սրվող հակամարտության ավելի լայն հետևանքներին: Հոդվածում ուսումնասիրվում են տարածաշրջանային ուժերի՝ մասնավորապես Ռուսաստանի, Թուրքիայի և Իրանի անվտանգության շահերն ու արտաքին քաղաքականության առաջնահերթությունները, ինչպես նաև արտատարածաշրջանային դերակատարների՝ Միացյալ Նահանգների, Եվրոպական Միության, Չինաստանի և Հնդկաստանի ռազմավարական մոտեցումները: Ավելին, ուսումնասիրվում են ժամանակակից անվտանգային մարտահրավերները, որոնք ազդում են Հայաստանի, Ադրբեյջանի և Վրաստանի վրա, այդ թվում՝ չկարգավորված հակամարտությունները, հաղորդակցական նախագծերը, ռազմաքաղաքական դաշինքները և տարածաշրջանային անվտանգության փոփոխվող համակարգերը: Հետազոտությունը եզրակացնում է, որ Հարավային Կովկասը աստիճանաբար վերածվում է բազմաբևեռ մրցակցության ռազմավարական հարթակի, որտեղ հաղորդակցական երթուղիները, աշխարհաքաղաքական ինքնիշխանությունը և տարածաշրջանային ուժերի հավասարակշռությունը ձեռք են բերում վճռորոշ նշանակություն: Տարածաշրջանից դուրս գործող դերակատարների ակտիվացումը Հարավային Կովկասի պետությունների համար ստեղծում է ինչպես նոր հնարավորություններ, այնպես էլ նոր անվտանգության ռիսկեր:

Բանալի բառեր՝ տարածաշրջան, արտաքին քաղաքականություն, դերակատար, ուժային կենտրոն, միջազգային կազմակերպություն, պետություն, հակամարտություն, խաղաղություն, կայունություն,

միասնություն:

Introduction

From a geospatial perspective, the South Caucasus is practically divided into several local sub-regions, which conditions the interdependence of the region's political entities within the framework of communicative relations. A vital characteristic of the region is its distinct communicative profile, as it represents a highly accessible communicative opportunity. In this context, it becomes evident that to ensure effective control over the region, it is imperative to control the so-called “Great Cross” communications (Kocharyan, 2012, p. 317).

As such, under the new regional conditions established by the “Trump Route for International Peace and Prosperity” (TRIPP) project—jointly announced on August 8, 2025, by the Prime Minister of the Republic of Armenia, Nikol Pashinyan, U.S. President Donald Trump, and the President of Azerbaijan, Ilham Aliyev—new opportunities for a balance of power emerged in the South Caucasus (Staff of the Prime Minister of the Republic of Armenia, 2025). This has been accompanied by significant shifts in the roles of key regional and extra-regional power centres in communication and connectivity.

Regional and extra-regional “power centres” perceive the South Caucasus as a distinct security vector through varying lenses. Conflicts currently unfolding in the Middle East, Eastern Europe, and Central and South Asia—driven by global political processes—pose new security threats to the maintenance of the security equilibrium in the South Caucasus. The burgeoning influence of hybrid threats from the Middle Eastern region is inevitably extending into the South Caucasus. Within this context, significant security risks are emerging concerning the long-term preservation of geopolitical sovereignty for the three South Caucasian states. Furthermore, in view of their respective foreign policy priorities, each state conceptualises the South Caucasus within the framework of different security complexes.

The Russo-Ukrainian war, ongoing since 2022, as well as the large-scale U.S.–Israeli operations surrounding Iran that commenced on February 28, 2026, exert a profound impact on the geopolitical situation of both the European and South Caucasian regions. Situated within a zone of strategic friction between Russia and the West, the South Caucasus is becoming one of the primary arenas for political, economic, and energy interests under these new realities. While European Union and American policies in the South Caucasus were previously centred on democratic reforms and economic cooperation, current engagement of extra-regional actors is taking on an increasingly strategic character.

Consequently, competition in the South Caucasus has never ceased; however, in recent years, it has taken on a more radical character, driven by fundamental shifts within and around the region. The objective of this research article is to examine the interrelations between extra-regional actors and the countries of the South Caucasus, and to analyse the observed characteristics of security policy and

predictable developments within the process of future political reconfiguration.

Theoretical and Methodological Bases

The theoretical foundation of this study is grounded in geopolitical theory, regional security complex theory, and the concept of multipolarity in international relations. The South Caucasus is examined as a strategic geopolitical crossroads where regional and extra-regional actors compete for influence over communication routes, political processes, and security mechanisms. The study particularly relies on Barry Buzan and Ole Wæver's Regional Security Complex Theory, according to which geographically proximate states develop interdependent security relations that shape regional dynamics.

Methodology and Methods

The research is based on qualitative methodology and utilises a combination of comparative, historical, geopolitical, and content analysis methods. The comparative method enables the examination of similarities and differences in the foreign policy priorities and security strategies of regional and extra-regional actors operating in the South Caucasus.

Security Interests of Regional Actors in the South Caucasus

Following the intensification of West–Russia antagonisms, the regional “power centres” of the South Caucasus—namely the Russian Federation, Turkey, and Iran—regard the area as a region falling within the domain of their vital interests. Moreover, since the onset of the Russo–Ukrainian war, the significance of their South Caucasian agendas for strategic cooperation has increased further. Since the beginning of the Russo–Ukrainian conflict, the primary actors have secured a series of agreements of strategic importance. These include, specifically:

- The alignment of positions among the Russian Federation, Turkey, and Iran regarding the Syrian conflict within the framework of the Astana format in November 2022;
- The signing of the Russia–Iran energy sector treaty;
- Cooperation on the establishment of the “North–South” International Transport Corridor (INSTC) involving Russia, Iran, and Azerbaijan;
- The conclusion of the Russia–Turkey grain export agreement;
- The agreement on the development of transit transport between Iran and Turkey.

In this context, the trends toward deepening cooperation among regional “power centres” are naturally reflected in the South Caucasus. Consequently, a primary priority—particularly for the Russian Federation and Iran—is the containment of the growing influence of extra-regional power centres within the South Caucasus region.

To maintain its influence in the South Caucasus and preserve its status as a

distinct pole within the emerging multipolar world order, the Russian Federation (RF) is attempting to establish new formats of geopolitical cooperation. Because it perceives a scarcity of geopolitical influence, the RF has begun to prioritise deepening of cooperation with states that demonstrate “strategic autonomy” within the multipolar system. Strategic cooperation with Turkey and Iran, as well as the opportunities to access Persian Gulf ports via the “North–South” International Transport Corridor, are being re-evaluated with renewed significance for the RF.

To remain an independent pole in the developing multipolar world order, the RF must seek new vectors for expanding its influence, where it can be regarded as the primary actor in the formation of a given security complex. If forced to choose between the East and the West, the RF will be unable to function as the primary guarantor of regional security. Situated at the crossroads of Europe and Asia, the RF has historically occupied the intersection of two socio-cultural archetypes: the European, where individual-centricity, freedom, and individual rights predominate; and the Asian (or socio-centric), where the rights of society, the collective, and the state take precedence (Baranov, 2016). Specifically, a European choice for the RF would necessitate membership in European security organisations—a prospect that is becoming increasingly unrealistic within the context of strained West–Russia relations.

Furthermore, as it seeks to expand its influence in the East, the RF faces the growing role of the People’s Republic of China (PRC). The deepening of Russia–China relations carries significant long-term risks of the PRC’s potential “absorption” of the Russian economy. Consequently, to maintain its strategic autonomy globally, the RF seeks to develop relations with states of the “Global South,” while regionally it attempts to preserve its influence through the Eurasianist agenda.

Eurasianism is an ideology rooted in the intermediate geostrategic position the RF occupies between Europe and Asia, and in its “Eurasian choice”—characterised by cultural distinctiveness resulting from the fusion of Slavic and Turkic–Islamic peoples. By avoiding a “peripheral” geopolitical status in both Europe and Asia and by positioning itself in opposition to Atlanticism, the RF views Eurasianism as a “third way.” While the West often accuses the RF of rebranding Marxist–Leninist ideologies and modernising “Sovietism” to pursue a new expansionist policy, the RF primarily promotes the ideology of Eurasianism to provide an ideological foundation for post-Soviet Russia’s existing political order of post-Soviet Russia.

Consequently, the South Caucasus, emerging as a geostrategic region within the multipolar world order, is assuming heightened importance for the Russian Federation. By maintaining influence in the South Caucasus, the RF preserves its land connectivity with Turkey, Iran, and the ports of the Persian Gulf ports; deepening of cooperation with these entities is critical to maintaining Russia’s strategic autonomy. Accordingly, the primary objective of Russia’s South Caucasian

policy is not merely the deepening of bilateral relations with individual states, but the preservation of overarching regional influence.

The foundation of Russia's South Caucasian policy lies in ensuring the security of its Caucasian borders. Following the Syrian crisis and the spread of Islamic extremism in the Middle East, the role of Azerbaijan—specifically its political stability—has significantly increased for the RF. Azerbaijan is viewed as a buffer state that prevents the penetration of radicalism into Russia's Caucasian borders (namely Dagestan and Chechnya). Consequently, the strategy behind the deployment of Russian bases in the South Caucasus is also rooted in preventing the spillover of instability into the southern regions of the RF.

In analysing Iran's South Caucasian policy, it is essential to examine its foreign policy priorities. Iran lacks a formal conceptual document that explicitly outlines all its foreign policy principles. Instead, Iranian foreign policy is guided by Articles 152–155 of the Constitution. According to these provisions, Iran's foreign policy is based on the rejection of all forms of domination, non-alignment with the hegemonic policies of superpowers, and the establishment of a policy of Islamic solidarity (The Constitution of the Islamic Republic of Iran, 1989).

Iran's South Caucasian policy also derives from the directions outlined in the Iranian Constitution; however, its policy of establishing Islamic solidarity in the South Caucasus and Central Asia—unlike its Middle Eastern policy—has distinct characteristics. The Iranian Ministry of Foreign Affairs has never presented a strategic document on its foreign policy specifically for the South Caucasian direction; therefore, these principles can be assessed of analysing the political positions of Iranian officials and the state's practical conduct of the state.

Iran's South Caucasian policy is based on the fundamental principles of the state's "neighbourhood policy," which aims to limit, as much as possible, the expansion of hostile states' influence in its vicinity and the emergence of new conflicts. Attaching great importance to the establishment of regional security and peace, Iran considers the South Caucasus part of its historical, cultural, and civilizational legacy. Iran regards the resolution of South Caucasian conflicts through the collective responsibility of regional states as a primary priority, based on the principle of excluding the presence of foreign forces (Staff of the Prime Minister of the Republic of Armenia, 2022).

The issues concerning the Azeris residing in northern Iran and the local Armenian minority exert a significant influence on Iran's South Caucasian policy. The Iranian–Armenian community enjoys various privileges in religious, educational, and domestic political processes. In contrast, Azeris in northern Iran are not only not classified as a minority but also periodically face political contradictions with local authorities. Hostile states have repeatedly attempted to exploit issues related to the rights of Iranian Azeris to incite domestic political tensions within Iran.

Consequently, the activism of Iran's South Caucasian policy is also conditioned by the degree of domestic political stability; providing unconditional

support to one of the parties in Armenian–Azerbaijani relations could pose risks to the preservation of Iran’s domestic political solidarity. In other words, while Iran’s foreign policy in the Middle East is largely predicated on Islamic solidarity—specifically the protection of the rights of Shia Muslims—in the South Caucasus, Iran does not provide unconditional support to Shia Azerbaijan. Instead, it adopts a balanced perspective and practice in its cooperation with regional states.

In the context of contemporary regional developments, Iran’s primary concern is ensuring that the process of unblocking regional communications does not turn the Armenian–Iranian border into an extraterritorial corridor, and that Iran’s northern border does not fall entirely under Turkish–Azerbaijani control. From a geopolitical standpoint, unblocking of regional communication routes benefits Iran, particularly of restoring the Yeraskh–Sadarak section; this would allow Iran to establish rail connectivity to both Armenia’s and Georgia’s maritime ports.

The evaluation of Turkey’s foreign policy priorities is based on a regional division. Turkey does not officially publish formal documents regarding its foreign policy concepts; therefore, its priorities can be assessed through the publications of the Turkish Ministry of Foreign Affairs. Unlike the Russian Federation and Iran, Turkey categorises its foreign policy priorities by region. Accordingly, the European region, the Balkans, the South Caucasus, the Middle East, North Africa, and Central Asia, among others, are considered primary.

According to official publications, Turkey’s South Caucasian policy is predicated on supporting the independence and sovereignty of regional states and their efforts toward integration into Euro–Atlantic structures (Republic of Türkiye, Ministry of Foreign Affairs, 2023). As noted, while the RF and Iran view the South Caucasian region as a single entity—grounding their cooperation with regional states of preserving holistic influence—Turkey bases its South Caucasian policy less on expanding influence across the region and more on deepening of separate bilateral relations with regional states.

A clear illustration of this is Turkey’s vested interest in deepening relations with Azerbaijan and Georgia, a commitment it does not demonstrate in the normalisation of Armenian–Turkish relations. Turkey’s caution regarding the normalisation of diplomatic ties with Armenia and its consideration of the “Azerbaijani factor” does not, in reality, strengthen Turkey’s position in terms of increased regional engagement. On the contrary, it underscores that Turkey remains far from achieving the kind of dominant role the Russian Federation maintained for a significant period.

Turkey’s South Caucasian policy is anchored in its economic, political, and military relations with Azerbaijan and Georgia. The Turkey–Georgia–Azerbaijan regional trilateral partnership, initially rooted in economics, developed a robust military–political component in subsequent years. This demonstrates that, after a century-long hiatus, Turkey is formally establishing a military presence in the

South Caucasus, fundamentally altering the established regional balance of power.

Following the 44-day war in 2020, the alliance between Turkey and Azerbaijan was further consolidated; Turkey provided unconditional guarantees regarding the preservation of Azerbaijan's territorial integrity. Consequently, the existing legal-contractual framework between the two nations was substantially augmented. A milestone in this direction was the signing of the "Shusha Declaration on Allied Relations between the Republic of Azerbaijan and the Republic of Turkey" on June 15, 2021, by President Recep Tayyip Erdoğan and President Ilham Aliyev (Sevencan & Zorlu, 2021). This declaration includes clauses on bilateral military, economic, and other sectoral cooperation, addresses the "Zangezur Corridor," and specifically References the 1921 Treaty of Kars.

In contrast to the regional "power centres," the West views the South Caucasus as part of the "Eastern European-Black Sea" security complex. This is evidenced by the fact that the European Union (EU) cooperates with South Caucasian states within the framework of the Eastern Partnership (EaP) project. The project's primary objective of this project is to support economic and political reforms in the states of the EU's Eastern Neighbourhood, emphasising the priority of alignment with EU rules and standards. (European External Action Service, 2022)

As regions, Eastern Europe and the South Caucasus serve as theatres for the Russia-NATO strategic competition. Furthermore, various analyses suggest that the primary arena for U.S.-Russia competition lies within the states of the EU's Eastern Partnership; with the onset of the Russo-Ukrainian war, this competition is poised to intensify. Renewed tensions in West-Russia relations will inevitably affect the security systems of the states in the South Caucasus.

For the West, the geostrategic significance of the South Caucasus's geostrategic significance is further amplified by its proximity to Iran. Contradictions arising from the Iranian nuclear deal and Iran's aspirations to expand its Middle Eastern influence increase the importance of the South Caucasus in the efforts to contain Iran. Accordingly, Iran's primary adversaries—Israel and the United States—are further deepening their cooperation with South Caucasian states, thereby attempting to impose new constraints on the expansion of Iranian influence in the region.

The military conflict surrounding Iran, ongoing since February 28, 2026, is gradually evolving into a broader geopolitical process, the consequences of which will be felt not only in the Middle East but also in adjacent regions. Under these conditions, the South Caucasus inevitably feels the impact of the conflict. Any major shift in the region can reverberate through the security environment, especially given that the balance of power remains sensitive and volatile. Although the states of the region attempt to maintain neutrality and avoid involvement in the hostilities, geographical and political factors prevent complete isolation from the unfolding processes. In recent days, several incidents have been reported involving the downing or crashing of Unmanned Aerial Vehicles (UAVs) and missiles

within border areas (Jégo, 2026). Such occurrences heighten the risk of the conflict spilling over into the South Caucasian theatre.

The United States, lacking vital security interests in the South Caucasus, predicates its policy not on the principle of providing military security guarantees to individual states, but rather on promoting the sovereign agency (subjectivity), institutional development, and economic, social, and energy independence of these nations. The security vacuum created in the South Caucasus—particularly under the conditions of a weakening Russian factor—and the prospects of an increasing Iranian role do not align with U.S. South Caucasian strategy. Therefore, as a counterweight to deepening Russia–Turkey–Iran cooperation, the foundation of U.S. policy in the South Caucasus will focus on facilitating, as much as possible, cooperation between regional states and Western institutions.

Extra-regional “power centres” in the South Caucasus—specifically the United States, the European Union, China, and India—do not possess vital security interests within the region. The expansion of their influence in the South Caucasus serves to balance the influence of regional “power centres” to some extent. It hinders attempts to adapt existing Middle Eastern conflict-management formats to this region.

With the activation of the policies of these extra-regional “power centres” in the South Caucasus, the Republic of Armenia gains new opportunities for manoeuvrability and the preservation of its geopolitical sovereignty (subjectivity). This, in turn, contributes to the processes of restoring the balance of power and reconstructing the security complex in the South Caucasus. Consequently, this creates a need to re-evaluate shifts in the policies of extra-regional “power centres” in the South Caucasus.

Current Security Challenges and Characteristics Surrounding the States of the South Caucasus Region

At the level of individual countries, the Armenian–Azerbaijani conflict persists; beyond a territorial dispute, it also has a significant ethnic component. Furthermore, regarding security developments in the region, Turkish–Azerbaijani security and military cooperation cannot be viewed merely as a counterweight to the previously manifested—but currently somewhat frozen—Armenian–Russian cooperation.

In regional processes, Turkey unequivocally and overtly aligns itself with Azerbaijan and positions itself in opposition to Armenia. Conversely, the Russian Federation, in addition to its strategic allied relations with Armenia, maintains multifaceted and close relations with both Azerbaijan and Turkey that likewise bear the character of a strategic partnership. Moreover, Russia’s political, military, economic, and other sectoral relations with these two nations continue to develop and show a clear trend toward further intensification.

In light of this, on August 8, 2025, in Washington, D.C., high-level representatives from Armenia and Azerbaijan initiated the Washington Trilateral

Agreement (RA Foreign Ministry, 2025). According to the agreement, the parties concurred to move toward peace and the establishment of interstate relations; they recognised each other's territorial integrity, agreed to continue and finalise the process of border delimitation and demarcation, and pledged non-interference in one another's internal affairs.

As previously noted, pursuant to another document, the Republic of Armenia is commencing work with the United States and mutually determined third parties to develop the framework for the “Trump Route for International Peace and Prosperity” (TRIPP) connectivity project within the territory of the Republic of Armenia (Staff of the Prime Minister of the Republic of Armenia, 2025).

The core provisions of this agreement and its accompanying framework include mutual recognition of sovereignty based on 1991 borders and the dissolution of the OSCE Minsk Group as part of the normalisation process. Furthermore, it establishes the TRIPP project as a strategic transit route through southern Armenia, connecting mainland Azerbaijan to Nakhchivan. Under this framework, the United States is granted exclusive rights to develop and manage the corridor for a period of 99 years, while all parties commit to security guarantees, specifically refraining from the use or threat of force.

In addition to these initial documents, the Armenian and Azerbaijani parties reached an agreement in April 2024 of delimiting the state border. According to the official communiqué, a meeting of the Commission on State Border Delimitation and Border Security between the Republic of Armenia and the Republic of Azerbaijan, and the State Commission on the Delimitation of the State Border between the Republic of Azerbaijan and the Republic of Armenia, was held on April 19, 2024. The session was chaired by the Deputy Prime Minister of Armenia, Mher Grigoryan, and the Deputy Prime Minister of Azerbaijan, Shahin Mustafayev (RA Foreign Ministry, 2024). As a result, it was decided to delimit specific sections of the borderline based on legally substantiated documents that existed at the time of the collapse of the Soviet Union, to align the boundary with the former inter-republican borders.

Within the context of the South Caucasian security vision, it must be noted that significant issues persist regarding Georgia's relations with Russia (Dickinson, 2021). On August 8, 2008, Russian forces invaded Georgia. Although the active conflict concluded within a few days, the consequences of the Russo-Georgian war continue to resonate years later, shaping the broader geopolitical environment. The August 2008 war significantly transformed geopolitical approaches in the South Caucasus. After the conflict, Russia recognised South Ossetia and Abkhazia as independent states, heightened tensions between Georgia and Russia, and challenged international norms on territorial integrity.

More recently, Georgia has experienced strained relations with the EU. Nevertheless, the EU remains effectively the largest provider of financial assistance to Georgia. From 2021 to 2024, the EU allocated €340 million in funding to Georgia.

Priority sectors include the economy, institutions, the rule of law, security, environmental and climate resilience, digital transformation, gender equality, and inclusive society.

The European Parliament has consistently served as a firm advocate for the European aspirations of the Georgian people. It emphasised the importance of implementing the relevant steps defined by the recommendation of November 8, 2023 (The Delegation of the European Union to Georgia, 2023), including measures regarding the fight against disinformation, alignment with the Common Foreign and Security Policy, improvement of parliamentary oversight, and efforts against political polarisation, de-oligarchization, and corruption. Additionally, on June 9, 2022 (European Parliament, 2022), the European Parliament adopted a resolution concerning the violation of media freedom and the safety of journalists in Georgia. In this document, members condemned the “state capture” by the “Georgian Dream” party and its founder, the oligarch Bidzina Ivanishvili. They expressed regret over the significant deterioration of the media environment in the country.

In the context of assessing the contemporary security vision of the South Caucasus, it must be emphasised that the military clashes around Iran are gradually beginning to affect the region’s security system of the South Caucasus as well. At the same time, the three states of the region—Armenia, Azerbaijan, and Georgia—generally attempt to pursue a cautious policy, avoiding overt positions. Their primary objective is to maintain regional stability and prevent the conflict between major powers from spilling over into the intra-regional domain (Barseghyan et al., 2026).

For Armenia, developments in Iran are particularly significant. Iran is not only a vital economic and transport partner but also one of the few neighbouring states with which Armenia maintains an open border. Consequently, prolonged instability in Iran could directly affect Armenia’s economic and security environment. These circumstances explain why Armenia currently pursues a policy of maximum balance and caution, attempting to preserve regional stability while avoiding participation in the escalation of the conflict.

Results

The research demonstrates that the South Caucasus is becoming an increasingly important arena of geopolitical competition among regional and extra-regional actors. Russia, Turkey, and Iran continue to view the region as a zone of vital strategic interests, while the United States, the European Union, China, and India are expanding their political and economic engagement.

The study reveals that regional communication projects, particularly the TRIPP initiative and the “North-South” corridor, are significantly reshaping the regional balance of power. At the same time, unresolved conflicts, the Russo-Ukrainian war, and the escalation surrounding Iran continue to generate new security risks for Armenia, Azerbaijan, and Georgia.

The findings further indicate that the growing involvement of extra-regional

actors creates additional opportunities to preserve the geopolitical sovereignty and strategic manoeuvrability of the South Caucasian states, especially Armenia, while also increasing regional competition and instability.

Conclusions

In the contemporary era, the South Caucasus faces the threat of expanding neo-imperialist influence from both regional and extra-regional “power centres.” Amidst the Russo-Ukrainian war, the increasing importance of regional connectivity, and the deepening antagonisms and military hostilities between Russia-West and Iran-West, the security risks have escalated significantly. The South Caucasus faces a profound risk of becoming a new “object” of military-political competition between these power centres, with potentially irreversible consequences for the preservation of the Republic of Armenia’s sovereignty.

Therefore, the Republic of Armenia must, to the extent possible, refrain from actions that deepen competition between regional power centres—which have vital interests in the area—and extra-regional power centres, whose interests are of a secondary.

The initialling of the document on August 8, 2025, represented a significant milestone not only in the normalisation process of Armenian-Azerbaijani relations but also in guaranteeing peace for the entire region. However, it is simultaneously necessary to recognise that in the event of a change in the U.S. administration, the initial agreements might not be further advanced. Armenia and the United States also continue to develop their relations based on treaties signed during the previous U.S. administration. Yet, the inverse of this issue is also observable: specifically, the policies pursued by the current and previous U.S. administrations regarding Ukraine differ profoundly.

Within the vision of regional security, it is emphasised that Georgia and Azerbaijan have not met their expectations through GUAM, nor has Armenia through the CSTO (Collective Security Treaty Organisation); thus, they find themselves in a certain phase of “exploration.” In this context, NATO’s activity in the region is logical. Furthermore, NATO’s presence may serve to balance Armenia-CSTO relations as well as Azerbaijan-Russia relations. Armenia’s decision not to withdraw from the CSTO is also conditioned by the fact that, by remaining within the organisation, Armenia retains the power to veto any decision.

In light of these developments, the emergence of a localised regional security structure—of which the region’s states coexist within a single security framework—cannot be ruled out. However, prior to achieving such an outcome, the region faces formidable challenges. The South Caucasus remains a primary zone of interest for various power centres, and each actor seeks to secure a dominant position of influence within the region.

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Համարի թողարկման պատասխանատու
և գլխավոր խմբագիր՝ ՆԱԻՐԱ ՀԱԿՈԲՅԱՆ

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