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Contact information

Website: https://sconferences.com

E-mail: info@sconferences.com

Content

Astronomy

R. T. Mammadov, M. M. Tahirov, L. R. Mammadova, M. B. Alizade
PROCESSING OF CCD SPECTRA USING DECH SOFTWARE 4

Chemical sciences

Kamala Aliyeva, Amina Allahverdiyeva, Aytan Sultanova, Qunel Qanbarova
DEVELOPMENT OF RECYCLING TECHNOLOGIES: FROM WASTE TO THE RESOURCE ECONOMY 7

Economic sciences

Ainash Mussabekova, Utekul K.
MANAGEMENT OF INTERCULTURAL COMMUNICATION IN LANGUAGE EDUCATION 10

Wang Xiangqing, Asanova Daniya, Abinova Alfiya
DIGITAL HIGHER EDUCATION ECOSYSTEM: A STUDY OF MODELS IN CHINA AND KAZAKHSTAN 13

Akifa Akif Aghayarova, Ibrahimov Nusret Kamal
THE INTERRELATIONSHIP BETWEEN URBANIZATION AND DEMOGRAPHY IN THE REPUBLIC OF AZERBAIJAN 23

Dong Xuejie, Akparova Aigul Amanzholovna, Nurgissa Seilov
LOCALIZATION STRATEGIES OF FOREIGN UNIVERSITIES IN KAZAKHSTAN: EVIDENCE FROM ENGINEERING-TECHNICAL HIGHER EDUCATION 25

Eltun İbrahimov Yulat oglu, İbrahimov Umid Coshgun oglu
MAIN APPLICATION AREAS OF GREEN TECHNOLOGIES IN AZERBAIJAN 30

Eltun İbrahimov Yulat oglu, Huseynli Araz Huseyn oglu
ANALYSIS OF THE DIVERSIFICATION POTENTIAL IN THE NAKHCHIVAN AUTONOMOUS REPUBLIC 34

Karimli Aytaj Akif
PRIMARY HEALTH CARE IN AZERBAIJAN: CURRENT STATE, SYSTEMIC CHALLENGES, AND EVIDENCE-BASED PATHWAYS FOR REFORM 38

M. Khojimatov, Sh. Mamatov
EDUCATIONAL MIGRATION IN MODERN SOCIETY 43

Kalieva Zhanel Zhenisovna, Yenshina Victoria Alekseevna
COUNTRIES' DEPENDENCE ON IMPORTS OF RARE EARTH METALS FROM CHINA: PROBLEMS AND WAYS TO REDUCE 46

Historical sciences

Omarkanova A.O., Zimina M.N., Talkhigova M.L.
MOLDOVA AT THE HISTORICAL RIFT: FROM THE MULTIVECTORISM OF THE 1990s TO THE GEOPOLITICAL COST OF THE EUROPEAN CHOICE (1991–2025) 53

Mathematical sciences

Mazhit Zhamilya Batykkyzy, Rustemova Karashash Zhorabekovna, Abdimanapova Perizat Bakhytovna, Shinikulova Gulnur Nurbekovna
THE RELATIONSHIP BETWEEN MATHEMATICS AND LIGHT INDUSTRY 58

Mazhit Zhamilya Batykkyzy, Rustemova Karashash Zhorabekovna, Abdimanapova Perizat Bakhytovna, Shinikulova Gulnur Nurbekovna
THE ROLE OF PROBABILITY THEORY IN THE ANALYSIS OF PRODUCTION PROCESSES 63

Medical sciences

Arman Khozhayev, Dina Omarova, Alisher Sherniyazov, Daniyar Muratbekov, Yuriy Shulekin, Gulfiya Teleukhanova, Dauren Bekmuratov, Chingiz Mukhtarov, Raushan Sadykova, Akezhan Orynbek, Shahizat Sultanaliyev, Yerdos Baigaliyev, Didar Akhmetzhanov, Zhakhangir Kanatuly
LIP CANCER: THE COMPLEXITY OF THE PROBLEM 67

Mammezadeh Sevinc Ramazan
BOTULINUM TOXIN IN DENTISTRY: A SYSTEMATIC REVIEW OF CLINICAL APPLICATIONS, MECHANISMS, AND EVIDENCE-BASED EFFECTIVENESS 80

Pedagogical sciences

Kazhym Alima Sagyndykkyzy, Moldabayeva Karlygash Yergaziyevna 83
THE ROLE OF THE PRAKTIKA.AI APPLICATION IN ENGLISH LANGUAGE LEARNING

Amiralieva Alua Kairatkyzy 87
THEATER IN THE CLASSROOM: DEVELOPING SPEAKING SKILLS IN ENGLISH LESSONS

Aripbayeva Alua Rauankyzy 94
USING VR AND AR TO IMPROVE ORAL SPEAKING SKILLS AMONG B2-LEVEL STUDENTS

Nargis Batyrbayeva, Aisulu Kaldayakova 98
PHILOSOPHICAL ASPECTS OF DIGITALIZATION OF MODERN MUSIC EDUCATION

Rashidova Ayaulym Kuanyshkyzy, Shayakhmetova Dana Beksultanovna 104
IMPLEMENTING SEMANTIC READING STRATEGIES TO DEVELOP FOREIGN LANGUAGE TEXTUAL COMPETENCE IN HUMANITIES-ORIENTED SENIOR STUDENTS

Assem Duisenbay, Shyryn Adilkairovna 110
THE USE OF AI AND DIGITAL TECHNOLOGIES IN TEACHING FOREIGN LANGUAGES TO B2-LEVELED STUDENTS

Gulnaz Kuanysh, Zhauynshiyeva Zh.B. 115
FORMATION OF INTERCULTURAL COMPETENCE THROUGH CASE STUDY-BASED ROLE-PLAY IN EFL CONTEXTS

Kengeskanova Ayaulym, Qaptagay Gulbanu 120
QUANTITATIVE ANALYSIS OF SURVEY RESULTS ON THE EFFECTIVENESS OF EXPERIMENTAL METHODS IN TEACHING THE MECHANICS SECTION

Kuanyshbek Nurailym Galymzhankyzy 134
PSYCHOLINGUISTIC FOUNDATIONS OF DEVELOPING SPEAKING SKILLS IN TEACHING ENGLISH

Tojiakhmedova Maftuna Umarjon kizi 139
COMPARATIVE STUDY OF VYGOTSKIAN AND MONTESSORI METHODS IN THE DEVELOPMENT OF ORAL SPEECH IN PRESCHOOL CHILDREN

Miras Zhunisbekov 144
ATTITUDES OF ENGLISH LANGUAGE LEARNERS TOWARDS LANGUAGE MULTIMEDIA PROGRAMS

Serikkyzy Aruzhan 151
PEDAGOGICAL CONDITIONS FOR THE APPLICATION OF PROJECT-BASED TECHNOLOGIES AND THEIR EFFECTIVENESS IN THE HIGHER EDUCATION SYSTEM

Torekhanova Dana Zhomartqyzy 158
INTEGRATING UNIVERSAL DESIGN FOR LEARNING INTO ACCESSIBLE ONLINE FOREIGN LANGUAGE TEACHING IN HIGHER EDUCATION

Philological sciences

Ainash Mussabekova, Birzhan D., Meirambekova N. 166
THE ROLE OF ARTIFICIAL INTELLIGENCE IN THE DEVELOPMENT OF MODERN CIVILIZATION AND ITS IMPACT ON MANAGEMENT SYSTEMS

Political sciences

Tamila Protsenko 171
THE ROLE OF USER-GENERATED CONTENT IN SHAPING A POLITICIAN'S IMAGE IN MODERN MEDIA COMMUNICATIONS: THE CASE OF E. MACRON

Technical sciences

Anakhanim Mutallımova, Nihad Abbaszada 173
COMPARATIVE ANALYSIS OF METHODS FOR EVALUATING THE QUALITY OF JEWELRY

Elmin Nasibzade 178
FRACTAL ANALYSIS-BASED APPROACH FOR LEAK DETECTION AND FLOW ANOMALY MONITORING IN NATURAL GAS PIPELINE SYSTEMS

Aidar Nygmet 185
ADVANCED DEEP METRIC LEARNING AND MULTIMODAL ALIGNMENT FOR FINE-GRAINED FACE-TO-TEXT RETRIEVAL

N. N. Kadyrbayev, Zh. N. Orazbekov 188
DEVELOPMENT OF A SYSTEM FOR ANALYSIS AND VISUALIZATION OF FACTORS INFLUENCING LEARNING OUTCOMES BASED ON ARTIFICIAL INTELLIGENCE

Astronomy

PROCESSING OF CCD SPECTRA USING DECH SOFTWARE

R. T. Mammadov
Nakhchivan State University, Batabat Astrophysical Observatory
https://orcid.org/0000-0001-5879-1368
M. M. Tahirov
Nakhchivan State University, Batabat Astrophysical Observatory
L. R. Mammadova
Nakhchivan State University, Nakhchivan Technical College
https://orcid.org/0009-0003-8859-6274
M. B. Alizade
1st-year Physics student, Faculty of Physics and Mathematics, Nakhchivan State University

Abstract

The solution of modern astrophysical problems necessitates the use of high-resolution spectrographs and sensitive CCD receivers for the analysis of cosmic radiation. This article investigates modern software packages designed for processing astronomical observation materials and their areas of application. During the research, preference was given to the DECH software package, which is specifically used for processing the spectra of symbiotic and young stars. This software consists of DECH-95 and DECH-20 components, which allow for the processing of spectra in both matrix and vector formats. The paper provides a detailed description of the sequence for processing stellar spectra, including calibration stages involving the application of 'dark' and 'flat' frames.

Keywords: *CCD, symbiotic stars, spectrum, spectrograph.*

Introduction. *Among the various methods of analyzing radiation from space, photometric and spectral studies occupy a special place. The solution of modern astrophysical problems requires the equipment of telescopes with higher resolution spectrographs and high-sensitivity CCD light receivers.*

Since digital images are obtained with CCDs, it was necessary to create special programs to work with them. In modern times, there are powerful standard software packages accepted by astronomers for processing any astronomical observation materials. These programs are the software packages of the US system IRAF (Image Reduction and Analysis Facility) and the European system MIDAS (Munich Image Data Analysis System). These programs work in the UNIX operating system. The spectra of the symbiotic stars we studied (CH Cyg, AG Peg, AG Dra), young stars (more about these studies [1-11].) and bright stars in general are carried out using the DECH program package. It is possible to process classical spectra of any type with scales and even with a single arrangement using the DECH program [12].

Research method. *These programs are easy to master, they work in MS DOC and OS Windows operating systems. The DECH program consists of 2 parts – DECH-95 and DECH-20. Spectra processing is carried out in 2 stages:*

1. Conversion of frames from matrix format to vector format or extraction of spectra – using DECH 95.

2. Operation on vectors – determination of spectrophotometric parameters from spectra – using DECH 20 [12].

According to the requirements of the program, in the Echelle spectra obtained, the Echelle arrays should be oriented horizontally. In other words, the dispersion direction should be in the horizontal direction, and the cross dispersion should be in the vertical direction. The Echelle spectrum should have an increasing wavelength from top to bottom and from left to right. If this is not the case, the direction of the spectra should be changed. The sequence of processing spectra in Dech 95 is as follows:

1. Super dark is created by averaging the Dark images;
2. Super flat is created by averaging the Flat spectra;
3. ThAr or Sky comparison spectra are averaged;
4. Super dark is subtracted from the Object, Flat and Sky spectra;
5. A mask is created for one of the spectra (e.g. the Sky spectrum);
6. All spectra are extracted using the Dech 95 program, taking into account the scattered light. That is, they are converted from matrix format to vector format.

Thus, the spectrum is ready for the next processing stage. The next stage consists of making heliocentric corrections, determining the radial velocities, emission line intensities, absorption line depths, line half-widths and equivalent line widths by various methods according to spectral lines.

For the completeness of the observation material, at least 5 dark and flat spectra, at least 3 frames of ThAr and Sky hummingbird spectra, and at least 2 frames of the stellar spectrum should be taken.

Requirements for CCD frames for processing CCD spectra: *In order to process and process the frames, it is absolutely necessary to obtain a calibration (adjustment) set along with the spectra of the studied star:* ***Dark*** *or bias, flat-field, ThAr or sky [2, 4, 9] (Figure 1). All frames of spectra (Flat, ThAr, Sky and Dark) should be acquired at the same values of the CCD parameters. At least 3 frames should be acquired from ThAr, Sky frames, and it is better to acquire at least 8-10 frames from Flat and Dark frames.*

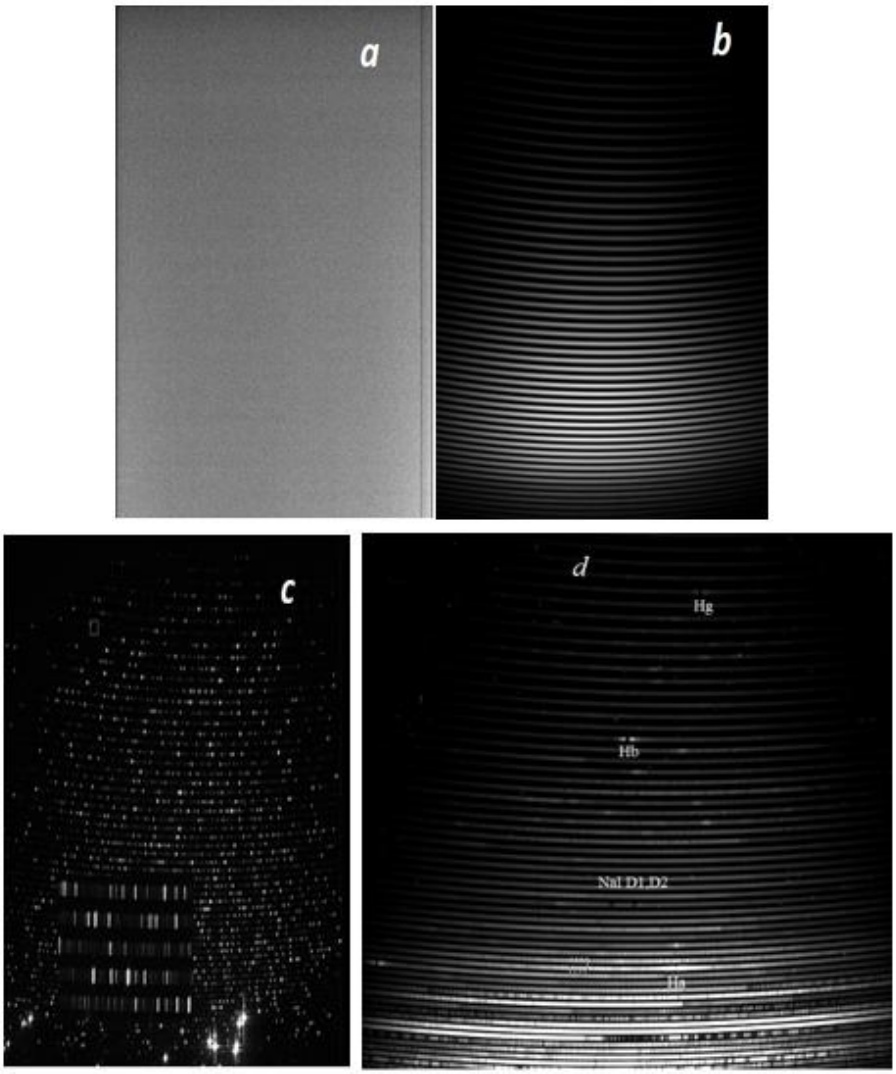

Figure 1. *Fragments of different types of images. Dark (a), flat (b), ThAr (c), CH Cyg (d).*

The CCD matrix is cooled to a temperature of -110 °C. At this temperature, the level of thermal noise signals is very low. At such temperatures, the thermal electrons of the CCD almost disappear and the dark-dark signals are indistinguishable from the bias signals even at high exposures. Therefore, there is no need to waste time and acquire additional frames.

Flat *- is a flat field spectrum. A flat field spectrum consists of a continuous smooth spectrum. A flat field spectrum is obtained to eliminate the non-uniformity of the sensitivity of the pixels of the matrix and fringing (light and dark stripes in the CCD spectrum).*

ThAr *or* ***Sky*** *comparison spectra are used to convert the spectrum of an object from the pixel scale to the wavelength scale. Note that all observation material is acquired in the coordinate system of the CCD. We need to convert to the wavelength scale to process the spectra. For this purpose, a ThAr lamp or a Sky (light scattered by the Sun in the atmosphere) spectrum is used. Because in these spectra the wavelength of each line is known.*

Conclusion. *The conducted research demonstrates that the DECH software package is a flexible and effective tool for processing astronomical spectra. To ensure the accuracy of observational materials, obtaining a specified number of calibration frames, such as 'Dark', 'Flat', and 'ThAr', with consistent parameters plays a crucial role. The conversion of spectra from matrix format to vector format enables the precise calculation of stellar radial velocities and spectral line parameters in subsequent stages. Consequently, the proposed methodology ensures high scientific reliability in the spectral analysis of both symbiotic and other bright stars.*

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Chemical sciences

DEVELOPMENT OF RECYCLING TECHNOLOGIES: FROM THE OF WASTE TO THE RESOURCE ECONOMY

Kamala Aliyeva
Amina Allahverdiyeva
Aytan Sultanova
Qunel Qanbarova
Baku State University
Baku, Azerbaijan

Abstract

This paper analyzes modern innovative waste recycling solutions as a key element in the transition to a circular economy and sustainable development. The study's relevance stems from the constant growth of waste volumes, their negative impact on the environment, and the need to implement effective methods for their reuse.

Particular attention is given to plastic and organic waste recycling technologies and the potential for their implementation on an industrial scale. Approaches to converting waste into secondary resources and methods for reducing environmental impacts are discussed. Based on an analysis of modern technological solutions and scientific developments, the key advantages and existing challenges of innovative recycling methods are highlighted. The conclusion emphasizes the importance of actively implementing advanced technologies to achieve environmental goals and foster a sustainable development model.

Keywords: *Waste recycling, circular economy, innovative technologies, biorecycling, chemical plastic recycling, mechanical recycling, secondary resources, environmental sustainability, microplastics, biogas and compost.*

1. Introduction

Every year, the volume of waste generated by human economic and household activities steadily increases. This ultimately leads to an exacerbation of environmental problems, including the pollution of water resources, soil, and the atmosphere. One of the most effective ways to address this problem is through recycling, which reduces the amount of waste while simultaneously using it as a source of secondary resources.

Modern innovative recycling technologies are crucial for the development of a circular economy, where waste is viewed not as useless waste but as a raw material for creating new products. It should be noted that traditional waste management methods, such as incineration and landfilling, often cause environmental damage. Therefore, the development and implementation of more environmentally friendly and efficient recycling methods remains a priority in addressing environmental challenges.

Waste recycling plays a key role in the transition from a traditional linear economy, where resources are simply used and discarded, to a circular model that reuses materials. In today's world, one of the main challenges in this area remains the low efficiency of existing recycling technologies and the difficulty of handling certain types of waste, particularly plastic. For example, when plastic products decompose, they can turn into microplastics, which accumulate in the environment, negatively impacting ecosystems and human health. Furthermore, recycling faces economic and organizational challenges: high process costs, underdeveloped infrastructure, and imperfect sorting and processing methods limit the full reuse of resources. Improving these aspects is a necessary step in creating a sustainable waste management system.

There are many waste recycling technologies, each with its own characteristics, advantages, and limitations. Among mechanical methods, the most common are sorting, shredding, and compacting waste. These processes allow the separation of valuable materials—metal, glass, paper, and cardboard—which can then be reused in production.

Thermal processing methods, such as waste incineration to generate energy, are also used, but they have a significant drawback: the emission of pollutants into the atmosphere.

Biological recycling is considered particularly promising. It involves the decomposition of organic waste by microorganisms, yielding useful products such as biogas, which can be used to generate energy, or compost, suitable for soil fertilization.

In recent years, innovative methods for recycling plastic waste have been rapidly developing. Chemical technologies allow plastic to be broken down into its original chemical components, which can then be used to produce new plastic products. New approaches include the use of enzymes to break down plastic materials and the chemical degradation of polymers with a catalyst, opening up opportunities for more efficient and environmentally friendly plastic recycling.

2. Experimental part

The aim of the study was to evaluate the effectiveness of modern plastic and organic waste recycling technologies and assess their potential for implementation in industrial and agricultural processes. The materials used included plastic products, including PET bottles and packaging materials, as well as organic waste, such as food scraps and compostable plant materials.

Various methods were used for waste processing. Mechanical processing involved sorting, shredding, and compacting plastic, paper, and glass waste. Biological processing of organic waste was accomplished through fermentation, producing biogas and compost. Chemical recycling of plastics involved catalytic degradation of polymers and enzymatic degradation of plastic materials.

The duration of the biological processing experiments ranged from 5 to 30 days, depending on the waste type. Temperatures ranged from 20 to 50°C for biological processes and from 50 to 70°C for chemical processing with a catalyst. Each method was tested three times to increase the reliability of the results. Processing efficiency was assessed based on the volume of processed waste, the amount of biogas and compost produced, and the mass of chemical components of the plastic suitable for reprocessing.

3. Results and discussion

Mechanical recycling allows for the recovery of up to 80% of metal, glass, and paper from total waste, making them suitable for reuse. This method remains cost-effective and relatively simple to implement, but it faces limitations when processing complex plastic and composite materials.

Biological recycling of organic waste demonstrates high efficiency: within 20–25 days, waste is completely converted into compost and biogas, producing approximately 0.45 cubic meters of biogas per kilogram of input material. This approach not only reduces landfill loads but also reduces methane emissions, a powerful greenhouse gas, making it an important element of environmentally sound waste management.

Chemical recycling of plastic products opens up opportunities for the circular use of polymers, breaking down over 60% of waste into primary chemical components suitable for remanufacturing. It also helps reduce microplastic pollution, although the high cost of the technology and the need for extensive infrastructure currently limit its widespread adoption.

Modern innovative waste recycling methods offer significant potential for reducing environmental impacts, but their industrial application requires further research and significant investment. The most effective approach is integrated recycling, combining mechanical, biological, and chemical methods. This strategy maximizes the use of waste as secondary resources, reduces pollution of soil and aquatic ecosystems, lowers greenhouse gas emissions, and creates a sustainable waste management system.

In the long term, the integration of these technologies could become a key element of sustainable development, ensuring more efficient use of resources and improved environmental safety at both the local and global levels.

4. Conclusions

Modern innovative waste recycling technologies play a key role in creating a sustainable development model and promoting the concept of a circular economy. The analysis confirms that the integrated use of mechanical, biological, and chemical recycling methods not only significantly reduces waste volumes but also transforms them into valuable resources for industry and agriculture.

Mechanical methods remain effective for recovering metals, glass, paper, and cardboard products, but their capabilities are limited when processing complex plastics and composite materials. Biological recycling of organic waste demonstrates significant environmental potential: converting food and plant waste into biogas and compost reduces landfill pressure, reduces methane emissions, and promotes soil fertility restoration. Chemical recycling of plastic products offers opportunities for the complete recycling of polymers, reducing microplastic pollution and supporting the production of secondary raw materials, but its widespread implementation requires significant investment and developed infrastructure.

The most promising approach is the integration of various recycling methods, which maximizes the use of waste as a resource, reduces ecosystem pollution, and minimizes greenhouse gas emissions.

Effective application of such technologies requires overcoming economic, technical, and organizational barriers, as well as ongoing research and process optimization.

In the long term, the active implementation of innovative waste recycling methods will ensure the rational use of resources, improve environmental safety at the local and global levels, and become the foundation for sustainable societal development. This not only reduces the negative impact on the environment but also forms the basis for an economic model that views waste as a source of value rather than a problem.

5. Offers

To accelerate the transition to a resource-based economy, it is recommended to implement comprehensive waste recycling systems at the city and enterprise levels. Investment in infrastructure and research should be encouraged, as should training for the public in sorting and rational use of materials. This will allow for more efficient use of recyclable resources and reduce environmental impact.

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Economic sciences

MANAGEMENT OF INTERCULTURAL COMMUNICATION IN LANGUAGE EDUCATION

Ainash Mussabekova
Senior Lecturer, Department of Management,
Academician E.A. Buketov Karaganda National Research University,
Republic of Kazakhstan, Karaganda
https://orcid.org/0000-0001-6787-8967
Utekul.K.
Academician E.A. Buketov Karaganda National Research University,
Republic of Kazakhstan, Karaganda

Abstract

The article examines the issues of managing intercultural communication in the system of language education under the conditions of modern globalization. The author analyzes the language learning process not merely as a set of grammatical rules, but as a social management system based on the principles of management. The paper identifies ways to overcome cultural dissonance among students majoring in Kazakh and English languages, highlights the impact of media content (Netflix, social networks) on cultural perception, and emphasizes the importance of developing pragmatic competence. As a result of the study, the professional role of future language specialists as a "cultural bridge" and their competitiveness in the global environment are substantiated.

Keywords: globalization, language education, intercultural communication, communication management, cultural code, pragmatic competence, digital space, personal development, cultural immunity, educational strategy

The rapid processes of globalization and the development of digital technologies are imposing fundamentally new requirements on the field of language education. Today, teaching a foreign language is no longer limited to memorizing grammatical rules or expanding vocabulary. On the contrary, this process necessitates defining the management of intercultural communication as a key strategic direction of the educational program. Transparency in modern society, international academic mobility, migration flows, and remote work formats have elevated human interaction to an unprecedented level. In this context, the most essential competence for a language learner is not only correct phonetic pronunciation, but also a deep understanding of the cultural code, ethical norms, and social behavior patterns of the people who speak the language. Without considering the cultural context, even a perfectly constructed sentence may lead to communicative failure or misunderstanding [1.33].

From the perspective of fundamental principles of management science, managing intercultural communication is a complex process involving systematic planning, organization, and regulation. In this regard, language education is viewed not merely as a subject, but as a complex "social management system." For example, a student learning both Kazakh and English simultaneously faces the challenge of integrating two different worldviews. They must preserve their national cultural identity while adapting to the communication style of the English-speaking environment. If balance between these two poles is not achieved, cultural dissonance may arise, potentially reducing the learner's motivation. Therefore, educational institutions and teaching staff should assume managerial roles by incorporating special cultural modules into curricula, anticipating cultural conflicts among students, and developing effective solutions. For instance, comparing the strict "time management" culture of English-speaking societies with the flexible perception of time in Kazakh culture facilitates students' professional adaptation [1.52].

The use of communicative training is of great importance in enhancing the professional competence of future specialists. In today's labor market, a teacher is not merely a transmitter of information but an organizer of the educational environment and a leader guiding personal development. For example, the democratic and egalitarian model of teacher-student interaction in Western culture may conflict with the traditional hierarchical respect system in Kazakh society. If a future specialist fails to recognize these subtle differences, they may encounter difficulties in adapting foreign materials to the local audience. Therefore, the use of role-playing, analysis of international cases, and models of cultural negotiation in the learning process helps to form students' professional communicative immunity. These approaches ensure that specialists can work effectively and confidently in any environment [2.17].

Modern media products significantly influence the consciousness and cultural values of young people. In particular, series on global platforms such as Netflix have a profound impact. Productions like "Wednesday," "Bridgerton," and "Stranger Things" are not merely entertainment; they serve as powerful mediators that shape speech patterns, slang, and behavioral norms. However, along with the positive aspects of such unconscious imitation, there are also risks, such as the erosion of national identity and the formation of misleading stereotypes. In this regard, the role of managing intercultural communication is to transform films into objects of in-depth cultural analysis. By examining characters' actions, ethical choices, and social roles, students can better understand cultural differences in an engaging and scientific way, which also enhances their critical thinking skills [2.44].

In addition, modern trends on social networks such as TikTok, Instagram, and YouTube have become an integral part of cultural management. Students' motivation for learning languages often originates in this digital space. However, the flow of information online is not always ethically sound, as it may include destructive memes or content offensive to national identity. In such cases, future language specialists must act as "cultural filters." Only when intercultural communication management is combined with media literacy can students critically evaluate information and develop a tolerant worldview. For example, analyzing popular trends during lessons and exploring their cultural foundations can both engage students and strengthen their cultural immunity [3.29].

In the era of rapid globalization, the content and essence of language education are undergoing fundamental transformation. Language learning is no longer limited to memorizing lexical units or mastering grammatical paradigms. Instead, language has become a unique cultural code that reflects a nation's inner identity and serves as a strategic tool regulating social relations. Accordingly, the concept of "intercultural communication management" is recognized as one of the most relevant areas in modern pedagogical science. Its relevance is explained by students' integration into the international academic environment, participation in global scientific projects, and continuous interaction with global information flows through digital platforms. In such a transnational environment, successful communication requires not only linguistic knowledge but also cultural reflection, empathy, and communication ethics. Without understanding the mentality, logic of thinking, and speech etiquette of another culture, a learner's linguistic competence remains insufficient for meaningful dialogue. Thus, intercultural communication management is not an auxiliary component of education but the foundation of professional competence and personal development [1.17].

When viewed through the lens of management science, intercultural communication management is a complex social mechanism that requires systematic planning, organization, and strict control. The management function involves making strategic decisions and regulating communication dynamics. In a language classroom, this responsibility falls on the teacher. Today, a teacher is not only an information provider but also an architect of the communicative environment and a manager regulating the cultural and psychological climate within the group. For instance, maintaining communicative balance between students accustomed to the extroverted discussion culture of English-speaking environments and those adhering to the values of modesty and restraint in Kazakh culture requires high professional skill. The teacher must establish inclusive dialogue by considering each student's ethnocultural characteristics. Therefore, intercultural management in education is one of the key methodological tools for improving the quality of learning [1.39].

The "Kazakh and English languages" major is considered one of the most strategic and prestigious fields in today's labor market. Its uniqueness lies in mastering the worldviews, value systems, and linguistic landscapes of two different civilizations. Through the Kazakh language, we preserve national identity, historical memory, and spiritual heritage, while the English language provides access to global science and innovation. The integration of these two directions elevates future specialists to the level of "cultural anthropologists," enabling them to act simultaneously as guardians of national values and active participants in the global community. In the context of Kazakhstan's aspiration to meet international standards, the importance of English continues to grow, while the state language remains a guarantee of internal social cohesion. Therefore, students of this major are recognized as "cultural diplomats," which highlights the high status of the profession [2.21].

The influence of the media industry, particularly Netflix, Hollywood productions, and social networks, on young people's cultural perception is immense. Films and series are not merely entertainment but powerful tools shaping speech patterns, youth subculture, and behavioral norms. Learning English through popular projects such as "Friends" or "Wednesday" enhances students' pragmatic skills and increases their interest in the language environment. However, it is important to remember that on-screen culture does not fully represent real life; it is often shaped by ideological or commercial purposes.

Therefore, the teacher's task is not just to present media content but to use it as an object of intercultural analysis. Studying the communicative strategies of characters is an effective method of modern linguodidactics [2.48].

Digital platforms, especially TikTok and Instagram, have created a new, dynamic space for intercultural communication. While language challenges and short educational videos promote unconscious language acquisition, they also carry risks of cultural stereotypes and conflicts. Therefore, intercultural communication management must be closely integrated with media literacy. Future language specialists should not only be translators but also individuals who filter information, preserve cultural stability, and ensure spiritual security in society. This significantly increases the social responsibility of the profession [3.34].

Another important aspect of language education is the development of pragmatic competence, which involves understanding the social meaning of words in context. For example, misunderstanding the pragmatic purpose of expressions such as the Kazakh phrase "Please stay for tea" or similar offers in English may lead to communicative failure. Teachers must explain not only the semantics of words but also the cultural intention behind them. Students with well-developed pragmatic skills can confidently navigate any intercultural environment and maintain constructive dialogue [4.26].

In conclusion, managing intercultural communication is an integral and strategic component of modern language education. This process, based on the principles of planning, organization, and regulation in management, enhances learners' global competitiveness. The "Kazakh and English languages" major is valuable for preparing specialists who balance national identity with international interaction. Today's language professionals are not merely teachers but cultural ambassadors of the nation on the global stage and guarantors of national identity. Only those who can effectively manage intercultural communication are prepared for the challenges of the global world, making this mission central to language education [5.18].

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DIGITAL HIGHER EDUCATION ECOSYSTEM: A STUDY OF MODELS IN CHINA AND KAZAKHSTAN

Wang Xiangqing
Al-farabi Kazakh National University Farabi International Business School
1st year Doctoral Student
Asanova Daniya
DBA, PhD, associate professor,
Al-Farabi Kazakh National University,
Farabi International Business School
Abinova Alfiya
PhD, associate professor, Al-Farabi Kazakh National University,
Farabi International Business School

Abstract

The digital transformation of higher education has driven traditional educational systems to evolve into complex digital ecosystems. Under globalization and digitalization, the lack of an integrated adaptive management model for digital higher education ecosystems has become a common challenge for emerging economies. This study aims to fill the scientific gap by identifying transferable and adaptable elements of adaptive management for digital higher education ecosystems through a comparative analysis of China and Kazakhstan, taking into account institutional and cultural differences. Using a qualitative comparative case study design, this research adopts document analysis, criterion-based comparative analysis, and conceptual modeling to examine policy documents, international reports, and academic literature. The findings show significant differences between the two countries: China has a centralized model with sound national digital platforms, in-depth big data integration, and strong state-led coordination; Kazakhstan implements a decentralized model with fragmented platforms, gradual policy implementation, and emerging stakeholder cooperation. This study refines the adaptability criteria of digital higher education ecosystems for developing and transitional economies, puts forward a hybrid management principle integrating centralized data governance and institutional flexibility, and constructs a conceptual adaptive management model suitable for Kazakhstan. The research contributes a methodological framework for cross-national comparative analysis of digital educational ecosystems, and provides practical implications for policymakers, university managers, and EdTech practitioners to improve the sustainability and competitiveness of digital higher education systems.

Keywords: *digital higher education ecosystem; adaptive management; comparative study; China; Kazakhstan; hybrid model*

1. Introduction

The rapid development of digital technologies has profoundly restructured higher education worldwide, giving rise to new educational formats, multi-stakeholder relationships, and innovative governance mechanisms. In the era of globalization and digitalization, higher education no longer operates as isolated institutions but evolves into an interconnected digital ecosystem integrating universities, governments, technology enterprises, digital platforms, educators, students, and employers. In this context, constructing effective adaptive management mechanisms for digital higher education ecosystems has become critical to ensuring system sustainability, educational service quality, and global competitiveness amid dynamic external changes.

Despite widespread digital technology adoption in higher education globally, most countries face a mismatch between advanced technological infrastructure and underdeveloped supporting management models. Digital transformation in practice often remains fragmented, limited to the deployment of individual platforms, online courses, or digital tools without systematic adaptive governance. This reveals a prominent scientific and practical gap: existing research insufficiently theorizes digital educational ecosystem management models tailored to national institutional and cultural contexts, lacking clear guidance on cross-national model transfer and adaptation.

Against this background, a comparative analysis of China and Kazakhstan's higher education digitalization practices holds unique research value. China implements a large-scale, state-led centralized digital transformation model supported by national strategies, artificial intelligence, big data, and unified national digital platforms. Kazakhstan, as a transitional economy, adopts a mixed model combining state regulation, market mechanisms, and international educational standards, featuring

gradual digitalization and institutional autonomy. Differences in digital maturity, institutional structures, and governance approaches provide a valuable context to identify universal and context-specific elements of digital ecosystem adaptive management.

Current academic research insufficiently focuses on cross-national comparative studies of digital higher education ecosystem management models and their context-aware adaptation. There is no standardized framework to evaluate which foreign model elements are transferable and which require institutional and cultural restructuring. This research gap defines the relevance and scientific novelty of this study.

2. Literature review

In the scientific literature, the ecosystem concept has become widespread as an interdisciplinary approach to the analysis of complex, multilevel and interconnected systems. One of the founders of the ecosystem approach in socio-economic research is considered to be J. Moore, who viewed an ecosystem as a collection of interdependent participants who jointly create value within a single interaction space[1].

In the context of education, this approach has been adapted to analyze digital educational environments, where universities, government institutions, digital platforms and users form an integrated educational ecosystem, the functioning of which is impossible without coordination and joint development.

In the works of Hein A. and his colleagues emphasizes that the digital ecosystem differs from the traditional education system by a high degree of openness, the network nature of interaction and the active use of digital platforms[2].

A key feature of the digital educational ecosystem is the shift in focus from individual educational organizations to the processes of interaction and data exchange between participants. This allows us to consider higher education as a dynamic system capable of self-development, but requiring new management approaches.

The problem of adaptivity in the management of complex systems is actively investigated within the framework of adaptive systems theory and management cybernetics. In the works of P. Senge, adaptivity is defined as the ability of a system to learn, respond to changes in the external environment and transform internal processes without loss of stability[3].

In the context of higher education, adaptability is manifested in the flexibility of educational trajectories, individualization of learning, and the ability of management structures to quickly adjust digital development strategies. The researchers note that in the context of digitalization, adaptability is becoming a key factor in ensuring the stability of educational ecosystems.

In the works of G. Mintsberg, the issues of managing digital educational ecosystems are considered in detail. The author analyzes the evolution of management models from hierarchical to network and hybrid forms[4].

In the context of digital transformation, traditional administrative management mechanisms may not be effective enough, since they do not take into account the complexity of horizontal connections and the autonomy of ecosystem participants. This is especially true for higher education, where digital platforms, EdTech companies, and students are becoming active management actors along with the government and universities.

Research in the field of digital education agrees that for effective management of the educational system it is necessary to combine elements of strategic regulation, adaptive management and digital coordination.

An analysis of existing scientific papers shows that most studies either focus on the technological aspects of digitalization or consider management within individual educational institutions. Cross-country comparative studies on adaptive management models of digital ecosystems of higher education remain insufficiently developed, which confirms the relevance and scientific significance of the chosen topic.

For example, in China, educational policy is closely linked to Confucian values and socialist principles, reflecting a more collectivist approach to learning and the role of higher education in society. In Kazakhstan, in turn, there are processes of integration of Western (European) educational standards, individual development and national identity for the purposes of higher education[5]. This study compares the goals of higher education in the two countries through the prism of cultural values, historical traditions and national educational philosophies. It shows how educational ecosystems form different development guidelines. Such a contrast, for educational purposes, corresponds to an ecosystem approach. In this approach, various elements of the system, such as values, institutions,

governments, and students, are interconnected and interact with each other to influence the management and development of the educational environment.

The ecosystem of higher education encompasses not only technological aspects, but also cultural elements that shape how effective development strategies can be implemented in different countries. This is similar to what Briscoe discussed in his work on distributed systems, in which various actors contribute to shaping the form and direction of development.

Management systems that integrate sustainability are being created in both countries, but the methods, regulatory frameworks and degree of implementation of SDGs differ. A comparative study by authors such as Bai Yu, Guo Xueli, Leilei, Araily Shakirova focuses on the management of the education system of Kazakhstan and China in the context of sustainable development[6]. It analyzes how the educational policies of these countries integrate the United Nations Sustainable Development Goals (SDGs) and what management mechanisms are used to achieve these goals. The study identifies factors that contribute to or hinder the adaptation of educational policy to global challenges, and suggests comparing the management models of the two countries to identify effective practices. Within the framework of adaptive management, this study shows how two national systems are trying to respond to external (global) challenges through management changes. This can be correlated with Peter Senge's ideas about systemic learning and the need for the educational system to adapt to the challenges of sustainable development, as well as with Mintzberg about hybrid forms of management in complex systems. Management is thus viewed not as a static hierarchy, but as a dynamic adaptive network of actors, procedures, and policies.

The concepts of ecosystem, adaptability and management are the theoretical basis for the study of digital higher education. However, there is a need to integrate these approaches into a single model of adaptive management of the digital educational ecosystem, taking into account national characteristics. This determines the direction of further research.

1.1 Problem Statement

Core Research Question: Which elements of adaptive management for digital higher education ecosystems, identified through a comparative analysis of China and Kazakhstan, are transferable, and how should they be modified considering institutional, regulatory, and cultural differences?

1.2 Research Purpose

To develop a context-adapted adaptive management model for digital higher education ecosystems by comparing Chinese and Kazakhstani models, identifying transferable elements, and proposing institutional adaptation pathways for Kazakhstan.

1.3 Research Hypotheses

The effectiveness of a digital higher education ecosystem depends not only on technological adoption but also on an integrated adaptive management model that coordinates the interests of all stakeholders.

Core elements of China's digital higher education model (centralized data governance, intelligent platform application) can be adapted to Kazakhstan's context through institutional modification, balancing centralized coordination and decentralized management.

A hybrid model integrating international best practices and national institutional characteristics will enhance the stability and flexibility of digital higher education ecosystem management for long-term sustainable development.

1.4 Scientific Novelty

1. Refined context-specific adaptability criteria for digital higher education ecosystems in developing and transitional economies.

2. Proposed a hybrid management principle for digital educational ecosystems, complementing centralized governance (Chinese experience) and network-based institutional autonomy (Kazakhstani practice).

3. Developed an integrated methodological framework for cross-national comparative analysis of digital educational ecosystems, combining technological infrastructure, governance mechanisms, and institutional dimensions.

3. Conceptual framework of the research

In this research, the digital educational environment is viewed as a sophisticated multi-layered system encompassing universities, governmental bodies, technological platforms, educators, students, and employers, all interacting with one another.

A distinctive feature of this ecosystem is its capacity for self-organization, integration of diverse resources, and fostering the sustainable growth of educational processes.

The digital educational environment is characterized by its adaptability, which manifests in the system's ability to:

- swiftly respond to alterations in the external environment, encompassing technological, economic, and societal factors;

- transform internal management procedures;

- individualize educational paths and incorporate novel technologies, including artificial intelligence and platform solutions.

In the context of this research, management is defined as a comprehensive approach that encompasses strategies, frameworks, regulations, and operational procedures designed to harmonize the activities of ecosystem stakeholders, maintain its resilience, and enhance its performance.

Efficient management serves as a bridge between the resources, technological capacities, and adaptive processes of the system.

In the conceptual model of the study, these three elements are interrelated as follows(figure 1):

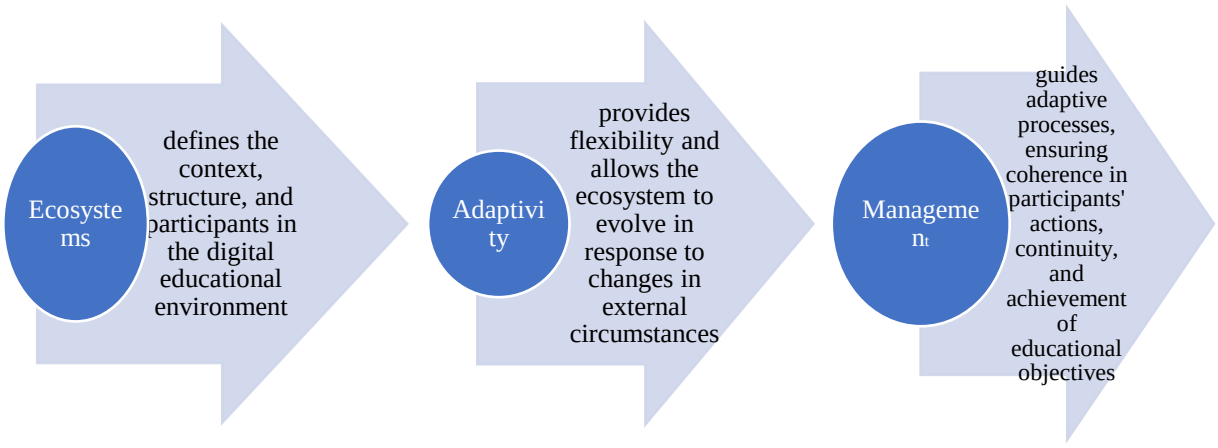

Figure 1 – Conceptual model

The source was compiled by author

Thus, management and flexibility mutually reinforce each other within the digital education ecosystem, forming the foundation for its sustainable development in different national contexts, such as China and Kazakhstan. Within this system, the ecosystem defines the context and participants, bringing together universities, government agencies, technological platforms, teachers, students, and employers. Flexibility ensures the system's capacity to respond to changes in the external environment, modify internal processes, and tailor educational paths, which enables effective integration of new technologies and teaching practices. Management coordinates and guides these adaptive processes, ensuring consistency in participants' actions, sustainability of operation, and achievement of strategic objectives.. The interaction of the three elements – ecosystem, adaptability and management – forms the integral basis for a sustainable, flexible and effective digital educational environment, which allows for the integration of theoretical approaches proposed by the aforementioned authors.

4. Research Methodology

This study adopts a qualitative comparative case study design focused on China and Kazakhstan as two contrasting cases of digital higher education governance.

4.1 Research Design

A comparative case study is selected to explore contextual differences, identify causal mechanisms, and generate context-adapted theoretical models. This design supports in-depth analysis of institutional, technological, and governance dimensions while enabling cross-case generalization.

4.2 Data Sources and Collection

Data is derived from secondary sources with rigorous selection criteria:

Policy and strategic documents: National digital higher education strategies (Digital Kazakhstan, Education Informatization 2.0 in China), ministerial regulations, and official programs.

International organizational reports: OECD, UNESCO, and World Bank analytical reports on higher education digitalization.

Academic literature: Peer-reviewed articles on digital educational ecosystems, adaptive management, and Sino-Kazakhstani higher education from Web of Science, Scopus, and Google Scholar.

Inclusion criteria: publication year 2020–2025; direct relevance to digital higher education ecosystems; theoretical or empirical rigor; consistency across data sources.

4.3 Data Analysis Methods

Document thematic analysis: Coding policy documents and reports to extract themes related to governance, infrastructure, data integration, and stakeholder collaboration.

Criterion-based comparative analysis: Using a pre-defined analytical framework (digital infrastructure, state policy, data integration, stakeholder interaction, adaptability) to systematically compare the two cases.

Conceptual modeling: Synthesizing findings to construct a hybrid adaptive management model, validated against theoretical frameworks and empirical evidence.

4.4 Methodological Rigor and Limitations

Validity: Triangulation of policy documents, international reports, and academic literature to reduce bias.

Reliability: Transparent coding and criterion definition to support replicability.

Limitations: Reliance on public secondary data; no primary empirical data (interviews/surveys); limited to two national cases; conceptual model untested in practice.

Results

In line with the objectives and the selected research approaches, the findings were obtained, showcasing the unique characteristics of the development and administration of digital educational ecosystems in China and Kazakhstan, and providing insights into the potential for creating a flexible management framework.

Using the comparative analytical method, it was possible to compare the key elements of the digital educational ecosystems of the two countries, identifying the strengths, limitations and structural features of each model(in table1).

Table 1. Comparative Analysis of Digital Higher Education Ecosystems in Kazakhstan and China

Comparison Criterion	*Kazakhstan*	*China*
Level of Digital Infrastructure	*Developing; fragmented platforms are present*	*High level; integrated national platforms (MOOC, AI services)*
Government Policy	*Digitalization strategies are being developed, but the transition is gradual*	*Strong centralized policy; large-scale national projects*
Data and Analytics Integration	*Limited; data is stored separately*	*Advanced big data analytics; automated management processes*
Stakeholder Interaction	*Collaboration between universities and EdTech is emerging, but full integration is lacking*	*Well-developed educational ecosystems involving universities, IT sector, and government bodies*
Level of Adaptability	*Moderate; digitalization progresses unevenly*	*High; the system quickly adapts due to technologies and regulation*

The source was compiled based on the data [7-10]

The study revealed that China possesses a more advanced digital infrastructure, a comprehensive data analytics system, and government backing for digital transformation. In contrast, Kazakhstan is in the process of actively developing digital platforms and establishing a regulatory framework, gradually moving towards ecosystem collaboration.

According to the data obtained, the digital infrastructure of higher education in Kazakhstan is characterized by fragmentation and uniqueness: universities use different platforms and services that are not always integrated with each other, and data analysis capabilities are limited. At the same time, China has created centralized digital platforms, including large-scale systems of massive open online courses (MOOCs) and artificial intelligence-based services that collect, process and use large amounts of data at the system-wide level.

An analysis of the state policy in the field of education has shown that digitalization strategies are being implemented in Kazakhstan, but their implementation is gradual and evolutionary. The regulation is aimed at supporting the autonomy of higher education institutions and developing local initiatives.

In China, on the contrary, the digital transformation of higher education is carried out within the framework of an independent centralized state policy, which is accompanied by large-scale national programs and strict state control.

There were also significant differences in the field of data scientists and analysts. In the Kazakh system, educational data is usually stored separately, which limits the possibilities of making managerial

decisions based on the data. The Chinese model uses advanced big data analysis tools and automated management mechanisms that make it possible to quickly adjust educational processes.

In Kazakhstan, cooperation with interested organizations is in the process of development. Cooperation between universities, EdTech companies and expansion at the international level is taking place, but it is not systemic.

China has created comprehensive educational ecosystems in which the IT sector and other structures are closely interconnected. This allows China to have a higher level of adaptation of the digital educational ecosystem than in Kazakhstan, which is assessed as moderate and uneven.

The results of the comparative analytical method allowed us to establish that Kazakhstan has significant potential for the growth of the digital educational environment, however, it requires more intensive coordination between ecosystem participants and the integration of digital solutions. The Chinese model demonstrates the possibility of using an integrated and adaptive system, which makes it a valuable reference point for developing a new management model.

The application of the system modeling method included several stages, on the basis of which key results were identified and a conceptual adaptive management model for the digital educational ecosystem was formed.

Collection and systematization of information

At the first stage, data on the digital educational ecosystems of China and Kazakhstan were collected from scientific literature, official documents of the ministries of education, university reports and analytical publications. These data allowed us to highlight:

digital platforms used (MOOCs, LMS, cloud services);

infrastructure components (server capacities, databases, cloud storage);

key ecosystem participants (universities, teachers, students, government agencies, EdTech companies).

Identification of ecosystem elements and connections

Based on the information collected, a structural analysis was carried out, during which the following parameters were determined:

key elements of the system: educational platforms, resources, management bodies, process participants;

Functional links: data flows between platforms and participants, learning process management, information exchange, quality control and feedback.

This stage allowed us to visualize the structure of the ecosystem and understand how the elements interact with each other.

Defining the criteria of adaptability

Using a systematic analysis and a comparative approach, adaptability criteria were formulated, taking into account the national context and international experience.:

flexibility of management decisions;

prompt response to changes in student demand and needs;

integration of digital technologies (AI, big data analytics);

resilience of the infrastructure to stress;

the possibility of personalized learning and flexible student trajectory.

Simulation of an adaptive control system

Based on the identified elements, relationships and criteria, a conceptual framework of the model was created:

integration of data and analytics for management decision-making;

establishing mechanisms for interaction between all stakeholders through digital platforms;

continuous monitoring of the quality of educational processes with feedback;

combining the best practices of China (centralized platforms, intelligent analytics) and Kazakhstan (flexibility, mobile solutions, local standards).

Verification and refinement of the model

After the conceptual model was built, the logical relationships between the elements were checked and compliance with the adaptability criteria was assessed. This made it possible to clarify the roles of participants, information flows and management functions, ensuring a balance between the technological, organizational and regulatory components of the system.

The results of the system modeling method were revealed through consistent data structuring, analysis of relationships, formulation of adaptability criteria and construction of a conceptual model,

which made it possible to create a management system adapted to the conditions of digital higher education in China and Kazakhstan.

In the course of system design, the essential components of the digital educational environment were identified, encompassing educational platforms, digital resources, government agencies, key stakeholders (universities, students, educators, government bodies, and EdTech companies), as well as data infrastructure and technological services. The primary functional connections between these components have been established, encompassing data flows, educational process management, digital user engagement, monitoring the quality of educational services, and feedback management. Based on these interconnections, the criteria for the system's adaptability have been formulated, including the flexibility of administrative decisions, the capacity to swiftly respond to shifts in demand, the incorporation of digital technologies, the resilience of infrastructure, and the potential for personalized learning.

Moreover, based on the identified components and criteria, a theoretical framework for ecosystem management was developed, with a particular focus on leveraging big data and AI for decision-making, facilitating communication among stakeholders through digital platforms, and continuously assessing the quality of educational processes. The framework also incorporates the best practices from China, such as centralized platforms and educational data analytics, alongside Kazakhstan's practices, including the creation of mobile applications and flexible national standards, ensuring the system's adaptability to diverse conditions and the needs of participants in the educational process.

Discussion

The results obtained make it possible to explain the differences identified based on theoretical approaches to ecosystem management and institutional development. The key factor determining the difference between the digital educational ecosystems of China and Kazakhstan is the role of the state in the management system.

In average state models, the function of the ecosystem system architect is supported, which corresponds to the principles of managed ecosystems and the principles of organizational learning of P. Senge. Sustainability is ensured through centralized coordination and continuous feedback. This is a high level of development of digital platforms and the adaptability of the system as a whole.

In Kazakhstan, on the contrary, a management model prevails, which is characterized by decentralization and is focused on institutional independence and the gradual introduction of digital solutions. According to Mintzberg's concept, this approach provides additional opportunities at the level of individual organizations, but reduces the level of coherence of ecosystems as a whole. This explains the fragmentation of digital employment and limited data integration.

The transition from the results of comparative analysis to the elements of a conceptual management model was carried out through the identification of cause-and-effect relationships between structural economic ecosystems and their adaptability.

The analysis showed that centralized platforms and advanced data analytics, typical for large models, ensure high speed of management decisions. However, their direct transfer to the Kazakh context is difficult due to the transformation in the institutional environment, regulatory regulation and the level of digital maturity of universities.

Therefore, the data requires adaptation rather than direct transfer.

Based on the analysis, it was concluded that Kazakhstan uses a hybrid management model of the digital educational ecosystem, which combines centralized coordination (unified data standards, integration platform) with the preservation of institutional flexibility and local digital solutions.

The logic of the research is as follows: comparative analysis – identification of structural explanations – determination of cause-effect relationships – selection of applicable elements – adaptation and integration into the conceptual model.

During the analysis of the data obtained, it was found that the sustainability and effectiveness of the digital educational ecosystem do not take into account the results of previous models, but are ensured by adapting managerial and technological solutions to changing environmental conditions. This confirms the assumption that the developed conceptual management model should take into account the institutional features of Kazakhstan and rely on China's best practices in data analysis and digital competition, adapting it into a flexible and multi-level management system.

During the discussion, it was revealed that the high efficiency of higher education models largely depends on centralized management, large-scale public investments and deep integration of analytical digital tools.

At the same time, the Kazakh model is characterized by greater institutional flexibility, but faces limitations related to the fragmentation of digital platforms and insufficient coordination of ecosystem participants.

These conclusions allow us to determine which elements of a complex model can be adapted to the conditions of Kazakhstan, and which require adaptation.

For this purpose, an approach has been developed that allows us to systematize the identified differences, identify key elements of the ecosystem, determine their interrelationships and criteria for adaptability.

In order to visually represent the sequence of these changes and the logic of forming an adaptive management model, a diagram is presented reflecting the stages of transformation of the results of comparative analysis into elements of a conceptual model of the digital educational ecosystem(figure 2).

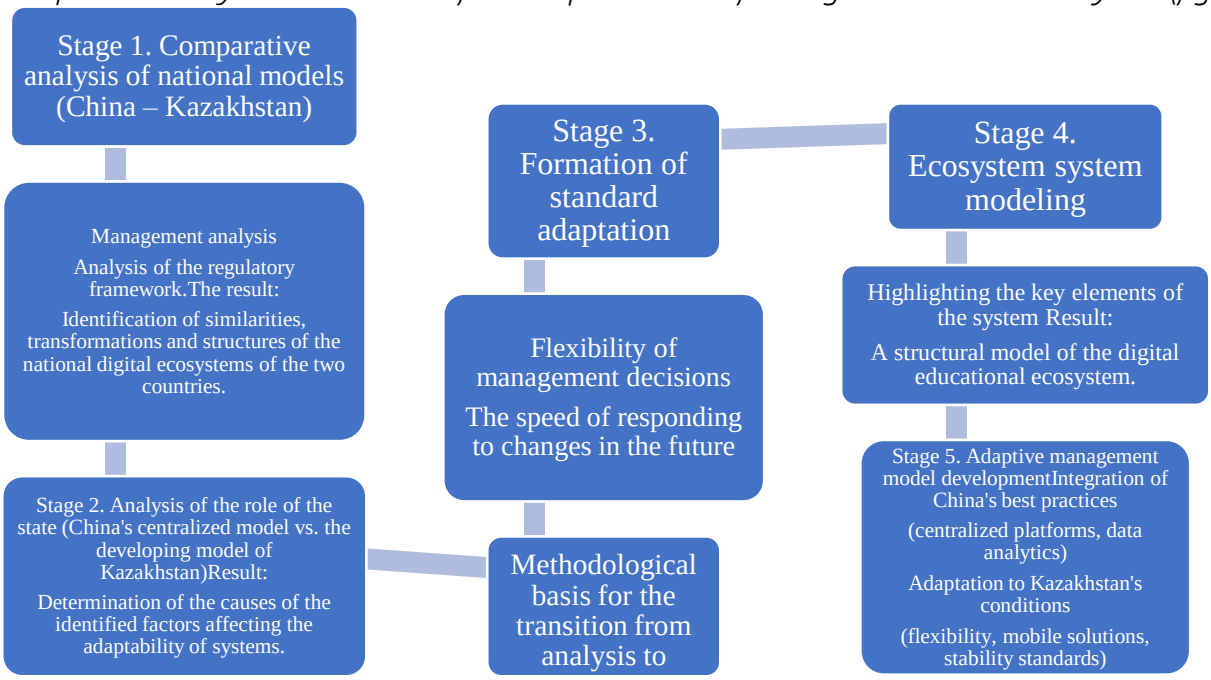

Figure 2. A comparative analysis of the adaptive management model of the digital educational ecosystem

The source was compiled by author

The diagram clearly shows how we have moved from comparing the digital educational ecosystems of China and Kazakhstan to creating an adaptive management model for higher education.

The identified differences in the level of digital maturity, management mechanisms and institutional conditions were systematized, interpreted and transformed into structural elements of a conceptual model.

It is important to note that the proposed adaptive control system is not an abstract idea. It is based on empirical data and system analysis, which makes it applicable in practice.

Conclusion

The research conducted allowed for a thorough examination of the models of digital educational ecosystems in China and Kazakhstan, and the creation of an adaptable management system for digital higher education. The analysis revealed that China boasts a well-established infrastructure, centralized platforms, and sophisticated analytical tools that enable swift adaptation to changes in the educational landscape.

Meanwhile, Kazakhstan is actively developing digital platforms and management frameworks, gradually integrating ecosystem participants and enhancing the accessibility and quality of educational services.

The application of the comparative analytical approach allowed us to pinpoint the key disparities and patterns in the operation of digital ecosystems, highlight the strengths of each nation, and identify areas for enhancement.

The utilization of the system modeling approach has facilitated the creation of a conceptual adaptive management model that incorporates the best international practices while considering

national peculiarities, criteria for adaptability, infrastructure resilience, and personalized learning opportunities.

Based on the research findings, practical suggestions have been formulated for the implementation of an adaptive management system: the utilization of big data analytics and artificial intelligence for managerial decision-making, the organization of effective collaboration among all stakeholders through digital platforms, and the continuous monitoring of the quality of educational processes, incorporating both national and international practices.

Consequently, the developed adaptive management model for the digital educational ecosystem offers:

Enhancing the efficiency and longevity of the educational process.

Adaptability to external changes and participant needs.

Integration of contemporary digital technologies into management practices.

A foundation for the further advancement of digital higher education in Kazakhstan, drawing on the Chinese experience.

In conclusion, the research validates the importance of the subject matter, the originality of the work, and the practicality of the proposed model, which can serve as a framework for the strategic growth of digital educational ecosystems and their global competitiveness.

Research limitations and future directions

Despite the results of the development and conceptual adaptive management model of the digital ecosystem of higher education, this study has a number of limitations.

First, the analysis is based solely on secondary data sources such as scientific publications, strategic documents, and official reports, which limits the ability to take into account primary empirical data such as interviews with government officials, universities, and EdTech companies.

Secondly, a comparative analysis is carried out only for two countries - China and Kazakhstan, which, on the one hand, allows for a more in—depth study, but, on the other hand, limits the possibility of generalizing conclusions for other national educational systems.

Thirdly, the developed adaptive model is conceptual in nature and has not been tested in real institutional conditions.

The prospects for the development of research in this field are primarily related to the expansion of the empirical base for conducting qualitative and quantitative research. This includes conducting interviews with experts, interviewing students and teachers, and analyzing large amounts of educational data.

It seems advisable to conduct a comparative analysis with other countries with different models of digitalization of higher education. This will clarify the versatility and scalability of the proposed model.

In addition, further research may be aimed at developing practical tools for implementing adaptive management, including the use of artificial intelligence, predictive analytics, and digital dashboards. It is also necessary to conduct an effective analysis of the results obtained.

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THE INTERRELATIONSHIP BETWEEN URBANIZATION AND DEMOGRAPHY IN THE REPUBLIC OF AZERBAIJAN

Akifa Akif Aghayarova
Institute of Economics, Ministry of Science and Education of the Republic of Azerbaijan, Azerbaijan
Senior Researcher, Phd in Economics
Ibrahimov Nusret Kamal
Institute of Economics, Ministry of Science and Education of the Republic of Azerbaijan, Azerbaijan
Researcher, Phd in Economics

Abstract

The interrelationship between urbanization and demography in the Republic of Azerbaijan has strengthened in recent years. Especially after 2005, structural changes in the economy and the development of the oil and gas sector have increased the attractiveness of cities, particularly Baku and the Absheron region. This has accelerated internal migration from the regions to the capital, leading to an uneven distribution of the population. The higher level of economic opportunities, education, and healthcare services in urban areas attracts young and active populations. In rural areas, however, limited employment opportunities, infrastructure problems, and weaker social services encourage migration. As a result, the share of the elderly population in rural areas increases, while economic activity declines. This process deepens regional inequality and places additional pressure on urban infrastructure. Although urbanization creates opportunities for development, it also highlights the need for balanced regional policy and planning.

Keywords: urbanization, demography, migration, region, city, rural area, infrastructure

Introduction

The Republic of Azerbaijan holds a middle position among CIS countries in terms of urbanization level, which can be explained by the country's socio-economic development model combining both industrial and agricultural elements. However, statistical indicators suggest that the urbanization process has entered a more intensive phase since 2005. From this period onward, structural changes in the national economy have significantly influenced the uneven distribution of the population within the country and internal migration flows.

One of the main drivers accelerating urbanization has been the city-centered economic model formed as a result of the rapid development of the oil and gas sector. The concentration of oil revenues primarily in Baku and the Absheron economic region has led to the expansion of industry, services, construction, and infrastructure sectors in the capital and its surrounding areas, significantly increasing the attractiveness of urban labor markets. As a result, intensive labor migration from regions to the capital and other large cities has taken place.

At the same time, the transformation of Baku into a regional economic, financial, and administrative center has led to a spatially uneven intensification of urbanization. Since Baku concentrates the country's main infrastructure in education, healthcare, transportation, business, and public administration, it has become a strong center of attraction for young and economically active populations. This process indicates that the capital holds a more advantageous position compared to other cities in the country.

In addition, limited employment opportunities in rural areas are among the key factors accelerating urbanization. Low efficiency in land use in agriculture, the weak development of the processing industry, and the limited scope of non-agricultural activities have narrowed the economic prospects of the rural population, especially the younger generation. As a result, migration from rural areas to cities has emerged as a socio-economic necessity, further accelerating the urbanization process.

The country's successful performance in urban development has been highly appreciated, and it has been decided that the 13th session of the World Urban Forum will be held in the capital city of Baku from May 17 to 22, 2026 [1]. The head of state signed a decree on April 25, 2025, on the appointment of the national coordinator of this forum [2].

In line with the discussion theme of WUF-13, six key directions have been identified. These include the global housing crisis, the transformation of informal settlements and slums, the role of housing in recovery and reconstruction processes, the intersection of climate and housing issues, the social and economic potential of housing, and new approaches to housing finance [3].

Let us review several statistical indicators related to the discussion topic:

● At the global level, approximately 2.8 billion people face inadequate living conditions, while more than 300 million people are without permanent housing;

● The share of household income allocated to housing expenditures has exceeded the normative 30% worldwide, with the most critical situation observed in Sub-Saharan Africa, where it exceeds 40%;

● As of 2022, 2.2 billion people globally lacked access to safely managed drinking water services, and 2 billion people were unable to benefit from essential hygiene services;

● It is estimated that around 1.1 billion people live in slums, of which 350–500 million are children;

● By the end of 2022, more than 123 million people had been forcibly displaced, mainly due to conflicts;

● The housing sector is at the center of climate change mitigation efforts, as in 2023 the built environment accounted for 34% of global energy-related CO_2 emissions and 32% of energy demand;

● By the end of 2022, the housing sector constituted approximately two-thirds of global real estate, valued at 287.6 trillion USD (with total global real estate valued at 379.7 trillion USD).

Regional inequality. *In the Republic of Azerbaijan, the population structure and settlement patterns have undergone significant socio-economic changes in recent years. As a result of this trend, the concentration of the population in urban areas has further increased. The fact that Baku, as the capital, accommodates a large share of the country's population contributes to the deepening of regional demographic disparities. For example, Baku and the Absheron region are the most densely populated areas in the country, and this centralization increases pressure on urban infrastructure. This process not only increases the urban population but also raises demand in areas such as the housing market, transportation networks, and social services.*

In contrast, the situation in rural areas is quite the opposite. The "Smart Villages" document series prepared by the World Bank indicates that due to limited economic opportunities, infrastructure deficiencies, and restricted employment prospects in rural areas, young people living there tend to migrate to cities. This, in turn, leads to an increase in the proportion of the elderly population in rural regions.

These demographic changes not only create differences in population distribution but also have significant socio-economic consequences. While urbanization increases the dynamism of young people entering urban labor markets and enhances society's openness to innovation, the relative dominance of the elderly population in rural areas leads to a greater burden on social infrastructure and a weakening of rural economies.

Real-life experiences show that this imbalance is reflected not only in statistical indicators but also has long-term effects on economic development and social welfare. For example, the increasing flow of population to cities rapidly raises the demand for urban services such as healthcare, education, and transportation systems, creating serious challenges in terms of planning and resource allocation.

Regional inequality in the Republic of Azerbaijan has developed as a result of long-term socio-economic processes. The main causes include economic centralization, infrastructure disparities, access to social services, as well as historical and cultural factors. The economic opportunities of the capital Baku and other large cities differ sharply from those of the regions. Industrial activity, the service sector, and the application of new technologies develop more rapidly in urban centers, which leads to limited job opportunities in rural areas and small towns. At the same time, infrastructure such as roads, transportation, energy, and communications is more developed in cities compared to other regions. This creates favorable conditions for both businesses and the population to concentrate in urban areas.

The quality of education, healthcare, and other social services is higher in cities than in rural areas. In many rural schools, there is even a shortage of teachers and infrastructure problems, which contributes to the mass migration of young people from villages to cities.

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LOCALIZATION STRATEGIES OF FOREIGN UNIVERSITIES IN KAZAKHSTAN: EVIDENCE FROM ENGINEERING-TECHNICAL HIGHER EDUCATION

Dong Xuejie
Al Farabi Kazakh National university, Al Farabi business school,
1st year Doctoral Student
Akparova Aigul Amanzholovna
PhD in Economics, Professor,
Abylai Khan Kazakh University of International Relations and World Language
Nurgissa Seilov
MSc in Finance, Certified Business Process Professional,
London School of Business and Finance

Introduction

The internationalization of higher education has become one of the most significant trends in the global education landscape over the past two decades. Driven by globalization, technological advancement, and the increasing demand for high-quality education, universities are no longer confined within national borders. Instead, they actively expand their presence through various forms of transnational higher education (TNHE), including branch campuses, joint programs, and strategic partnerships [1].

Kazakhstan represents a particularly interesting case in this context. As one of the most economically developed countries in Central Asia, Kazakhstan has implemented a series of reforms aimed at integrating its higher education system into the global academic community. Government initiatives, such as the Bolashak scholarship program and policies encouraging international collaboration, have significantly increased the participation of foreign universities in the domestic education sector[3]. These policies are closely linked to the country's broader strategy of economic modernization and diversification.

Among different fields of study, engineering and technical education occupies a central position in Kazakhstan's development agenda. The country's industrialization goals and its transition toward a knowledge-based economy require a highly skilled workforce with strong technical competencies. As a result, foreign universities entering Kazakhstan often focus on engineering-related programs, which are perceived as critical for enhancing innovation capacity and technological advancement.

However, the entry of foreign universities into a new national context is not a straightforward process. Differences in institutional structures, cultural norms, language environments, and labor market demands create significant challenges. Simply transferring educational models from the home country often leads to misalignment with local needs. Therefore, localization strategies become essential. Localization, in this study, refers to the process by which foreign universities adapt their academic content, governance models, and operational practices to fit the host country environment while maintaining their global standards.

Despite the growing presence of foreign universities in Kazakhstan, there remains a lack of systematic analysis focusing on how these institutions localize their operations, particularly in engineering and technical education. Existing studies tend to focus either on general internationalization trends or on policy-level analysis, leaving a gap in understanding the practical mechanisms of localization at the institutional level.

To address this gap, this paper aims to examine the localization strategies adopted by foreign universities in Kazakhstan's higher education system, with a specific focus on engineering-technical disciplines. The study is guided by the following research question:

How do foreign universities localize their educational practices in Kazakhstan's engineering-technical higher education sector?

By answering this question, the paper seeks to contribute to the broader literature on transnational higher education and provide practical insights for policymakers and educational institutions involved in international collaboration.

Research Methodology

This study adopts a qualitative research approach to explore the localization strategies of foreign universities operating in Kazakhstan's higher education system, with a particular focus on engineering and technical disciplines. Given the exploratory nature of the research question, qualitative methods are considered appropriate for capturing institutional practices, policy contexts, and strategic adaptations[2][6].

2.1 Research Design

The study is based on a combination of literature review and secondary data analysis. This approach allows for a comprehensive understanding of both theoretical perspectives and real-world practices.

The research design includes:

A systematic review of academic literature on transnational higher education (TNHE) and localization

Analysis of policy documents related to higher education in Kazakhstan

Examination of existing cases of foreign university entry and operation

This multi-source approach enhances the reliability and depth of the analysis.

2.2 Data Sources

The data used in this study are derived from three main categories:

(1) Academic Literature

Peer-reviewed journal articles and books focusing on:

Internationalization of higher education

Localization strategies

Engineering education

(2) Policy Documents

Official publications from:

Ministry of Science and Higher Education of Kazakhstan

National education development strategies

Regulatory frameworks for foreign university entry

(3) Institutional Reports and Case Materials

Reports and publicly available data from:

International organizations

Foreign universities operating in Kazakhstan

Joint education programs and partnerships

2.3 Analytical Framework

To systematically analyze localization strategies, this study develops a four-dimensional analytical framework. This framework is adapted from existing studies on internationalization and localization in higher education.

Table 1. Analytical Framework of Localization Strategies

Dimension	Key Focus Areas	Indicators
Academic	Curriculum and teaching methods	Local content integration, program adaptation
Institutional	Governance and partnerships	Joint programs, branch campuses
Cultural	Language and social adaptation	Medium of instruction, faculty composition
Economic	Labor market alignment	Industry collaboration, employability

2.4 Data Analysis Method

The study employs qualitative content analysis to examine the collected data. The analysis process includes:

·Data collection and classification

Relevant documents and literature are grouped according to themes.

·Coding and categorization

Key concepts related to localization strategies are identified and categorized into the four dimensions.

·Comparative analysis

Different cases of foreign university entry are compared to identify common patterns and differences.

·Synthesis and interpretation

Findings are integrated into a coherent analytical narrative.

2.5 Research Limitations

Despite its contributions, this study has several limitations:

The reliance on secondary data limits the ability to capture real-time institutional practices

The absence of primary data (e.g., interviews) may reduce empirical depth

The focus on Kazakhstan may limit generalizability to other regions

However, the study still provides valuable insights into localization strategies within the context of emerging higher education systems.

Results and Discussion

Based on the analytical framework developed in the previous section, this study identifies four major dimensions of localization strategies adopted by foreign universities in Kazakhstan: academic, institutional, cultural, and economic localization. Each dimension reflects a specific aspect of adaptation to the host country environment.

3.1 Academic Localization: Curriculum Adaptation

One of the most important localization strategies is the adaptation of academic programs. Foreign universities entering Kazakhstan often face the challenge of aligning their curricula with local educational standards and labor market needs.

In engineering and technical disciplines, this adaptation is particularly significant. While maintaining international accreditation requirements[4], foreign institutions incorporate local elements into their curricula. These include:

Integration of Kazakhstan-specific case studies

Inclusion of regional industrial practices

Alignment with national education standards

This hybrid curriculum model allows institutions to maintain global academic quality while ensuring local relevance.

Table 2. Academic Localization Strategies

Strategy	Description	Impact
Curriculum adaptation	Inclusion of local content	Increased relevance
Industry-oriented courses	Focus on applied engineering skills	Improved employability
Accreditation alignment	Compliance with both local and global standards	Quality assurance

The findings suggest that academic localization enhances student satisfaction and employability, particularly in technical fields where practical application is essential.

3.2 Institutional Localization: Partnership and Governance Models

Institutional localization is primarily reflected in the choice of entry mode and governance structure. Foreign universities rarely operate independently; instead, they establish partnerships with local institutions[4][5].

The most common forms include:

Joint educational programs

Dual-degree arrangements

Collaborative research initiatives

These partnerships provide several advantages, such as:

Easier compliance with local regulations

Access to local academic resources

Reduced operational risks

Table 3. Entry Modes of Foreign Universities

Entry Mode	Characteristics	Advantages
Branch Campus	Full foreign control	Strong brand presence
Joint Programs	Shared teaching and curriculum	Risk sharing
Dual Degrees	Degrees from both institutions	Increased attractiveness

In Kazakhstan, joint programs are particularly popular due to their flexibility and lower financial risk compared to establishing full branch campuses.

3.3 Cultural Localization: Language and Teaching Practices

Cultural adaptation is another critical component of localization. Kazakhstan presents a multilingual environment, where Kazakh, Russian, and English coexist[6][7].

·Foreign universities typically adopt a flexible language policy, including:

English as the primary language of instruction

Supplementary support in Russian or Kazakh

Recruitment of local faculty members

This approach helps bridge cultural and linguistic gaps between foreign institutions and local students.

·Moreover, teaching practices are also adapted. For example:

Interactive and student-centered teaching methods are introduced

Local learning styles and expectations are considered

These adjustments improve student engagement and academic performance.

3.4 Economic Localization: Alignment with Labor Market Needs

Economic localization focuses on aligning educational programs with the needs of the local labor market[5]. This is especially important in engineering and technical education, where industry demand plays a key role.

Foreign universities contribute to this alignment through:

Collaboration with local industries

Internship and training opportunities

Applied research projects

Table 4. Economic Localization Outcomes

Strategy	Outcome
Industry partnerships	Enhanced practical skills
Internship programs	Improved employment prospects
Applied research	Increased innovation capacity

These strategies ensure that graduates possess skills that are directly relevant to Kazakhstan's economic development goals.

3.5 Key Challenges in Localization

·Despite the effectiveness of these strategies, several challenges remain:

Regulatory barriers: Complex approval processes for foreign institutions

Quality assurance issues: Maintaining consistent academic standards

Cultural differences: Misalignment in teaching and learning expectations

Financial sustainability: High operational costs for foreign providers

These challenges highlight the need for a balanced approach to localization, combining global standards with local adaptability.

3.6 Synthesis of Findings

Overall, the findings indicate that successful localization requires a multi-dimensional strategy. No single approach is sufficient; instead, foreign universities must integrate academic, institutional, cultural, and economic adaptations.

Conclusion

This study examined the localization strategies adopted by foreign universities entering Kazakhstan's higher education system, with a particular focus on engineering and technical disciplines. Drawing on a qualitative analysis of existing literature, policy documents, and institutional practices, the research identified four key dimensions of localization: academic, institutional, cultural, and economic.

The findings suggest that successful localization is not a single-step adjustment but a comprehensive and dynamic process. Academic localization, through curriculum adaptation and alignment with local standards, ensures the relevance of educational programs. Institutional localization, particularly through partnerships and joint programs, helps foreign universities navigate regulatory environments and reduce operational risks. Cultural localization, including language adaptation and pedagogical adjustments, enhances student engagement and accessibility. Economic localization, especially through collaboration with industry, strengthens the employability of graduates and supports national development goals.

In the context of engineering and technical education, localization becomes even more critical due to the strong connection between education and labor market demand. Foreign universities must align their programs with local industrial needs while maintaining international academic standards. This balance between global and local elements is essential for achieving both educational quality and practical impact.

The study also highlights several challenges, including regulatory constraints, cultural differences, and financial sustainability. These challenges indicate that localization strategies must be flexible and context-sensitive. Policymakers should continue to support international collaboration while ensuring quality assurance, and foreign institutions should invest in long-term partnerships and local engagement.

Overall, this research contributes to the understanding of transnational higher education in emerging markets and provides practical insights for institutions seeking to expand internationally. Future research could incorporate empirical data, such as interviews or surveys, to further validate and deepen the findings presented in this study.

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MAİN APPLİCATİON AREAS OF GREEN TECHNOLOGİES İN AZERBAİJAN

Eltun İbrahimov Yulat oglu
Associate professor,
Nakhchivan State University
İbrahimov Umid Coshgun oglu
Master's student
Nakhchivan State University

Abstract

In recent decades, climate change, the depletion of energy resources, and environmental pollution have guided Azerbaijan toward a sustainable and eco-friendly development model. Within the framework of the "green transition," ecological technologies are being implemented in the energy, agriculture, industry, transport, and urban planning sectors. The development of alternative energy sources, efficient use of water and land resources, digitalization, and "smart agriculture" technologies enhance economic resilience and productivity. Energy efficiency, waste recycling, and green certification are expanding in the industrial and transport sectors. The education and innovation system is focused on training young specialists. These measures combine Azerbaijan's economic growth with ecological balance, moving the country toward becoming a regional hub for green innovations.

Keywords: *climate change, energy efficiency, alternative energy, ecological innovations*

Introduction

In recent decades, global climate change, the depletion of energy resources, and environmental pollution have compelled countries to seek more sustainable and environmentally oriented development models. Modern economic development is measured not only by the intensive use of resources but also by their efficient management and the preservation of ecological balance. In this context, the process known as the "green transition" not only drives structural changes across all sectors of the economy but also elevates the application of ecological technologies and the development of alternative energy sources to a strategic priority. For Azerbaijan, this is of particular importance both in maintaining competitiveness in international markets as an energy exporter and in ensuring sustainable development while protecting vulnerable ecosystems.

Innovations in the country's energy, agriculture, industry, transportation, and urban infrastructure sectors not only contribute to environmental protection but also play a significant role in strengthening economic resilience and improving social welfare. In this regard, Azerbaijan's green transition strategy aims to transform the national development model into a more diversified, sustainable, and environmentally based form through the implementation of technological innovations, digitalization, and the strengthening of scientific potential.

***The main objective of this article** is to analyze Azerbaijan's green transition strategy and the transformation of its energy sector. Against the backdrop of global climate change and resource limitations, the country's economic development model must now focus not only on traditional energy resources but also on ecological sustainability and the adoption of innovative technologies. Through reforms and technological innovations in the energy, agriculture, industry, transportation, and urban planning sectors, Azerbaijan's economy is being transformed into a more sustainable, diversified, and environmentally oriented model. The article also emphasizes the practical outcomes of implementing green technologies through state strategy, international cooperation, and innovation infrastructure, highlighting the country's potential future role as a regional "green innovation hub.".*

Azerbaijan's green transition strategy and transformation in the energy sector

In recent decades, global issues such as climate change, depletion of energy resources, and environmental pollution have compelled states and societies to seek new development models. In the modern era, economic growth is measured not only by the intensive use of resources but also by their rational management and the preservation of ecological balance. In this regard, environmentally efficient technologies, the adoption of alternative energy sources, and resource-saving production models have become a strategic necessity. Globally, this process, known as the "green transition," leads to structural changes across all sectors of the economy.

For Azerbaijan, this direction is of particular importance. The country holds a significant position in international markets as an energy exporter and also possesses ecosystems that are sensitive to the

impacts of climate change. Therefore, maintaining a balance between economic development and ecological stability has become one of the main priorities of state policy. In the recently adopted document "Azerbaijan 2030: National Priorities for Socio-Economic Development," sustainable energy, ecological security, and efficient resource use are identified as strategic goals. This document indicates that the sustainability of economic growth is now measured not only by financial indicators but also by ecological and social factors (1).

Environmentally oriented innovations in the modern era not only serve to protect the environment but also enhance the competitiveness of the economy. Areas such as energy efficiency, waste recycling, water resource management, and modernization of the transportation sector reduce production costs while increasing export potential. In this sense, the application of ecological technologies becomes a key tool for qualitative change in Azerbaijan's economic model. The country aims to leverage its experience and revenues from traditional energy resources to develop the "green energy" sector, thereby gradually transforming its economy into a more diversified and sustainable model.

At the same time, ecological changes in the region and growing resource demand make innovation in this field inevitable for Azerbaijan. Problems such as decreasing water levels in the Caspian Sea basin, soil erosion, and environmental stress caused by urbanization affect long-term economic sustainability. Addressing these challenges requires not only traditional administrative measures but also new technological approaches. Consequently, ecological innovations have become a primary development priority for both state policy and the business sector.

Azerbaijan's geographic location and natural resource potential also create extensive opportunities in this area. The abundance of solar, wind, bioenergy, and hydroelectric resources provides favorable conditions for increasing alternative energy production. At the same time, a strong agricultural sector allows the implementation of ecological farming models and enhances the competitiveness of local products. In the transportation and industrial sectors, modernizing production processes, reducing resource circulation, and implementing innovative waste management practices have already reached a practical stage.

An important aspect of this process is international cooperation. Azerbaijan has joined several international climate agreements and integrated the United Nations Sustainable Development Goals (SDGs) into its national development strategies. In this context, projects implemented in the country play a strategic role not only for the domestic market but also for regional energy security and ecological stability. Initiatives such as the creation of a "green energy zone," particularly in liberated territories, exemplify practical steps taken by the state in this direction.

Thus, the application of environmentally oriented technologies in Azerbaijan is no longer limited to individual projects and initiatives but is taking shape within a broader strategic framework. Measures in energy, agriculture, transportation, industry, and urban infrastructure contribute to structural changes in the economy and the strengthening of ecological values. In doing so, Azerbaijan is gradually moving from a resource-exporting country toward a practitioner of ecological innovations and a regional model. Against the backdrop of global ecological trends, the country's economic development model is transitioning from a resource-based phase to an innovative and sustainable phase. The main goal of this transition is to ensure economic growth while protecting natural resources and maintaining environmental resilience.

The implementation of this model relies heavily on the application of ecological technologies in specific sectors, with the energy sector being particularly important due to the country's economic structure and export potential. For this reason, it is necessary to first analyze the transformation processes taking place in this sector (5).

Recent changes in the country's energy sector are not only technological updates but also systematic reforms aimed at aligning economic and ecological objectives. Within these reforms, diversification of the energy balance, increasing the share of renewable sources, and improving energy efficiency have been identified as key directions.

Innovations in the energy sector

For a long time, the oil and gas industry has been the leading sector of Azerbaijan's economy. This not only brought substantial revenue to the country but also secured its strategic position in the international energy market. However, fluctuations in oil prices and the global energy transition have increasingly highlighted the risks of a resource-based economic model. Consequently, over the past decade, resource diversification and the development of alternative energy sources have become central to the country's energy policy.

Assessments of Azerbaijan's energy potential indicate significant advantages in this area. According to official sources, the total renewable energy potential exceeds 200 GW, with 135 GW onshore and 157 GW offshore wind energy. The economically feasible portion is estimated at around 27 GW, demonstrating the potential to partially reduce dependence on oil and gas and strengthen energy security. To utilize this potential efficiently, the state has implemented several large-scale projects in recent years. In 2021, in partnership with the Saudi Arabian company ACWA Power, construction began on the Garadagh Solar Power Plant (240 MW), which became operational in 2024. Simultaneously, a 230 MW wind power station is planned in collaboration with the UAE's Masdar company. These projects increased the country's renewable energy capacity to 1,688 MW by the end of 2023, marking a 567 MW increase compared to 2014. Official statistics indicate that the share of alternative sources in electricity production rose from 5.5% in 2020 to 13.5% in 2024. The Azerbaijani government aims to increase this share to 30% by 2030, including the establishment of wind farms along the Caspian Sea coast and solar energy projects in Nakhchivan and Jabrayil (2).

Innovations in the energy sector are not limited to new production capacity. Important measures have also been taken to modernize existing infrastructure, reduce energy losses, and cut carbon emissions. In the first three months of 2025, renewable energy production increased by 40%, demonstrating practical results of the "green transition." Azerbaijan also supports the international commitment to achieve net-zero emissions by 2050. Priority areas include the deployment of smart grid technologies and improving the energy efficiency of older power plants.

In agriculture, the application of ecological approaches and innovative technologies is crucial not only for increasing production but also for efficient resource use, environmental protection, and long-term sustainability. Reforms in this sector involve digitalization, modernization of irrigation systems, and the implementation of "smart agriculture" approaches, indicating structural changes within the sector.

The Azerbaijani government has made significant steps in digitalizing agriculture. The e-Agro electronic agricultural information system provides services to a larger number of farmers; approximately 470,000 farmers are registered, and data on 719,000 hectares of planted land has been entered. Through this system, subsidies, seed and fertilizer provision, and farm management are implemented electronically, promoting centralized and transparent administration. Furthermore, technology adoption has increased productivity and resource efficiency. For example, GPS-controlled machinery, soil moisture sensors, and precision irrigation systems have resulted in approximately a 25% increase in productivity, a 20% reduction in water usage, and up to a 15% decrease in fertilizer use. This digitalization process is accompanied not only by technical measures but also by administrative integration, training programs, and expanded access to innovation (4).

Sustainable use of water and soil resources is critical for Azerbaijan's agriculture. The country's irrigation systems were largely outdated, causing water loss and soil erosion. Approximately 70% of the national water demand is used for irrigation. Modern irrigation systems, such as drip irrigation, flexible water distribution, and pivot systems, allow farmers to save water and increase yields. In some areas, these systems have increased productivity by 13.1 quintals per hectare compared to traditional methods, while also preserving soil structure and reducing erosion (4).

In urban planning, concepts such as "green architecture" and "smart cities" are gradually being implemented. Key measures include energy-efficient building systems, rainwater harvesting, and increasing green spaces. In waste management, the focus is not merely on collection and transportation but also on recycling and converting waste into valuable resources. Circular economy approaches aim to minimize waste, reorganize material flows, and improve resource efficiency. Sorting, recycling facilities, and environmental awareness campaigns are integral components of this system.

Industrial enterprises have adopted technological innovations to improve resource efficiency, reduce waste, and save energy. Automation, digitalization, and recycling technologies enhance production efficiency while minimizing environmental impact. Some enterprises have introduced "green certification" and adapted ISO environmental standards.

The transportation sector, driven by urbanization and economic activity, has become a major source of energy consumption and emissions. Consequently, the introduction of eco-friendly transport and optimization of public transport systems have been prioritized. The promotion of electric buses, hybrid vehicles, and bicycle infrastructure are important steps in this direction. Green transition in these sectors requires not only technological upgrades but also changes in management models. Integrating ecological responsibility into business processes and increasing social and environmental accountability of enterprises is essential for future development.

The sustainable formation of a green economy is closely linked not only to technological innovation but also to strengthening scientific potential and integrating ecological awareness into society. Innovation and the education system play a decisive role in applying green technologies. Azerbaijan's future development strategy emphasizes promoting ecological innovations, training young specialists, and strengthening links between science, education, and production. Research centers and technoparks contribute to developing new ecological solutions, creating energy-efficient and environmentally optimal models suitable for local conditions. These models are applicable to industry, agriculture, and urban management.

In the education system, integrating ecological knowledge and promoting green thinking are strategic priorities. Universities offer courses in "sustainable development," "energy management," and "environmental engineering" to prepare professionals in these fields. At the school level, environmental awareness programs cultivate responsible attitudes toward nature. The joint development of innovation and education also strengthens the institutional base of the green economy, as technology application is only possible with knowledgeable human resources. State support, funding of research projects, and international cooperation ensure the sustainability of the green transition.

Analysis shows that the application of green technologies in Azerbaijan not only serves ecological goals but also enhances economic resilience, energy security, and social welfare. Measures in energy, agriculture, industry, transport, urban development, and education collectively form the ecological modernization of the national development model. Ensuring the successful continuation of the green transition requires comprehensive management and coordination mechanisms. Strengthening interactions between the state, private sector initiatives, and civil society is crucial. This involves not only the import and application of technologies but also the development of local scientific potential and the realization of innovative ideas. Moreover, fostering ecological awareness and changing public consciousness is key to the long-term effectiveness of green technologies. As environmental responsibility gradually becomes part of the economic behavior model, it will be reflected in production, consumption, and daily life. Therefore, Azerbaijan's development in green technologies can be considered a process aligned with global trends and adapted to national specifics. These steps can strengthen the country's future position as a regional "center of green innovation" and provide a practical foundation for implementing sustainable development strategies.

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ANALYSİS OF THE DİVERSİFİCATİON POTENTİAL İN THE NAKHCHİVAN AUTONOMOUS REPUBLİC

Eltun İbrahimov Yulat oglu
Associate professor,
Nakhchivan State University
Huseynli Araz Huseyn oglu
Master's student
Nakhchivan State University

Abstract

The Nakhchivan Autonomous Republic, despite being geographically separated from the mainland territory of Azerbaijan, has formed a sustainable socio-economic development model as a result of purposeful economic policies. The diversification of the economy, the development of agriculture and industry, and the achievement of energy independence are among the region's priority directions. State support, subsidies, and investment incentives have created favorable conditions for the expansion of entrepreneurship and the growth of local production. The strengthening of economic relations with Turkey and Iran, as well as the prospects of transportation projects, further increase the strategic importance of the region. In recent years, GDP growth, rising budget revenues, and the обеспечение of transparency in the tax system have demonstrated the effectiveness of economic governance. Social programs implemented in the region have also improved the welfare of the population. Overall, the reforms carried out in Nakhchivan serve to strengthen sustainable development and economic stability.

Keywords: *Nakhchivan economy, economic policy, entrepreneurship development, foreign economic relations.*

Introduction

The Nakhchivan Autonomous Republic, while being an integral part of Azerbaijan, is a region distinguished by its unique economic and geographical position. Although its separation from the mainland territory and lack of access to the sea create certain challenges, these factors have also made it necessary to formulate a specific and purposeful economic policy in the region. As a result of consistent and systematic measures implemented in recent years, Nakhchivan has succeeded in establishing a sustainable socio-economic structure with its own distinctive development model. The economic policy implemented in the autonomous republic is aligned with the national development strategy and covers priority areas such as the efficient use of local resources, economic diversification, energy independence, and the development of entrepreneurship. This policy is aimed both at strengthening internal economic potential and expanding foreign economic relations. As a result, the Nakhchivan Autonomous Republic is gradually transforming into a dynamically developing economic region that plays an important role in ensuring economic stability and social welfare in the area...

Objective and methods

The main objective of the study is to analyze the key directions, characteristics, and impact of the economic policy implemented in the Nakhchivan Autonomous Republic on socio-economic development. At the same time, the evaluation of the effectiveness of measures taken to enhance the region's self-sufficiency capacity, diversify the economy, ensure energy independence, and expand foreign economic relations is also among the objectives of the research.

During the study, methods such as analysis and synthesis, comparative analysis, and generalization were employed. Based on official statistical indicators, state programs, and economic reports, the dynamics of Nakhchivan's socio-economic development were examined, and the obtained results were systematically analyzed to draw scientific generalizations.

Main directions and characteristics of economic policy in the Nakhchivan Autonomous Republic

The Nakhchivan Autonomous Republic, while being an integral part of Azerbaijan, possesses a unique economic and geographical position. Although its geographical separation from the mainland territory and the lack of sea access create certain limitations for the region's economic development, purposeful economic policies implemented in recent years have enabled Nakhchivan to establish a sustainable socio-economic system. The economic policy in Nakhchivan is based on Azerbaijan's overall national development strategy and is implemented in accordance with the specific conditions of the autonomous republic. The main objective of this policy is to enhance the region's self-sufficiency capacity, ensure the efficient use of local resources, improve social welfare, and provide sustainable economic

growth. In recent years, serious steps have been taken toward the diversification of the economy, and state support for the development of agriculture and industrial sectors has been strengthened. One of the important directions of economic policy is ensuring energy independence, increasing the use of renewable energy sources, as well as stimulating entrepreneurship and investment activities (2).

Nakhchivan's economic development is also linked to the strengthening of regional integration. The expansion of economic relations with Turkey and Iran, as well as the prospective implementation of new transportation projects (especially the Zangezur Corridor), further increases the strategic importance of the autonomous republic. In fact, the economic policy implemented in Nakhchivan is a model based on local conditions but harmonized with national interests. This policy not only transforms Nakhchivan into an important part of Azerbaijan's economic space but also plays a significant role in ensuring economic stability and social welfare in the region.

The economic policy implemented in the Nakhchivan Autonomous Republic has a comprehensive and multifaceted nature. This policy has been formulated by taking into account the geographical, economic, and social characteristics of the autonomous republic.

One of the main pillars of its economy is agriculture. The region's climate and soil characteristics create broad opportunities for the development of this sector. State policy is aimed at modernizing agriculture on the basis of modern technologies, increasing productivity, and ensuring that the domestic market is supplied by local production. Mechanisms such as state subsidies, concessional loans, and the provision of machinery are applied in agriculture. The main production areas include grain farming, viticulture, vegetable growing, fruit cultivation, and livestock farming. The goal is to ensure the region's food security and improve the social welfare of the rural population.

In Nakhchivan, industrialization policy is mainly based on the development of small and medium-sized enterprises. Sectors such as the food industry, building materials production, light industry, and furniture manufacturing have been developed in the region. The establishment of industrial parks and the technological modernization of local production enterprises are among the important steps in this direction. At the same time, one of the main targets of industrial policy is to reduce dependence on imports and expand local production.

In Nakhchivan, energy security is one of the priority directions of economic policy. The use of renewable energy sources is expanding in the region. In particular, energy independence is being ensured through the use of solar and hydropower potential. As a result of commissioning new power plants and renewing energy infrastructure, Nakhchivan is gradually meeting its energy demand through domestic production.

A favorable legal and economic environment has been created in the autonomous republic for the development of entrepreneurship. Tax incentives, state support, and investment promotion mechanisms create conditions for the expansion of entrepreneurial activity. In this direction, the Nakhchivan Business Center, consultancy services for investment projects, and local production branding programs are being implemented. An important component of economic policy is the enhancement of social welfare and ensuring balanced development in the region. State programs are being implemented in the fields of education, healthcare, housing construction, and social protection. At the same time, the renewal of infrastructure in rural areas and district centers improves living conditions for the population while also increasing economic activity.

Socio-Economic Development of Nakhchivan and the Expansion of Its Foreign Economic Relations

Although the Nakhchivan Autonomous Republic is geographically isolated from the mainland territory of Azerbaijan, it maintains significant foreign economic relations due to its favorable geopolitical position and proximity to international borders. The autonomous republic has substantial potential for both regional and international economic cooperation. Nakhchivan's foreign economic relations are primarily developed with other regions of Azerbaijan, Turkey, and Iran. These relations are fostered through mutually beneficial cooperation in trade, industry, energy, and transportation sectors.

Turkey is one of Nakhchivan's key economic partners. Cooperation exists both at the state level and among business circles. The simplification of customs and logistics systems, as well as streamlined import-export procedures between Nakhchivan and Turkey, has intensified economic ties. Enterprises operating with Turkish capital successfully operate in Nakhchivan's industry, construction, and trade sectors. Moreover, the export of agricultural and food products from Nakhchivan to Turkey occupies an important place in the region's economic balance.

Nakhchivan also maintains long-standing economic and humanitarian relations with Iran. Border trade and energy exchanges with Iran play a special role in the region's economic security. Joint projects, including hydroelectric power stations and energy transmission lines on the Araz River, have been

implemented between the two countries. Transportation connections to other countries via Iran further mitigate Nakhchivan's economic isolation. Economic cooperation also extends to customs, tourism, and agriculture sectors.

As an integral part of Azerbaijan, the Nakhchivan Autonomous Republic operates in close coordination with the country's economic policy. State investments, subsidies, and support for infrastructure projects from Azerbaijan are provided to the autonomous republic. Connections between Baku and Nakhchivan are maintained through air transport and transit routes. In the future, the opening of the Zangezur Corridor will facilitate full integration of Nakhchivan into Azerbaijan's economic system, increase the region's export potential, and expand international trade relations.

Nakhchivan actively cooperates with various regional and international organizations to expand its foreign economic relations. Economic and cultural projects implemented within the framework of the Organization of Turkic States enhance Nakhchivan's regional role. Joint projects with foreign partners are also carried out in the development of tourism and service sectors. Promoting Nakhchivan's products at international exhibitions and economic forums is significant for regional branding.

Purposeful economic policies implemented in the Nakhchivan Autonomous Republic in recent years have fundamentally transformed the region's socio-economic landscape. As a result of a planned and consistent economic strategy, the autonomous republic has established a self-sufficient, sustainable, and diversified economic model. Key indicators of economic development in Nakhchivan have shown an upward trend over the past decades. Gross Domestic Product (GDP) has increased significantly, and per capita income has approached the national average. Industrial and agricultural production has expanded, and the number of local enterprises has grown. Significant progress has been achieved in energy independence, with the autonomous republic increasingly meeting its electricity and heat supply from its own resources. Infrastructure projects, including new roads, bridges, water and gas pipelines, and social facilities, have enhanced economic activity in the region. In the social sphere, education, healthcare, and employment indicators have improved, raising the population's standard of living and welfare. Policies promoting entrepreneurship and tax incentives have contributed to the expansion of the private sector and the creation of new jobs. These achievements demonstrate the effectiveness of economic governance and the efficiency of state support in Nakhchivan.

Consistent socio-economic reforms and measures to ensure transparency in governance, implemented under the leadership of the head of state of Azerbaijan, have had a significant impact on regional development processes. In this context, measures aimed at sustainable economic development in Nakhchivan have produced positive results. In 2024, the GDP of the Nakhchivan Autonomous Republic increased by 3.1% compared to the previous year, indicating that regional economic policy has been implemented purposefully and economic activity has intensified.

The growth of local budget revenues plays an important role in ensuring economic stability. According to statistics, the share of local revenues in financing the autonomous republic's expenditures was 30% in 2022, 38% in 2023, and 57% in 2024. Overall, in 2024, 87.5% of local revenues were generated through the line of the Ministry of Economy. These figures confirm the increasing fiscal independence of Nakhchivan's economy and positive trends in mobilizing local economic potential (5).

In recent years, tax policy has become a key regulatory mechanism for stimulating economic growth and improving the business environment. In 2023-2024, the minimization of tax inspection measures, along with the opening of taxpayer service centers in Nakhchivan, Sharur, Babek, and Ordubad, led to a voluntary compliance rate of 99.1% and a voluntary declaration rate of 99.5% among entrepreneurs in 2024. Improvements in tax administration have facilitated a significant increase in tax revenues. In 2024, tax revenues in Nakhchivan increased by 37.6% compared to 2023, reaching 226.6 million AZN, exceeding the forecast by 30.2%. At the same time, the number of active taxpayers increased by 71.4% to 21,778, and the number of VAT payers rose by 87.1% to 709. Advances in digitalization have resulted in 83% of 241 newly registered commercial legal entities in 2024 being registered electronically. In the past two years, nearly 3,200 online cash registers and over 2,200 POS terminals have been installed in Nakhchivan. In 2024, the total volume of cashless transactions increased by 66.2%, exceeding 1 billion AZN, while POS terminal transactions increased by 38.8% to 112 million AZN. This dynamic contributes to greater transparency in financial circulation and the establishment of a cashless payment culture (5).

At the same time, significant increases have been observed in social insurance contributions. Mandatory state social insurance contributions rose by 9.7% to 162 million AZN, contributions from the non-state sector increased by 15.8% to 25.4 million AZN, unemployment insurance fund contributions grew by 11.4% to 4.4 million AZN, and compulsory health insurance contributions increased by 18.9% to 28.9

million AZN. As a result of measures aimed at increasing transparency in the labor market, the number of active employment contracts in the non-state sector rose 3.6 times to 11,038.

As part of ongoing reforms, mechanisms for the management and privatization of state property have been optimized. Consequently, revenues from the privatization of state property increased by 23.5%, revenues from the lease of state property rose by 87.6%, and income from auctions of small state enterprises and non-residential spaces increased thirteenfold.

These indicators overall demonstrate the increased efficiency of the economic governance system in the Nakhchivan Autonomous Republic, showing that fiscal and institutional reforms have translated into real economic growth. Over the past two years, large-scale administrative and personnel reforms have been carried out in Nakhchivan to improve labor relations, strengthen financial transparency, and create a more favorable business environment. According to the activity plan adopted in September under the "State Program on Socio-Economic Development of the Nakhchivan Autonomous Republic for 2023-2027," approved by the Cabinet of Ministers of the Republic of Azerbaijan, these reforms are aimed at increasing investment inflows, developing the agro-industrial sector, and enhancing export potential (3).

The ongoing economic reforms in Nakhchivan are already producing results. According to official data as of October 2024, the number of small and medium-sized enterprises (SMEs) in the autonomous republic increased by 57.3% compared to the beginning of the year. Local entrepreneurs are mainly expanding their activities in the real sector and effectively utilizing the financial resources of the Entrepreneurship Development Fund. During the first ten months of the year, 75.9% of allocated loans were directed to the industrial sector and 16.9% to the development of agriculture.

In addition, a significant step has been taken to develop Nakhchivan's processing and food industry: the establishment of the Nakhchivan Industrial Park. The management, operation, and development of the park are overseen by the Agency for the Development of Economic Zones (ADEZ) under the Ministry of Economy of the Republic of Azerbaijan. The Nakhchivan Industrial Park is a modern industrial zone created in the autonomous republic, established by the Presidential Decree dated December 5, 2024. The park aims to accelerate industrialization in the region, develop the non-oil sector, enhance local production potential, and create new jobs.

The park covers a total area of 310 hectares and provides necessary infrastructure, logistics facilities, and tax-customs incentives for entrepreneurs, making the investment environment more attractive. The priority sectors of the Nakhchivan Industrial Park include chemical, food and processing industries, building materials production, machinery and equipment manufacturing, renewable energy, furniture, and textiles. Both local and foreign investors are expected to participate, with plans to establish innovative and export-oriented production enterprises. Overall, the creation of the Nakhchivan Industrial Park marks a new stage in the autonomous republic's economy. This initiative is expected to support regional economic growth, stimulate entrepreneurship, and further strengthen Nakhchivan's socio-economic potential (4).

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PRİMARY HEALTH CARE İN AZERBAİJAN: CURRENT STATE, SYSTEMİC CHALLENGES, AND EVİDENCE-BASED PATHWAYS FOR REFORM

Karimli Aytaj Akif

Abstract

Background. Primary health care (PHC) is the foundation of any successful health system. PHC in Azerbaijan has been significantly transformed since independence, but structural, workforce, and informational shortcomings continue to limit its performance. This paper provides an in-depth evaluation of the PHC situation in Azerbaijan, including institutional structure, resource endowment, epidemiological burden, and governance.

Methods. The mixed-methods design was used, which included the analysis of official statistical data (State Statistical Committee, 20102024), the review of regulatory and policy documents, secondary analysis of WHO/Europe Observatory reports, and a specific sociological survey of PHC providers and patients in the facilities of Baku, Ganja, and Sumqayit.

Results. State health spending increased fourfold between 2018 and 2024 and 256 new family health centres were established. The infant mortality rate declined from 19.2 to 12.8 per 1,000 live births (2010–2024). However, maternal mortality almost doubled (14.4 to 28.3 per 100,000 live births); unnecessary emergency calls grew by 13.1 per cent annually; and the execution of capital expenditure was only 19 per cent of the planned amount. The density of physicians in urban and rural areas is still high.

Conclusions. The PHC system in Azerbaijan has achieved quantifiable improvements but is still limited by the lack of full transition to a general-practitioner-centred model, workforce shortages, and insufficient digital infrastructure. It is suggested to implement a gradual reform plan that includes optimisation of governance, specific workforce incentives, and digital transformation, with quantifiable goals by 2030.

Keywords: *primary health care; Azerbaijan; health system reform; family medicine; compulsory health insurance; digital health; Starfield framework.*

1. Introduction

Primary health care (PHC) is the initial interaction between individuals, families, and communities and the national health system. Well-functioning PHC is linked to improved population health outcomes at reduced aggregate cost as articulated by the Alma-Ata Declaration (1978) and reaffirmed by the Astana Declaration (2018). The seminal framework by Barbara Starfield recognizes four fundamental features of effective PHC, namely first-contact accessibility, longitudinality, comprehensiveness, and coordination, each of which has quantifiable implications on system design and resource allocation. Azerbaijan is a particularly educative example of post-Soviet PHC reform. After gaining independence in 1991, the nation inherited a Semashko-type polyclinic system that was highly institutionalised, fragmented in financing and had little focus on preventive care. The following decades of oil-financed economic development allowed investing heavily in infrastructure, but structural imbalances remained. The establishment of the Territorial Medical Division Management Association (TABIB) in 2018 and the introduction of Compulsory Medical Insurance (CMI) nationwide by April 2021 are the most important institutional restructurings in the history of the sector since independence. In spite of these reforms, quantitative indicators are pointing to unresolved issues: maternal mortality has almost doubled since 2015; avoidable emergency service use is increasing; and shortages of physicians in rural areas are chronic. The paper provides a systematic evidence-based evaluation of PHC in Azerbaijan, analyzes the factors behind the existing performance gaps, and suggests a multi-level reform agenda based on international best practice.

2. Methods

The research design is a mixed-method design that is consistent with the Donabedian quality triad (structure, process, outcome). The quantitative analysis is based on the official statistical collection Health, Social Protection and Housing Conditions in Azerbaijan (State Statistical Committee, 2025 edition), which includes the period 20102024. The institutional and regulatory analysis includes primary legislation (Law on Compulsory Medical Insurance, 1999; Presidential Decree No. 418, 2018), strategic policy documents (PHC Improvement Concept, Azerbaijan), and published reports of TABIB and the State Agency on Compulsory Medical Insurance. The sources used in international benchmarking are the WHO/Europe Health Systems in Action 2024 report on Azerbaijan and the European Observatory on

Health Systems and Policies. The qualitative data are based on a structured survey of PHC providers and patients in Baku, Ganja, and Sumqayit (n = 340) and semi-structured expert interviews with facility directors (n = 12). Aware of geographic sampling limitations, results are reported as indicative and not nationally representative. Key mortality indicators were trend analysed and SWOT methodology was used to synthesise system-level strengths, weaknesses, opportunities and threats.

3. Results

3.1 Institutional Architecture and History

The PHC system in Azerbaijan has passed through four phases. The Soviet period (19201991) created a polyclinic-based system that offered universal, state-funded care. The period of post-independence crisis (19912006) was marked by budgetary collapse, infrastructure decay, and the spread of informal out-of-pocket payments, which by 2007 constituted about 62% of total health spending. The infrastructure acceleration phase (20062015) used oil revenues to restore physical capacity, but financing and governance mechanisms were not reformed. The ongoing insurance transformation stage (2015-present) is characterized by two historic events: the creation of TABIB in 2018 and the gradual implementation of CMI, which began in Mingachevir and Yevlakh (2017) and was rolled out nationwide by April 2021. The functional division between regulator (Ministry of Health), purchaser (State Agency for CMI), and provider (TABIB, which operates more than 1,100 facilities with 14 regional divisions) is a principal-agent structure that is in line with the best international practice.

Institution	*Function*	*PHC Relevance*
Ministry of Health	*Regulator: normative framework, licensing, accreditation*	*Standards setting, quality oversight*
State Agency for CMI	*Purchaser: fund management, service contracting*	*PHC financing via capitation*
TABIB	*Provider: management of state health facilities*	*Family health centres, rural clinics, polyclinics*
Private sector	*Complementary provider*	*Urban supplement to TABIB network*

Table 1. Institutional architecture of the Azerbaijan health system (post-2021)

3.2 Infrastructure and Resource Endowment

In 2021-2023, 256 new family health centres were established, including those in liberated territories (Agali, Hadrut, Lachin, Talish, Jabrayil, Shusha). The CMI package covers 3,315 categories of medical service. The increase in state health spending was fourfold between 2018 and 2023. However, the execution of capital expenditure was at 19.01 percent of the planned levels in the first ten months of 2025, which is an indicator of implementation constraints in infrastructure investment. The diagnostic capacity differs significantly across locations. Ultrasound, radiology, and clinical laboratory units are usually located in urban polyclinics; basic diagnostic equipment is often absent in rural ambulatories and feldsher-midwife stations. The growth in PHC revenue (+0.39 year-on-year) is significantly lower than the growth in total TABIB revenue (+5.05 year-on-year), which suggests that primary-level services are underfunded.

3.3 Workforce: Capacity and Distribution

The density of physicians in Azerbaijan is about 3.2 per 1,000 population (combined with all specialties). Nevertheless, the distribution is extremely uneven: Baku is estimated to have 60-70 percent of the national medical workforce, and rural and highland regions are experiencing acute shortages. The basic cadres of PHC delivery, general practitioners, are still inadequate in quantity and unevenly distributed. PHC physicians are relatively older in age, and a significant percentage of them are above 50 years, and the recruitment of younger generations to primary care is limited by the salary disparity compared to specialist and private-sector jobs. A special programme to attract internationally trained specialists saw 79 physicians recruited in 15 institutions. PHC pilot work was carried out in Shamakhi by the WHO/Europe mission. However, according to WHO statistics, the per-capita health workforce has been decreasing in the last ten years, and the urban-rural gap is increasing.

3.4 Epidemiological Context and Health Outcome Trends

The leading cause of death is cardiovascular diseases (56.5% or 326.3 per 100,000 population in 2024), which makes secondary prevention a priority activity of PHC. Neoplasms represent a further 16.4%. Infant mortality rate has reduced significantly, 19.2 (2010) to 12.8 (2024) per 1,000 live births, as a result of better antenatal and neonatal care in the PHC system. Nevertheless, the maternal mortality has risen alarmingly, 14.4 (2015) to 28.3 (2024) per 100,000 live births, indicating a decline in the quality of obstetric and primary maternity care.

Table 2. Selected health outcome indicators, Azerbaijan 2010–2024 (State Statistical Committee, 2025)

Indicator	2010	2015	2020	2023	2024
All-cause mortality (per 100,000)	599.7	574.0	756.5	592.4	577.4
Cardiovascular mortality (per 100,000)	364.4	344.5	412.3	326.8	326.3
Infant mortality (per 1,000 live births)	19.2	18.1	17.8	16.9	12.8
Maternal mortality (per 100,000 live births)	15.7	14.4	15.8	29.3	28.3

3.5 Governance and Quality Management

The gatekeeping role of PHC - to control patient flows and avoid inappropriate use of specialist services - is sub-optimal. During the first nine months of 2024, 39,548 (6.6% of 599,976) calls to the emergency dispatch centre were categorized as unjustified, versus 34,968 (6.3) in the same period in 2023. This 13.1 percent growth in avoidable emergency contacts indicates a structural failure of PHC to perform its first-contact and triage roles. According to patient survey data, 47 percent of the respondents mentioned long waiting time as a major issue, 38 percent mentioned inadequate consultation time, and 29 percent mentioned dissatisfaction with equipment. Sixty-one percent of PHC workers said they were over-administered and 54% of them rated continuing professional development as poor.

4. Discussion

4.1 Reform Achievements in Context

The PHC sector in Azerbaijan has already realized quantifiable benefits in ten years of systemic reform. The regulatory, purchasing, and provider functions institutional separation, which is reflected in the MOHSAMHI-TABIB triad, is a structural improvement in line with international standards. The almost twofold increase in infant mortality reduction in 2010-2024 shows that population health dividends are achieved through increased PHC coverage. The Bardinski pilot, which is a collaborative initiative between SAMHI and TABIB, is an example of the evidence-based iterative strategy suggested by the WHO operational framework (2020). These achievements notwithstanding, the system has not yet realised the full potential of its reform architecture. The continued existence of preventable hospitalisations, the increasing trend in maternal mortality, and the disparity between planned and implemented capital budgets indicate that institutional redesign is not enough without the investment in workforce, quality management, and digital infrastructure.

4.2 Structural Gaps: A Starfield Lens

Using the four-attribute framework by Starfield, there are clear shortcomings. Physician shortage and geographic distance continue to undermine first-contact accessibility in rural environments. Longitudinality is limited by the fact that not all patients have migrated to a general-practitioner model: most still self-refer to specialists, which compromises the therapeutic continuity that defines effective PHC. The lack of diagnostic equipment in peripheral facilities restricts comprehensiveness. The partially digitalised referral systems and the lack of universal electronic medical records impair coordination.

4.3 Workforce: The Bottleneck

PHC physician supply is a consistent determinant of population health outcomes identified by international evidence. OECD studies indicate that the ratio of PHC physicians to 10,000 population is statistically significantly related to decreases in all-cause, cardiovascular, and cancer mortality. The shortage of rural physicians in Azerbaijan is not a market failure that is temporary but a structural consequence of the historical concentration of medical education and health investment in Baku, exacerbated by salary differentials that favour specialist and private-sector work. Demand-side measures such as higher salaries, housing, and career advancement of rural practitioners are needed but not enough without supply-side changes to medical education pipelines and retention. The Mais Médicos programme in Brazil and the rural GP incentive scheme in Germany provide transferable design principles. The nascent advanced practice nursing model, which was implemented in the Netherlands and the United Kingdom to expand PHC coverage without corresponding physician growth, deserves serious consideration in the context of primary care in Azerbaijan.

4.4 Digital Transformation: Advances and Focus

The digital health infrastructure in Azerbaijan has developed through the e-Tabib application (patient portal), partial electronic referral systems, and intended integration of emergency dispatch with mobile services. These programs are in line with the digital transformation requirement of the PHC Improvement Concept. Nevertheless, the coverage of electronic medical records is not full, interoperability between facility-level systems is not complete, and the rural digital connectivity restricts the growth of telehealth. Telehealth has specific value in the geographic setting of Azerbaijan: real-time access to specialists in rural PHC providers would significantly decrease unnecessary referrals and enhance chronic

non-communicable disease (NCD) management. The almost universal implementation of EHR in Estonia and the automated referral workflow in Denmark can serve as examples of the digitalisation path that can be suggested in this paper.

5. A Reform Pathway Proposal on a Multi-Level

On the basis of the analysis above, a three-dimensional reform strategy is suggested, which is operationalised in three consecutive implementation phases.

5.1 Governance Optimisation

On the national level, a holistic PHC development plan with clear outcome goals and autonomous evaluation must be implemented, which will transform the existing Concept into a multi-year binding plan. Mobile medical teams must be required at the regional level to supplement fixed-facility networks in under-served areas. At the institutional level, institutionalisation of clinical audit cycles using Donabedian process indicators should be made, and the outcomes should be associated with performance-related pay elements. Reform financing should be based on capitation-based funding with risk-adjusted coefficients (age, sex, morbidity profile) to all regions, and add pay-for-performance components based on NCD prevention and maternal health quality indicators. The TABIB governance should gradually increase institutional operational autonomy, which will allow PHC staff to set competitive salaries.

5.2 Workforce Strengthening

Table 3. Proposed workforce strengthening measures with international benchmarks

Challenge	*Proposed Measure*	*International Reference*
Rural GP shortage	*Differentiated salary supplements; housing provision; career advancement credits*	*Australia, Germany, Canada*
Ageing workforce	*Targeted rural admissions quotas; scholarship-linked placement obligations*	*Brazil (Mais Médicos)*
Inadequate CPD	*Mandatory accredited CPD (min. 50 hours/year); online platform + mentorship*	*Netherlands, Finland*
Administrative burden	*EHR automation; task delegation to nurses*	*Estonia, Denmark*
Limited nursing scope	*Advanced practice nursing framework for stable chronic NCD management*	*UK, Netherlands, USA*

5.3 Digital Transformation: A Phased Strategy (2025–2030)

Table 4. Phased digital transformation strategy for PHC in Azerbaijan

Phase	*Period*	*Key Actions*	*Milestone Indicator*
Phase I: Foundation	*2025–2027*	*EHR coverage completed across all PHC facilities; electronic patient registration; automated referral tracking*	*≥95% PHC facilities with EHR; 100% electronic referrals*
Phase II: Services	*2027–2029*	*Telehealth expansion; patient portal (e-Tabib) enhancement; AI-assisted clinical decision support; mHealth apps for NCD patients*	*≥70% chronic patients on telemonitoring; >50% contacts via digital channels*
Phase III: Intelligence	*2029–2030*	*Predictive analytics for resource planning; AI-enabled NCD screening; integration with national disease registries*	*≥15% reduction in preventable hospitalisations*

6. Performance Targets for 2030

Table 5. Proposed PHC reform performance targets, Azerbaijan 2030

Domain	*Indicator*	*Baseline (2024)*	*Target (2030)*
Health outcomes	*Infant mortality (per 1,000 live births)*	*12.8*	*≤8.0*
Health outcomes	*Maternal mortality (per 100,000 live births)*	*28.3*	*≤15.0*
Health outcomes	*Cardiovascular mortality (per 100,000)*	*326.3*	*≤280.0*
Access	*Population coverage by PHC (%)*	*Partial*	*≥95%*
Quality	*Chronic patients under dispanser observation (%)*	*No data*	*≥80%*
Workforce	*GP supply (per 10,000 population)*	*Below standard*	*WHO standard*
Digitalisation	*PHC facilities with EHR (%)*	*Partial*	*100%*
Financing	*CMI coverage (%)*	*100% (since 2021)*	*Maintain + deepen*

7. Limitations This research has a number of limitations

Remote rural districts of Azerbaijan may not have complete or verifiable official statistics. The sociological survey was restricted to three urban centres, which limited the generalisability to the national PHC system. The speed of institutional change implies that certain quantitative data can be somewhat out of date by the time of publication. Causal attributions between PHC-specific interventions and population health trends are constrained by the absence of a counterfactual design.

8. Conclusions

The PHC system in Azerbaijan is at a crossroad. The institutional preconditions of successful reform a working purchaser-provider division, national CMI coverage, and an expanding network of family health centres are present. The major health indicators are on positive trends. However, the continued existence

of preventable emergency contacts, an almost doubling of maternal mortality since 2015, shortages of physicians in rural areas, and partial digitalisation demonstrate an architecturally sound but operationally incomplete reform programme.

The three-dimensional approach suggested below, including governance optimisation, focused workforce development, and gradual digital transformation, provides a consistent roadmap to the achievement of the potential of the system by 2030. It will need concerted efforts of all stakeholders: the Ministry of Health as the regulator, SAMHI as the purchaser, TABIB as the provider, and medical education institutions as the future pipeline of PHC professionals. It will be necessary to monitor against the proposed performance targets to maintain political momentum and facilitate adaptive management. The results of this research add to the evidence base of PHC reform in post-Soviet middle-income nations and provide transferable lessons to systems experiencing similar shifts in the model of care between hospital-centred and community-centred care.

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EDUCATIONAL MIGRATION IN MODERN SOCIETY

M. Khojimatov
Sh. Mamatov
Center for the implementation of educational programs of Webster university in Tashkent

Abstract

Migration should be understood not merely as the physical movement of people, but as a complex social process with significant economic, demographic, and sociocultural implications. Within population dynamics, migration represents one of three key forms of movement alongside natural change (births and deaths) and social mobility. In recent decades, educational migration has emerged as a particularly important and multifaceted phenomenon, driven by globalization, digitalization, and increasing socio-economic and political transformations worldwide. Educational migration involves the international movement of individuals seeking higher education, professional development, or cultural experience. It has become a central component of global mobility, reflecting aspirations for career advancement and personal growth. Higher education institutions play a crucial role in this process by expanding international cooperation and attracting foreign students. At the same time, host countries face challenges related to migration management and the integration of international students into academic and social environments.

Keywords: Educational migration, international student mobility, human capital development, migration theories, adaptation, integration, globalization, digitalization, higher education systems.

Migration should be viewed not simply as people relocating geographically, but as a complex social phenomenon studied in both economics and demography. It plays a key role in shaping a society's socio-economic progress. Population dynamics are typically divided into three types: natural change (births and deaths), spatial change (migration), and social change (social mobility). Social mobility refers to shifts in an individual's social position, professional development, career changes, and the enhancement of qualifications.

Educational migration has emerged as a highly relevant and multifaceted issue in today's world. Its importance is linked to the rapid increase in migration caused by global political shifts, demographic trends, and socio-economic challenges.

Each year, large numbers of individuals travel abroad to pursue university or advanced studies, gain professional skills, complete internships, or learn new languages. As a result, educational migration has become a key component of global mobility, highlighting individuals' pursuit of both career advancement and personal growth [1].

In the context of digitalization and globalization, higher education institutions are actively developing international cooperation, expanding academic exchange programs, and attracting foreign students to obtain high-quality professional education. However, host countries, acting as key participants in the market for educational services, face a number of challenges related to managing migration processes, including educational migration. These challenges require a comprehensive approach to regulation and the creation of conditions for the effective integration of international students into both the academic and social environment.

A well-functioning system of educational migration serves as an important tool for addressing a wide range of socio-economic and demographic issues, as its benefits for Uzbekistan have significant potential. In modern conditions, higher education institutions, including regional universities, are forced to actively compete with one another to attract both domestic and international applicants and students, since their sustainable development, financial stability, and prestige at the national and international levels depend on this.

In recent years, the expansion of migration has drawn growing attention from scholars, who increasingly focus on its different forms depending on the underlying causes. For example, economic downturns and political instability have traditionally led to greater emphasis on studying labor and forced migration. Meanwhile, educational migration – despite its crucial role in building human capital and fostering innovation – remains comparatively understudied.

Although it significantly influences social, economic, political, and cultural developments in both origin and destination countries, educational migration is often overlooked in comparison with other types of migration. This underestimation is problematic, as it affects the development of a nation's

workforce, scientific capacity, and overall education system, potentially hindering socio-economic and technological advancement.

While international scholars typically use the unified term educational migration, domestic researchers tend to adopt a more nuanced approach, differentiating between concepts such as intellectual migration, educational migration, and student migration.

Educational migration can be defined as a voluntary, legal, and typically temporary type of social mobility that may, in some cases, become permanent. For analytical purposes, participants in this process can be grouped into four categories: schoolchildren, prospective students, current students and graduates, as well as trainees and skilled professionals. A major concern in this area is "brain drain," where individuals who study abroad choose not to return home, thereby weakening the human capital base of their home regions and highlighting the need for effective retention strategies.

The study of educational migration often emphasizes motivation. Decisions to migrate are shaped not only by economic considerations but also by aspirations for professional development, access to better educational opportunities, and the potential for upward social and career mobility.

Equally important is the adaptation of educational migrants, which involves several interconnected stages. How successfully individuals navigate these stages determines how well they integrate into the academic system and broader socio-cultural environment of the host country.

Today, educational migration is recognized as a significant social phenomenon, although it remains relatively under-researched. While there is a growing body of statistical and analytical work, most studies focus on demographic and socio-economic dimensions, as well as adaptation challenges. This gap can be explained by the complex and multifaceted nature of educational migration and the wide range of factors influencing its development and consequences.

From the perspective of neoclassical economics, migration is primarily driven by regional imbalances in labor supply and demand. Wage disparities between locations encourage workers to move from areas with excess labor and low incomes to those offering better employment opportunities and higher wages.

The systems approach interprets migration as a complex, multidimensional process shaped by interconnected social, economic, demographic, and political factors. This perspective is especially useful in analyzing educational migration, as it highlights the interaction between migrants and host societies. Its versatility allows it to be applied across various migration contexts, from local to global levels. Within this framework, migration is seen as an ongoing, multi-layered process influenced by numerous interacting variables.

Modern studies of educational migration most often rely on systems and transnational approaches. The transnational perspective focuses on how migrants adapt to new cultural and social environments and considers migration as a means of strengthening international cultural and educational connections.

In domestic research, Uzbek scholars analyze educational and intellectual migration primarily in the context of demographic development and integration processes, emphasizing their role in shaping human capital and strengthening international cooperation.

Uzbek researchers pay particular attention to the study of student migration from Uzbekistan to Russia, examining the challenges students face in the process of studying, living, and finding employment abroad. In their view, student migration, as a form of intellectual migration, can have both negative and positive consequences. Depending on the effectiveness of state policy and governance mechanisms, it can either turn into a "brain drain," when highly qualified professionals leave the country, or a "brain gain," contributing to the development of the national economy and science.

Foreign researchers identify a number of factors that influence educational migration and the level of social inequality in education. One such factor is gender differences among educational migrants. Western studies highlight several key trends. First, over the past two decades, Europe and the United States have experienced a significant increase in cultural and demographic diversity, leading to new socio-economic challenges. Second, the age of migrants plays an important role: the earlier migration occurs, the higher the likelihood of successful adaptation and integration into the host society.

The issue of psychological and pedagogical adaptation is of particular importance in the context of educational migration. It is considered a key factor that determines not only the academic success of international students but also their social integration. At the same time, studying this process opens up broad opportunities for further methodological development in this field.

An analysis of Western academic literature has identified five main adaptation strategies used by international students: temporary, pragmatic, assimilationist, bicultural, and marginal. The method of

comparative analysis is widely applied in studying the adaptation processes of educational migrants, allowing for a deeper understanding of differences in students' behavioral patterns and integration across various socio-cultural contexts.

A situational factor in educational migration arises when an individual independently decides to gain international experience by choosing to study abroad. Despite the many challenges encountered during study and adaptation, the positive emotions and experiences gained through participation in academic and cultural life at universities generally outweigh the negative aspects.

One of the key problems faced by educational migrants is the language barrier. It is particularly acute during the first months in a new country and affects not only academic activities – such as understanding lectures and completing written and oral assignments – but also everyday life. Limited opportunities for full communication often lead to social isolation, slowing the integration process and potentially causing stress.

Additional difficulties arise when dealing with organizational and legal issues, such as interactions with customs and tax authorities, the police, and the processes of obtaining or renewing visas and migration documents. These aspects require not only time and effort but also an understanding of the host country's legal system.

Social barriers faced by migrants are largely determined by the characteristics of the host society and the degree of cultural distance between the country of origin and the destination country. Linguistic and cultural proximity, as well as shared religious traditions, play an important role in facilitating smoother and faster adaptation. At the same time, the migrant's level of education is a key factor in successful integration, contributing not only to academic achievement but also to broader social opportunities.

Thus, international educational migration represents a complex socio-cultural process that includes many interrelated aspects and has a significant impact on the social and cultural life of both sending and receiving countries. In modern conditions, there is a shift in academic research toward the study of the cultural dimensions of migration, while the rapid development of digital technologies is creating new forms of migration processes that require a reconsideration of existing theories and approaches.

The diversity of the examples and concepts presented above demonstrates the multifaceted nature of educational migration. Research in this field provides broad opportunities for scholars from various disciplines, enabling the development of new academic directions and the advancement of interdisciplinary approaches to studying this phenomenon.

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COUNTRIES' DEPENDENCE ON IMPORTS OF RARE EARTH METALS FROM CHINA: PROBLEMS AND WAYS TO REDUCE

Kalieva Zhanel Zhenisovna
Yenshina Victoria Alekseevna
Turan University, third-year student
Educational Program «6B04104 – World Economy»
Scientific supervisor: ***Bukeykhanova Tamara Koshkarbayevna***

ЗАВИСИМОСТЬ СТРАН ОТ ИМПОРТА РЕДКОЗЕМЕЛЬНЫХ МЕТАЛЛОВ ИЗ КИТАЯ: ПРОБЛЕМЫ И ПУТИ СНИЖЕНИЯ

Калиева Жанель Женисовна
Еньшина Виктория Алексеевна
Университет «Туран», студенты 3 курса
ОП «6B04104 – Мировая экономика»
Научный руководитель: ***Букейханова Тамара Кошкарбаевна***

Abstract

In the context of the modern global economy, rare earth metals have gained particular strategic importance, serving as a key resource for the development of high-tech industries and innovative production. This study analyzes countries' dependence on imports of rare earth metals from China and identifies ways to reduce this dependence amid intensifying geoeconomic competition and the transformation of global supply chains. The structure of the global market is examined, including the distribution of mining and processing, as well as the factors that create asymmetry and concentration of production in a limited number of countries. It is shown that rare earth metals include lanthanides, scandium, and yttrium, which possess unique physicochemical properties that determine their wide application in electronics, energy, defense, and aerospace industries. Particular attention is paid to the growing demand associated with the development of green energy and the implementation of environmentally oriented technologies, which intensifies competition for access to these resources. The analysis of the global market structure demonstrates a significant concentration of extraction and processing in individual countries, primarily China, which creates dependence of other states on imports of both raw materials and high value-added products. It is revealed that this dependence is driven by a combination of economic, technological, and environmental factors, including the relocation of production, differences in costs, and limited domestic processing capacities in a number of countries. Strategies adopted by states to reduce dependence are considered, including the development of national production chains, the creation of strategic reserves, the stimulation of investments, and the expansion of international cooperation. It is noted that the measures implemented allow for partial diversification of supplies; however, fully eliminating dependence in the short term remains difficult. The prospects of coordination mechanisms in the market aimed at aligning the actions of producing countries, stabilizing supplies, and reducing price volatility are also analyzed. It is emphasized that the implementation of such mechanisms is constrained by differences in national interests, heterogeneity of resources, and the potential impact of international trade rules. As a result, it is concluded that the rare earth metals market remains highly concentrated and sensitive to geopolitical factors, and reducing dependence requires a comprehensive approach, including the development of domestic production, diversification of supplies, and improved international coordination. Additionally, it is noted that the resilience of global supply chains largely depends on the ability of countries to adapt to changes in external conditions and to develop long-term strategies for ensuring resource security. In the context of China's growing role as a key market player, the likelihood of export restrictions and other instruments influencing international trade remains, increasing uncertainty for importing countries. Therefore, the development of alternative sources of raw materials, the expansion of supply geography, and the strengthening of cooperative ties between states are becoming particularly important. The conducted analysis leads to the conclusion that a systemic approach is necessary to address the issue of dependence, combining economic, institutional, and technological measures at both national and international levels.

Аннотация

В условиях современной глобальной экономики редкоземельные металлы приобретают особое стратегическое значение, выступая ключевым ресурсом для развития

высокотехнологичных отраслей и инновационных производств. Настоящее исследование посвящено анализу зависимости стран от импорта редкоземельных металлов из Китая и выявлению направлений её снижения в условиях усиливающейся геоэкономической конкуренции и трансформации глобальных цепочек поставок. Рассматривается структура мирового рынка, особенности распределения добычи и переработки, а также факторы, формирующие асимметрию и концентрацию производства в ограниченном числе стран. Показано, что редкоземельные металлы включают лантаноиды, скандий и иттрий, обладающие уникальными физико-химическими свойствами, определяющими их широкое применение в электронике, энергетике, оборонной и аэрокосмической промышленности. Особое внимание уделено росту спроса, связанному с развитием «зелёной» энергетики и внедрением экологически ориентированных технологий, что усиливает конкуренцию за доступ к данным ресурсам. Анализ мировой структуры рынка демонстрирует значительную концентрацию добычи и переработки в отдельных странах, прежде всего в Китае, что формирует зависимость других государств от импорта как сырья, так и продукции с высокой добавленной стоимостью. Выявлено, что данная зависимость обусловлена сочетанием экономических, технологических и экологических факторов, включая перенос производств, различия в издержках и ограниченность собственных перерабатывающих мощностей в ряде стран. Рассмотрены стратегии государств, направленные на снижение зависимости, включая развитие национальных производственных цепочек, создание стратегических резервов, стимулирование инвестиций и расширение международного сотрудничества. Отмечается, что принимаемые меры позволяют частично диверсифицировать поставки, однако полностью устранить зависимость в краткосрочной перспективе затруднительно. Отдельно проанализированы перспективы координационных механизмов на рынке, направленных на согласование действий стран-производителей, стабилизацию поставок и снижение ценовой волатильности. Подчёркивается, что реализация подобных механизмов ограничена различиями национальных интересов, неоднородностью ресурсов и возможным влиянием международных торговых правил. В результате делается вывод о том, что рынок редкоземельных металлов остаётся высококонцентрированным и чувствительным к геополитическим факторам, а снижение зависимости требует комплексного подхода, включающего развитие внутреннего производства, диверсификацию поставок и совершенствование международной координации. Дополнительно отмечается, что устойчивость глобальных цепочек поставок во многом зависит от способности стран адаптироваться к изменениям внешней конъюнктуры и выстраивать долгосрочные стратегии обеспечения ресурсной безопасности. В условиях усиления роли Китая как ключевого участника рынка сохраняется вероятность использования экспортных ограничений и других инструментов влияния на международную торговлю, что повышает неопределённость для импортирующих стран. В связи с этим особую актуальность приобретает развитие альтернативных источников сырья, расширение географии поставок и укрепление кооперационных связей между государствами. Проведённый анализ позволяет сделать вывод о необходимости системного подхода к решению проблемы зависимости, сочетающего экономические, институциональные и технологические меры на национальном и международном уровнях.

Keywords: *rare earth metals, global raw materials market, import dependence, supply chains, China, supply diversification, industrial policy*

Ключевые слова: *редкоземельные металлы, мировой рынок сырья, импортная зависимость, цепочки поставок, Китай, диверсификация поставок, промышленная политика.*

Введение.

В современных условиях глобальной экономики редкоземельные металлы приобретают стратегическое значение, поскольку являются ключевым компонентом высокотехнологичных отраслей.

Актуальность исследования обусловлена усилением геоэкономической конкуренции и рисками нарушения глобальных цепочек поставок. Ряд стран стремятся снизить зависимость от Китая в сфере критически важных сырьевых ресурсов. Концентрация производства и переработки редкоземельных металлов в одной стране формирует угрозы экономической и технологической безопасности.

Степень научной разработанности темы характеризуется наличием исследований, посвящённых как особенностям рынка редкоземельных металлов, так и вопросам ресурсной зависимости. В частности, отдельные аспекты функционирования рынка и его структуры рассматриваются в работах Федорова В. и Михайлова А. Вопросы зависимости от импорта и роли Китая в глобальных цепочках поставок анализируются Сафроновым Е., Черашевым Д. и Гушлой С. Вместе с тем проблема поиска эффективных механизмов снижения зависимости и оценки их реализуемости остаётся недостаточно разработанной.

Научная новизна исследования заключается в обобщении и сравнительном анализе стратегий стран по снижению зависимости от импорта редкоземельных металлов, а также в оценке перспектив координационного механизма на данном рынке с учётом роли Китая.

Базу исследования составили материалы Геологической службы США, а также аналитические и научные публикации, посвящённые развитию рынка редкоземельных металлов, вопросам международной торговли и формированию глобальных цепочек поставок. Использование данных источников позволило обеспечить достоверность статистической информации и комплексность анализа.

Объектом исследования является мировой рынок редкоземельных металлов, предметом – зависимость стран от импорта редкоземельных металлов из Китая и механизмы её снижения. Цель работы – проанализировать зависимость стран от импорта редкоземельных металлов из Китая и выявить основные направления её снижения.

Для достижения цели поставлены следующие задачи:

- *рассмотреть роль редкоземельных металлов и структуру их мирового рынка;*
- *выявить причины зависимости стран от импорта редкоземельных металлов;*
- *проанализировать стратегии различных стран по снижению зависимости от импорта;*
- *проанализировать перспективы и реализуемость координационных механизмов на рынке редкоземельных металлов с учётом роли Китая и существующих ограничений.*

В ходе исследования использовались методы анализа и синтеза, сравнительного анализа, системного подхода и обобщения статистических данных.

Теоретические основы редкоземельных металлов.

Редкоземельные металлы представляют собой группу химических элементов, которую часто путают с понятием «редкие металлы», однако эти категории не являются тождественными. Редкоземельные металлы включают лантаноиды, а также скандий и иттрий, тогда как редкие металлы – более широкая группа элементов с ограниченной распространённостью или сложностью добычи. Следовательно, все редкоземельные металлы относятся к редким, но не все редкие металлы являются редкоземельными.

В мировой практике выделяют 17 редкоземельных элементов: 15 лантаноидов, а также скандий и иттрий. Сам термин возник исторически вследствие ошибочного представления ранних исследователей, считавших эти элементы редкими из-за сложности их обнаружения и переработки.

Редкоземельные металлы обладают уникальными физико-химическими свойствами, что определяет их широкое применение в высокотехнологичных отраслях: электронике, аккумуляторах, электродвигателях, ветрогенераторах, а также в оборонной и аэрокосмической промышленности. В условиях технологического развития их значение возрастает, поскольку они выступают ключевым ресурсом для производства инновационной продукции.

Рост спроса во многом связан с развитием ESG-повестки и «зелёной» энергетики. Как отмечают Федоров В. и Михайлов А., глобальный переход к экологически ориентированным ***технологиям усиливает конкуренцию за доступ к данным ресурсам [1].***

Структура мирового рынка.

Мировой рынок редкоземельных металлов имеет сложную структуру и включает добычу, переработку и производство конечной продукции. Наибольшая концентрация наблюдается на первых двух стадиях, что формирует асимметрию рынка. По данным Геологической службы США, объём мировой добычи в 2024 году составил около 390 тыс. тонн, при этом производство характеризуется высокой территориальной концентрацией (рисунок 1).

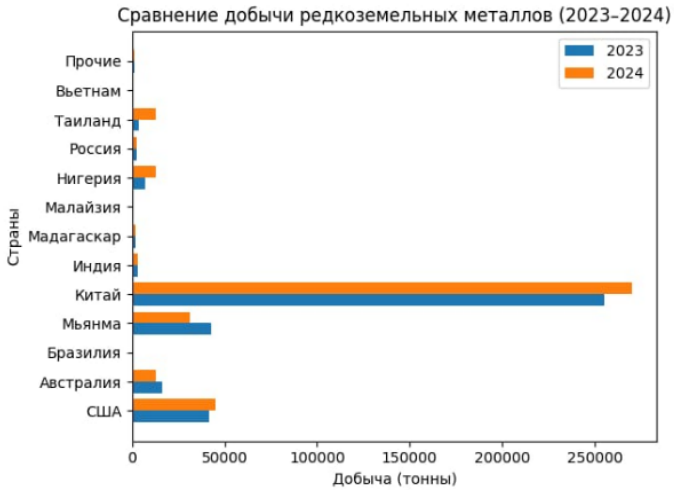

Рисунок 1. Сравнение добычи редкоземельных металлов 2023-2024 гг. [2]

Важную роль играет и распределение запасов, определяющее долгосрочный ресурсный потенциал. Лидирующие позиции по запасам и добыче занимает Китай, тогда как Бразилия, Индия и Австралия обладают значительными ресурсами, но их участие в добыче остаётся ограниченным (рисунок 2).

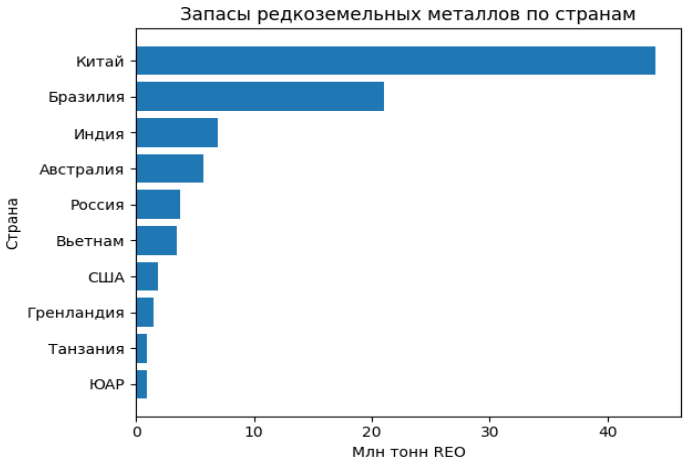

Рисунок 2. Запасы редкоземельных металлов по странам. 2024 г. [2,3]

Подобная структура мирового рынка редкоземельных металлов формирует предпосылки для зависимости других государств от импорта редкоземельных металлов и продукции с высокой добавленной стоимостью. Данная зависимость сформировалась под воздействием ряда экономических, технологических и экологических факторов.

Причины зависимости стран.

Одной из ключевых причин является неравномерное распределение мощностей по переработке, значительная часть которых сосредоточена в Китае. Это приводит к тому, что даже при наличии добычи в других странах они остаются зависимыми от поставок переработанной продукции. По мнению Сафронова Е., доминирующее положение Китая стало результатом целенаправленной государственной политики, направленной на развитие полного производственного цикла. В отличие от него, развитые страны в значительной степени утратили собственные перерабатывающие мощности, что усилило их зависимость от внешних поставщиков [4].

Существенным фактором выступает высокая доля импорта в структуре потребления редкоземельных металлов. Как отмечает Черашев Д., США покрывают значительную часть своих потребностей за счёт импорта из Китая, доля которого достигает 70-80%. В странах Европейского союза зависимость от внешних поставок ещё выше и, по оценкам, достигает почти полной зависимости по отдельным видам редкоземельных элементов [5].

Дополнительно следует учитывать перенос производственных мощностей в Китай, обусловленный более низкими издержками, а также менее строгими экологическими нормами и государственным стимулированием промышленного производства. Это привело к

концентрации переработки в одной стране и снижению конкурентоспособности аналогичных отраслей в развитых экономиках. Вместе с тем значительное воздействие производства редкоземельных металлов на окружающую среду привело к закрытию части предприятий в развитых странах, включая США, и их переносу в Китай. В результате усилилась импортная зависимость: так, в период 2018–2021 гг. США обеспечивали около 74% своих потребностей за счёт поставок из Китая.

Как отмечает Гушла С., контроль над цепочками поставок редкоземельных металлов позволяет оказывать влияние на экономические процессы, что усиливает геоэкономическую значимость данного ресурса и закрепляет зависимость стран-импортёров [6].

Стратегии снижения зависимости.

В условиях доминирования Китая на мировом рынке редкоземельных металлов его позиция приобретает характер монопольной, что усиливает влияние на глобальные цепочки поставок и ценовую конъюнктуру. Сформировавшаяся структура отрасли позволяет Китаю использовать редкоземельные металлы как инструмент геоэкономического воздействия. Так, в период торговых противостояний с США применялись экспортные ограничения, включая лицензирование и квотирование. В апреле 2025 года новые ограничения вызвали перебои на европейском рынке, продемонстрировав уязвимость стран-импортёров.

В этих условиях страны «Большой семёрки» рассматривают меры по снижению зависимости от Китая и укреплению собственной ресурсной базы. К ним относятся установление минимальных цен при государственной поддержке, введение тарифных и нетарифных ограничений (включая углеродный налог), а также географические ограничения в государственных закупках [7].

При этом часть мер может противоречить правилам Всемирной торговой организации: минимальные цены – подпадать под регулирование субсидий, углеродный налог – нарушать принцип национального режима, а географические ограничения – принцип наибольшего благоприятствования. Это повышает риски фрагментации мировой торговли и усиления протекционизма. В то же время страны Глобального Юга могут воспользоваться изменением конъюнктуры: такие государства, как Южная Африка, Демократическая Республика Конго и Индонезия, получают возможность привлечь дополнительные инвестиции.

США занимают одну из ключевых позиций в данной стратегии. В 2022 году был принят закон CHIPS Act, предусматривающий около 53 млрд долларов на развитие производства полупроводников и укрепление цепочек поставок. Дополнительно реализуется инициатива Project Vault по созданию стратегического резерва редкоземельных минералов, включающего 44 вида критически важных материалов. Однако эффективность этих мер ограничена сохраняющейся концентрацией переработки в Китае, поэтому одной из альтернатив остаётся сотрудничество с австралийской компанией Lynas [8].

Европейский союз также предпринимает шаги по снижению зависимости, стремясь восстановить утраченные перерабатывающие мощности. В рамках стратегии поставлены цели увеличить долю на рынке полупроводников до 20% к 2030 году, повысить уровень самообеспечения редкоземельными металлами к 2035 году и сформировать стратегические запасы.

Австралия выступает важным игроком вне Китая, развивая собственную сырьевую базу и переработку. Государственная политика включает механизмы ценовой стабилизации, поддержку новых проектов и финансирование добычи и переработки, что снижает инвестиционные риски и укрепляет позиции страны в глобальных цепочках поставок.

Россия, несмотря на значительные запасы, пока занимает ограниченную долю в мировом производстве. В последние годы реализуются меры государственной поддержки отрасли: в 2026-2028 гг. предусмотрено финансирование в объёме около 3,85 млрд рублей, а также субсидирование производителей для стимулирования внутреннего производства [9].

Координационные механизмы рынка.

В условиях реализации различными странами мер по развитию собственной сырьевой базы и переработки редкоземельных металлов усиливается интерес к институциональным механизмам регулирования рынка. В научной и экспертной среде обсуждаются подходы, направленные на снижение зависимости от ограниченного круга поставщиков и повышение устойчивости глобальных цепочек поставок. Одним из таких направлений является модель координации производителей по аналогии с Организацией стран – экспортёров нефти (ОПЕК) [10].

В рамках подобной модели страны, обладающие значительными запасами и производственными мощностями, могли бы согласовывать политику в сфере добычи, переработки и экспорта. Это способствовало бы снижению ценовой волатильности, повышению предсказуемости поставок и усилению переговорных позиций производителей.

К потенциальным участникам можно отнести государства с развитой сырьевой базой и растущими мощностями добычи и переработки, включая Австралию, страны Юго-Восточной Азии, Африки и Латинской Америки. В экспертной среде также обсуждаются инициативы создания стратегических альянсов с участием Казахстана, России и Китая как инструмента усиления координации и влияния на рынок. Однако участие Китая в подобной структуре представляется маловероятным ввиду его доминирующего положения в переработке и контроле глобальных цепочек поставок, что сохраняет за ним роль ключевого внешнего игрока [11,12].

Реализация данной модели связана с рядом ограничений. Различия в национальных интересах затрудняют согласование единой политики, а неоднородность редкоземельных металлов усложняет формирование универсальных механизмов ценообразования. Кроме того, подобные объединения могут сталкиваться с ограничениями со стороны международных торговых институтов.

Следует учитывать и возможную ответную реакцию Китая, которая может проявляться в усилении экспортной политики, ценовой конкуренции и дальнейшем укреплении собственных цепочек поставок. В этих условиях эффективность координационных механизмов будет зависеть как от согласованности действий участников, так и от адаптивности стратегии Китая.

Формирование подобных механизмов отражает стремление к более сбалансированной модели функционирования рынка. Однако их практическая реализуемость остаётся ограниченной и во многом определяется текущей структурой отрасли и сохраняющимся доминированием Китая.

Вывод.

В ходе исследования установлено, что мировой рынок редкоземельных металлов характеризуется высокой концентрацией производства и переработки, при доминирующей роли Китая, что формирует устойчивую зависимость других стран от импорта. Основными причинами данной зависимости являются неравномерное распределение перерабатывающих мощностей, перенос производств, различия в издержках и экологическом регулировании, а также ограниченность национальных производственных возможностей ряда государств.

Полученные результаты подтверждаются анализом статистических данных и научных источников, включая материалы Геологической службы США и работы исследователей, посвящённых проблемам глобальных цепочек поставок. Это обеспечивает достоверность сделанных выводов и их соответствие реальной структуре мирового рынка.

Практическая значимость работы заключается в систематизации подходов различных стран к снижению зависимости от импорта редкоземельных металлов, а также в оценке ограничений и перспектив координационных механизмов. Показано, что несмотря на предпринимаемые меры по развитию собственной сырьевой базы и диверсификации поставок, полное преодоление зависимости в краткосрочной перспективе затруднено.

Перспективы дальнейших исследований могут быть связаны с более детальным анализом эффективности национальных стратегий отдельных стран, а также с оценкой конкретных механизмов международной координации и их влияния на устойчивость глобальных цепочек поставок редкоземельных металлов.

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Historical sciences

MOLDOVA AT THE HISTORICAL RIFT: FROM THE MULTIVECTORISM OF THE 1990s TO THE GEOPOLITICAL COST OF THE EUROPEAN CHOICE (1991-2025)

Omarkanova A.O.
Academic Supervisor, Senior Lecturer, Higher school of humanities
S. Amanzholov East Kazakhstan University,
Ust-Kamenogorsk, Kazakhstan
Zimina M.N.
Third-year student, specializing in 6B01510 «Geography-History»
S. Amanzholov East Kazakhstan University,
Ust-Kamenogorsk, Kazakhstan
Talkhigova M.L.
Third-year student, specializing in 6B01510 «Geography-History»
S. Amanzholov East Kazakhstan University,
Ust-Kamenogorsk, Kazakhstan

МОЛДОВА НА ИСТОРИЧЕСКОМ РАЗЛОМЕ: ОТ МНОГОВЕКТОРНОСТИ 1990-х К ГЕОПОЛИТИЧЕСКОЙ ЦЕНЕ ЕВРОПЕЙСКОГО ВЫБОРА (1991-2025)

Омарканова А.О.
Научный руководитель, сеньор-лектор Высшей школы гуманитарных наук
Восточно-Казахстанский университет им. С. Аманжолова,
Усть-Каменогорск, Казахстан
Зимина М.Н.
Студент 3 курса специальности 6B01510 «География-История»,
Восточно-Казахстанский университет им. С. Аманжолова,
Усть-Каменогорск, Казахстан
Талхигова М.Л.
Студент 3 курса специальности 6B01510 «География-История»,
Восточно-Казахстанский университет им. С. Аманжолова,
Усть-Каменогорск, Казахстан

Abstract

The article explores the transformation of Moldova's foreign policy from multivectorism in the 1990s - early 2010s to a sharp pro-European course after 2022 and shows the high geopolitical cost of this choice: energy crisis, GDP decline and actual division of the country into "two Moldovas". Special attention is paid to the field observations of one of the authors in the summer of 2025: the sharp contrast in gas and electricity prices, differences in public attitudes and living standards convincingly confirm the thesis about the persistence of the historical rift even against the background of EU candidate status.

Аннотация

В статье исследуется трансформация внешней политики Республики Молдова от многовекторности 1990-х - начала 2010-х годов к резкому проевропейскому курсу после 2022 года и показана высокая геополитическая цена этого выбора: энергокризис, падение ВВП и фактическое разделение страны на «две Молдовы». Особое внимание уделено полевым наблюдениям одного из авторов летом 2025 года: резкий контраст цен на газ и электричество, различия в общественных настроениях и уровне жизни убедительно подтверждают тезис о сохранении исторического разлома даже на фоне статуса кандидата в ЕС.

Keywords: *Republic of Moldova, foreign policy, multivectorism, geopolitics, «East», «West», USSR, CIS, Russia, Europe, European integration, confrontation, convergence, energy crisis, Transnistria, European Commission 2025 report, author's field observations*

Ключевые слова: *Республика Молдова, внешняя политика, многовекторность, геополитика, «Восток», «Запад», СССР, СНГ, Россия, Европа, европейская интеграция,*

конфронтация, сближение, энергокризис, Приднестровье, отчет Еврокомиссии 2025, полевые наблюдения автора

Когда в 1991 году распался Советский Союз, Молдова оказалась в очень непростом положении. Страна лежит прямо между «Востоком» и «Западом» - и исторически, и географически. С одной стороны - общая советская история, русский язык, газопроводы из России, огромный рынок сбыта для тех же яблок и вина. С другой - Румыния рядом, мечта о «возвращении в Европу», безвиз и европейские гранты. На протяжении тридцати лет Молдова пыталась не выбирать «или-или», а брать хорошее и оттуда, и оттуда. И у неё это более-менее получалось.

Ещё в 2013-2014 годах молдавские учёные очень чётко объясняли, почему такой баланс - это не слабость, а единственно правильный путь для маленькой страны. Многие молдавские учёные считали, что именно такой баланс и есть самое правильное решение для страны без выхода к морю, с непростой историей и с Приднестровским конфликтом. Однако события 2022 года полностью изменили эту картину: Молдова сделала резкий и однозначный поворот в сторону Европы. В настоящей статье мы постараемся показать, какой высокой оказалась геополитическая и экономическая цена этого выбора, опираясь на труды ряда исследователей 2013-2025 годов, а также на личные полевые наблюдения одного из нас летом 2025 года.

Повторяемся, молдавские исследователи очень чётко формулировали особенность геополитического положения своей страны. В. Андриевский писал, что «территория Молдовы была не полем конфронтации, а местом сближения Запада и Востока» [1, с. 161]. В том же году Л. Фокина отмечала, что Молдова находится «на перепутье между ЕС и ТС» и что любой резкий отказ от одного из направлений приведёт к серьёзным экономическим и социальным издержкам [3, с. 44]. С. Назария в 2014 году развивал эту мысль и подчёркивал, что укрепление отношений с Россией не отдаляет республику от Европы, а, наоборот, - может стать фактором сближения с ней [2].

Похожие выводы содержатся в монографии П. Байора, где Восточное партнёрство рассматривается как инструмент баланса, а не разрыва с Россией [4]. И. А. Банага в своей выпускной работе показывала, что до конца 2010-х годов Молдова успешно совмещала членство в СНГ и подготовку к ассоциации с ЕС [5]. А. В. Ткач в 2019 году уже отмечал первые признаки «реконфигурации» внешней политики, но всё ещё говорил о сохранении экономических связей с Россией и СНГ [6].

Если посмотреть на цифры и на то, как всё было устроено до 2022 года, то сразу видно - многовекторность не просто красивое слово, а реально работающая схема. Молдова умудрялась одновременно быть и в СНГ, и в Восточном партнёрстве ЕС, и никому особенно не изменять.

Страна оставалась полноправным членом Содружества Независимых Государств. Участвовала во всех саммитах, подписывала кучу документов, получала разные льготы. Самое главное - российский природный газ шёл по ценам в разы ниже рыночных. В 2019-2021 годах «Газпром» продавал Молдове газ по 150–180 долларов за тысячу кубометров, а иногда и дешевле [7]. Для сравнения - в Европе тогда платили 300–400, а то и больше. Это позволяло держать тарифы для населения на уровне 4-5 леев за куб.

Экспорт. До 2021 года Россия и страны СНГ брали у Молдовы 35-40 % всей сельхозпродукции - яблоки, сливы, виноград, орехи, вино. Как писала ещё Л. Фокина в 2013 году, именно этот рынок «обеспечивал стабильность молдавской экономики и давал возможность фермерам планировать свою работу» [3, с. 44]. Когда в 2014 году Россия ввела временное эмбарго, Молдова быстро договорилась об исключениях и снова начала поставлять почти всё.

Европейское направление тоже развивалось. В июне 2014 года подписали Соглашение об ассоциации и зоне свободной торговли с ЕС. С 28 апреля 2014 года - безвизовый режим. Начались европейские гранты, кредиты, программы помощи. К 2020 году ЕС уже стал крупнейшим торговым партнёром Молдовы (около 65-70 % всего экспорта). При этом Россия не исчезла - просто доля упала, но объёмы в деньгах оставались огромными.

Получалось очень удобно:

1. *фермеры продавали продукцию в Россию и СНГ;*
2. *винодельни и консервные заводы переориентировались на Европу;*
3. *молодёжь уезжала на заработки в основном в Италию и Румынию (безвиз), и в Москву, Питер (там платили больше и быстрее);*

4. пенсионеры и бюджетников получали относительно дешёвый газ и свет.

Как отмечал С. Назария ещё в 2014 году, «в современных условиях глобализации внешняя политика государства должна быть прагматичной и многоплановой» [2, с. 208]. И до 2022 года Молдова именно так и делала. Даже когда в 2019-2020 годах у власти были пророссийские силы (Додон), а потом в 2020-2021 - проевропейские (Санду), никто не рвал экономические связи полностью. Все понимали: если рвануть только в одну сторону - будет очень больно.

Именно поэтому до февраля 2022 года в Молдове не было ни энергетического кризиса, ни массового гниения фруктов на полях, ни тарифов в 29 леев за куб. Всё держалось на этом хрупком, но вполне рабочем балансе. Мы считаем, что именно этот период 1991-2021 годов и есть лучший пример того, как маленькая страна может выживать между двумя гигантами, не становясь ничьим сателлитом. Казалось, что учёные были правы - многовекторность это и есть молдавский путь.

Всё, что так аккуратно балансировало тридцать лет, рухнуло буквально за несколько месяцев. 24 февраля 2022 года началась военная операция Российской Федерации на Украине. Уже 3 марта 2022 года Республика Молдова вместе с Украиной и Грузией официально подала заявку на вступление в Европейский союз. 23 июня 2022 года Молдова получила статус кандидата, а в декабре 2024 года начались переговоры о вступлении. Параллельно с этим Майя Санду и её команда сделали всё, чтобы максимально быстро и демонстративно разорвать практически все связи с Россией.

Ещё в конце декабря 2022 года президент Санду публично заявила, что отношения с Россией на всех уровнях прекращены. Контракт с «Газпромом» на поставку газа для правобережья был фактически сорван (Приднестровье же продолжило получать газ по старой схеме). Введён запрет на георгиевские ленточки, запрещён транзит некоторых российских товаров, закрыты русскоязычные телеканалы, высланы российские дипломаты. Как пишет Е. М. Кузьмина, Молдова с 2022 года «присоединилась к антироссийской коалиции», и именно «давление геополитики» стало главным фактором резкого разворота [7, с. 27].

Осенью 2022 года истёк старый контракт с «Газпромом». Россия предлагала продлить его на очень выгодных условиях (около 350-400 долларов за тысячу кубометров при условии сохранения нейтралитета), но Кишинёв отказался. Вместо этого Молдова начала покупать газ на спотовом рынке Европы и у Румынии по ценам 1000–2500 евро за тысячу кубометров. Зимой 2022–2023 годов тариф для населения правобережья доходил до 29 леев за кубометр - это в 6-7 раз выше, чем было раньше [7].

Одновременно закрылся российский рынок для молдавских яблок, слив, орехов и вина. Если в 2021 году туда шло около 35-40 % сельхозэкспорта, то к 2024 году осталось меньше 3 %. Десятки тысяч тонн фруктов просто сгнили на складах и полях. Переводы трудовых мигрантов из России (а это были сотни миллионов долларов в год) упали почти на 40 % [7].

Отчёт Еврокомиссии 2025 года, несмотря на всю похвалу реформам и борьбе с коррупцией, честно признаёт: «энергетическая уязвимость остаётся ключевым вызовом для Молдовы, страна сильно зависит от дорогих альтернативных источников поставок» [8, с. 37-38].

Мы считаем, что именно в этот момент предупреждения Андриевского, Фокиной и Назарии 2013–2014 годов сбылись буквально слово в слово. Страна сделала именно тот «резкий отказ от одного из направлений», о котором писала Фокина [3, с. 44], и получила именно те последствия, о которых она предупреждала десять лет назад.

Экономические и социальные последствия европейского выбора (2022–2025). Цифры получились просто страшные. Когда собирался материал, мы сами не ожидали, что всё будет настолько плохо.

В первую очередь, падение ВВП и инфляция. В 2022 году экономика Молдовы упала на 5,9 %, а инфляция подскочила до 28,7 % - это самый высокий показатель за всю историю независимости [7]. В 2023 году инфляция немного снизилась до 13,4 %, а в 2024 году - до 5,3 %, но люди этого уже почти не почувствовали, потому что цены на всё выросли навсегда.

Следом - энергетический кризис. Зимой 2022-2023 годов тариф на газ для населения правобережья доходил до 29 леев за кубометр - это в 6-7 раз больше, чем было в 2021 году [7]. Правительство ввело огромные субсидии: в отопительный сезон 2022-2023 годов на компенсации ушло больше 10 % всего госбюджета. Но даже с субсидиями многие платили 23-25 леев за куб, а при средней зарплате 7000-9000 леев и пенсии 3000-4000 это просто нереально. Люди снова начали топить дровами, углём, старой мебелью и ящиками из-под фруктов.

Затронуто было и сельское хозяйство. Российский рынок закрылся почти полностью. Если в 2021 году в Россию и страны СНГ шло около 35-40 % молдавских яблок, слив, орехов и винограда, то к 2025 году осталось меньше 2-3 % [7]. Десятки тысяч тонн фруктов просто сгнили на полях и складах. Фермеры рассказывали, что выгоднее было оставить урожай на деревьях, чем собирать и потом выбрасывать.

Промышленность и рабочие места. Многие предприятия на правом берегу Днестра, особенно энергоёмкие (металлургия, цементные заводы, консервные), либо закрылись, либо перешли на 2-3 дня работы в неделю. Безработица официально выросла не сильно (потому что люди просто уехали), но реально в сёлах работы почти не осталось.

Миграция и переводы. В 2021 году переводы трудовых мигрантов из России составляли сотни миллионов долларов в год - это была огромная поддержка для семей. После 2022 года они упали почти на 40 % [7]. Зато выросли переводы из ЕС, но там люди получают больше, а переводят домой меньше - хватает только себе.

Отчёт Еврокомиссии 2025 года, который в целом хвалит реформы и борьбу с коррупцией, всё-таки честно пишет: «энергетическая уязвимость остаётся ключевым вызовом» и «страна сильно зависит от дорогих альтернативных источников поставок» [8, с. 37]. То есть даже в Брюсселе понимают, что цена оказалась очень высокой.

Мы же считаем, что именно здесь полностью подтвердились слова Л. Фокиной ещё 2013 года: полный отказ от одного из направлений приведёт к «резкому росту цен и падению уровня жизни» [3, с. 44]. Всё случилось ровно так, как она и писала десять лет назад.

Полевые наблюдения одного из авторов (июль–август 2025 года). Летом 2025 года одна из нас - Зимина М. Н. - пребывала в Молдове на каникулах и имела возможность своими глазами увидеть, как обычные люди живут после всего этого «европейского выбора». Результаты наблюдений разнятся в зависимости от того, какую часть Молдовы мы рассматриваем: правобережье (Кишинёв и окрестности (в частности пригород столицы - село Бубуечи), Сорока, Бельцы) + Приднестровье (Бендеры, Тирасполь). Разница оказалась такой сильной, что словами передать трудно - как будто автор попала в две разные страны.

Село Бубуечи (15 минут езды от центра Кишинёва). Первое, что бросилось в глаза - высокая стоимость коммунальных платежей: тетя автора показала квитанцию на 24,7 лея за куб газа в июле 2025 года. Пенсия у неё 3800 леев. По ее словам, «в прошлом году мы ещё как-то платили, а в этом уже наверное будем топить печку старыми ящиками из-под яблок и досками от забора. А газ включать только чтобы чайник вскипятить». В соседнем доме знакомая молодая семья с двумя детьми показала свой счёт за июнь - 4800 леев за газ и свет вместе. Муж работает водителем, жена в детсаду - вместе получают около 14 000 леев. Получается, треть зарплаты только на коммуналку.

Город Сорока (север страны). Продавщица фруктов прямо при нас выкидывала ящик гнилых плодов и ругалась (приблизительная цитата по памяти): «Раньше всё до крошки в Россию уходило, а теперь добро пропадает». Бабушка моей подруги, которая там живет, так высказывалась: «Газ в шесть раз дороже сделали. Зачем нам такая Европа?». Люди там не стесняются, открыто говорят, что скучают по старым временным.

Бельцы. Останавливались у знакомых и у нее в гостях встретили женщину, которая рассказывала: «Муж остался дома, завод встал - дорогой газ. Если ещё год так - тоже поедет в Россию, хоть и визы теперь нет». В очереди на маршрутку половина разговоров бабушек - «когда это всё кончится» и «раньше хоть свет был дешёвый».

Ну и наконец - Приднестровье. Переезжаем через Днестр - и будто в другую эпоху попадаем. Газ - 3,8 лея за куб (в шесть раз дешевле!). Свет - копейки. Заводы гудят на полной мощности. В магазине наблюдалась интересная ситуация: обычная бабушка берёт полную тележку продуктов и когда автор ее спросила, каково ее мнение по поводу России, сказала: «У нас всё своё, всё российское - и цены нормальные». На въезде в Бендеры стоит танк-памятник российским миротворцам, в российской форме стоят военные и проезжающих имеют право досматривать. Продавец в маленьком магазинчике, когда узнал, что мы проездом из правобережья, прямо сказал, что наша зона европейская, а им хорошо с Россией.

Самое сильное впечатление - это контраст за один день. Условно утром ты в кишинёвском селе слушаешь, как люди плачут над платёжками, а вечером в Тирасполе видишь улыбающихся людей и работающие заводы. Так, разница в тарифах уже создала две абсолютно разные жизни в одной стране.

Мы пришли к выводам, что эти наблюдения полностью подтверждают всё, о чём писали Андриевский, Фокина и Назария ещё в 2013-2014 годах: полный отказ от одного из направлений привёл именно к тому «историческому разлому», о котором они предупреждали. Только теперь этот разлом видно не на карте, а в кошельках и на лицах обычных людей, а также из их слов. [1, 2, 3].

Завершая наше мини-исследование, важно понимать, прогнозы молдавских учёных 2013-2014 годов о недопустимости полного отказа от одного из внешнеполитических векторов полностью подтвердились. Многовекторность, которую часто критиковали как «сидение на двух стульях», на деле была единственно жизнеспособной стратегией для небольшой страны, расположенной на историческом разломе.

Сегодня Молдова уже получила статус кандидата в ЕС и начала переговоры о вступлении - этот процесс необратим. Однако для того, чтобы европейская интеграция стала действительно успешной и не привела к дальнейшему углублению внутреннего раскола, необходимо вернуть хотя бы минимальный экономический прагматизм: диверсифицировать источники энергии, искать новые рынки сбыта и не превращать геополитический выбор в идеологическую войну внутри собственного общества.

Только при сохранении хотя бы частичного баланса Молдова сможет реализовать свою историческую роль «места сближения», о которой писал ещё В. Андриевский, а не превратиться в очередной форпост конфронтации между Востоком и Западом.

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Mathematical sciences

THE RELATIONSHIP BETWEEN MATHEMATICS AND LIGHT INDUSTRY

Mazhit Zhamilya Batykkyzy
Master of Mathematics,
Rustemova Karashash Zhorabekovna
candidate of physical and mathematical sciences, assistant professor,
Abdimanapova Perizat Bakhytovna
PhD, assistant professor,
Shinikulova Gulnur Nurbekovna
Master of Physics
Almaty Technological University, Almaty, Republic of Kazakhstan

ВЗАИМОСВЯЗЬ МАТЕМАТИКИ С ЛЁГКОЙ ПРОМЫШЛЕННОСТЬЮ

Мажит Жамила Батыккызы
Магистр математики,
Рустемова Карашаш Жорабековна
к.ф.-м.н., ассистент профессор,
Абдиманапова Перизат Бахытовна
PhD, ассистент профессор,
Шиникулова Гульнур Нурбековна
Магистр физики,
Алматинский технологический университет, г. Алматы, Республика Казахстан

Abstract

The article examines the application of mathematical methods in light industry, which includes sectors such as textile, garment, and footwear production. In the context of modern economic development and increasing competition, the use of precise scientific approaches has become a necessary condition for improving the efficiency of enterprises. Particular attention is paid to the implementation of mathematical models and analytical methods that enable informed managerial decision-making.

The use of linear programming for optimizing material cutting is demonstrated. This method makes it possible to arrange pattern pieces on fabric in the most rational way, minimizing waste and reducing production costs. This is especially important in mass production, where even small savings in resources lead to significant financial results.

The article also considers the application of statistical methods for product quality control. These methods are used to analyze production processes, identify deviations, and prevent the release of defective products. The use of tools such as sampling inspection, control charts, and variation analysis helps improve quality stability and ensure compliance with established standards.

In addition, economic and mathematical models used to calculate the optimal production volume and manage inventory are discussed. These models help enterprises effectively plan output, taking into account demand, resource constraints, and production capacity. They also contribute to reducing costs associated with excess inventory or shortages of raw materials.

The presented calculation examples confirm that the application of mathematical methods helps reduce costs and improve the quality and efficiency of production processes. In the context of the digitalization of the economy, the role of mathematics is significantly increasing, as it forms the basis for automation, data analysis, and the implementation of modern information technologies.

It is concluded that mathematics is a fundamental basis for enhancing the competitiveness of light industry enterprises and a key tool for the digital transformation of the industry. Its further development and implementation will contribute to sustainable growth and innovative advancement of enterprises.

Аннотация

В статье рассматривается применение математических методов в лёгкой промышленности, которая охватывает такие отрасли, как текстильное, швейное и обувное производство. В современных условиях развития экономики и усиления конкуренции использование точных научных подходов становится необходимым условием повышения

эффективности предприятий. Особое внимание уделяется внедрению математических моделей и методов анализа, позволяющих принимать обоснованные управленческие решения.

Показано использование линейного программирования для оптимизации раскроя материалов. Данный метод позволяет наиболее рационально размещать детали изделий на ткани, минимизируя отходы и снижая себестоимость продукции. Это особенно важно при массовом производстве, где даже небольшая экономия ресурсов приводит к значительным финансовым результатам.

Также в статье рассматривается применение статистических методов для контроля качества продукции. С их помощью осуществляется анализ производственных процессов, выявление отклонений и предотвращение выпуска бракованных изделий. Использование таких инструментов, как выборочный контроль, построение контрольных карт и анализ вариаций, позволяет повысить стабильность качества и соответствие продукции установленным стандартам.

Кроме того, рассматриваются экономико-математические модели, применяемые для расчёта оптимального объёма производства и управления запасами. Эти модели помогают предприятиям эффективно планировать выпуск продукции с учётом спроса, ограниченности ресурсов и производственных мощностей. Они также способствуют снижению издержек, связанных с хранением избыточных запасов или нехваткой сырья.

Приведённые расчётные примеры подтверждают, что применение математических методов способствует снижению издержек, повышению качества и эффективности производственных процессов. В условиях цифровизации экономики роль математики значительно возрастает, так как она лежит в основе автоматизации, анализа данных и внедрения современных информационных технологий.

Сделан вывод о том, что математика является фундаментальной основой повышения конкурентоспособности предприятий лёгкой промышленности и важнейшим инструментом цифровой трансформации отрасли. Её дальнейшее развитие и внедрение будут способствовать устойчивому росту и инновационному развитию предприятий.

Keywords: *mathematical modeling, optimization, statistical analysis, light industry, economic calculations.*

Ключевые слова: *математическое моделирование, оптимизация, статистический анализ, лёгкая промышленность, экономические расчёты.*

Введение. Лёгкая промышленность — одна из важнейших сфер материального производства, включающая изготовление тканей, одежды, обуви, трикотажа, аксессуаров и других изделий широкого потребления. Она обеспечивает людей предметами ежедневного использования, влияет на экономику, моду, социально-культурные процессы. Несмотря на кажущуюся творческой направленность (дизайн, мода), лёгкая промышленность тесно связана с точными науками, особенно с математикой. Математика — универсальный язык описания и оптимизации процессов, анализа данных и прогнозирования. В лёгкой промышленности математические методы применяются на всех этапах: от проектирования изделий до управления производством, логистики, маркетинга и продажи. Эта статья рассматривает ключевые направления, где математические модели и алгоритмы используются для повышения эффективности лёгкой промышленности.

Легкая промышленность является одной из важнейших отраслей экономики. Несмотря на творческую направленность (дизайн, мода), она тесно связана с математикой. Математические методы используются при проектировании изделий, оптимизации раскроя, контроле качества, логистике, финансовом моделировании и прогнозировании спроса.

Любой предмет одежды или текстильный продукт имеет чёткую геометрическую структуру: длина, ширина, кривизна, форма деталей. Проектирование таких изделий невозможно без математического описания формы объекта. Трёхмерные модели создаются в системах САПР (CAD — Computer - Aided Design), где активно используются элементы аналитической геометрии, векторной алгебры и топологии.

Математическое моделирование позволяет:

- *точно описать кривые и поверхности (например, контуры рукавов, линий талии);*
- *оценить посадку на теле, используя данные сканирования;*

- автоматически адаптировать выкройки под разные размеры — это так называемая ***градация.***

- Фундаментальные математические понятия, такие как ***функции, кривые Безье, сплайны,*** *применяются для плавного описания линий изделия и переходов между элементами. Эти методы обеспечивают точность и повторяемость при массовом производстве, уменьшают долю брака.*

- Экономия ткани — одна из основных задач текстильного производства, так как стоимость сырья составляет значительную часть затрат. Математическая задача оптимизации раскладки плоских выкроек называется ***задачей раскроя.***

- Эта задача формулируется так: множество элементов различных форм и размеров, требуется разместить их на ограниченной площади материала так, чтобы минимизировать отходы.

Это комбинаторная задача, близкая к задачам теории упаковки и оптимизации. Решение производится с помощью методов:

- линейного программирования,

- эвристических алгоритмов (генетические алгоритмы, алгоритмы муравьиной колонии),

- динамического программирования.

Применение таких моделей позволяет сократить материальные затраты и повысить устойчивость производства.

Оптимизация раскроя материалов. Задача раскроя ткани является классической задачей линейного программирования. Цель — минимизировать отходы материала при размещении выкроек.

ТАБЛИЦА 1 – ЭКОНОМИЯ МАТЕРИАЛА ПРИ ОПТИМИЗАЦИИ

Метод раскроя	*Расход ткани (м²)*	*Отходы (%)*
Ручной	*1200*	*18*
Автоматизированный	*1100*	*10*
Оптимизированный алгоритм	*1030*	*4*

Статистический анализ качества и данных продукции: качество продукции — важнейший показатель в лёгкой промышленности. Для оценки стабильности параметров (размеров, плотности ткани, цвета) используется статистический контроль качества.

Сбор данных о параметрах изделий на разных стадиях производства позволяет вычислить:

1) *средние значения и отклонения;*
2) *дисперсию и стандартное отклонение;*
3) *статистические интервалы надёжности.*

Математические методы помогают выявлять отклонения от нормы и принимать решения о корректирующих действиях. Это снижает процент брака и повышает удовлетворённость потребителей

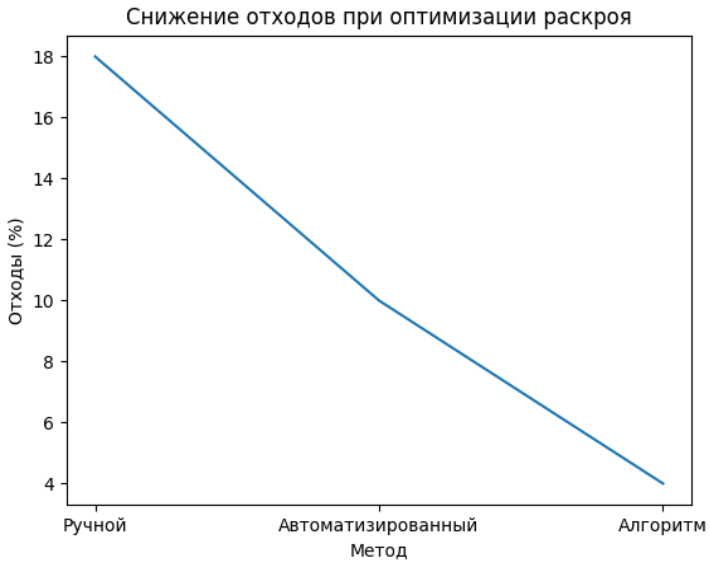

Рисунок 1 – Динамика снижения отходов ткани.

Современные фабрики оснащены датчиками и автоматизированными системами учёта, что приводит к генерации больших массивов данных. Анализ таких данных позволяет:

- *отслеживать тенденции спроса;*
- *выявлять зависимости между параметрами производства и качеством конечного продукта;*
- *оптимизировать графики работ.*

Математические методы машинного обучения (регрессия, кластеризация, нейронные сети) используют данные для прогнозирования спроса, оптимизации запасов, предотвращения простоев.

Статистический контроль качества. Для оценки стабильности параметров продукции используются методы математической статистики: среднее значение, дисперсия, стандартное отклонение, интервальные оценки.

ТАБЛИЦА 2 – КОНТРОЛЬ РАЗМЕРОВ ИЗДЕЛИЙ

Партия	*Средний размер (см)*	*Отклонение (см)*
№1	*48.1*	*0.3*
№2	*47.9*	*0.4*
№3	*48.0*	*0.2*

Применение математики в логистике и управлении цепочками поставок: производство изделий — это не только производство, но и доставка сырья и готовой продукции. Математика логистики включает задачи: планирования маршрутов; определения оптимального количества транспорта; минимизации затрат времени и топлива.

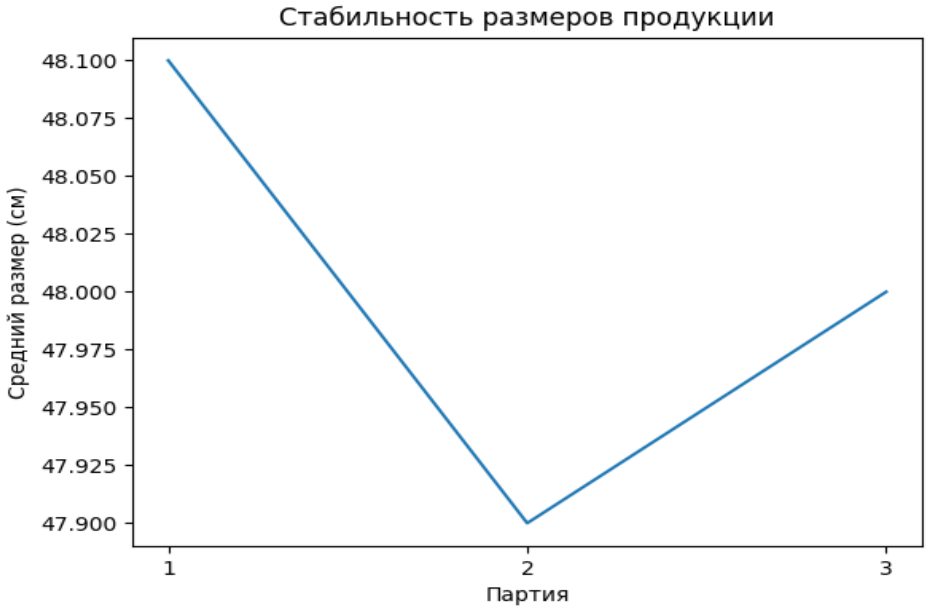

Рисунок 2 – Контроль стабильности размеров

*Классическая математическая модель — **задача коммивояжера,** а также **задача оптимального потока в сети**. Решения этих задач помогают строить эффективные маршруты между фабриками, складами и торговыми точками.*

Задачи оптимального управления запасами включают определение минимального уровня сырья и готовой продукции, при котором предприятие может функционировать без задержек.

Это связано с математическими моделями:

- *EOQ (Economic Order Quantity — экономичный размер заказа);*
- *модели с ограничениями;*
- *вероятностные модели для оценки времени доставки.*

Такие модели помогают снизить издержки, связанные с хранением, и увеличить оборачиваемость продукции.

Цифровая печать и математика цвета: современные технологии индустрии моды включают цифровую печать узоров на ткани. Здесь математика участвует в обработке цвета, трансформации изображений и точной передаче оттенков.

1) Цветовые модели и трансформация. Цифровые изображения описываются в пространстве цветов, например:

- *RGB (красный-зелёный-синий);*
- *CMYK (голубой-пурпурный-жёлтый-чёрный);*
- *Lab (люминанс и два цветовых параметра).*

Преобразование между этими моделями — это математика: векторы, матричные преобразования, линейные комбинации.

2) Алгоритмы обработки изображений. Математические алгоритмы позволяют: сглаживать контуры, устранять шумы, изменять масштаб и разрешение без потери качества.

Это критично при создании оригинальных дизайнов, когда важно сохранить детализацию узора на ткани.

Финансовое моделирование и маркетинг. Ценообразование — это не только художественный выбор, но и математическое планирование: учёт затрат на материалы и работу; анализ конкурентов; моделирование спроса и эластичности цен.

Формулы наценки, маржи, прибыльности продукта являются частью финансовой математики.

Математические методы маркетингового анализа включают:

- *сегментацию потребителей по характеристикам;*
- *анализ предпочтений по данным опросов и продаж;*
- *построение прогностических моделей спроса.*

Статистика, теория вероятностей и методы оптимизации позволяют компаниям принимать обоснованные решения и эффективно продвигать продукцию.

Одной из ключевых тенденций современной лёгкой промышленности является автоматизация. Это связано с внедрением искусственного интеллекта и машинного обучения.

Модели МО используются для:

a) *прогнозирования объёмов продаж;*
b) *распознавания дефектов на конвейере;*
c) *анализа предпочтений клиентов.*
d) *алгоритмы классификации и регрессии учатся на исторических данных, позволяя заранее адаптировать производство к будущим условиям и требованиям рынка.*
e) *математика управляет работой роботов на производстве.*

Заключение. Взаимосвязь математики и лёгкой промышленности глубока и многообразна. Математические методы лежат в основе проектирования изделий, оптимизации материалов, контроля качества, логистики, финансов, маркетинга и автоматизации. В современном мире, где данные становятся критическим ресурсом, роль математики в лёгкой промышленности продолжает расти.

Использование математических моделей повышает эффективность производства, снижает затраты, улучшает качество продукции и помогает бизнесам адаптироваться к изменяющимся условиям рынка. Понимание этой взаимосвязи важно, как для инженеров и технологов, так и для менеджеров, экономистов и дизайнеров.

Математика играет ключевую роль в развитии легкой промышленности. Она позволяет снижать затраты, повышать качество продукции, оптимизировать производство и прогнозировать спрос.

В условиях цифровизации значение математических методов продолжает расти.

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THE ROLE OF PROBABILITY THEORY IN THE ANALYSIS OF PRODUCTION PROCESSES

Mazhit Zhamilya Batykkyzy
Master of Mathematics,
Rustemova Karashash Zhorabekovna
candidate of physical and mathematical sciences, assistant professor,
***Abdimanapova** Perizat Bakhytovna*
PhD, assistant professor,
Shinikulova Gulnur Nurbekovna
Master of Physics
Almaty Technological University, Almaty, Republic of Kazakhstan

РОЛЬ ТЕОРИИ ВЕРОЯТНОСТЕЙ В АНАЛИЗЕ ПРОИЗВОДСТВЕННЫХ ПРОЦЕССОВ

Мажит Жамила Батыккызы
Магистр математики,
Рустемова Карашаш Жорабековна
к.ф.-м.н., ассистент профессор,
Абдиманапова Перизат Бахытовна
PhD, ассистент профессор,
Шиникулова Гульнур Нурбековна
Магистр физики,
Алматинский технологический университет, г. Алматы, Республика Казахстан

Abstract

The article examines the role of probability theory as an important mathematical tool in the analysis and optimization of production processes. In the context of modern industrial production, characterized by a high degree of complexity and uncertainty, the application of probabilistic methods becomes especially relevant. Probability theory makes it possible to account for the influence of random factors and provides a more accurate description of real production systems.

It is shown that probabilistic modeling methods make it possible to analyze such phenomena as fluctuations in the time required to perform technological operations, the probability of equipment failure, deviations in product quality, as well as the influence of the human factor. Taking these parameters into account allows for a more accurate representation of real production processes, identification of potential risks, and development of effective management strategies.

Particular attention is paid to the application of probability distributions, mathematical expectation, and variance for analyzing production indicators. These tools help determine the average values of key parameters, assess the level of their variability, and predict possible deviations. In addition, statistical forecasting methods are used to plan production processes, determine optimal timelines, and minimize equipment downtime.

Furthermore, the use of probability theory contributes to improving the reliability of technological systems. By analyzing the probability of failures and malfunctions, it becomes possible to carry out timely preventive maintenance of equipment and minimize downtime. This, in turn, has a positive impact on the overall efficiency of production.

It is scientifically substantiated that the application of probabilistic methods helps reduce risks, improve resource planning, and enhance the quality of managerial decision-making. In the context of industrial digitalization and automation, these methods become an integral part of modern management systems.

The results of the study confirm the importance of probability theory as an effective tool for increasing the stability and competitiveness of industrial enterprises.

Аннотация

В данной работе рассматривается роль теории вероятностей как важного математического инструмента в анализе и оптимизации производственных процессов. В условиях современного промышленного производства, характеризующегося высокой степенью сложности и неопределённости, применение вероятностных методов становится особенно актуальным. ерия вероятностей позволяет учитывать влияние случайных факторов и обеспечивают более точное описание реальных производственных систем.

Показано, что методы вероятностного моделирования дают возможность анализировать такие явления, как колебания времени выполнения технологических операций, вероятность отказа оборудования, отклонения качества продукции, а также влияние человеческого фактора. Учет этих параметров позволяет более точно описывать реальные производственные процессы, выявлять потенциальные риски и разрабатывать эффективные стратегии управления ими.

Особое внимание уделяется применению вероятностных распределений, математического ожидания и дисперсии для анализа производственных показателей. Эти инструменты помогают определить средние значения ключевых параметров, оценить уровень их вариативности и спрогнозировать возможные отклонения. Кроме того, методы статистического прогнозирования используются для планирования производственных процессов, определения оптимальных сроков выполнения работ и минимизации простоев оборудования.

Кроме того, использование теории вероятностей способствует повышению надежности технологических систем. За счёт анализа вероятности отказов и сбоев становится возможным своевременно проводить профилактическое обслуживание оборудования и минимизировать простои. Это, в свою очередь, положительно сказывается на общей эффективности производства.

Научно обосновано, что применение вероятностных методов способствует снижению рисков, улучшению планирования ресурсов и повышению качества управленческих решений. В условиях цифровизации и автоматизации промышленности данные методы становятся неотъемлемой частью современных систем управления.

Результаты исследования подтверждают значимость теории вероятностей как эффективного инструмента повышения устойчивости и конкурентоспособности производственных предприятий.

Keywords: *probability theory, production processes, mathematical modeling, pstatistical methods, risk assessment, equipment reliability, production optimization, management of technological systems, industrial digitalization, production efficiency.*

Ключевые слова: *теория вероятностей, производственные процессы, математическое моделирование, статистические методы, оценка рисков, надежность оборудования, оптимизация производства, управление технологическими системами, цифровизация промышленности, эффективность производства.*

Введение. Современные производственные системы характеризуются высокой сложностью и динамичностью. В условиях рыночной экономики предприятия сталкиваются с необходимостью оптимизации процессов, снижения затрат и повышения эффективности производства. Одним из основных инструментов анализа и прогнозирования таких процессов является теория вероятностей. Это позволяет учитывать случайные факторы, возникающие в производственных системах, и принимать решения на основе количественного анализа рисков. Теория вероятностей широко используется в производственной практике для анализа отказов оборудования, оценки качества продукции, планирования производственных мощностей и управления запасами. Его роль особенно возрастает в условиях автоматизации и оцифровки производства, когда большие объемы данных требуют системного и статистически обоснованного подхода.

Теория вероятностей изучает закономерности случайных явлений и позволяет количественно оценить риск возникновения различных событий. Основные понятия: случайное событие-это результат непредсказуемого процесса.

Вероятность события - это количественная мера вероятности того, что событие произойдет, обычно выраженная в диапазоне от 0 до 1. Случайная величина-количественная характеристика результата случайного события.

Распределение вероятностей - это функция, которая описывает вероятность различных результатов случайной величины. В производственных процессах эти понятия помогают описывать вариации параметров технологических операций, выявлять закономерности отказов оборудования и прогнозировать качество продукции.

Моделирование случайных процессов в производстве. Производственные процессы редко идут по плану. На их течение влияет множество случайных факторов: поломка оборудования,

колебания качества сырья, человеческий фактор, колебания спроса. Случайные процессы, описываемые вероятностными моделями, позволяют количественно оценить влияние этих факторов.

Марковские процессы. Марковские процессы используются для анализа систем с переходами между состояниями, где вероятность перехода зависит только от текущего состояния системы. В производстве применяется: прогнозирование простоев оборудования; анализ последовательности операций на трубопроводе; оценка вероятности возникновения дефектов на разных этапах производства.

Пуассоновские процессы. Процессы, характеризующиеся распределением Пуассона, позволяют моделировать события, которые происходят случайно с течением времени, такие как: отказ оборудования; поступление заказов на производство; обнаружение неисправного продукта. Использование этих моделей может помочь спланировать техническое обслуживание, оптимизировать производственный график и снизить затраты, связанные с простоями.

Статистический анализ производственных данных. Статистические методы, основанные на теории вероятностей, используются для обработки производственных данных. Сюда входят: оценка вероятности брака на различных этапах технологического процесса; анализ изменений во времени цикла операций; составление контрольных карт для выявления отклонений от нормального режима работы. Такие методы, как распределение Пуассона или нормальное распределение, позволяют анализировать количество сбоев, время работы оборудования и принимать решения об обновлении процессов.

Статистический анализ производственных данных статистические методы, основанные на теории вероятностей, используются для обработки и анализа производственных данных. Ключевые области: контроль качества продукции (SPC) — выявление отклонений от стандартов с помощью контрольных карт, распределений вероятностей и анализа вариаций. Анализ времени операционного цикла-оценка рабочего времени, выявление трудностей и прогнозирование нагрузки производственных линий. Прогнозирование отказов оборудования-использование распределений вероятностей для оценки рабочего времени и планирования профилактического обслуживания. Применение статистических методов позволяет минимизировать дефекты, повысить надежность оборудования и оптимизировать производственные процессы.

Оптимизация производственных систем. Теория вероятностей также лежит в основе оперативного анализа и методов оптимизации. Например, при планировании запасов необходимо учитывать вероятность спроса на продукцию, а при проектировании производственных линий — вероятность простоя. С помощью вероятностных моделей можно снизить риски и издержки: рассчитать оптимальные размеры партии; оценить экономическую эффективность различных вариантов планирования; прогнозировать потребность в ресурсах при неопределенности внешних и внутренних факторов.

Применение вероятностных методов на практике. Надежность оборудования прогнозирование отказов оборудования осуществляется с помощью вероятностных моделей, таких как экспоненциальное и нормальное распределение. Эти модели позволяют: определить среднее время выхода из строя; определить наиболее уязвимые узлы оборудования; разработать стратегии обслуживания. Управление качеством вероятностные методы используются для анализа дефектов и контроля качества. С помощью статистического контроля процессов (SPC) можно своевременно обнаруживать отклонения, уменьшать количество дефектов и повышать эффективность производственного контроля.

Планирование производства. При планировании учитываются случайные факторы: колебания рабочего времени, неожиданные остановки, сезонные колебания спроса. Вероятностные модели помогают определить оптимальные графики, распределение ресурсов и уровень запасов, что повышает гибкость и экономическую эффективность производства. При планировании производственного процесса учитываются случайные факторы: колебания рабочего времени, неожиданные остановки, сезонные колебания спроса. Вероятностные модели помогают определить оптимальные графики, распределение ресурсов и уровень запасов, что снижает затраты и повышает гибкость производства.

Примеры применения теории вероятностей. Автомобильная промышленность-прогнозирование отказов компонентов и управление запасами деталей. Пищевая промышленность-анализ дефектов упаковки и контроль качества продукции. Энергетическое

производство-оценка вероятности простоя оборудования и планирование ремонтных работ. Эти примеры демонстрируют универсальность вероятностного подхода в различных отраслях производства.

Надежность оборудования. Одним из основных аспектов производственной деятельности является надежность оборудования. Применение теории вероятностей позволяет прогнозировать время до сбоя, анализировать сбои и разрабатывать стратегии обслуживания. Например, для оценки надежности электрических и механических систем используется экспоненциальное распределение времени до отказа.

Заключение. Теория вероятностей является основным инструментом анализа и оптимизации производственных процессов. Это позволяет учитывать случайные факторы, прогнозировать риски и принимать обоснованные решения. Использование вероятностного подхода повышает надежность оборудования, уменьшает неисправности и улучшает планирование производства. В условиях цифровизации и больших данных значение вероятностных методов возрастает, предоставляя предприятиям новые возможности для повышения эффективности и конкурентоспособности.

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LIP CANCER: THE COMPLEXITY OF THE PROBLEM

Arman Khozhayev
Professor of the S.N. Nugmanov Department of Oncology, Asfendiyarov Kazakh National Medical University, Almaty, Kazakhstan
Dina Omarova
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Alisher Sherniyazov
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Daniyar Muratbekov
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Yuriy Shulekin
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Gulfiya Teleukhanova
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Dauren Bekmuratov
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Chingiz Mukhtarov
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Raushan Sadykova
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Akezhan Orynbek
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Shahizat Sultanaliyev
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Yerdos Baigaliyev
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Didar Akhmetzhanov
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan
Zhakhangir Kanatuly
Resident, Asfendiyarov Kazakh National Medical University, School of Dentistry, Department of Surgical Dentistry, Almaty, Kazakhstan

Abstract

This scientific and analytical work presents current data on the epidemiology, pathogenesis, clinical and morphological features, and diagnostic approaches to lip cancer, which belongs to the group of lip and oral cavity neoplasms. The most common histological types are squamous cell carcinoma and basal cell carcinoma, frequently developing on the background of precancerous lesions of the vermilion border, primarily actinic cheilitis (solar cheilosis). Special attention is given to epidemiological risk factors, particularly chronic exposure to ultraviolet radiation, which plays a key role in the development of actinic cheilitis and subsequent malignant transformation. Other potentially malignant disorders, including leukoplakia, erythroplakia, and erythroleukoplakia, are also considered due to their potential progression to

carcinoma in situ. The clinical manifestations of actinic cheilitis, such as dryness, fissures, epithelial atrophy, erythematous and leukoplastic changes, are discussed together with modern approaches to severity assessment using the clinical index for actinic cheilitis. The article also summarizes molecular mechanisms of lip carcinogenesis associated with DNA damage and mismatch repair system dysfunction involving MutS and MutL proteins. The diagnostic significance of mismatch repair proteins (MSH2, MSH6, MLH1, PMS2) and the proliferation marker Ki-67 is described. In addition, the diagnostic value of immunohistochemical biomarkers related to cancer stem cells (ALDH1 and CD44) is analyzed. Modern diagnostic techniques, including fine-needle aspiration biopsy, tissue microarray technology, and statistical evaluation of diagnostic performance using receiver operating characteristic analysis, are also described. In addition, the epidemiological characteristics of this pathology in our republic are presented in detail across the country's regions.

Keywords: *oncology, dentistry, maxillofacial surgery, lip cancer, squamous cell carcinoma, basal cell carcinoma, actinic cheilitis, inflammatory lesion, epithelial dysplasia, leukoplakia, erythroplakia, erythroleukoplakia, ultraviolet radiation, solar radiation, immunohistochemical markers, biomarkers, mismatch repair system, epidemiology, incidence, mortality, lethality, five-year survival rate, prognosis.*

Lip cancer (LC) is a malignant tumor of the stratified squamous epithelium of the vermilion border of the lower or upper lip. The skin and mucous membrane of the lip are affected secondarily by the tumor process. LC invades adjacent anatomical structures and interferes with eating. In the later stages, severe cosmetic defects are observed due to tissue destruction and secondary infections. Lymphatic metastases in LC occur more often than hematogenous metastases [1,2].

Diagnostic criteria are as follows. Complaints and anamnesis: the development of LC begins with the appearance of scale, under which a lump can initially be detected, later becoming noticeable to the patient. Sometimes the tumor manifests as a small erosion with a dense base or an initial painless ulceration without exophytic growth; a dense nodule may develop, at the site of which necrosis later develops. Initially, the tumor is accompanied by horizontal growth, and then vertical growth. Cancer developing against the background of erosive actinic cheilitis (AC) can reach several centimeters in diameter and have a more or less nodular tumor portion. The lip is thickened due to the tumor growing deeper into it, and the corner of the mouth can be displaced by the tumor mass from metastases to the regional lymph nodes [1].

Physical examination includes a thorough examination, including inspection and palpation (bimanual) of the lesion and regional lymph nodes, an assessment of the nutritional status in order to determine the prevalence of the tumor process and decide on the need for nutritional status correction [1,2].

Instrumental studies: taking smears-imprints or scrapings from the surface of erosions, ulcers, cracks on the lip, punctates of lip thickenings without signs of ulceration and enlarged cervical lymph nodes, for cytological examination; if the cytological examination is unclear, a biopsy is necessary for histological confirmation of the diagnosis. Chest X-ray; ultrasound examination of the submandibular region and neck on both sides; ultrasound of the abdominal organs and retroperitoneal space; computed tomography of the facial bones with intravenous contrast in case of suspected tumor spread to the lower/upper jaw, base of the skull. Fine-needle aspiration biopsy (FNAB) under ultrasound control in case of suspected metastases of the lymph nodes of the neck in preparation for surgical treatment in order to assess the functional status, if indicated, conduct additional examination: echocardiography, study of external respiratory function, ultrasound Dopplerography of the vessels of the neck and lower extremities [1].

Silva W.R. et al. [3] note that the lips are the transition zone between the facial skin and the oral mucosa and are the site of alterations related to a broad spectrum of etiologies. Lip neoplasms differ etiologically from intraoral lesions since they are locations highly exposed to ultraviolet (UV) radiation. Ultraviolet A radiation (320-400 nm) and Ultraviolet B radiation (280-320 nm) rays act dose-dependently and cumulatively in initiating and promoting carcinogenesis due to direct damage to the DNA structure. Squamous cell carcinoma (SCC) and basal cell carcinoma (BCC) are the most prevalent neoplasms affecting lips. This study evaluated the demographic and clinicopathological features of the SCC and BCC in the lip. Researchers point out that the lips are the anterior limit of the oral cavity and consist of the transition zone between the facial skin and the oral mucosa. These anatomical structures play an important role in facial expression, chewing, phonation, and tactile sensation and contribute to facial aesthetics. Also, the lips may be the site of clinical and pathological alterations related to a broad spectrum of etiologies, ranging from traumatic, inflammatory, and infectious lesions to malignant neoplasms.

This retrospective cross-sectional study investigated the occurrence of SCC and BCC of the lips diagnosed at the Dermatology Service of Hospital das Clínicas of the Federal University of Pernambuco and Cancer Hospital of Pernambuco from 1994 to 2019. Demographic and clinicopathologic data regarding sex, age, anatomic site, clinical aspect, TNM grading system, histopathological diagnosis, surgical margin, and recurrence were collected from the patient's medical records. Nevertheless, this data was not available in all SCC and BCC cases. In this context, cases needed to contain information about the histopathological diagnosis to be included in the present study. On the other hand, cases that did not affect the lips and/or had an undetermined diagnosis were excluded from the sample. Clinical cancer staging was classified according to the American Joint Committee on Cancer - Cancer Staging Manual [3,4]. Pearson's chi-square test was performed to assess the association between the anatomical location of the lesions and clinicopathologic characteristics (sex, histopathological diagnosis, clinical stage, and treatment). The significance level was set at 5% ($p \leq 0.05$) for all tests.

A total of 417 patients were diagnosed with SCC and BCC during the period studied. Of these, 323 (77.5%) lip carcinomas were histopathologically diagnosed as SCC and 94 (22.5%) as BCC in both centers. It was found that SCC was diagnosed more frequently in males (58.8%; n = 190), while BCC was more diagnosed in females (54.3%; n = 51). The mean age of SCC was 64.7 ± 14.8 years old, while BCC presented a mean age of 65 ± 15.3 years old. SCC was more frequent in patients between the sixth and eighth decades of life, and BCC was more frequent in the eighth decade of life. SCC and BCC significantly affected the lower lip (70.6%; n = 228; 56.4%; n = 53, respectively; p = 0.014). It was observed that BCC cases initially affected the skin, and the lesion extended to lip vermilion. Also, when analyzing the association between sex and anatomical location, it was observed that the lower lip of male patients was more affected than the upper one ($p < 0.0001$). Of the 417 patients, 48% reported outdoor occupational activities related to chronic sun exposure, and SCC was frequently clinically described as an ulcer and plaque. In contrast, BCC was most described as a nodule and papule. Concerning the TNM grading system findings, SCC cases presented a high frequency of tumors with sizes ≤ 20 mm (T1) (39.7%) and > 20 mm to ≤ 40 mm (T2) (42.9%), as well as the absence of regional lymph node metastasis (N0) (90.4%) and distant metastasis (M0) (84%). In contrast, only 05 cases of BCC presented this information. From these 05 cases, two cases presented tumors with size > 20 mm to ≤ 40 mm (T2), one case with size ≤ 20 mm (T1), one case with size > 40 mm (T3), and one case with size > 40 mm invading adjacent structures (T4). Besides this, three cases showed the absence of regional lymph node metastasis (N0), one case showed metastasis in a single ipsilateral lymph node > 30 mm and ≤ 60 mm (N2), and one case showed metastasis in a single ipsilateral lymph node > 60 mm (N3). Regarding distant metastasis, four cases presented the absence (M0), and one showed the presence (M1) of distant metastasis. About the clinical stage, SCC frequently exhibited clinical stage I (39.8%; n = 62) and II (33.9%; n = 53), while BCC mainly presented stage IV (40%; n = 2). No significant association was observed between the anatomical location and the cancer clinical staging (p = 0.065). Regarding the treatment approach of the neoplasms, SCC was mainly treated with surgery (88.3%; n = 264), followed by surgery with radiotherapy (11.4%, n = 34) and radiotherapy (0.3%; n = 1), while BCC was frequently treated with surgery (93.2%; n = 69), followed by surgery with radiotherapy (6.8%; n = 5). No significant association was observed between the anatomical location and the treatment (p = 0.674). The surgical margin was frequently negative in SCC and BCC (87%; n = 281; 72.3%; n = 68, respectively), and no recurrence was observed in 79.9% (n = 258) of SCC cases and 69.1% (n = 65) of BCC cases. No significant association was observed between the type of neoplasm and the presence of regional lymph node metastasis, distant metastasis, treatment, cancer clinical stage, surgical margin, and recurrence. The study found that SCC was more frequent in male patients and BCC in female patients. Lesions in the lower lip were significantly frequent in male patients, and both SCC and BCC significantly affected this anatomical site. SCC was more frequent in patients between the sixth and eighth decades of life and BCC in the eighth decade of life. Besides, understanding the epidemiological profile and etiology of these lesions in the lip is essential for planning preventive measures in health education since the lip is an important functional and aesthetic region, possessing a strong relationship with the quality of life and individual self-esteem [3].

In their study, Barragán Y.V. et al. [5] indicate that lip squamous cell carcinoma (LSCC) is associated with malignant transformation of AC. Since solar radiation alters the functions of mismatch repair (MMR) complex, authors evaluated for their possible role in lip carcinogenesis. For the sample size, a ratio of three cases for each control (45 LSCC and 15 lip epithelia without microscopic alterations) was adopted to achieve a sample representing the hypothesis of this research with 80% power and 95% confidence. For inclusion of AC samples, a proportion of two cases for each control was set. Therefore, the total sample size for each tissue type was determined as 45 lip SCC, 30 AC, and 15 normal epithelia of

the vermilion of the lower lip. The samples of LSCC, AC and normal lip epithelia were collected from different patients and paraffin blocks. The current study collected samples from patients at Hospital Haroldo Juaçaba/Instituto do Câncer do Ceará who underwent surgery to resect carcinoma of the vermilion of the lips, without neoadjuvant treatment. Additional samples were obtained from normal lip epithelia from oral mucoceles and SCC cases. Clinicopathological data were collected, and suitable paraffin blocks were selected for histopathological analysis. The study excluded cases with incomplete records and blocks without sufficient material for the tissue microarray technique.

The study involved examining microscopic slides of LSCC and AC in comparison to control regions. For the tissue microarray technique, two cores of 2 mm diameter circumferential areas (3.14 mm²) were selected from each sample using a tissue microarrayer. The samples of tumor were selected from invasive front of tumor. Equally, two cores of NLE and AC were selected in health areas of lips and dysplastic areas of AC. So, paraffin blocks from these areas were punched and transferred to a receiver block with 70 circular wells. The resulting paraffin receptor blocks, containing oral ulcers, were then sectioned into 3-µm thick slices and placed on silanized slides for subsequent analysis. For immunohistochemical processing, samples were deparaffinized, rehydrated, and subjected to antigen retrieval in Tris-ethylenediaminetetraacetic acid buffer (pH 9.0). To inactivate endogenous peroxidases, samples were incubated in phosphate-buffered saline (PBS) with 3% H2O2 for 30 min, washed in PBS, and incubated for one h with primary antibodies against MSH2 (Dako®, FE11), MSH6 (Dako®, EP49), PMS2 (Dako®, EP51), and MLH1 (Dako®, ES05). Additionally, given that Ki-67 is strongly related to the cell cycle and appears to be associated with MMR proteins, a primary antibody for Ki-67 (Dako®, MIB-1) was also used. Samples were washed in PBS, incubated in Envision Plus horseradish peroxidase Anti-IgG-rabbit/mouse for 30 min (ready-to-use; monoclonal; Dako® K4065), and washed again in PBS, after which diaminobenzidine chromogen (Dako® K3469) was applied to the samples for 5 min. Harris hematoxylin was used as the counterstain (10 s), after which the specimens were dehydrated in ethanol and xylene and covered with a permanent mounting medium (Enthelam®). Colorectal carcinoma sections were used as a positive control, and the negative control and positive control were treated in parallel with an antibody diluent instead of the primary antibody. For evaluation of MSH2, MSH6, PMS, MLH1, and Ki-67, ten fields per histological section were photographed at 400× magnification. The images were exported to ImageJ® software and counted to determine the percentage of immunostained positive cells. Brown nuclear staining of all keratinocytes cells (control group and AC group) and all cancer cells (LSCC group) was considered a positive immunoreaction. As previously described, the imbalance of MutSa (MSH2≠MSH6) was calculated by ration between MSH2/MSH6 and imbalance of MutLa (PMS2≠MLH1) was calculated by ration between PMS2/MLH1 [5].

Most patients were male, aged up to 65 years, living in the countryside, had no insurance, and were farmers or retired/pensioners. The lower lip was the most affected site. Microscopically, the lip samples (n=15) showed mostly stratified squamous ortho-keratinized epithelium tissue with well-defined basal, spinous, and granular layers, occasional exocytosis, and spongiosis supported by a fibrovascular connective tissue. AC samples (n=30) exhibited atrophic stratified squamous keratinized epithelium tissue with four to six layers of squamous cells, disorganization of the basal and spinous layers, significant nuclear hyperchromatism cellular pleomorphism, and were parakeratinized. The supporting connective tissue showed solar elastosis throughout the lesions and occasional mononuclear inflammatory cells. Most AC patients had low-risk dysplasia (n=19). The LSCC samples (n=45) showed proliferation of islands and strands of cells of epidermoid origin, organized, sometimes in nests, exhibiting intense cellular and nuclear pleomorphism, keratin pearls, typical and atypical mitotic figures, and intense mixed inflammatory infiltrate. Of the LSCCs evaluated, 29 (64.4%) were low-grade, 5 (11.1%) showed vascular invasion, and 12 (26.7%) showed perineural invasion. Most patients were men (n=34, 75.5%), aged <65 years (n=24, 53%), and the average age of 64.7±12.2 years. The most prevalent tumor TNM stage was T1/2 (n=30, 66.7%), N0 (n=29, 64.4%), and M0 (n=42, 93.3%), and recurrence was observed in only three (6.7%) of the patients. The median of follow up time was 13 months (range = 3-96 months). All tissues showed positive immunostaining for MMR proteins. Immunostaining was concentrated in the basal and parabasal layers in the lip, in the basal, paranasal, and spinous layers in the AC, and in the tumor islands and nests in LSCC. Immunostaining for MSH2, MSH6, MLH1, and Ki-67 was significantly higher in AC and LSCC tissues (p<0.001, p<0.001, p=0.040, and p=0.004, respectively). MSH2 immunostaining was significantly higher in LSCC (p<0.001). An imbalance was observed in MutSa, with higher expression of MSH2 in the lip (p=0.043), and the opposite relationship in AC (p=0.005), which was also noted in the MSH2/MSH6 ratio (p<0.001). The mean MSH2/MSH6 ratio was lower in the AC group (p=0.028). Lower expression of MSH2 compared to MSH6 was observed in AC with low-risk dysplasia (p=0.018).

Immunostaining for MSH6 was significantly lower in patients with AC with high-risk dysplasia (p=0.024). The presence of vascular invasion in LSCC was associated with a lower mean MSH6 (p=0.035). In LSCC depth of invasion >10cm showed less immunostained cells for MSH6 than MSH2 (p=0.027) and MLH1 than PMS2 (p=0.007). A significant imbalance in PMS2/MLH1 ratio was showed in LSCC with a depth of invasion >10cm than <10cm depth invasion (p=0.013). T3/T4 patients showed higher mean values of MSH2/MHS6 and PMS2/MLH1 ratio compared to T1/T2 (p=0.028, p=0.014), whereas N+ patients showed higher mean values of PMS2/MLH1 than MSH2/MHS6 (p=0.046). N+ patients showed higher immunostaining for Ki-67 than did N0 patients (p=0.039). LSCC exhibited a greater number of positive correlations, with all MMR. Proteins correlated with each other. AC presented less statistically significant findings, with positive correlations only between MSH2 and MSH6 (p=0.038). No correlations were found in lip samples. In conclusion, our colleagues state that this is the first study to address the immunostaining for all MMR complex proteins in the three stages of LSCC progression and clinical-pathological features. The researchers have found that, there is increased activity and inter-association between these proteins in tumors, but their loss of expression significantly worsens the prognosis [5].

Silva L.V.O. et al. [6] in a multicenter study examined the demographic and clinical pathologic features of actinic cheilitis and lip squamous cell carcinoma. According to the authors, a number of researchers note that AC is a chronic inflammatory condition that has been described as a potentially malignant oral disorder. AC affects the vermilion region of the lower lips in 95% of cases. The worldwide occurrence of AC ranges from 4.6 to 43.2%. High-risk populations, including those living in tropical regions under excessive exposure to UV radiation, fair-skinned male individuals in their forties, and smokers are the most affected by this condition. Clinically, AC is characterized by dryness, fissures/erosions, atrophy (characterized by smooth, blotchy, pale areas) and erythematous and/or leucoplastic areas with blurring of the margin between vermilion and the adjacent skin. Regarding risk factors, the authors emphasize that LSCC has predilection for fair-skinned men, with a peak incidence between the sixth and seventh decades of life. The lower lip is affected in 95% of cases. Prolonged exposure to sunlight also is an etiological factor for LSCC. Long-term consumption of alcohol and tobacco associated with the carcinogenic action of UV radiation greatly increases the risk of developing this malignancy. Sociodemographic conditions such as social vulnerability, and genetic susceptibility, or immunosuppression, are also factors that may contribute to the development of this disease. The initial clinical signs of LSCC may include asymptomatic crusts or ulcerations that may be quite equivalent to those observed in AC. At advanced stages, a painful exudative ulcer may occur, covered with scales and crusts, with indurated borders and an infiltrated base that does not heal.

Affected individuals were analysed concerning gender, age, skin colour (fair-skinned/brown-skinned), occupation (indoors/outdoors) and habits (tobacco smoking, alcohol consumption and chronic solar exposure). Lesions were analysed in terms of anatomical location (upper/lower lip), evolution time (months), symptoms (symptomatic/asymptomatic), manifestation type (primary/recurrent), and previous history of AC for cases of LSCC. A total of 198,709 histopathological records of oral and maxillofacial biopsies had been diagnosed at the 10 centres; of these, 2,017 were cases of AC (1.0%) and 850 were cases of LSCC (0.4%). AC a total of 1,439 (71.4%) cases occurred in males and 575 (28.6%) in females (male-to-female ratio of 2.5:1). Older subjects (≥ 60 years) accounted for 49.8% of the survey. Most individuals were fair-skinned (87.3%), reported an indoor occupation (56.6%) and had no symptoms (78.8%). Of the individuals who had answered positively regarding habits of tobacco smoking, alcohol consumption and chronic solar exposure, 75.5% were smokers, 91.7% were alcohol users and 91.5% were chronically exposed to the sun. The most common site of AC was the lower lip (98.7%) and 87.2% of the lesions presented as a primary manifestation with a median evolution time of 12 months. In 55.1% of the cases, the histopathological diagnosis confirmed the clinical diagnosis of AC. The other clinical diagnostic hypotheses were oral leukoplakia (25.2%) and oral SCC (5.6%). LSCC a total of 673 (79.3%) cases occurred in males and 176 (20.7%) in females (male-to-female ratio of 3.8:1). The majority of cases consisted of older individuals (54.2%), fair-skinned (91.3%), with an indoor occupation (56.9%) and asymptomatic (63.3%). Of the individuals who had reported on the habits evaluated, 67.6% were smokers, 50.5% were alcohol users and 83.5% were chronically exposed to the sun. The lower lip was also the most common anatomical location of LSCC (97.3%). Regarding the type of manifestation, 94.2% of the lesions were primary and 91.5% of the patients did not report a previous history of AC. The median follow-up time was 12 months. In 74.2% of the cases, the histopathological diagnosis confirmed the clinical diagnosis of LSCC. The other clinical diagnostic hypotheses were AC (11.5%) and oral leukoplakia (4.4%). In conclusion, our colleagues state that data of the Brazilian individuals with AC and LSCC reported herein agree with findings of case series and retrospective studies reported elsewhere. There is a predilection of

white men in their seventh decade of life. In most cases, the lower lip is affected [6].

A very interesting study was conducted by Barros C.C. et al. [7]. The objective of this study was to describe the upper and lower lip lesion occurrence in an oral diagnostic service. This is a retrospective sectional study investigating upper and lower lip lesion occurrence. Clinical records of patients treated at the Oral Diagnostic Service belonging to the Dentistry Department at the Federal University of Rio Grande do Norte (Brazil) from January 2006 to December 2016 were analyzed. A medical record analysis was performed simultaneously by two researchers with experience in treating patients with mouth lesions. Adequately completed medical records of patients of all ages who presented an upper and/or lower lip lesion were included in the study. Medical records that did not meet these criteria were excluded from the sample. Data regarding gender, age, anatomic site of the lesion, diagnosis and recurrence were obtained. For biopsy cases, the histopathological analysis result was considered as the final diagnosis. Diagnostic lesions were categorized according to their etiology into reactional/inflammatory, infectious, benign neoplasms, malignant neoplasms, and oral potentially malignant disorders. A patient age range categorization was created to facilitate the analysis, namely children (0-9 years), adolescents (10-19 years), adults (20-59 years) and elderly (over 60 years), according to World Health Organization (WHO) criteria. Regarding the anatomic site, the following locations were considered: upper lip, lower lip and lip commissure.

Out of a total of 5,511 patient records, 587 presented lip lesions, representing an occurrence of 10.7%. Most lesions were diagnosed in female and adults. The most frequent lesions in the sample were mucocele (n = 147; 25%), AC (n = 136; 23.1%) and vascular lesions (n = 51; 8.7%). The lower lip was the most affected site (n = 447; 76.2%). Regarding recurrence, only 3.6% of the 587 analyzed cases presented lesion recurrence. In the association test between gender, age group and anatomic site with the most frequent lesions (mucocele, AC and vascular lesions), only AC displayed statistical significance concerning gender ($p < 0.001$). There was also statistically significant difference between mucocele, AC and vascular lesions with the age group ($p < 0.001$; $p < 0.001$; $p < 0.001$, respectively) and anatomic site ($p < 0.001$; $p < 0.001$; $p = 0.002$, respectively) [7].

As the authors note the lips represent an important lesion site when compared to other mouth sites, especially the lower lip, which was the main lesion site in this study, for 76.2% of all lesions. Reactional/inflammatory lesions were the most frequent, followed by potentially malignant disorders which together accounted for about two thirds of all lesions. Regarding the type of lesion, this study observed that mucocele is the most frequent, and the findings reported herein corroborate these data for all age groups ($p < 0.001$). The researchers believe that this result is related to constant trauma in this region, especially in the lower lip, which was the most significantly affected herein ($p < 0.001$). Mucocele is an inflammatory lesion characterized by rupture or damage to the salivary gland duct, leading to mucus leakage into the surrounding tissues. Treatment is carried out by the surgical removal of the lesion and the affected gland, generally presenting an excellent prognosis. In this study, 57.1% of the assessed cases presented recurrence, probably due to the partial removal of the affected glands. The second most frequent lesion in the sample was AC, affecting almost exclusively the lower lip ($p = 0.001$) of adult and elderly patients ($p < 0.001$). This finding was expected, as AC is a chronic condition associated with prolonged exposure to solar radiation and develops insidiously over time. It is noteworthy that most individuals with this condition reported professional occupations related to sun exposure, justifying the high AC occurrence in this sample. It is important to note that the presence of AC raises concerns regarding possible evolution to lower lip squamous cell carcinoma (LLSCC). In this study, LLSCC represented almost all of the malignant neoplasms, affecting mainly the lower lip of elderly men. No LLSCC were found on the upper lip, as it rarely affects this location. Probably, LLSCC does not affect the upper lip due to its anatomical position, less exposed to solar radiation than the lower lip. In the present study, vascular lesions represented by vascular malformations and hemangioma corresponded to the third most frequent occurrence in the evaluated samples. Benign neoplasms were less frequently observed in the present study, at 6.0% of the total analyzed cases. Fibroma and squamous papilloma were the two most common lesions in this category, affecting mainly adult individuals [7].

Summarizing the study, our colleagues state that mucocele was the most common lower lip lesion in all age groups, followed by AC, which mainly affected adults and the elderly. Clinical data seems the most reliable characterization of the occurrence of these lesions and, thus, permit dentists to become more familiarized with the diagnosis of these diseases at the time of initial diagnosis, which is a crucial time to establish the most likely differential diagnoses and, in this manner, being able to properly guide the pathologist who may eventually receive the biopsy. Understanding the occurrence, etiology and clinical characteristics of lesions affecting this anatomical site is paramount so that preventive and

therapeutic measures can be promptly implemented [7].

The purpose of the study by Mello F.W. et al. [8] was to investigate the prevalence of malignant and potentially malignant lesions of the lip in an oral pathology service and to compare these data with a literature review.

Main study. Biopsy reports and histopathological records from March 2007 to February 2018 were analyzed, totalizing 3173 cases. Firstly, biopsy reports were analyzed and lip lesions were selected (only lesions in the lip vermillion semi-mucosa were considered). Then, cases that were clinically diagnosed as AC, leukoplakia, erythroplakia, erythroleukoplakia, in situ carcinoma, and LSCC were selected. Lastly, histopathological records were evaluated and cases were included in the sample when histologically diagnosed as AC with no epithelial dysplasia (NoED), AC with mild epithelial dysplasia (MiED), AC with moderated epithelial dysplasia (MoED), AC with severe epithelial dysplasia (SED), in situ carcinoma (ISC) and LSCC. Cases that did not fulfill these criteria were excluded from the sample. From the biopsy reports, information of clinical diagnosis, gender, age and skin color of the patients, lesion location, smoking and/or alcohol consumption habits, and history of chronic solar exposure was collected. Individuals that had outdoor occupations or self-reported periodical outdoor activities with long duration were considered as with "prolonged solar exposure". All clinical data of patients were collected from biopsy files and, therefore, were reported by the responsible surgeon of each procedure. Furthermore, histological diagnosis was performed following criteria of the WHO by an oral pathology team, composed by three experienced oral pathologists. A total of 3173 cases of the pathology laboratory cases were analyzed; 124 files from 107 patients were selected to comprise the sample. Moreover, 16 individuals had more than one file in the laboratory archive, of which 8 had lesions with the same histological diagnosis in the second biopsy and 4 had higher degrees of epithelial dysplasia in the second sample; only one case evolved from AC to LSCC. Most patient were male (73.2%), fair-skinned (83.2%), and the mean age was 54.3±12.3 years. 103 files provided data regarding profession of individuals, from which the most frequent were farmers (18.5%), construction workers (11.6%), fishermen (9.7%), and drivers (7.8%). There were few variations in the epidemiological profile of AC and LSCC patients. LSCC individuals tend to be older than AC individuals since the mean age of LSCC individuals was 56.3±12.2 years (ranging from 32-79 years) and in the AC group was 53.7±12.1 years (ranging from 24-79 years). The sex and skin color distribution were similar in both groups, and the concentration of individuals with chronical solar exposure was similar in AC than in LSCC group. 120 (96.8%) lesions were located in the lower lip and 04 (3.2%) in the upper lip. The lesions located in the upper lip were histologically diagnosed as NoED (n=1), AC with MiED (n=2), and LSCC (n=1). There was no statistic difference in regards to age, gender, skin color, solar exposure, and alcohol consumption between LSCC and AC groups (p>0.05). There was an association between smoking habits and histological diagnosis, the LSCC group presented higher rates of smoking habits than the AC group (p=0.03). The majority (80.64%) of AC cases presented some degree of epithelial dysplasia and the majority of LSCC cases were well and moderately differentiated in the histopathological analysis. Clinically, 62 (50%) lesions were diagnosed as AC, 19 (15.3%) as leukoplakia, and 20 (16.1%) as LSCC. Considering the histological features of these cases, 31 (25%) were SCC, two (1.6%) consisted of ISC, 77 (62.1%) were AC with some degree of epithelial dysplasia, and 16 (12.9%) were described as AC without epithelial dysplasia. 18 lesions clinically diagnosed as LSCC were SCCs at histological analysis, one was MiED, and one was MoED. In addition, 8 cases were initially described as AC by the surgeon and later diagnosed as LSCC by the oral pathology team [8].

Literature review. A comprehensive review of the literature was conducted to assess studies that investigated the prevalence of AC and/or LSCC. No time restriction was applied. Retrospective studies and case-series were considered eligible for inclusion. The following exclusion criteria were applied: 1) studies that did not report the histological diagnosis; 2) studies not published in English; and 3) full-text not available. Electronic search strategies were developed and adapted for each of the following bibliographic databases: Embase, PubMed, and Web of Science. In addition, a grey literature search was performed in Google Scholar, ProQuest Dissertations & Thesis, and OpenGrey. The following truncations and word combinations summarize the search strategy: (prevalence or prevalences or occurrence or frequency or frequencies or incidence or epidemiology or epidemiologic or incidence or incidences) and ("actinic cheilitis" or "actinic cheilosis" or "actinic elastosis" or "solar cheilitis" or "solar cheilosis" or "solar elastosis" or "in situ carcinoma" or "squamous cell carcinoma" or "epidermoid carcinoma" or "planocellular carcinoma" or "squamous carcinoma") and (lip or lips or labium or labial). All searches were conducted from the starting coverage date through 26 February 2018. A two-phase process was performed in the selection of studies. In phase-1, titles and abstracts of identified references were screened for potentially eligible studies. In phase-2, a full-text read was performed and studies that met eligibility criteria

were included. The following data were extracted from the articles included in the literature review: author, year of publication, country, sample size, participants' gender and age, histological diagnosis, and associated factors. From the main electronic databases searches, 1590 papers were identified, of which 1008 remained after duplicates had been removed. After title and abstract screening, 49 articles were considered eligible for full-text reading, of which 16 met the inclusion criteria and were finally included. Moreover, 2 additional papers were included from the grey literature, resulting in 18 included studies [8].

In discussing a large-scale study conducted on LC, our colleagues state that the reported prevalence of LSCC is variable in the literature, ranging from 1.27 to 5.3 per 100.000 individuals and the prevalence of AC can vary between 4.4% and 5.1% of the oral lesions. Most of the cases included in our sample were clinically diagnosed as AC and approximately 10% as LSCC. However, some of the cases diagnosed as AC were, in fact, LSCC in the histologic analysis, which highlight the importance of diagnosing these lesions at an early stage, since an earlier beginning of the treatment results in fewer consequences for the patient and higher survival rates. The most affected site by LSCC and AC in sample and in the studies included in the literature review was the lower lip, which is frequently related in the literature as the preferential site for LSCC. In sample, only four cases were located in the upper lip, from which one was LSCC (3.2%) and three were AC (3.2%). In the included studies the results were similar for AC cases; however, approximately 8% of LSCC cases were reported in the upper lip, which is considerably higher than data from the main study. Since lip vermillion semi-mucosa can be highly affected by UV exposure, it is important to emphasize prevention campaigns as relevant ways of aware a high number of individuals, especially in locations with an economy based in agriculture or livestock, such as some areas in Santa Catarina state in Brazil. The authors particularly emphasize that this population needs to be aware of the ways to prevent AC and LSCC, such as utilizing wide-brimmed hat and lip balms with sun protection factor during labor activities and solar exposure. Data from this survey showed that the most prevalent profile of the patients, for both AC and LSCC, was fair-skinned males, older than 40 years of age, and exposed to solar UV radiation due to labor or leisure activities. Overall, these results were similar to findings of literature review. Only five of the fourteen papers investigating LSCC reported data in regards to solar exposure of the individuals, still, most of these articles reported similar results to the main study [8].

As the researchers note, fair-skinned people are naturally more susceptive to UV related disorders, such as skin cancer. This fact associated with intense incidence of solar radiation, which occurs in tropical countries such as Brazil, leads to an increase in the incidence of LC. Moreover, the pathology laboratory from the medical service is located on a tropical island, which has a high concentration of street workers, especially in the summer season, when UV incidence rises, a fact that may increase their susceptibility to LSCC and AC. Interestingly, five (27.8%) of the included articles were also performed in Brazil and two (11.1%) in Australia demonstrating the importance of studying AC and LSCC in tropical locations, which present higher incidences of UV radiation and, therefore, higher incidences of sun exposure related diseases. In this way, health care professionals, especially in these geographic locations, need to be vigilant, since diagnosing these lesions at the earliest stage possible can provide a better prognosis and, consequently, fewer treatment-related consequences for these individuals. Tobacco consumption was found to be significantly higher in individuals with LSCC than in individuals with adenocarcinoma in the main study sample. The rates of smoking tobacco in the medical service LSCC sample were similar to other studies included in the literature review. Several cigar associated substances are linked to the development of intra-oral cancer; however, the role of these substances in the LSCC physiopathology is not clear. Some previous studies suggested that smoking may be considered an important secondary factor in LSCC. However, most of the lesions in our sample were located in the lower lip, which is commonly associated with UV damage, and rarely with the carcinogenic effect of secondary factors, such as alcohol and smoking habits. Still, these behavior habits may be in fact confounding factors in our sample, external effects (such as sun exposure) seem to have a major role in the development of LSCC rather than tobacco and alcohol consumption. The most cases of AC and LSCC in the main study were in fair-skinned individuals with solar exposure, and these data were similar to findings from the literature review. It should be emphasized that most of the lesions clinically diagnosed as AC had some kind of epithelial dysplasia or, in some cases, the presence of LSCC after histopathological evaluation. In conclusion, the authors come to the conclusion that patients with a history of chronic and cumulative UV exposure should be carefully evaluated and, when lip alterations are present, biopsy and histopathological evaluation should be considered [8].

As the authors note Santana T. et al. [9] AC is a potentially malignant disorder of the lip, characterized by epithelial and connective tissue alterations caused by chronic exposure to UV radiation. In the

past decades, diverse studies have been conducted in lip carcinogenesis and many biomarkers have been identified in lip lesions, yet there is no scientific evidence that determines its usefulness in the clinical setting or in histopathological routine. In this regard, as our colleagues write, they conducted the first systematic review in this field to summarize the results of published studies on immunohistochemical biomarkers in lip carcinogenesis, to evaluate if there is a marker than can distinguish the different histological grades of AC. Retrospective studies that investigated immunohistochemical biomarkers in AC defined on standardised histological assessment were gathered from five databases and evaluated. Each study was qualitatively evaluated using the critical appraisal tools from System for the Unified Management, Assessment and Review of Information. The proliferation marker Ki-67 was the most studied biomarker and they observed, through meta-analysis, that it was differently expressed between AC and LC, but not in AC sub-groups. Most articles had a high risk of bias. In conclusion, the researchers come to the conclusion that the literature lacks quality follow up studies in AC. Multicentre cohort studies, with patients stratified by treatment type and the use of image analysis soft-ware, could be the solution to further address the issues of investigating potentially malignant lesions and help change clinical practice, in terms of individualizing patients' treatment and prognosis prediction.

Ortiz R.C. et al. [10] in their work consider the possible role of aldehyde dehydrogenase 1 (ALDH1) and Cluster of Differentiation 44 (CD44) in lip carcinogenesis. According to the authors, LSCC accounts for 12% of all head and neck cancers. It is caused by chronic exposure to UV light solar radiation and related to previous AC. This study aimed to investigate the immunostaining of the putative cancer stem cells markers ALDH1 and CD44 in AC (n=30) and LSCC (n=20). ALDH1 positivity was found to be statistically higher in LSCC than in AC lesions (p=0.0045), whilst CD44 expression was statistically higher in AC than in LSCC lesions (p=0.0155). ALDH1+ cells in AC lesions were associated with specific clinical features: a younger age (<60 years old), the female gender, white skin, not smoking or consuming alcohol, and a fast evolution, and not associated with the chronic exposure to UV radiation (p<0.0001). CD44 positivity was associated with patients who were male, feoderm, smoked, consumed alcohol, underwent occupational exposure to UV radiation, and demonstrated lesions with log-time evolution (p<0.0001). ALDH1 + cells were associated with mild dysplasia using a system from the WHO, and with a low risk of malignant transformation, according to the binary system (p<0.0001). CD44+ cells were also associated with moderated dysplasia, according to the WHO system. In LSCC, ALDH1+ cells were positively associated with patients who were older (≥ 60 years old), smokers, and with those who consumed alcohol (p<0.0001). CD44 + cells in LSCC were associated with older (≥ 60 years old) patients as well, but also with female patients, white skin, non-smokers, and individuals who did not consume alcohol (p<0.0001), all of whom showed distinct patterns in pre- and malignant lesions of both markers. Additionally, in LSCC, both ALDH1 and CD44 staining were associated with smaller tumor sizes (T1/T2; p<0.0001). In summary, although both ALDH1 and CD44 were associated with the presence of dysplasia in AC lesions, the present findings suggest that ALDH1 and CD44 may be activated by different etiopathogenic pathways, predominantly in distinct steps of oral carcinogenesis. CD44 would thus be more significantly related to the potentially malignant lesion, while ALDH1 would be closely linked to malignancy.

A very revealing and fundamental study was conducted by Medeiros C.K. et al. [11], which consisted of proposal a clinical index for AC. This was an observational study conducted in two steps. The first step consisted of the development of a clinical index for assessing the severity of AC, followed by analysis of the accuracy of this index.

First step: development of the clinical index. First, an exhaustive literature search was performed to identify the clinical characteristics associated with AC for bibliographic validation of these features. The Medline/PubMed, Scopus and Google Scholar databases were searched for articles published in English or Portuguese from 1999 to 2016 using the following keywords: AC, solar cheilosis, lip, and precancerous conditions. After determination of the clinical characteristics associated with AC, forms containing these features were sent electronically between April and November 2016 to 52 masters and doctors in Stomatology and Oral Pathology with at least two years of experience in clinical care of patients with AC. The instrument contained three questions: 1) the professional was asked to identify, among the listed clinical characteristics (resulting from the literature review), those comprising the clinical presentation of AC; 2) the professional should then indicate which of the characteristic identified by him are present in mild, moderate, or severe AC; 3) If you checked the "Other changes" option, what are they? The answers to the questionnaires were analyzed and the clinical characteristics indicated as being representative of the clinical presentation of AC by 90% of the experts were listed and the remaining ones were discarded. The tertile of these characteristics was calculated and the values located in the second and third tertiles were selected. Next, each characteristic as mild, moderate or severe was determined for

inclusion in the index according to the classification in which they were most frequently cited. Finally, the clinical index containing these characteristics was elaborated by assigning a score according to severity grade, with 1 for mild characteristics of AC, 2 for moderate characteristics, and 3 for severe characteristics. Thus, after application of the clinical index, each patient received a final score corresponding to the sum of points assigned to the clinical presentation of AC to be used as a parameter for clinical decision-making [11].

Second step: validation of the clinical index. The second step consisted of a diagnostic study. First, the clinical index for AC (CIAC) was applied to patients with a clinical suspicion of AC attending the Stomatology Service of the Department of Dentistry, Universidade Federal do Rio Grande do Norte, between May 2017 and November 2019. The study sample was intentional and not probabilistic. Participants older than 18 years of age with a clinical diagnosis of AC were included in this study. Participants with a histopathological diagnosis incompatible with AC were excluded, resulting in a sample of 36 participants. The participants were examined by a trained and calibrated researcher. Intraexaminer agreement was determined using the weighted kappa test by evaluating 10 participants at an interval of 15 days between applications of the CIAC and was classified as almost perfect agreement (K = 0,83; P < 0.05). During application of the index, the characteristics that were present on the participants' lips were recorded and scores were then assigned to each characteristic. Finally, these values were summed to obtain a final score and an incisional biopsy was performed in the area showing the highest degree of clinical severity of AC. Briefly, the specimens were routinely fixed in 10% formaldehyde, embedded in paraffin wax, cut into 5 µm-thick sections, and stained with hematoxylin and eosin [11].

For development of the clinical index for assessing AC severity, researchers first conducted an exhaustive literature search, which resulted in the identification of 35 clinical characteristics associated with AC. Clinical characteristics that represented symptoms (burning and absence of painful symptoms) or that corresponded to the subjective description of a clinical feature (smooth, rough, and irregular surface) were excluded. Repeated clinical characteristics (desquamation/scaly areas; fissures/cracked areas; white/white-greyish plaques) were combined, resulting in 24 characteristics. Only characteristics present in the second and third tertiles of the frequency of citation by dentists were selected, totaling 16 clinical characteristics. The selected clinical characteristics were then classified as mild (score 1), moderate (score 2) or severe (score 3) and based on these results, the CIAC was developed. For validation, the clinical index was applied to 36 patients with a diagnosis of AC. This sample predominantly consisted of men (n=29; 80.6%) aged 40 years or older (n=34; 94.4%) with fair skin (n=24; 66.7%), a history of smoking (n=20; 55.6%), and occupational sun exposure (n=24; 66.7%). In addition, most participants used some type of photoprotection such as a cap/hat (n=27; 75%). With the exception of induration, all characteristics of the clinical index were observed upon physical examination of the patients with AC. The most frequent characteristics were blurred demarcation between lip and skin (n=32; 88.9%), white spots (n=31; 86.1%), dryness (n=30; 83.3%), and desquamation (n= 26; 72.2%). Most patients scored 10 (n=5; 13.9%) and 11 points (n=5; 13.9%), followed by 12 (n=4; 11.1%) and 7 points (n=4; 11.1%) after application of the clinical index. Morphological analysis revealed that 80.6% of the sample had some degree of epithelial dysplasia. Receiver operating characteristics analysis revealed that the optimum cut-off value of the CIAC as clinical diagnostic tool to differentiate among patients with more severe AC was 10 and 11 points. The area under the curve (AUC) of the CIAC was 0.823 (P=0.022) for the binary grading system, while a smaller AUC was obtained for the WHO grading system (0.728, P=0.043). Additionally, association tests were performed between the individual clinical characteristics and the two grading systems used. Using the WHO grading system, a significant association was observed between the blurred demarcation between lip and skin (P=0.041) and cases without dysplasia/mild dysplasia, as well as between the presence of ulceration (P=0.002) and crusts (P=0.012) and moderate/severe dysplasia. The blurred demarcation between lip and skin (P=0.005) was also significantly associated with cases of low risk of malignancy, while erosion (P=0,024), ulceration (P=0,005) and crusts (P=0,045) were associated with a high risk of malignancy by the binary system [11].

Scientific researchers have shown in their work that the clinical management of patients diagnosed with AC is often a challenge for the professional since the clinical presentation of this lesion does not always correspond to its histopathological severity. Thus, procedures that improve diagnostic accuracy are necessary since the treatment and follow-up of these patients are essential for the prevention or early diagnosis of malignant transformation of this lesion. Individual analysis of the clinical characteristics of AC showed a statistically significant association between the blurred demarcation between lip and skin and cases without dysplasia/mild dysplasia and low risk of malignancy. Only four of the 36 participants did not exhibit blurred demarcation between lip and skin (focal or diffuse). The latter is a

relatively common characteristic in patients with AC. In conclusion, the authors come to the conclusion that the CIAC was found to be a promising diagnostic tool, showing good reproducibility, easy applicability, rapidity, and low cost. However, further prospective studies involving a larger patient cohort to validate the reproducibility of the index are necessary. Demographic data of the sample analyzed reinforce the profile of patients with AC already established in the literature. Clinical characteristics such as erosion, ulceration and crusts were significantly associated with a higher histopathological severity grade of the lesion. The CIAC cut-off values of 10 and 11 using the WHO and binary grading systems, respectively, showed the best accuracy and these values should be used for biopsy indication. The use of CIAC may contribute to reduction of subjectivity of the decision-making process in the clinical management of AC patients [11].

Now, regarding this pathology in our country at the national level. The incidence of LC in the Republic of Kazakhstan in 2023 was 0.5 per 100 thousand population (0.6 – a year earlier), which in absolute numbers amounted to 109 people (118 cases – a year earlier), which for such a localization (the data are taken into account excluding skin cancer), is certainly a lot. At the same time, 87 men fell ill (in 2022 – 84 patients), women – 22 (34 patients – a year earlier) [12].

LC levels above the national average were established in 12 regions of the country: East Kazakhstan – 2.2 (the maximum indicator); Pavlodar – 1.5; Karaganda and Akmola – 1.0; Ulytau – 0.9; Kostanay and Abay – 0.7; Aktobe, Zhambyl, West Kazakhstan, Mangistau, and North Kazakhstan regions – 0.6. This indicator is below the national average in 8 regions: the city of Almaty – 0.1 (lowest level); the city of Astana and Almaty – 0.2; Atyrau, Zhetysu, Turkestan, and the city of Shymkent – 0.3; Kyzylorda regions – 0.4 per 100 thousand population.

The mortality rate from this pathology was 0.1 per 100 thousand population, the same as in 2022, which in absolute numbers amounted to 12 people (11 patients – the year before).

The regions where the mortality rate from LC is above the national average include: Pavlodar – 0.3 (highest level); Kostanay and Abay regions have a mortality rate of 0.2 per 100 thousand people. Six regions – Almaty, Aktobe, East Kazakhstan, Zhambyl and Turkestan regions, and the city of Shymkent – are on par with the national average. In the remaining regions (North Kazakhstan, Karaganda, Akmola, West Kazakhstan, Mangistau, Atyrau, Kyzylorda, Ulytau, and Zhetysu regions, as well as the cities of Almaty and Astana), there were no deaths from this pathology [12].

One-year lethality was 3.5% (3.4% in 2022). Moreover, the ratio between one-year lethality and the severity of the disease (stage IV) was quite high at 1.3, despite the ratio of LC to visually accessible localizations. At the same time, we recall that the value furthest from "1" is the worst ratio between the one-year lethality and neglect rates.

Now, regarding preventive examinations. It should be noted that during large-scale preventive examinations of the population in 2023, significantly more patients with malignant neoplasms were actively identified than in 2022. This number was 25,193 compared to 23,623 patients identified in 2022, an increase of 6.6%. This is due to the continued easing of the epidemiological situation related to the coronavirus and the increased availability of preventive care for the population. The proportion of patients identified during preventive examinations increased from 62.0% to 62.4% of the total number of patients identified for the year.

As for LC, the early detection rate of this pathology during preventive examinations decreased from 87.6% to 83.3%. The number of newly diagnosed LC patients registered with oncology organizations was 108 patients (113 patients in 2022). The absolute number of patients with LC identified during routine examinations was 90 (99 in the previous year). Of these 90, 83 were in stages I and II (89 in 2022). The proportion of LC patients detected in the early stages was 92.2% in 2023 and 89.9% in 2022.

Of course, early diagnosis rates are very important when analyzing the epidemiological situation. With this tumor location, 9 out of 10 patients are detected in the early stages (I-II). At the same time, despite the availability of visual diagnostics, one in ten patients is diagnosed in the advanced stages (III-IV), which is a significant percentage. The regions where the proportion of patients with early stage I of the pathology in question is above the national average (42.6% - 7th place among all nosological forms of malignant tumors) include the following: Atyrau, Kyzylorda regions and the city of Shymkent - 100.0% (and, naturally, the best indicator). Next come: North Kazakhstan - 66.7%; Abay, West Kazakhstan, Karaganda, Ulytau regions and the city of Almaty - 50.0%; East Kazakhstan - 43.8%; Zhambyl - 42.9%.

The lowest rates of early diagnosis were recorded in the Zhetysu, Mangistau and Kostanay regions - not a single patient (0.0%). Then come: Aktobe - 16.7%; Pavlodar - 27.3%; Turkestan - 28.6%; Almaty region and the city of Astana - 33.3%; Akmola - 37.5% of the region [12].

The regions where the proportion of patients with LC detected at stages I-II is above the national

average [(90.7% - 3rd place after non-melanoma skin cancer (98.4%) and thyroid cancer (92.4%)] include the following regions. In 12 regions (Akmola, Almaty, Atyrau, Zhambyl, West Kazakhstan, Kyzylorda, North Kazakhstan, Turkestan, Ulytau regions and our three megacities) this figure is 100%. Not far from them are the East Kazakhstan (93.8%) and Pavlodar (90.9%) regions. Low rates of early diagnosis were recorded in the Abay and Zhetysu regions - 50.0%. Next come: Karaganda and Mangistau - 80.0%; Aktobe and Kostanay - 83.3% of the region [12].

As the above data clearly demonstrates, there is a wide range in early diagnosis rates across the country, from very good to dismal. Of course, migration processes and other factors influencing early diagnosis rates must be taken into account. Nevertheless, the results obtained provide a reason for oncologists, dentists, maxillofacial surgeons, otorhinolaryngologists, and general practitioners to continue to strive for excellence. Improving early diagnosis rates for malignant tumors, as one of the fundamental tenets and one of the primary goals of medicine as a whole, remains a pressing need today.

The proportion of stage IV LC among all nosological forms of malignant neoplasms was 0.9%.

The total number of patients with malignant neoplasms registered with specialized oncology organizations in the republic continued to increase and by the end of 2023 amounted to 218,186 people, an increase of 6.0% compared to the previous year (2022 – 205,822, +5.8%). The overall incidence rate of malignant neoplasms increased by 3.9%, from 1,055.3 to 1,096.4 per 100 thousand population. This increase is due to both the increased incidence and detection of pathology, and the increased survival rate of cancer patients. Furthermore, statistical data on patients diagnosed with malignant neoplasms, who have been under observation for 5 years or more and continue to be monitored in 2023, showed that the number of patients under observation by oncology organizations in Kazakhstan for over five years continued to grow and at the end of the reporting year amounted to 117,616 people, an increase of 6.2% (2022 – 110,790 people, +6.6%) (Form No. 7).

An important clinical aspect, such as the coverage of patients diagnosed with malignant neoplasms in the Republic of Kazakhstan with specialized treatment for the first time, cannot be ignored. In 2023, the number of hospitalizations for all types of malignant tumors in oncology organizations across the country amounted to 108,252 cases (2022: 101,095), representing a 7.1% increase compared to the previous year. This is due to the steady growth of the oncology patient population, improved standardization of oncology care, and the development of palliative and restorative services.

At the end of 2023, the absolute number of patients with LC who completed specialized treatment was 81, with 19 continuing treatment. The following results were obtained in percentages by treatment method and type. 29.6% of patients received surgery alone, 24.7% received radiation alone, 22.2% received combined treatment, 8.6% received complex treatment, 6.2% received drug therapy alone, and 3.7% received chemotherapy and radiation therapy.

Further information is available regarding the five-year survival rate of patients. Regarding LC, at the end of 2023, 1,395 people, or 7.0 per 100 thousand population, were registered for dispensary care. At the end of 2022, there were 1,431 patients, or 7.3 per 100 thousand population, respectively.

Moreover, the mortality rate of the monitored cohorts in 2023 increased compared to the previous year and amounted to 0.9% in 2023 (0.8% in 2022).

The five-year survival rate for patients with LC was 72.5% in 2023 and 72.0% in 2022 [12].

To summarize the above, the following conclusion can be drawn. LC is traditionally considered a visually accessible location, which theoretically ensures a high probability of its early detection during routine examinations. However, the analysis shows a downward trend in this indicator: the proportion of cases diagnosed in the early stages has decreased from 87.6% to 83.3%. Despite the existing capabilities and accessibility of primary visual diagnostics, issues apparently remain that hinder timely patient referral and specialist awareness. The five-year survival rate for patients with LC was 72.5%, reflecting the continuing clinical and social significance of this pathology. Given the direct correlation between prognosis and disease stage, a decrease in early detection may ultimately lead to further deterioration in long-term treatment outcomes. In the current situation, it seems appropriate to: increase oncological alertness among primary care physicians, dentists, maxillofacial surgeons, and otorhinolaryngologists when examining and treating patients with this pathology, including those from high-risk groups; intensify targeted preventive examinations for smokers and individuals with chronic precancerous lesions of the vermilion border; expand public health education programs aimed at raising public awareness of the early signs of the disease; implement standardized algorithms for routing patients with suspicious changes in the mucous membrane and vermilion border; and utilize modern diagnostic methods at the initial detection stage.

A comprehensive approach, including organizational, educational, and clinical measures, will

increase the early detection of LC, improve survival rates, and reduce the medical and social consequences of this pathology. An epidemiological assessment of the LC situation in our country reveals significant regional variations not only in incidence rates but also in early diagnosis of this malignant tumor entity. Therefore, this pathology remains a serious challenge in modern clinical oncology.

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BOTULINUM TOXIN IN DENTISTRY: A SYSTEMATIC REVIEW OF CLINICAL APPLICATIONS, MECHANISMS, AND EVIDENCE-BASED EFFECTIVENESS

Mammezadeh Sevinc Ramazan
ES Aesthetic Clinic, Dentist

Abstract

Background: Botulinum toxin type A (BTX-A) has become an increasingly utilized neuromodulator in dentistry for both functional and aesthetic indications. Despite growing clinical adoption, its evidence base remains heterogeneous.

Objective: To systematically evaluate the clinical applications, efficacy, and safety profile of BTX-A in dental practice.

Methods: A systematic literature review was conducted following PRISMA principles. PubMed, Scopus, Web of Science, and Google Scholar databases were searched for studies published between 2000 and 2024. Randomized controlled trials (RCTs), systematic reviews, and high-quality observational studies were included.

Results: A total of 62 studies met inclusion criteria. Evidence supports BTX-A efficacy in bruxism, temporomandibular disorders (TMD), gummy smile correction, masseter hypertrophy, and orofacial pain. However, variability in injection protocols and outcome measures limits comparability.

Conclusion: BTX-A is an effective adjunct in dental therapeutics, but standardization of protocols and long-term multicenter trials are required.

Keywords: *Botulinum toxin, dentistry, systematic review, bruxism, TMD, gummy smile*

1. Introduction

Botulinum toxin type A (BTX-A), a neurotoxic protein derived from Clostridium botulinum, inhibits acetylcholine release at neuromuscular junctions, resulting in temporary muscle paralysis [1]. Initially developed for neurological disorders, its application has expanded into dentistry due to its ability to modulate hyperfunctional muscular activity.

In dental practice, BTX-A is increasingly used for both therapeutic and aesthetic purposes, including bruxism management, temporomandibular disorders (TMD), masseter hypertrophy reduction, orofacial pain control, and gummy smile correction [2–4]. However, clinical protocols vary significantly, and high-level evidence synthesis remains limited.

2. Methods:2.1. Study Design.*A systematic review was conducted in accordance with PRISMA guidelines.*

2.2. Data Sources.*Electronic databases searched:*

PubMed
Scopus
Web of Science
Google Scholar

2.3. Search Strategy. *Keywords used:*
"botulinum toxin", "dentistry", "bruxism", "temporomandibular disorders", "gummy smile", "masseter hypertrophy", "orofacial pain".

2.4. Inclusion Criteria. *RCTs, cohort studies, systematic reviews, meta-analyses:*

Human clinical studies
Published 2000–2024
English-language publications

2.5. Exclusion Criteria.

Case reports (low evidence level)
Animal studies
Non-peer-reviewed articles

2.6. Data Extraction and Synthesis

Data were extracted on:
Indications
Dosage protocols
Clinical outcomes
Adverse effects

Follow-up duration

Quality assessment was based on Cochrane Risk of Bias tool and Newcastle–Ottawa Scale.

3. Results. *Clinical Indications and Evidence Strength.*

3.2.1. Bruxism. *High-level evidence indicates BTX-A significantly reduces electromyographic activity of the masseter muscle and decreases clenching episodes [5]. Meta-analyses show moderate to high efficacy in pain reduction.*

3.2.2. Temporomandibular Disorders (TMD). *BTX-A demonstrates statistically significant improvement in myofascial pain and mandibular function. However, heterogeneity in outcome scales reduces comparability [6].*

3.2.3. Gummy Smile. *BTX-A shows consistent aesthetic improvement through reduction of gingival display by 2–4 mm. Evidence is mostly short-term (3–6 months follow-up) [7].*

3.2.4. Masseter Hypertrophy. *Repeated injections result in measurable reduction of muscle volume and facial contour improvement, with high patient satisfaction rates [8].*

3.2.5. Orofacial Pain. *Moderate evidence supports analgesic effects in neuropathic and myofascial pain conditions, though mechanisms remain partially unclear [1].*

Discussion. The application of botulinum toxin type A (BTX-A) in dentistry has emerged over the past decades as one of the key interdisciplinary developments in both clinical and aesthetic dentistry. Analysis of the literature indicates that the primary therapeutic advantage of BTX-A lies in its selective, reversible, and dose-dependent muscle relaxation effect, which enables the restoration of both functional and aesthetic balance in various orofacial disorders (Jankovic, 2004; Carruthers & Carruthers).

Mechanism of clinical efficacy and biomechanical basis. BTX-A inhibits neuromuscular transmission by blocking the presynaptic release of acetylcholine, resulting in temporary paresis of the targeted muscles and a reduction in muscle tone. In the dental context, this mechanism is particularly relevant in the management of hyperactivity of muscles such as the levator labii superioris, zygomaticus major, and masseter (Sposito, 2014).

As a result of this biomechanical effect, not only symptom reduction but also the restoration of aesthetic harmony becomes achievable. In cases of gummy smile, the reduction of gingival exposure is associated with the limitation of the vertical movement amplitude of the upper lip (Lee et al., 2016).

Role in aesthetic dentistry.Among aesthetic indications, gummy smile is one of the most extensively studied applications of BTX-A. The literature suggests that, with proper patient selection, gingival display can be reduced by approximately 2–4 mm, leading to a significant improvement in patient self-perception (Carruthers & Carruthers, 2003). Additionally, the aesthetic impact of BTX-A is not limited to gingival reduction; improvements in lip symmetry and perioral dynamic balance have also been reported. However, some authors emphasize that excessive dosing may result in a "flat smile" effect, which negatively affects aesthetic outcomes.

Functional indications and clinical effectiveness.The role of BTX-A in functional dentistry has been widely investigated, particularly in relation to bruxism and temporomandibular disorders (TMD). Randomized clinical trials demonstrate that BTX-A injections into the masseter muscle reduce muscle activity, thereby decreasing the frequency and intensity of teeth grinding episodes (Fedorowicz et al., 2013).

In patients with TMD, BTX-A reduces the myofascial pain component and improves mandibular function. Studies by Al-Wayli (2017) reported a statistically significant reduction in pain scores. However, some authors highlight that long-term use may increase the risk of muscle atrophy.

Dosage, technique, and clinical variability.The clinical efficacy of BTX-A is influenced not only by its pharmacological properties but also by the injection technique. Inaccurate dosage selection may lead to asymmetry, excessive muscle weakening, and functional imbalance.

The literature emphasizes that individual anatomical variations—particularly masseter muscle size, mimetic muscle strength, and craniofacial skeletal structure—significantly affect treatment outcomes (Sposito, 2014). Therefore, the absence of standardized injection protocols contributes to variability in clinical results.

Safety and limitations. Although BTX-A is generally considered safe, its use is associated with certain limitations. The most commonly reported adverse effects include localized weakness, temporary asymmetry, reduced masticatory strength, and, in rare cases, diffusion-related functional alterations (Jankovic, 2004).

Furthermore, the temporary nature of its effect (3–6 months) necessitates repeated injections, which must be considered in long-term treatment planning. While immunological resistance during repeated applications is reported to be very rare, it cannot be entirely excluded.

Multidisciplinary approach and future perspectives. In contemporary dental practice, BTX-A is not considered a standalone treatment modality but rather a multidisciplinary component used alongside orthodontic, surgical, and prosthetic interventions. In cases of skeletal-origin gummy smile, BTX-A provides only symptomatic correction without addressing the underlying etiology.

Overall assessment. Current literature indicates that BTX-A is highly effective in dentistry; however, its use requires precise clinical indication and an individualized risk–benefit assessment. Thus, botulinum toxin represents a promising yet carefully regulated tool in the management of both aesthetic and functional orofacial conditions in modern dentistry.

Conclusion. Botulinum toxin type A (BTX-A) represents a minimally invasive therapeutic modality with high clinical potential in the management of both functional and aesthetic disorders in contemporary dentistry. A systematic analysis of the available literature indicates that its primary advantage lies in the selective and reversible blockade of neuromuscular transmission, which enables pharmacological correction of orofacial muscular imbalance.

Existing studies confirm the effectiveness of BTX-A in clinical conditions such as gummy smile, perioral muscle hyperactivity, masseter hypertrophy, and temporomandibular disorders. In aesthetic indications, the reduction of gingival exposure and improvement of perioral harmony are associated with increased patient satisfaction. In the functional domain, decreased muscle activity contributes to pain reduction and improved control of occlusal parafunctions, particularly bruxism.

However, the clinical efficacy of BTX-A is determined not only by its pharmacological properties but also by the clinician's injection technique, appropriate dose selection, and consideration of individual anatomical variations. The literature indicates that inaccurate dosing may lead to undesirable outcomes such as asymmetry, a "flat smile" effect, and functional imbalance.

Although current clinical evidence suggests that BTX-A has a generally favorable safety profile, its temporary effect and the need for repeated injections impose certain limitations on its long-term application. Furthermore, in skeletal-origin aesthetic problems, this method provides only symptomatic relief and does not replace etiological treatment.

In conclusion, BTX-A should be regarded as an integral component of a multidisciplinary approach in dentistry and applied within individualized treatment protocols in combination with orthodontic, surgical, and prosthetic interventions. Future research should focus on the development of standardized dosing regimens, long-term outcome evaluation, and deeper investigation of its biomechanical mechanisms of action.

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Pedagogical sciences

THE ROLE OF THE PRAKTIKA.AI APPLICATION IN ENGLISH LANGUAGE LEARNING

Kazhym Alima Sagyndykkyzy
Abai Kazakh National Pedagogical University
7M01703 specialty 2 year MA students
Moldabayeva KarlygashYergaziyevna
Abai Kazakh National Pedagogical University
PhD, Associate Professor

PRAKTIKA.AI ҚОЛДАНБАСЫНЫҢ АҒЫЛШЫН ТІЛІН ҮЙРЕНУДЕГІ РӨЛІ

Кажым Алима Сағындыққызы
Абай атындағы Қазақ ұлттық педагогикалық университеті
7М01703 мамандығы бойынша 2-курс магистранттары
Молдабаева Карлығаш Ерғазиевна
Абай атындағы Қазақ ұлттық педагогикалық университеті
PhD, доцент

РОЛЬ ПРИЛОЖЕНИЯ PRAKTIKA.AI В ИЗУЧЕНИИ АНГЛИЙСКОГО ЯЗЫКА

Кажим Алима Сагыныккызы
Казахский национальный педагогический университет имени Абая
Студенты 2-го курса магистратуры по специальности 7М01703
Молдабаева Карлыгаш Ергазиевна
Казахский национальный педагогический университет имени Абая
Кандидат наук, доцент

Abstract

This article examines the role of the Praktika.Ai application in English language learning in the context of digital transformation and the increasing use of artificial intelligence in education. The study focuses on the impact of AI-powered tools on the development of learners' communicative competence, particularly speaking skills. Praktika.Ai provides interactive dialogue with virtual tutors, real-time feedback, and personalized learning pathways, which contribute to increased learner motivation and autonomy. The paper also analyzes the pedagogical potential of integrating AI applications into the educational process and highlights their advantages compared to traditional teaching methods. The findings suggest that Praktika.Ai can significantly enhance language acquisition by creating a supportive and engaging learning environment that encourages active participation and reduces language anxiety.

Аңдатпа

Бұл мақалада цифрландыру және білім беруде жасанды интеллект технологияларының қарқынды дамуы жағдайында Praktika.Ai қолданбасының ағылшын тілін үйренудегі рөлі қарастырылады. Зерттеу барысында жасанды интеллект негізіндегі құралдардың білім алушылардың коммуникативтік құзыреттілігін, әсіресе сөйлеу дағдыларын дамытуға әсері талданады. Praktika.Ai қолданбасы виртуалды оқытушылармен интерактивті қарым-қатынас орнатуға, жедел кері байланыс алуға және жеке оқу траекториясын қалыптастыруға мүмкіндік береді. Сонымен қатар, мақалада аталған қолданбаны оқу үдерісіне енгізудің педагогикалық мүмкіндіктері мен дәстүрлі оқыту әдістерімен салыстырғандағы артықшылықтары сипатталады. Зерттеу нәтижелері Praktika.Ai қолданбасының білім алушылардың мотивациясын арттырып, дербес оқу дағдыларын дамытуға және тілдік кедергілерді азайтуға ықпал ететінін көрсетеді.

Аннотация

В данной статье рассматривается роль приложения Praktika.Ai в изучении английского языка в условиях цифровизации и активного развития технологий искусственного интеллекта в образовании. Основное внимание уделяется влиянию AI-инструментов на формирование коммуникативной компетенции обучающихся, особенно навыков говорения. Приложение

Praktika.Ai предоставляет возможность интерактивного общения с виртуальными преподавателями, обеспечивает мгновенную обратную связь и способствует персонализации процесса обучения. В статье также анализируются педагогические возможности интеграции подобных технологий в учебный процесс и их преимущества по сравнению с традиционными методами обучения. Результаты исследования показывают, что использование Praktika.Ai повышает мотивацию обучающихся, развивает их самостоятельность и снижает языковой барьер.

Keywords: *Praktika.Ai, artificial intelligence, English language learning, speaking skills, communicative competence, digital education, learner autonomy.*

Түйін сөздер: *Praktika.Ai, жасанды интеллект, ағылшын тілін үйрену, сөйлеу дағдылары, коммуникативтік құзыреттілік, цифрлық білім беру, дербес оқу.*

Ключевые слова: *Praktika.Ai, искусственный интеллект, изучение английского языка, навыки говорения, коммуникативная компетенция, цифровое образование, автономия обучающихся.*

Introduction

In the context of globalization and rapid technological development, digital tools play an increasingly important role in education. The integration of artificial intelligence (AI) into language learning has transformed traditional approaches, making the process more interactive and personalized. Modern foreign language education focuses not only on grammar and vocabulary but also on the development of communicative competence necessary for effective interaction [1, p. 41–45]. One of the main challenges in learning English is the development of speaking skills, as learners often lack opportunities for real communication. According to the principles of communicative language teaching, meaningful interaction is essential for successful language acquisition [2, p. 13–18]. The concept of intercultural communicative competence, introduced by Byram, highlights the importance of combining linguistic knowledge with cultural awareness and communication skills [3, p. 43–44]. In this regard, AI-based applications such as Praktika.Ai provide learners with interactive environments where they can practice speaking, receive immediate feedback, and improve their communicative abilities. Therefore, the aim of this study is to examine the role of the Praktika.Ai application in English language learning, with a focus on speaking skills and learner motivation.

Theoretical Part

The integration of artificial intelligence into language education is closely connected with modern pedagogical approaches, particularly the communicative approach and learner-centered learning. According to Richards (2006), effective language acquisition requires meaningful interaction and the use of language in real-life contexts rather than the memorization of isolated structures [1, p. 13–18]. In addition, the concept of communicative competence emphasizes the importance of developing not only linguistic knowledge but also the ability to use language appropriately in different situations. Byram (1997) expands this idea by introducing intercultural communicative competence, which includes attitudes, knowledge, and skills necessary for successful communication in a multicultural environment [2, p. 43–44]. Modern educational theories also highlight the role of technology in enhancing language learning. Digital tools and AI-based applications provide opportunities for personalized learning, immediate feedback, and increased learner autonomy. According to recent studies, technology-supported learning environments can significantly improve students' motivation and engagement, especially in developing speaking skills [3]. Furthermore, Kramsch (1993) argues that language learning should be viewed as a social practice closely connected with culture. From this perspective, interactive tools such as AI applications create conditions for meaningful communication and cultural understanding, which are essential for effective language acquisition [4, p. 21–26]. Thus, the use of AI technologies in language learning aligns with modern pedagogical principles and supports the development of communicative competence, learner autonomy, and motivation.

The Use of Artificial Intelligence in Language Learning

The rapid development of artificial intelligence (AI) technologies has significantly influenced modern education, particularly in the field of language learning. AI-based tools provide learners with interactive, adaptive, and personalized learning environments that enhance the effectiveness of the educational process. Unlike traditional methods, AI applications allow continuous practice, immediate feedback, and individualized learning paths [1]. One of the key advantages of AI in language learning is its ability to simulate real-life communication. Through virtual tutors and conversational interfaces, learners can

engage in meaningful interaction, which is essential for developing communicative competence. According to Richards (2006), language acquisition is most effective when learners actively use the language in realistic contexts [2, p. 13–18]. AI technologies create such contexts by offering dynamic and context-based communication scenarios. In addition, AI supports the development of speaking skills, which are often considered the most challenging aspect of language learning. Many learners experience anxiety when speaking in a foreign language, but AI applications provide a safe and non-judgmental environment for practice. This reduces language barriers and increases learners' confidence and motivation [3]. Furthermore, AI-based applications contribute to learner autonomy by allowing students to control their learning pace and choose personalized content. As noted by Kukulska-Hulme (2020), mobile and AI-assisted learning environments promote independent learning and increase student engagement [4]. Thus, the integration of artificial intelligence into language education represents a significant advancement in teaching methodology. AI tools not only enhance linguistic skills but also create more flexible, accessible, and learner-centered educational experiences

Pedagogical Strategies for Using AI Tools

The integration of artificial intelligence (AI) tools into language education requires a systematic and pedagogically grounded approach. AI technologies should not replace traditional teaching methods but complement them, creating a blended learning environment that supports both teacher-guided instruction and learner autonomy [1]. Effective use of AI tools involves structured stages that guide students through preparation, interaction, and reflection.

1. *Pre-task activities are essential for preparing learners to work effectively with AI tools. At this*

stage, teachers introduce the topic, activate students' prior knowledge, and provide necessary vocabulary and linguistic structures. This may include brainstorming, discussing key concepts, or predicting possible communication scenarios. Such preparation helps learners approach AI-based tasks with clear objectives and reduces anxiety, especially when practicing speaking skills. According to Seelye (1993), preparatory activities play a crucial role in facilitating meaningful engagement with learning materials [2, p. 57–60].

2. *While-task Activities: During interaction with AI tools, learners actively engage in communi-*

cation tasks. AI-based applications, such as Praktika.Ai, allow students to participate in simulated real-life conversations, focusing on pronunciation, fluency, and communicative functions. One of the key advantages of AI tools at this stage is the provision of immediate feedback. Learners receive corrections related to grammar, vocabulary, and pronunciation, which enables them to monitor their progress and improve performance in real time. As emphasized in communicative language teaching, active participation and meaningful interaction are essential for language acquisition [1, p. 13–18].

3. *Post-task Activities: After completing AI-based tasks, students can analyze their performance,*

discuss challenges, and evaluate their progress. Teachers may organize group discussions, error analysis sessions, or reflective exercises. This stage encourages critical thinking and helps learners become more aware of their strengths and weaknesses. According to Liddicoat et al. (2003), reflection is a key component of effective language learning, as it promotes deeper understanding and intercultural awareness [3].

4. *Individualized Learning and Adaptation: AI tools provide opportunities for personalized learn-*

ing by adapting to individual learners' needs, levels, and learning pace. Students can choose tasks that correspond to their abilities and focus on specific areas, such as speaking or listening. This flexibility enhances learner autonomy and motivation. Kukulska-Hulme (2020) notes that mobile and AI-supported learning environments contribute to independent learning and increase student engagement [4].

5. *Teacher's Role in AI Integration: Despite the advantages of AI tools, the role of the teacher*

remains crucial. Teachers are responsible for selecting appropriate materials, guiding students' learning process, and creating a supportive classroom environment. They also help learners interpret feedback provided by AI systems and integrate it into their learning strategies. Thus, AI should be viewed as a supportive tool rather than a replacement for the teacher. Effective integration depends on a balanced combination of technological and pedagogical approaches.

Conclusion

In conclusion, the integration of artificial intelligence into language learning represents a significant shift in modern educational practices. AI-based applications, such as Praktika.Ai, provide innovative opportunities for developing communicative competence, particularly speaking skills, through interactive and personalized learning environments. The study has shown that the use of AI tools enhances learner motivation, supports autonomy, and reduces anxiety associated with speaking in a foreign language. By offering real-time feedback and simulating authentic communication scenarios, such applications create conditions that are essential for effective language acquisition. At the same time, the successful implementation of AI technologies depends on appropriate pedagogical strategies and the active role of the teacher. AI tools should be integrated into a blended learning model, where they complement traditional methods rather than replace them.

Overall, Praktika.Ai demonstrates the potential of artificial intelligence to transform language education by making it more flexible, engaging, and learner-centered. The continued development and thoughtful use of such technologies will play an important role in shaping the future of foreign language learning.

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THEATER IN THE CLASSROOM: DEVELOPING SPEAKING SKILLS IN ENGLISH LESSONS

Amiralieva Alua Kairatkyzy [1]
2nd year Master's Student,
Faculty of Pedagogy of Philology
Abai Kazakh National Pedagogical University,
Kazakhstan, Almaty

Abstract

The article examines the use of theatrical methods in English lessons as a means of developing students' oral speech. Special attention is paid to the role of dramatic techniques - improvisation, role-playing and dramatization - in the formation of communication skills in school settings. Unlike traditional exercises based on the reproduction of ready-made language models, theatrical tasks create communicative situations that are close to real interaction. The article analyzes the theoretical foundations of the use of dramatic methods in teaching foreign languages, and also offers practical lesson scenarios developed on the basis of the 11th grade curriculum modules. It is shown that the integration of theatrical techniques into the educational process contributes to the development of fluency of speech, interaction skills and more active participation of students in oral communication.

Аннотация

Бұл мақалада ағылшын тілі сабақтарында оқушылардың ауызша сөйлеуін дамыту құралы ретінде театрлық әдістерді қолдану қарастырылады. Әсіресе импровизация, рөлдік ойындар және драма сияқты драмалық тәсілдердің мектеп жағдайында коммуникативтік дағдыларды қалыптастырудағы рөліне ерекше назар аударылады. Дайын тілдік үлгілерді қайталауға негізделген дәстүрлі жаттығулардан айырмашылығы, театрлық тапсырмалар нақты қарым-қатынасқа жақын коммуникативтік жағдайлар жасайды. Мақалада шетел тілдерін оқытуда драмалық әдістерді қолданудың теориялық негіздері талданып, 11-сыныптың оқу бағдарламасының модульдері негізінде әзірленген сабақ сценарийлері ұсынылады. Театрлық тәсілдерді оқу үдерісіне енгізу оқушылардың сөйлеу еркіндігін, өзара әрекеттесу дағдыларын дамытуға және ауызша коммуникацияға белсенді қатысуына ықпал ететіні көрсетіледі.

Аннотация

В статье рассматривается использование театральных методов на уроках английского языка как средства развития устной речи учащихся. Особое внимание уделяется роли драматических техник - импровизации, ролевых игр и драмы - в формировании коммуникативных навыков в условиях школьного обучения. В отличие от традиционных упражнений, основанных на воспроизведении готовых языковых моделей, театральные задания создают коммуникативные ситуации, приближенные к реальному взаимодействию. В статье анализируются теоретические основы применения драматических методов в обучении иностранным языкам, а также предлагаются практические сценарии уроков, разработанные на основе учебных модулей программы 11 класса. Показано, что интеграция театральных техник в учебный процесс способствует развитию беглости речи, навыков взаимодействия и более активному участию учащихся в устной коммуникации.

Keywords: *theatrical teaching methods, oral speech, communicative competence, English language teaching, dramatic pedagogy.*

Тірек сөздер*: театрлық оқыту әдістері, ауызша сөйлеу, коммуникативтік құзыреттілік, ағылшын тілін оқыту, драмалық педагогика.*

Ключевые слова: *театральные методы обучения, устная речь, коммуникативная компетенция, преподавание английского языка, драматическая педагогика.*

Introduction

Developing students' speaking ability remains one of the main challenges in English language teaching at school. Although learners often acquire grammatical knowledge and vocabulary, many of them experience difficulties when they need to express their ideas orally. These difficulties are frequently related to limited speaking practice, lack of authentic communication in the classroom, and students' uncertainty when participating in discussions. In recent years, educators have increasingly explored creative teaching approaches that can make language learning more interactive and meaningful. One of these approaches is the use of theatrical techniques in the classroom. Theatre-based activities create

situations in which students use language for real communication rather than mechanical repetition. Through role-play, dramatization, and improvisation, learners can experiment with language while interacting with their classmates in simulated real-life contexts.

Researchers in language pedagogy argue that drama techniques help connect linguistic knowledge with communicative practice. Maley and Duff note that dramatic activities allow learners to experience language as a form of social interaction rather than a set of isolated structures [1]. Similarly, communicative language teaching theory emphasizes the importance of meaningful interaction and authentic tasks in language development. Despite the theoretical support for theatre-based teaching, its practical application in regular school lessons is still limited. Many teachers remain uncertain about how to integrate theatrical activities into the curriculum or how to organize such tasks effectively within the time constraints of a lesson.

The aim of this article is to examine how theatre-based teaching techniques can support the development of speaking skills in English lessons and to demonstrate practical ways of integrating theatrical activities into classroom practice.

Literature review

The use of drama and theatre techniques in language education has been widely discussed in recent decades. Researchers emphasize that drama activities create interactive environments where students can practice language in meaningful situations.

Maley and Duff are among the most influential scholars in this area. They argue that drama techniques such as improvisation, role-play, and dramatization help learners experience language as communication rather than as a set of grammatical rules [1]. Their work provides numerous classroom activities that encourage spontaneous speech and creative expression. However, the authors focus primarily on practical exercises and provide limited empirical evidence on long-term language development.

Kao and O'Neill investigated the role of process drama in second language learning. Their study shows that students who participate in dramatic scenarios tend to communicate more actively and experiment with language forms [2]. The researchers note that fictional contexts reduce fear of making mistakes because learners speak through characters rather than as themselves. At the same time, the authors acknowledge that process drama requires careful teacher guidance. Without clear structure, dramatic activities may lose their linguistic focus.

Another important contribution comes from Stinson and Winston, who explored the relationship between drama education and language learning. Their research suggests that drama activities increase classroom participation and collaboration [3]. These social benefits may indirectly support language development. Nevertheless, the authors also point out that not all studies demonstrate consistent linguistic improvement, which indicates that the effectiveness of drama depends on how activities are designed and integrated into lessons.

Schewe introduces the concept of performative language teaching, where learning occurs through physical and emotional engagement. According to this approach, language learning becomes more effective when students combine speech with movement, gesture, and role enactment [4]. However, Schewe also highlights practical limitations. Teachers may hesitate to use drama techniques due to limited time, lack of training, or classroom management concerns.

Existing research demonstrates that theatre-based techniques can support language learning by creating interactive and emotionally engaging environments. At the same time, scholars emphasize the importance of structured activities and clear pedagogical goals to ensure that drama contributes effectively to the development of speaking skills.

Theoretical background

Several theoretical perspectives explain why theatre techniques can support the development of speaking skills in language learning. Among the most relevant frameworks are communicative language teaching, sociocultural theory, affective approaches to second language acquisition, and more recent research on process drama and role-play techniques.

Communicative language teaching (CLT) emphasizes the use of language for meaningful interaction. Hymes introduced the concept of communicative competence, arguing that successful communication requires more than grammatical knowledge [5]. Learners must also understand how language functions in social contexts. Later, Canale and Swain expanded this concept by identifying several components of communicative competence, including discourse competence and strategic competence [6]. Drama-based activities support these principles because they require learners to use language to achieve communicative goals. When students participate in role-plays, improvisations, or dramatic dialogues, they must respond to unpredictable situations and negotiate meaning with their peers. These processes

resemble authentic communication more closely than traditional speaking drills. However, some scholars highlight limitations of communicative approaches. Littlewood (1981) notes that communicative tasks may sometimes lack linguistic focus if they are not carefully structured [7]. In such cases students may rely on limited vocabulary or avoid complex language forms. Therefore, theatre activities should be designed with clear linguistic objectives so that communicative practice also contributes to vocabulary and grammar development.

Another important theoretical foundation for theatre-based teaching can be found in Vygotsky's sociocultural theory. According to Vygotsky, learning occurs through social interaction and collaborative activity. Language development emerges through communication with others, particularly within the learner's zone of proximal development (ZPD) [8]. Drama activities naturally create such collaborative environments. During theatrical tasks students work together to construct dialogues, develop scenes, and respond to unexpected communicative situations. Through this interaction they receive support from their peers and gradually expand their linguistic abilities. Nevertheless, sociocultural theory also suggests that interaction alone does not guarantee language development. Lantolf and Thorne emphasize the importance of scaffolding provided by teachers or more competent peers [9]. Without guidance, collaborative activities may become unfocused and fail to support language learning. This limitation highlights the importance of careful planning when integrating theatre techniques into language lessons.

Emotional factors also play a significant role in second language acquisition. Krashen's Affective filter hypothesis suggests that learners acquire language more successfully when anxiety is low and motivation is high [10]. Theatre activities can contribute to these conditions because they allow students to speak through fictional characters rather than through their personal identities. According to Kao and O'Neill, role distance can reduce psychological pressure during speaking tasks [2]. Students may therefore become more willing to experiment with language and participate actively in communication. At the same time, researchers note that drama activities do not automatically reduce anxiety for all learners. Stinson and Winston observe that some students initially feel uncomfortable performing in front of others [3]. For this reason drama techniques should be introduced gradually and supported by a positive classroom environment.

Recent studies have expanded the theoretical understanding of drama-based language teaching by focusing on process drama. Process drama involves collaborative storytelling in which learners explore a fictional situation through dialogue and role interaction. Luo examined the implementation of process drama in EFL classrooms and found that such activities increased students' willingness to communicate and helped sustain longer speaking interactions [11]. Because learners remain involved in an evolving narrative situation, they are encouraged to negotiate meaning continuously with their peers. However, Luo also notes that the effectiveness of process drama depends on careful teacher guidance. If the narrative element becomes the primary focus, students may concentrate on acting rather than on language use. This observation suggests that process drama must be integrated with clear linguistic goals in order to support language development.

Recent research also proposes a holistic approach to drama-based language learning. This perspective integrates several pedagogical frameworks, including Task-based language teaching (TBLT), communicative language teaching, and drama pedagogy. Studies of drama-based educational programs suggest that theatrical activities combine cognitive and emotional aspects of learning. Role-play tasks provide structured communicative practice, while theatrical elements such as improvisation, gesture, and nonverbal expression create sensory and emotional engagement. Researchers argue that this holistic integration supports language learning more effectively than isolated communicative exercises [12]. At the same time, they emphasize that drama-based programs require careful curriculum design and teacher preparation in order to achieve consistent results.

Together, these theoretical perspectives demonstrate why theatre techniques can contribute to the development of speaking skills in language learning. Communicative language teaching highlights meaningful interaction, sociocultural theory emphasizes collaborative learning, and affective approaches focus on emotional conditions that encourage communication. Recent research on process drama, role-play, and holistic drama-based learning further supports the integration of theatre techniques into English language teaching.

Methodology

Integrating theatrical techniques into English lessons provides a dynamic and learner-centered approach to developing oral communication. This study adopts a practice-oriented methodological approach that demonstrates how theatre techniques can be integrated into English lessons within the

existing curriculum. The activities are designed for 11th grade students and are aligned with the thematic units of the English textbook "Aspect".

Theatre-based techniques are used as communicative tasks that allow students to practice speaking skills in meaningful contexts. Each activity corresponds to specific learning objectives of the curriculum, including vocabulary development, discussion skills, and the use of grammatical structures such as passive voice and conditionals.

The following section presents three sample lesson scenarios based on textbook modules.

Lesson plan 1

Module 4 - Timekeeping Devices: Dramatic interview activity

Curriculum focus:

Topic: History of timekeeping devices

Grammar: Passive voice

Skill: Presenting information

***Objective**: Students practice speaking by performing an interview with a historical inventor.*

***Duration:** 45 minutes*

Stage	*Teacher activity*	*Student activity*	*Time*
Introduction	*Teacher briefly introduces the history of timekeeping devices*	*Students share prior knowledge*	*5 min*
Vocabulary preparation	*Teacher reviews key terms (clock, invention, measurement of time)*	*Students repeat and discuss meanings*	*10 min*
Role assignment	*Teacher assigns roles (journalist, inventor, historian)*	*Students prepare interview questions*	*10 min*
Interview performance	*Students perform interviews in pairs or small groups*	*Students act as historical characters*	*15 min*
Reflection	*Teacher discusses how passive voice was used in presentations*	*Students reflect on language use*	*5 min*

This activity connects historical content with communicative speaking practice.

Lesson plan 2

Module 5 - Work and Inventions: Invention pitch (mini-theatre presentation)

Curriculum focus:

Topic: inventions and business ideas

Grammar: infinitives and -ing forms

Skill: persuasive speaking

***Objective**: Students present an invention idea through a short dramatic presentation.*

***Duration:** 45 minutes*

Stage	*Teacher activity*	*Student activity*	*Time*
Warm-up	*Teacher asks students to name famous inventions*	*Students brainstorm ideas*	*5 min*
Language preparation	*Teacher reviews useful persuasive phrases*	*Students practice expressions*	*10 min*
Group preparation	*Students design a fictional invention*	*Groups prepare a short presentation*	*15 min*
Dramatic presentation	*Groups perform "product pitches" for the class*	*Students present inventions*	*10 min*
Feedback	*Teacher provides feedback on fluency and vocabulary*	*Students discuss which invention was most convincing*	*5 min*

This activity develops persuasive speaking and creativity while reinforcing topic vocabulary.

Lesson plan 3

Module 6 - Social Change: Debate theatre

Curriculum focus

Topic: technological and social change

Grammar: conditionals and unreal past

Skill: argumentative speaking

***Objective**: Students practice expressing opinions and debating social issues.*

***Duration:** 45 minutes*

Stage	Teacher Activity	Student Activity	Time
Topic introduction	Teacher introduces a controversial issue (technology and society)	Students express initial opinions	5 min
Language review	Teacher reviews conditional structures for speculation	Students practice examples	10 min
Role preparation	Students receive roles (scientist, journalist, activist, citizen)	Students prepare arguments	10 min
Debate performance	Students perform a moderated debate	Students respond and argue	15 min
Reflection	Teacher summarizes arguments and language use	Students evaluate their performance	5 min

This activity encourages critical thinking and extended speaking practice.

Assessment of speaking skills

Students' speaking performance can be evaluated using a communicative rubric that reflects both linguistic and expressive aspects of speech.

Criterion	Description	Score
Fluency	Ability to speak continuously with minimal hesitation	2
Pronunciation	Clarity of speech and intonation	2
Vocabulary use	Range and appropriateness of vocabulary	2
Interaction	Ability to respond and maintain dialogue	2
Expressiveness	Use of voice, gesture, and emotion	2

This form of assessment reflects communicative language teaching principles because it evaluates real communicative performance rather than isolated grammar accuracy.

Practical challenges

Despite the advantages of theatre-based activities, teachers may face several practical challenges. One challenge is large class size, which may limit opportunities for every student to perform. To address this issue, teachers can organize students into small groups performing simultaneously. Another challenge involves teacher preparation. Drama activities require clear instructions and structured planning. Teachers who are unfamiliar with theatrical techniques may initially feel uncertain about classroom management. Time management is also important. Since drama activities include preparation and reflection stages, teachers need to integrate them carefully into lesson schedules.

Results and Discussion

The implementation of theatre-based activities within the curriculum modules revealed several pedagogical outcomes related to the development of students' speaking skills. The activities described in the methodology section created communicative situations that encouraged active participation and spontaneous speech production.

Speaking fluency development. One of the most noticeable outcomes was the improvement in students' speaking fluency. Theatre activities required learners to react to unexpected situations and maintain interaction with their peers. Unlike traditional speaking exercises, improvisation and role-play tasks encouraged longer utterances and more natural conversational flow. This result supports the principles of **communicative language teaching**, which emphasize meaningful communication rather than isolated grammar practice. When students performed the dramatic interview activity in Module 4, they had to describe historical inventions and respond to questions from classmates. This interactive format allowed them to practice extended speech rather than short textbook answers.

Student engagement and participation. Another important observation was the increase in student engagement during speaking tasks. Theatre-based activities required collaboration and role interaction, which naturally involved more students in the learning process. For example, during the invention presentation activity in Module 5, students worked in groups to design and present fictional inventions. The creative nature of the task encouraged students to share ideas and contribute to group discussions. Even learners who were usually less active participated more actively when they were assigned specific roles. These findings correspond with research on drama pedagogy, which suggests that role-based communication can increase learner motivation and participation.

Development of interaction skills. Theatre activities also helped students develop interactional competence. During the debate theatre activity in Module 6, learners practiced expressing opinions, responding to arguments, and maintaining dialogue with their peers. This type of task reflects the concept of communicative competence described in language pedagogy research. Students were required not only to produce language but also to respond appropriately to other speakers, which is an essential element of real communication.

Assessment outcomes. Students' speaking performance was evaluated using a communicative assessment rubric that included criteria such as fluency, pronunciation, vocabulary use, interaction, and expressiveness.

The assessment results indicated that theatre activities were particularly effective in improving interaction and fluency, while vocabulary development depended on students' prior language knowledge. Expressiveness also increased as students used gestures, intonation, and emotional expression during performances.

These outcomes are consistent with studies on drama-based language learning, which highlight the importance of combining verbal and non-verbal communication.

Implementation challenges

Despite the positive outcomes, several practical challenges were observed. In large classes, it was sometimes difficult to provide equal speaking opportunities for every student. Additionally, some learners initially felt hesitant about performing dramatic roles. However, these difficulties decreased as students became more familiar with theatre activities. Structured guidance from the teacher and clear role instructions helped maintain focus on language learning objectives.

Conclusion

The analysis presented in this article demonstrates that theatre-based activities can be effectively integrated into English language lessons to support the development of students' speaking skills. When aligned with curriculum objectives, drama techniques provide opportunities for meaningful communication, collaborative interaction, and creative language use. Activities such as improvisation, role-play, and dramatization allow learners to practice language in realistic situations while engaging cognitively and emotionally in the learning process.

The lesson scenarios designed for the textbook modules illustrate how theatre techniques can be incorporated into a standard classroom structure without disrupting the existing curriculum. By linking drama activities with specific linguistic objectives - such as practicing passive constructions, persuasive language, or conditional forms - teachers can combine communicative practice with language accuracy. The results of classroom implementation suggest that theatre-based tasks support fluency development, improve interaction skills, and encourage active participation among students.

Based on the findings of this study, several practical recommendations can be proposed for teachers who wish to use theatre techniques in English lessons:

1. Begin with short structured activities. Teachers may introduce simple role-play or improvisation tasks before moving to more complex dramatic performances.

2. Connect theatre tasks with lesson objectives. Drama activities should reinforce the vocabulary, grammar, or communicative skills presented in the curriculum.

3. Provide clear instructions and role descriptions. Well-defined roles help students focus on communication rather than on performance alone.

4. Encourage collaboration in small groups. Group work allows more students to participate actively, especially in larger classes.

5. Use communicative assessment criteria. Evaluation should consider fluency, interaction, and expressive communication rather than only grammatical accuracy.

At the same time, teachers should be aware of potential challenges when implementing theatre-based activities. Classroom management, limited lesson time, and students' initial reluctance to perform may require gradual introduction of drama techniques and careful lesson planning.

Future research could explore the long-term impact of theatre-based learning on language development. Further studies may also examine how drama techniques influence different aspects of communicative competence, including pronunciation, discourse organization, and intercultural communication. In addition, comparative research across different age groups and educational contexts would help clarify how theatre-based teaching can be adapted for diverse language learning environments.

In conclusion, theatre techniques represent a valuable pedagogical tool that can enrich English language teaching by creating interactive and meaningful learning experiences. When carefully integrated into the curriculum, drama activities can contribute significantly to the development of students' speaking skills and communicative confidence.

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USING VR AND AR TO IMPROVE ORAL SPEAKING SKILLS AMONG B2-LEVEL STUDENTS

Aripbayeva Alua Rauankyzy
Master's Student,
Faculty of Foreign Languages,
Abai Kazakh National Pedagogical University (KazNPU),
Almaty, Kazakhstan

Abstract

The rapid development of digital technologies has significantly influenced contemporary approaches to language education, particularly in the teaching of speaking skills. Among emerging tools, Virtual Reality (VR) and Augmented Reality (AR) offer new possibilities for creating interactive and context-rich learning environments. This study investigates the use of VR and AR technologies as instruments for enhancing oral communication skills among English language learners at the B2 level, where students are expected to demonstrate fluency, coherence, and active participation in spoken interaction.

The research aims to examine how immersive and semi-immersive environments affect learners' ability to produce spoken language in meaningful contexts. It is based on the assumption that realistic and engaging scenarios can stimulate more natural communication, increase learner involvement, and support the development of communicative competence. Special attention is given to the role of technology in reducing psychological barriers to speaking, such as hesitation and lack of confidence, which are commonly observed even at intermediate and upper-intermediate levels.

A comparative approach was applied to analyze the impact of VR and AR on key components of speaking performance, including fluency, accuracy, and interaction. The study also considers learners' engagement and their readiness to participate in communicative tasks within technology-enhanced environments. The results indicate that both VR and AR contribute to noticeable improvement in speaking skills, although their influence differs in focus. VR-based activities are associated with increased fluency and more spontaneous speech production, while AR-supported tasks tend to enhance accuracy and structured language use through contextual support.

The findings suggest that immersive technologies can create conditions that closely resemble real-life communication, allowing learners to practice language use in a more authentic and less restrictive way. At the same time, the effectiveness of these tools depends on their pedagogical integration and alignment with learning objectives. The study demonstrates that combining different types of technologies may provide a balanced approach to developing oral communication skills.

Overall, the research highlights the practical value of VR and AR in modern language teaching and underlines their potential to support the development of speaking competence in a more engaging and effective manner.

Keywords: *immersive learning, oral communication competence, interactive environments, language anxiety reduction, communicative fluency, digital pedagogy, authentic language practice, student engagement*

Introduction. In the context of rapid technological development, language education is undergoing significant transformation. Traditional methods of teaching speaking skills often rely on textbook-based tasks, controlled dialogues, and limited real-life interaction. While such approaches provide a necessary foundation, they are not always sufficient for developing communicative competence at higher levels, particularly at the B2 level, where learners are expected to express ideas fluently, interact spontaneously, and adapt their language to different situations.

One of the key challenges faced by B2-level learners is the lack of authentic speaking practice. Many students experience difficulties not because they lack grammatical knowledge, but because they are not exposed to realistic communication contexts. As a result, they may hesitate, feel anxious, or struggle to maintain conversations. This problem becomes even more noticeable in educational environments where opportunities for real interaction with native speakers are limited.

In recent years, Virtual Reality (VR) and Augmented Reality (AR) technologies have emerged as promising tools that can address these challenges. These technologies make it possible to create immersive and interactive environments where learners can practice speaking in simulated real-life situations. For example, students can participate in virtual conversations, explore different environments, and engage in task-based communication activities that require active language use.

The integration of VR and AR into language learning is supported by modern pedagogical approaches that emphasize interaction, meaningful communication, and learner engagement. By placing students in realistic contexts, these technologies can reduce psychological barriers, increase motivation, and encourage more natural speech production. Furthermore, they provide opportunities for repeated practice without the fear of making mistakes in front of others.

This study aims to explore the role of VR and AR technologies in improving speaking skills among B2-level students. It focuses on how these tools influence learners' fluency, confidence, and ability to participate in communicative situations. The research also considers the differences between VR and AR in terms of their educational potential and practical application in language classrooms.

Theoretical Background. The use of technology in language learning is closely connected with communicative and interaction-based approaches. According to modern language teaching theories, effective learning occurs when students actively use the language in meaningful contexts. Speaking, in particular, is considered one of the most complex skills, as it requires the integration of vocabulary, grammar, pronunciation, and real-time processing.

Immersive technologies such as VR and AR align with these principles by creating environments where communication becomes necessary and purposeful. VR provides a fully simulated space in which learners can interact with virtual characters and scenarios, while AR enhances the real world by adding digital elements that support learning tasks. Both technologies contribute to the creation of authentic-like situations that are essential for developing communicative competence.

Another important aspect is the psychological dimension of language learning. Many learners experience anxiety when speaking a foreign language, especially in front of peers or teachers. Immersive environments can reduce this pressure by allowing students to practice in a more private and controlled setting. This can lead to increased confidence and willingness to communicate.

In addition, the use of VR and AR supports learner-centered education. Students become active participants in the learning process rather than passive recipients of information. They explore, interact, and make decisions, which enhances both engagement and retention of knowledge.

Methodology. This study was conducted among B2-level university students studying English as a foreign language. The research design included a comparative approach, focusing on the use of VR and AR technologies in developing speaking skills. A total of 40 students participated in the study and were divided into two groups: one group used VR-based activities, while the other worked with AR-based tools.

The intervention lasted for four weeks and was integrated into regular speaking lessons. Students in the VR group engaged in immersive scenarios such as virtual travel, role-plays, and interactive dialogues. The AR group used applications that combined real-world environments with digital prompts, including visual cues, vocabulary support, and task-based speaking activities.

To evaluate the effectiveness of the technologies, students' speaking performance was assessed before and after the intervention. The assessment focused on fluency, accuracy, and interaction skills. In addition, qualitative data were collected through observations and student feedback to better understand their experiences and attitudes toward the use of VR and AR.

Results and Discussion. The results of the study demonstrate that the integration of Virtual Reality (VR) and Augmented Reality (AR) technologies had a measurable and meaningful impact on the development of speaking skills among B2-level students. The analysis was based on three key criteria: fluency, accuracy, and interaction, which reflect the core components of oral communicative competence.

TABLE 1. SPEAKING PERFORMANCE BEFORE AND AFTER INTERVENTION

Group	Fluency (Pre)	Fluency (Post)	Accuracy (Pre)	Accuracy (Post)	Interaction (Pre)	Interaction (Post)
VR Group (ENGAGE VR, Mondly VR)	5.2	7.8	5.5	7.2	5.0	8.1
AR Group (Assemblr EDU, ImmerseMe)	5.3	7.1	5.6	7.6	5.1	7.4

(Scores are based on a 10-point scale)

As shown in Table 1, both groups demonstrated statistically visible improvement across all speaking criteria. However, the distribution of progress differed depending on the technological environment and the type of tasks implemented.

*Students in the VR group, who worked with platforms such as **ENGAGE VR** and **Mondly VR**, showed the most significant improvement in fluency (from 5.2 to 7.8) and interaction (from 5.0 to 8.1). This can be explained by the immersive nature of VR environments, where learners are placed in simulated real-life situations such as conversations in airports, meetings, or social interactions. These scenarios required immediate responses and spontaneous speech, which naturally increased fluency and reduced hesitation.*

*In contrast, students in the AR group, who used tools like **Assemblr EDU** and **ImmerseMe**, demonstrated slightly higher gains in accuracy (from 5.6 to 7.6). AR applications provided visual scaffolding, contextual vocabulary prompts, and structured speaking tasks integrated into real-world environments. This type of support allowed students to focus more on grammatical correctness and lexical choice while producing speech.*

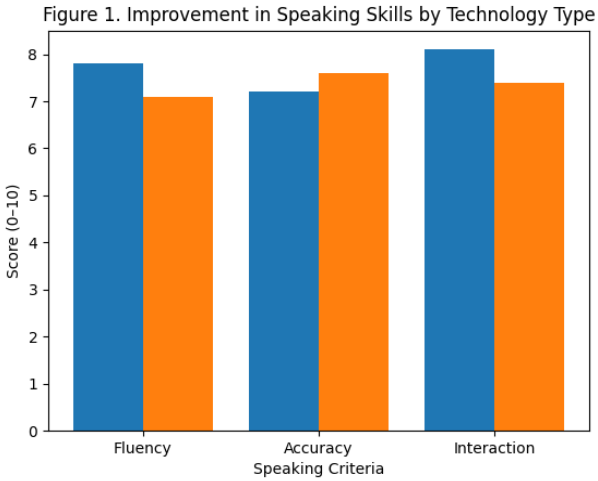

FIGURE 1. IMPROVEMENT IN SPEAKING SKILLS BY TECHNOLOGY TYPE

Figure 1 presents a comparison of speaking performance improvements between the VR group (ENGAGE VR, Mondly VR) and the AR group (Assemblr EDU, ImmerseMe) across three criteria: fluency, accuracy, and interaction. The results indicate that students using VR technologies achieved higher gains in fluency and interaction, reflecting increased spontaneity and engagement in communication. In contrast, learners in the AR group demonstrated slightly stronger improvement in accuracy, which can be attributed to the structured support and contextual guidance provided by AR tools. Overall, the figure visually confirms that different technologies contribute to different dimensions of speaking competence.

Discussion of Findings. The results of this study can be more deeply understood through the lens of established theories in second language acquisition and educational technology integration. The observed improvements in speaking skills among B2-level learners are not случайные, but align with key theoretical frameworks, particularly those proposed by Krashen, Swain, Long, and the TPACK model.

First, the increase in fluency and reduced hesitation in the VR group can be interpreted through Stephen Krashen's Affective Filter Hypothesis. According to this theory, emotional factors such as anxiety, self-confidence, and motivation play a crucial role in language acquisition. The immersive nature of VR environments, especially platforms like ENGAGE VR and Mondly VR, appeared to lower students' affective filter by creating a psychologically safe space for communication. Learners reported feeling less judged and more willing to take risks when speaking. This reduction in anxiety allowed for more natural and continuous speech production, which directly contributed to gains in fluency.

Secondly, the findings related to increased speech production and interaction can be explained by Merrill Swain's Output Hypothesis. Swain emphasizes that producing language (not just understanding it) is essential for developing communicative competence. VR environments required students to actively respond, negotiate meaning, and maintain conversations in real time. This pushed learners to use their linguistic resources more actively, identify gaps in their knowledge, and refine their language output. As a result, students in the VR group demonstrated longer utterances and more spontaneous interaction.

The role of interaction itself is further supported by Michael Long's Interaction Hypothesis, which argues that language acquisition is enhanced through meaningful interaction and negotiation of meaning. Both VR and AR technologies created opportunities for such interaction, but in different ways. VR provided dynamic, scenario-based communication that simulated real-life exchanges, while AR supported interaction through guided tasks and contextual prompts. The higher interaction scores in the VR group suggest that immersive dialogue-based environments may be particularly effective in facilitating negotiation of meaning, clarification requests, and conversational repair strategies.

At the same time, the improvement in accuracy observed in the AR group can be interpreted as a result of scaffolded learning environments. AR tools such as Assemblr EDU and ImmerseMe provided visual and contextual support, which aligns with the idea that learners benefit from structured input and

guided production. This balance between support and output allowed students to focus on grammatical correctness and appropriate vocabulary use, leading to more accurate speech.

From a pedagogical perspective, the integration of VR and AR technologies in this study reflects the principles of the TPACK framework. Effective teaching with technology requires not only access to digital tools, but also the ability to align them with pedagogical strategies and content goals. In this case, VR and AR were not used as isolated innovations, but as tools integrated into communicative language teaching practices. Tasks were designed to promote meaningful interaction, contextualized language use, and learner engagement, which demonstrates a balanced interaction between technological, pedagogical, and content knowledge.

Importantly, the findings suggest that VR and AR technologies should not be viewed as competing approaches, but rather as complementary tools within a unified instructional design. VR supports experiential and immersive learning, which is particularly effective for developing fluency, interaction, and communicative confidence. AR, in contrast, provides structured and accessible support, which is essential for improving accuracy and linguistic control. Together, they create a more holistic learning environment that addresses both the cognitive and affective dimensions of language learning.

Conclusion. This study demonstrates that both Virtual Reality (VR) and Augmented Reality (AR) technologies effectively support the development of speaking skills among B2-level students. The results show that VR contributes more to fluency and interaction by creating immersive communication environments, while AR improves accuracy through structured and guided support.

The results of this study are consistent with major theories of second language acquisition and demonstrate that immersive technologies, when pedagogically grounded, can significantly enhance the development of speaking skills. Their effectiveness lies not only in their technological novelty, but in their ability to operationalize key principles of language learning, including reduced anxiety, increased output, meaningful interaction, and balanced instructional design.

Overall, VR and AR can serve as practical and innovative tools for enhancing speaking competence in modern language education.

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PHILOSOPHICAL ASPECTS OF DIGITALIZATION OF MODERN MUSIC EDUCATION

Nargis Batyrbayeva
First-year PhD Doctoral Student,
Faculty of Arts,
Abai Kazakh National Pedagogical University,
Almaty, Kazakhstan
Aisulu Kaldayakova
PhD,
Faculty of Arts,
Abai Kazakh National Pedagogical University,
Almaty, Kazakhstan

ФИЛОСОФСКИЕ АСПЕКТЫ ЦИФРОВИЗАЦИИ СОВРЕМЕННОГО МУЗЫКАЛЬНОГО ОБРАЗОВАНИЯ

Батырбаева Наргис Фирузовна
Докторант 1 курса,
Факультет искусств,
Казахский национальный педагогический университет имени Абая,
г.Алматы, Казахстан
Калдаякова Айсулу Абылкасымовна
Доктор Философии (PhD),
Факультет искусств,
Казахский национальный педагогический университет имени Абая,
г.Алматы, Казахстан

Abstract

This article is devoted to philosophical reflections on the integration of digital technologies into music education. The authors demonstrate how digitalisation is transforming not only the organisation of the educational process, but also the very essence of the musical experience. The focus is on issues relating to physicality, perception, and the status of music in a virtual environment. Particular importance is attached to the active participation of digital tools and artificial intelligence systems in the educational process. These tools do more than just assist teachers; they also facilitate new methods of transmitting and mastering musical knowledge. This approach enables us to reconsider the boundaries of musical creativity and challenges the conventional distinction between the real and the virtual. The authors also analyse the cognitive consequences of the digital environment. They consider the phenomenon of 'clip thinking', which affects one's ability to perceive music aesthetically. They emphasise that new forms of perception require careful philosophical analysis to preserve the cultural and educational value of musical art. The ontological aspect of the study relates to the change in the status of a piece of music. In the digital age, music loses the uniqueness associated with its time and place of performance and becomes an infinitely replicable object. This creates a new cultural reality in which the copy acquires an independent meaning and ceases to be secondary to the original. In conclusion, the concept of 'critical digital humility' is proposed. This involves striking a balance between the practical effectiveness of technology and preserving the philosophical depth of musical art. This approach considers both the advantages and limitations of digitalisation. The study emphasises the importance of an interdisciplinary analysis that combines phenomenology, posthumanism and the philosophy of technology in order to comprehend the changes that digitalisation has brought to music education.

Аннотация

Данная статья посвящена философской рефлексии процесса интеграции цифровых технологий в систему музыкального образования. Авторы показывают, что цифровизация меняет не только организацию учебного процесса, но и саму природу музыкального опыта. В центре внимания находятся вопросы телесности, восприятия и статуса музыкального произведения в условиях виртуальной среды. Особое значение придается тому, как цифровые инструменты и системы искусственного интеллекта становятся активными участниками образовательного процесса. Они не просто помогают преподавателю, но формируют новые способы передачи и освоения музыкального знания. Такой подход позволяет по-новому взглянуть на границы музыкального творчества и разрушает привычное противопоставление реального

и виртуального. Авторы также анализируют когнитивные последствия цифровой среды. Рассматривается феномен «клипового мышления», который влияет на способность к глубокому эстетическому восприятию музыки. Подчеркивается, что новые формы восприятия требуют внимательного философского анализа, чтобы сохранить культурную и образовательную ценность музыкального искусства. Онтологический аспект исследования связан с изменением статуса музыкального произведения. В цифровой эпохе музыка теряет уникальность, связанную с конкретным временем и местом исполнения, и превращается в бесконечно тиражируемый объект. Это создает новую культурную реальность, где копия приобретает самостоятельное значение и перестает быть вторичной по отношению к оригиналу. В заключение предлагается концепция «критического цифрового смирения». Она предполагает поиск баланса между практической эффективностью технологий и сохранением философской глубины музыкального искусства. Такой подход помогает учитывать, как преимущества цифровизации, так и ее ограничения. Исследование подчеркивает важность междисциплинарного анализа, объединяющего феноменологию, постгуманизм и философию техники, для понимания трансформаций музыкального образования в цифровую эпоху.

Keywords: *music education, digitalization, phenomenology, posthumanism, philosophy of technology, digital pedagogy, musical ontology.*

Ключевые слова: *музыкальное образование, цифровизация, феноменология, постгуманизм, философия техники, цифровая педагогика, музыкальная онтология.*

Введение. *В эпоху цифрового развития неизбежна фундаментальная трансформация многих сфер общественной жизни, включая и педагогическую отрасль. В свете этих изменений становится очевидным, что глобальная пандемия COVID-19 стала катализатором «цифрового поворота» в образовании, вынуждая преподавателей и студентов перемещаться в непривычную для них среду - онлайн. Таким образом, очевидно, музыкальное образование также оказалось вовлечено в этот процесс и испытало значительные изменения. Как отмечают Д. Кэмлин и Т. Лиссабон, этот переход выявил не только практические, но и глубинные философские проблемы, связанные с природой музыкального знания, передаваемого в цифровом формате [1]. Следовательно, становится ясно, что речь идет не просто о технической модернизации учебного процесса, а о качественно иной парадигме музыкального образования, требующей серьезного философского осмысления.*

Цифровизация музыкального образования ставит перед исследователями ряд фундаментальных вопросов: каков онтологический статус музыки, опосредованной цифровыми технологиями? Как изменяется телесный опыт музыкального исполнения и восприятия в виртуальном пространстве? Какова роль искусственного интеллекта в переосмыслении границ музыкального творчества? Каким образом «клиповое мышление», формируемое цифровой средой, влияет на способность к глубокому эстетическому восприятию? Эти вопросы подчеркивают необходимость интердисциплинарного подхода, объединяющего философию техники, феноменологию, постгуманистическую теорию и музыкальную педагогику.

Исходя из этого, целью настоящей статьи является философский анализ ключевых аспектов цифровизации музыкального образования с выявлением онтологических, эпистемологических и аксиологических трансформаций, обусловленных интеграцией цифровых технологий в музыкально-педагогическую практику. Методологическую основу исследования составляют феноменологический анализ, постгуманистическая теория и философская герменевтика, что позволяет рассмотреть проблему в широком философском контексте.

Онтология музыки в цифровую эпоху. *Цифровизация существенно трансформирует онтологический статус музыкального произведения. Как показывает критический обзор современных дискуссий в области онтологии музыки, наблюдается парадигмальный сдвиг от метафизических исследований сущности музыкального произведения к методологическим и феноменологическим подходам, рассматривающим музыку как человеческую практику [2]. В результате традиционные объектно-центрированные онтологии оказываются все менее состоятельными перед лицом цифровой трансформации.*

О. А. Губанов, анализируя проблематику симулякров в цифровом бытии музыки, убедительно показывает, что семантический и синтаксический уровни музыкального произведения претерпевают глубокую трансформацию в процессе цифровой обработки и распространения [3]. Таким образом, музыкальное произведение в цифровой среде утрачивает

свою «ауру» -уникальность, привязанную к конкретному месту и времени исполнения, -и приобретает статус бесконечно тиражируемого цифрового объекта. Семантико-синтаксическая симулякризация создает новую реальность, в которой копия не отсылает к оригиналу, но формирует собственное автономное бытие.

Записывающие технологии, от аналоговых до цифровых, фундаментально меняют модель «произведение-исполнение». В рок-музыке запись становится первичным артефактом, а студия -перформативным пространством [2]. Более того, стриминговые платформы дематериализуют музыку еще более радикально: она превращается в поток данных, доступный в любой точке мира, но лишенный физической субстанциальности. Й. Хьюман и Р. Рампаццо Гамбарато отмечают, что стриминговые медиа обладают значительным образовательным потенциалом, однако коммерческие интересы и непрозрачные алгоритмы платформ формируют «культуру стримабильности», подчиняющую музыкальный опыт логике потребления [4].

Данные онтологические сдвиги имеют прямое значение для музыкального образования. Если музыкальное произведение больше не представляет собой фиксированный объект, а является процессом «генеративного становления», со-конституированным в динамической петле обратной связи между человеческой практикой, технологическим опосредованием и имагинативным слушанием [2], то и педагогические подходы должны отражать эту процессуальность.

***Феноменология телесности в цифровом обучении**. Одной из центральных философских проблем цифровизации музыкального образования является вопрос о роли тела в процессе обучения и музицирования. К. Вилатт и Л. М. Флорес, опираясь на феноменологию М. Мерло-Понти, предлагают оригинальную концепцию «виртуального тела» (corps virtuel), преодолевающую бинарную оппозицию физического и виртуального [5]. Согласно их подходу, виртуальность не противоположна телесной реальности, а является фундаментальным измерением самой телесности.*

Авторы критикуют два распространенных допущения: «бестелесную цифровость» (тело как простой инструмент, технологии как расширения мозга) и «девиртуализованную телесность» (тело как физический объект, противопоставленный виртуальности, натурализация «живого» контакта как единственно подлинного) [5]. Концепция виртуального тела открывает возможность понимать цифровое обучение не как ущербную замену физического присутствия, а как специфическую форму телесного бытия, обладающую собственными возможностями и ограничениями.

Для музыкального образования это означает, что онлайн-обучение, видеоконференции и цифровые инструменты не просто имитируют физическое присутствие, а создают новые формы «бытия-здесь-и-там» одновременно. Тело музыканта в цифровой среде проецируется через интенциональность, которая представляет собой дорефлексивное «я могу», а не «я мыслю». Данный подход позволяет преодолеть дуалистическое противопоставление «подлинного» живого обучения и «неполноценного» цифрового, признавая за каждым из них специфическую феноменологическую ценность.

Вместе с тем необходимо признать, что цифровые среды привилегируют зрение (окулоцентризм), ограничивая тактильные, кинестетические и проприоцептивные аспекты музыкального опыта [5]. Это обстоятельство требует от педагогов сознательного проектирования учебных ситуаций, восстанавливающих полноту мультисенсорного музыкального переживания.

***Постгуманистический поворот**. Постгуманистическая философия предлагает радикальное переосмысление места человека в образовательном процессе, рассматривая нечеловеческих агентов -инструменты, технологии, пространства, звуки -как активных участников со-конструирования музыкального знания. Специальный выпуск журнала Music Education Research, посвященный постгуманистическим перспективам, демонстрирует, как данный подход изменяет исследовательскую и педагогическую практику [6].*

С постгуманистической точки зрения музыкальный звук является не пассивным объектом восприятия, а активным участником диалогической педагогики. Цифровые технологии - программное обеспечение для записи и обработки, виртуальные инструменты, алгоритмы искусственного интеллекта - действуют как своего рода «вибрантная материя», формирующая музыкальное обучение через социо-аффективно-материальные факторы [6].

Студия звукозаписи, например, понимается не как нейтральное пространство, а как среда, активно влияющая на процесс музыкального становления.

Постгуманизм также переосмысливает идентичность педагога-музыканта как реляционную и проницаемую, а не бинарную. Р. Льюис предлагает онто-эпистемологический сдвиг, понимая идентичность как «становление-с», что особенно актуально в контексте технологически опосредованного обучения [6]. Учитель и ученик не существуют как изолированные субъекты, а со-конституируются во взаимодействии друг с другом, с технологиями и с музыкальным материалом.

***Искусственный интеллект и границы творчества**. Развитие генеративного искусственного интеллекта ставит перед музыкальным образованием беспрецедентные философские вопросы. В частности, Р. Цзян показывает, что ИИ-технологии преобразуют музыкальное творчество для людей с различным уровнем музыкальных знаний, размывая барьеры традиционного педагогического подхода, ориентированного на воспроизводство знаний [7]. Таким образом, генеративный ИИ выступает как «итеративный музыкальный инструмент», расширяющий возможности музыкального сотрудничества между человеком и машиной.*

Философские импликации ИИ в музыкальном образовании многоплановы. Прежде всего, ИИ размывает эпистемологические барьеры, бросая вызов дихотомиям, привилегирующим «талантливое» меньшинство. Кроме того, он нарушает традиционные властные динамики, обеспечивая доступ к музыкальному творчеству для маргинализированных групп. Вместе с тем, важно подчеркнуть, ИИ выступает катализатором межкультурных и междисциплинарных коммуникаций, раскрывая «молчащие музыкальные голоса» [7]. Вместе с тем автор подчеркивает необходимость «критического смирения» при интеграции ИИ: пользователи должны осознавать предвзятости, заложенные в алгоритмы разработчиками, и сохранять критическое мышление.

Пересечение технологии, философии и педагогики требует постоянного диалога между преподавателями, философами и технологами. В этом контексте, философские основы музыкального образования - от конструктивизма до холистического развития - должны быть переосмыслены в контексте цифровых инструментов [8]. Конструктивистские философы видят в технологии средство коллаборативного музицирования и исследования, тогда как подходы К. Орфа и Э. Далькроза, акцентирующие телесное обучение, ставят вопрос о допустимых границах технологического опосредования.

***Клиповое мышление и эстетическое восприятие**. Цифровая среда формирует специфический когнитивный стиль, получивший в отечественной научной литературе название «клиповое мышление». Данный феномен характеризуется фрагментарностью восприятия, ослаблением способности к длительной концентрации и предпочтением визуально-образной информации перед логико-вербальной [9, 10]. Следовательно, клиповое мышление представляет серьезную проблему для музыкального образования, требующего глубокого, сосредоточенного и длительного вовлечения в художественный материал.*

Т. В. Семеновских определяет клиповое мышление как процесс отражения множества разнообразных свойств объектов без учета связей между ними, что характеризуется фрагментарностью информационного потока, алогичностью, высокой скоростью переключения между фрагментами и гетерогенностью поступающей информации [10]. В контексте музыкального образования это проявляется в неспособности студентов к целостному восприятию крупных музыкальных форм, к выстраиванию драматургии исполнения, к глубокому анализу музыкальных текстов.

С философской точки зрения клиповое мышление можно рассматривать как «пространственный фокус», противопоставленный «временному фокусу», который необходим для музыкального восприятия [11]. Музыка по своей природе является временным искусством, разворачивающимся в длительности; клиповое же мышление фрагментирует временной поток, подчиняя его пространственной логике мгновенных образов. Педагогическая задача состоит в разработке стратегий, восстанавливающих способность к длительному временному вовлечению.

***Цифровой дуализм и его преодоление**. Философский анализ цифровизации образования часто строится на предпосылке «цифрового дуализма» - представления о том, что «онлайн» и «офлайн», «виртуальное» и «реальное» представляют собой качественно различные сферы бытия. Тем не менее современные исследования показывают, что данный дуализм является*

«соломенным чучелом» - упрощенной конструкцией, не отражающей сложность современного технологически опосредованного опыта [12].

В этом контексте показательно, что Д. Г. Макмиллан, анализируя дуализм в философии музыкального образования, прослеживает историческую оппозицию эстетического подхода Б. Реймера и праксиального подхода Д. Эллиотта [13]. Реймер рассматривает значение и ценность музыки как внутренне присущие самому произведению (абсолютный экспрессионизм), тогда как Эллиотт подчеркивает процессуальную природу музыки -«музыка есть то, что люди делают». Цифровизация усложняет эту оппозицию, поскольку цифровые технологии одновременно трансформируют как музыкальный «продукт» (объект), так и музыкальный «процесс» (практику).

Таким образом, преодоление цифрового дуализма возможно на основе феноменологического подхода, признающего виртуальность фундаментальным измерением телесного опыта [5], и постгуманистической перспективы, рассматривающей технологию не как внешнее дополнение к человеку, а как интегральный компонент «ассамбляжа», в котором со-конституируются педагог, ученик, инструмент, пространство и звук [6].

***Эффективность и ценностные дилеммы**. Эмпирические исследования демонстрируют значительный потенциал цифровых технологий в повышении результативности музыкального образования. Ф. Г. Рексхепи, Р. К. Брезница и Б. Р. Рексхепи установили, что внедрение цифровых технологий повышает эффективность образовательного процесса на 35%, при этом студенты, использующие цифровые ресурсы, лучше усваивают материал, демонстрируют повышенный интерес к обучению и развивают творческие навыки [14]. Кроме того, цифровые технологии способствуют также оптимизации времени и сохранению музыкальных ресурсов.*

В свою очередь, М. Шарма подчеркивает, что интеграция цифровых технологий требует от преподавателей овладения моделью TPACK (Technological Pedagogical Content Knowledge), объединяющей технологические, педагогические и содержательные компетенции [15]. Программное обеспечение для нотации, аранжировки, звукозаписи и интерактивного музицирования предоставляет беспрецедентные возможности для дифференциации обучения и развития самостоятельности студентов.

Однако философский анализ не позволяет свести эффективность образования к количественным показателям. Д. Уолцер, рассматривая цифровой сторителлинг в музыкальном образовании, показывает, что технологии являются не самоцелью, а средством рефлексивной практики, раскрывающей «прожитый опыт» студентов [16]. Следовательно, эффективность в подлинном смысле предполагает не просто объем усвоенных знаний, а качество музыкального переживания, глубину эстетического опыта и развитие критического мышления.

***Заключение**. Исходя из проведенного нами философского анализа, можно сформулировать ряд выводов относительно природы и перспектив цифровизации современного музыкального образования.*

Во-первых, цифровизация трансформирует онтологический статус музыки, переводя ее из модуса фиксированного объекта в модус процессуального «генеративного становления», со-конституированного человеческой практикой, технологическим опосредованием и имагинативным слушанием. Это требует соответствующего переосмысления педагогических стратегий -от трансляции готового знания к со-конструированию музыкального опыта.

Во-вторых, феноменологическая концепция «виртуального тела» позволяет преодолеть бинарную оппозицию физического и цифрового обучения, признавая за каждой формой специфическую ценность. Вместе с тем педагогам необходимо осознанно компенсировать окулоцентрическую тенденцию цифровых сред, восстанавливая полноту мультисенсорного музыкального опыта.

В-третьих, постгуманистический поворот открывает продуктивные перспективы для понимания цифровых технологий как активных агентов музыкального образования, а не нейтральных инструментов. Искусственный интеллект, размывая традиционные барьеры и властные иерархии, одновременно требует «критического цифрового смирения» -осознания ограничений, предвзятостей и этических рисков алгоритмических систем.

В-четвертых, проблема клипового мышления обнажает противоречие между когнитивными привычками, формируемыми цифровой средой, и требованиями глубокого музыкального восприятия. Разрешение этого противоречия возможно через разработку педагогических стратегий, синтезирующих технологическую доступность с восстановлением способности к длительному эстетическому вовлечению.

Таким образом, философское осмысление цифровизации музыкального образования указывает на необходимость диалектического подхода, удерживающего баланс между эмансипаторным потенциалом технологий и сохранением субстанциальных ценностей музыкальной педагогики -телесности, глубины, критичности и подлинности художественного опыта.

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IMPLEMENTING SEMANTIC READING STRATEGIES TO DEVELOP FOREIGN LANGUAGE TEXTUAL COMPETENCE IN HUMANITIES-ORIENTED SENIOR STUDENTS

Rashidova Ayaulym Kuanyshkyzy
Abai Kazakh National Pedagogical University
7M01703 specialty 2 year MA students
Shayakhmetova Dana Beksultanovna
Abai Kazakh National Pedagogical University
Doctor of Pedagogical Sciences, Associate Professor

МАҒЫНАЛЫҚ ОҚУ СТРАТЕГИЯЛАРЫ АРҚЫЛЫ ГУМАНИТАРЛЫҚ БЕЙІНДЕГІ ЖОҒАРЫ СЫНЫП ОҚУШЫЛАРЫНЫҢ ШЕТ ТІЛДІК МӘТІНДІК ҚҰЗЫРЕТТІЛІГІН ДАМЫТУДЫҢ ТЕОРИЯЛЫҚ НЕГІЗДЕРІ

Рашидова Аяулым Қуанышқызы
Әбішке Абай атындағы Қазақ ұлттық педагогикалық университеті
7М01703 мамандығы бойынша 2-курс магистранты
Шайахметова Дана Бексұлтанқызы
Әбішке Абай атындағы Қазақ ұлттық педагогикалық университеті
Педагогика ғылымдарының докторы, доцент

ТЕОРЕТИЧЕСКИЕ ОСНОВЫ РАЗВИТИЯ ИНОЯЗЫЧНОЙ ТЕКСТОВОЙ КОМПЕТЕНЦИИ У УЧАЩИХСЯ СТАРШИХ КЛАССОВ ГУМАНИТАРНОГО ПРОФИЛЯ ПОСРЕДСТВОМ СТРАТЕГИЙ СМЫСЛОВОГО ЧТЕНИЯ

Рашидова Аяулым Куанышкызы
Казахский национальный педагогический университет имени Абая
Студенты 2-го курса магистратуры по специальности 7М01703
Шаяхметова Дана Бексултановна
Казахский национальный педагогический университет имени Абая
Доктор педагогических наук, доцент

Abstract

This study explores the effectiveness of semantic reading strategies in developing foreign language textual competence among senior school students of a humanities profile. The research focuses on the practical implementation of strategy-based instruction in the classroom and its impact on students' reading comprehension, inferencing abilities, and critical thinking skills. A quasi-experimental study was conducted with an experimental and a control group. The results demonstrate that the use of semantic reading strategies significantly improves students' ability to understand, interpret, and evaluate texts. The findings confirm the importance of integrating semantic reading strategies into foreign language teaching.

Аңдатпа

Бұл зерттеу гуманитарлық бағыттағы жоғары сынып оқушыларының шет тіліндегі мәтіндік құзыреттілігін дамытуда семантикалық оқу стратегияларының тиімділігін қарастырады. Зерттеу стратегияға негізделген оқытуды сынып жағдайында практикалық тұрғыда қолдануға және оның оқушылардың мәтінді түсінуіне, инференциялық дағдыларына және сыни ойлау қабілеттеріне әсеріне бағытталған. Эксперименттік және бақылау топтары қатысқан квази-эксперименттік зерттеу жүргізілді. Зерттеу нәтижелері семантикалық оқу стратегияларын қолдану оқушылардың мәтінді түсіну, интерпретациялау және бағалау қабілеттерін айтарлықтай арттыратынын көрсетті. Алынған нәтижелер шет тілін оқыту үдерісінде семантикалық оқу стратегияларын енгізудің маңыздылығын дәлелдейді.

Аннотация

В современной методике преподавания иностранных языков развитие тДанное исследование посвящено изучению эффективности семантических стратегий чтения в развитии текстовой компетенции при обучении иностранному языку у учащихся старших классов гуманитарного профиля. Особое внимание уделяется практическому применению обучения, основанного на стратегиях, в учебном процессе, а также его влиянию на развитие навыков понимания текста, инференции и критического мышления учащихся. В исследовании использован

квазиэкспериментальный дизайн с участием экспериментальной и контрольной групп. Результаты показали, что применение семантических стратегий чтения значительно повышает способность учащихся понимать, интерпретировать и оценивать тексты. Полученные данные подтверждают важность интеграции семантических стратегий чтения в практику преподавания иностранных языков.

Keywords: *semantic reading, textual competence, reading strategies, EFL, strategy-based instruction, humanities students*

Түйін сөздер: *семантикалық оқу, мәтіндік құзыреттілік, оқу стратегиялары, ағылшын тілі шет тілі ретінде (EFL), стратегияға негізделген оқыту, гуманитарлық бағыттағы оқушылар*

Ключевые слова: *семантическое чтение, текстовая компетенция, стратегии чтения, английский язык как иностранный, обучение на основе стратегий, учащиеся гуманитарного профиля*

Introduction

In contemporary foreign language education, the development of reading competence has become one of the central objectives of the learning process. In the context of globalization, digital transformation, and the increasing availability of information, learners are required not only to decode written texts but also to interpret, analyze, and evaluate them critically. As a result, reading is no longer viewed as a passive activity but as an active, cognitively complex process that involves constructing meaning through interaction between the reader and the text.

However, in many educational contexts, including secondary schools, reading instruction still relies on traditional approaches that emphasize translation, memorization, and reproduction of information. Such approaches often lead to superficial comprehension and do not adequately prepare students for working with authentic texts or engaging in higher-order thinking. This issue is particularly relevant for senior school students of a humanities profile, whose academic activities require advanced reading skills, including the ability to interpret implicit meanings, analyze arguments, and form independent judgments.

In this regard, increasing attention has been given to the concept of semantic reading, which focuses on deep comprehension and meaning construction. Semantic reading involves the use of cognitive and metacognitive strategies that enable learners to understand not only the explicit content of a text but also its underlying meanings, relationships between ideas, and communicative purpose. These strategies include inferencing, identifying semantic relationships, organizing information, and evaluating textual content.

The importance of semantic reading is supported by cognitive theories of reading, which emphasize the interaction between linguistic knowledge and conceptual understanding. According to these theories, effective comprehension depends on the reader's ability to integrate textual information into a coherent mental model. This process requires active engagement and the use of appropriate strategies, particularly in foreign language contexts where learners often face linguistic difficulties.

One of the key approaches to developing semantic reading is strategy-based instruction, which involves the explicit teaching of reading strategies and their systematic application in classroom practice. Research has shown that students who are trained to use reading strategies demonstrate higher levels of comprehension, greater independence, and improved critical thinking skills.

Despite the recognized importance of semantic reading strategies, their implementation in school practice remains limited. Many students continue to rely on translation and lack the skills necessary for deep comprehension. This creates a need for practical approaches that can effectively integrate semantic reading strategies into foreign language teaching.

Therefore, the present study aims to investigate the effectiveness of implementing semantic reading strategies in developing textual competence among humanities-oriented senior students. The research focuses on the practical application of these strategies in classroom settings and evaluates their impact on students' reading comprehension, inferencing abilities, and overall engagement with texts.

Literature Review

Reading in a foreign language is widely recognized as a complex cognitive process that involves the interaction of linguistic knowledge, cognitive skills, and strategic behavior. Early models of reading, such as bottom-up approaches, emphasized the decoding of linguistic units, while top-down models highlighted the role of background knowledge and prediction. However, contemporary research supports an

interactive view of reading, in which comprehension results from the dynamic interplay between textual information and the reader's prior knowledge.

Within this framework, reading is not limited to the recognition of words and grammatical structures but involves the construction of meaning at multiple levels. Kintsch's Construction-Integration Model explains comprehension as a process in which readers build a mental representation of the text by integrating new information with existing knowledge. This model highlights the importance of inferencing and coherence-building processes in understanding texts.

A key factor influencing reading comprehension in a foreign language is vocabulary knowledge. According to Nation, both the breadth and depth of vocabulary knowledge are essential for effective reading. Learners must not only recognize words but also understand their meanings in context and their relationships with other lexical items. Insufficient vocabulary knowledge often leads to difficulties in comprehension and increased reliance on translation.

In addition to linguistic knowledge, the use of reading strategies plays a crucial role in comprehension. Reading strategies are defined as conscious, goal-oriented actions that readers use to facilitate understanding. Grabe emphasizes that skilled readers employ a variety of strategies, including predicting, inferencing, summarizing, and monitoring comprehension. These strategies enable learners to process texts more efficiently and adapt to different reading tasks.

Among various approaches to reading, semantic reading has gained increasing attention in recent years. Semantic reading focuses on meaning construction and emphasizes the interpretation of both explicit and implicit information. It involves the use of cognitive and metacognitive strategies that allow learners to identify relationships between ideas, organize information, and evaluate textual content.

One of the central components of semantic reading is inferencing, which refers to the ability to derive meaning that is not directly stated in the text. Research shows that inferencing is essential for building coherence and understanding complex texts. Learners who are able to make inferences demonstrate higher levels of comprehension and are better equipped to engage with texts critically.

Another important aspect of semantic reading is the organization of information. Techniques such as semantic mapping and graphic organizers help learners visualize relationships between concepts and structure their understanding. Studies indicate that these strategies reduce cognitive load and improve retention by presenting information in a structured format.

The effectiveness of semantic reading strategies is closely linked to strategy-based instruction. Oxford defines strategy-based instruction as an approach that involves the explicit teaching of learning strategies and their systematic application. This approach has been shown to enhance learners' autonomy and improve their ability to regulate their own learning processes.

Empirical studies have demonstrated that students who receive instruction in reading strategies outperform those who rely on traditional methods. They show greater comprehension, improved inferencing skills, and increased confidence in working with texts. Moreover, strategy-based instruction promotes deeper engagement with reading tasks and supports the development of higher-order thinking skills.

Despite the growing body of research on reading strategies, their implementation in classroom practice remains limited. In many educational contexts, reading instruction continues to focus on translation and comprehension questions, without providing students with the tools needed for deep understanding. This gap between theory and practice highlights the need for further research on effective methods of integrating semantic reading strategies into foreign language teaching.

Thus, the literature suggests that semantic reading strategies, supported by strategy-based instruction, have significant potential for improving reading comprehension and developing textual competence. However, there is a need for empirical studies that examine their effectiveness in specific educational contexts, particularly among humanities-oriented senior students.

Methodology

The present study adopts a quasi-experimental research design to investigate the effectiveness of semantic reading strategies in developing foreign language textual competence among humanities-oriented senior school students. This design was selected in order to conduct the research in a natural classroom environment while allowing for a comparison between different instructional approaches. The study was carried out in a secondary school with a total of 30 students enrolled in the 10th grade, aged 15 to 16. All participants were learning English as a foreign language and demonstrated a proficiency level corresponding to B1–B2 according to the Common European Framework of Reference for Languages. The participants were divided into two groups, namely an experimental group consisting of 15 students and a control group consisting of 15 students. Both groups were comparable in terms of

language proficiency, academic performance, and learning conditions, which ensured the reliability of the experimental results.

The research procedure consisted of three main stages. At the initial stage, a diagnostic pre-test was administered in order to assess the students' level of textual competence. The test included a range of tasks designed to evaluate reading comprehension, understanding of vocabulary in context, inferencing ability, and summarizing skills. The analysis of the results demonstrated that both groups had similar levels of performance, which made it possible to proceed with the experimental intervention.

During the formative stage, the experimental group received instruction based on semantic reading strategies, whereas the control group continued learning through traditional methods of reading instruction. The intervention lasted for approximately four to six weeks and was integrated into regular English lessons. The instructional approach applied in the experimental group included a combination of lexical-semantic strategies, inferencing strategies, semantic mapping, and interpretive and evaluative tasks. Students were trained to infer the meaning of unfamiliar vocabulary using contextual clues, identify relationships between ideas, organize information, and analyze implicit meanings within the text. The lessons were structured according to three stages of reading activity, including pre-reading, while-reading, and post-reading phases. At the pre-reading stage, students activated prior knowledge and made predictions about the content of the text. During the while-reading stage, they applied semantic reading strategies to construct meaning and process information. At the post-reading stage, students engaged in interpretation, discussion, and evaluation of the text. In contrast, the control group worked with texts using traditional approaches such as translation, memorization of vocabulary, and answering comprehension questions without explicit strategy instruction.

At the final stage of the research, a post-test was administered to both groups in order to evaluate changes in students' textual competence. The structure of the post-test corresponded to that of the pre-test, which allowed for a direct comparison of results and an objective assessment of progress. The study employed both quantitative and qualitative methods of data collection. Quantitative data were obtained through pre-test and post-test results, while qualitative data were collected through classroom observation and student questionnaires. Observation focused on students' engagement, participation, and ability to apply reading strategies, whereas questionnaires were used to gather students' perceptions of the learning process.

The assessment of students' textual competence was based on several criteria, including comprehension of main ideas and details, ability to infer implicit meaning, understanding of vocabulary in context, ability to organize and summarize information, and interpretation and evaluation of textual content. Each criterion was assessed using a point-based system to ensure objectivity and comparability of results. The collected data were analyzed using comparative and descriptive methods, with particular attention given to differences between the experimental and control groups and changes in performance before and after the intervention.

Ethical considerations were taken into account throughout the study. All participants were informed about the purpose of the research, and their participation was voluntary. The data collected during the experiment were used exclusively for academic purposes, and confidentiality was maintained at all stages of the research process.

Implementation

The implementation of semantic reading strategies was carried out during the formative stage of the experiment and was integrated into regular English lessons over a period of four to six weeks. The instructional process in the experimental group was organized in a systematic and structured way, with the aim of developing students' textual competence through the consistent use of semantic reading strategies. The implementation was based on the principles of meaning-oriented instruction, gradual scaffolding, and active learner engagement, which ensured that students were not only exposed to strategies but also learned how to apply them independently.

At the initial phase of the implementation, students were introduced to the concept of semantic reading and the importance of reading for meaning rather than translation. The teacher provided clear explanations of different types of strategies and demonstrated their use through modeling techniques. One of the most effective methods used at this stage was the think-aloud technique, where the teacher verbalized the process of understanding a text, including how to infer meaning, identify key ideas, and establish connections between concepts. This helped students become aware of the cognitive processes involved in reading.

During the lessons, particular attention was given to the development of lexical-semantic strategies. Students were trained to understand vocabulary in context rather than relying on direct translation.

They were encouraged to analyze surrounding words, identify synonyms and antonyms, and use contextual clues to determine meaning. For example, students were asked to underline unfamiliar words in a text and suggest possible meanings based on the context, followed by discussion and justification of their answers. This approach reduced their dependence on dictionaries and promoted deeper engagement with the text.

Inferencing strategies were also a central component of the implementation. Students were guided to make predictions, draw conclusions, and interpret implicit information. They were asked questions that required them to go beyond the literal meaning of the text, such as explaining causes of events, predicting outcomes, or interpreting the author's intentions. These activities encouraged students to actively construct meaning and develop higher-order thinking skills.

Another important element of the implementation was the use of semantic mapping as an organizational strategy. Students created visual representations of the information presented in the text, organizing key ideas into categories and showing relationships between them. This helped them structure their understanding and retain information more effectively. Semantic maps were used at different stages of the lesson, including before reading to activate prior knowledge, during reading to organize new information, and after reading to summarize the text.

The implementation also included interpretive and evaluative tasks, which aimed to develop students' ability to analyze and critically assess textual information. Students were asked to identify the author's purpose, evaluate arguments, and express their own opinions about the text. Group discussions and pair work were frequently used to encourage interaction and exchange of ideas. This not only improved comprehension but also increased students' motivation and confidence in working with texts.

Each lesson followed a structured sequence that included pre-reading, while-reading, and post-reading stages. At the pre-reading stage, students engaged in activities such as brainstorming and prediction, which helped activate their prior knowledge and prepare them for the text. During the while-reading stage, they applied semantic reading strategies to process information and construct meaning. At the post-reading stage, students summarized the text, discussed key ideas, and reflected on their understanding.

Throughout the implementation, the teacher gradually reduced the level of support, allowing students to become more independent in their use of strategies. Initially, tasks were highly guided, but over time, students were encouraged to select and apply strategies on their own. This gradual transition from guided practice to independent use contributed to the development of learner autonomy.

In contrast, the control group continued to work with texts using traditional methods, which primarily involved translation, memorization of vocabulary, and answering comprehension questions. These activities did not explicitly focus on strategy use or deep comprehension, which limited students' ability to engage with texts at a higher level.

Overall, the implementation of semantic reading strategies created a more interactive and meaningful learning environment. Students became more active participants in the reading process, demonstrated greater engagement, and showed increased confidence in their ability to understand and interpret texts. This stage of the research provided a practical foundation for evaluating the effectiveness of the proposed methodology.

Conclusion

The results of the study confirm that the implementation of semantic reading strategies significantly improves students' foreign language textual competence. Students in the experimental group demonstrated better comprehension, stronger inferencing skills, and greater ability to interpret and evaluate texts compared to those in the control group. In addition, they became more independent and engaged in the reading process. These findings indicate that semantic reading strategies are an effective tool for enhancing reading comprehension and should be integrated into foreign language teaching practice.

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THE USE OF AI AND DIGITAL TECHNOLOGIES IN TEACHING FOREIGN LANGUAGES TO B2 LEVELED STUDENTS

Assem Duisenbay
2 year MA student
Shyryn Adilkairovna
PhD Acting Associate Professor,
Abai Kazakh National Pedagogical University
Almaty, Kazakhstan

Abstract

The integration of artificial intelligence (AI) and digital technologies has increasingly transformed foreign language education, offering new possibilities for enhancing learning outcomes. This study investigates the use of AI-powered tools in teaching English as a Foreign Language (EFL) to B2-level university students, focusing on learner engagement, autonomy, and language development. A qualitative research design was employed, involving second-year EFL students who participated in a four-week instructional intervention during which AI-based tools, including conversational chatbots and automated feedback systems, were integrated into classroom activities and independent learning tasks. Data were collected through semi-structured interviews, classroom observations, and student reflective journals. The findings indicate that AI technologies contributed to increased engagement by creating interactive and low-anxiety learning environments, with participants reporting that chatbots enabled more frequent speaking practice while automated feedback supported improvements in writing accuracy and vocabulary use. Additionally, immediate feedback and flexible access to learning resources promoted learner autonomy and encouraged self-directed learning. However, several challenges were identified, including over-reliance on AI-generated feedback and concerns regarding the accuracy of automated responses, as some students tended to accept corrections without critical evaluation. Overall, the results suggest that AI and digital technologies can effectively support language learning at the B2 level when used as complementary tools alongside teacher guidance, highlighting the importance of critical engagement and pedagogical support in maximizing their educational potential.

Keywords: generative artificial intelligence, digital technologies, EFL learning, B2 learners, learner autonomy, language education, higher education

Introduction

The rapid development of artificial intelligence (AI), particularly generative AI (GenAI), has significantly transformed the educational landscape. Tools such as ChatGPT and other large language models have become widely accessible, leading to both enthusiasm and concern regarding their role in teaching and learning processes. In recent years, these technologies have moved beyond simple support tools and are increasingly capable of generating content, assisting with academic tasks, and facilitating interactive learning experiences (Mishra et al., 2023).

In the context of foreign language education, especially at the B2 level, GenAI offers new opportunities for enhancing language acquisition through personalized feedback, interactive communication, and increased exposure to authentic language use. Language education is currently experiencing what has been described as a "calculator moment," where technology reshapes both the process and expectations of learning (Galaczi & Luckin, 2024). These developments require a rethinking of traditional pedagogical approaches and learning outcomes.

At the same time, the integration of AI into education raises critical questions about its impact on student learning, autonomy, and critical thinking. Generative AI systems are not merely passive tools but active participants in the learning process, capable of influencing how students construct knowledge and engage with information (Bozkurt, 2025). This dual nature—offering both opportunities and risks—makes it essential to critically examine the role of AI in language education.

Therefore, this study aims to explore the use of AI and digital technologies in teaching foreign languages to B2-level students, focusing on their impact on engagement, learner autonomy, and language development.

Literature Review

The integration of AI into education has been widely discussed in recent literature, with particular attention to its transformative potential and associated challenges. Generative AI technologies are

characterized by their ability to produce new content based on learned patterns from large datasets, enabling applications such as text generation, feedback provision, and interactive dialogue (Mishra et al., 2023). These features make them especially relevant for language learning contexts, where communication and feedback are central.

One of the key frameworks for understanding technology integration in education is the Technological Pedagogical Content Knowledge (TPACK) model. According to this framework, effective use of technology requires a balance between technological, pedagogical, and content knowledge (Mishra et al., 2023). The emergence of GenAI challenges traditional interpretations of this framework, as these tools introduce new forms of interaction, knowledge construction, and teaching practices.

In language education, GenAI has been shown to support several key learning processes. It enables personalized learning pathways, provides immediate feedback, and facilitates interactive communication, all of which are essential for developing language proficiency (Galaczi & Luckin, 2024). For example, AI chatbots can simulate real-life conversations, allowing learners to practice speaking more frequently than in traditional classroom settings. Additionally, automated feedback systems can support writing development by identifying errors and suggesting improvements.

However, the literature also highlights significant concerns related to the use of AI in education. One major issue is the reliability of AI-generated content, as these systems can produce inaccurate or fabricated information, often referred to as "hallucinations" (Mishra et al., 2023 ; Galaczi & Luckin, 2024). This raises questions about the development of critical thinking skills and students' ability to evaluate information.

Another important concern is the impact of AI on learner autonomy and cognitive engagement. While AI tools can support independent learning, they may also lead to over-reliance and reduced cognitive effort. According to Bozkurt (2025), the increasing use of generative and agentic AI may reshape student agency, potentially limiting independent thinking and promoting homogenized outputs . This phenomenon, described as "modal collapse," refers to the tendency of AI systems to generate similar patterns of responses, which may reduce diversity in student thinking.

Furthermore, ethical issues such as academic integrity, bias, and unequal access to technology remain significant challenges. The widespread use of AI tools has raised concerns about plagiarism, fairness in assessment, and the digital divide between students with different levels of access and skills (Mishra et al., 2023).

Overall, the literature suggests that while AI offers substantial benefits for language learning, its effectiveness depends on how it is integrated into educational practices and how its limitations are addressed.

To achieve this aim, the study is guided by the following research questions:

1. *How do B2-level EFL students perceive the use of AI and digital technologies in language learning?*
2. *How do AI-powered tools influence students' engagement and motivation?*
3. *In what ways do these technologies support the development of learner autonomy?*
4. *What challenges do students encounter when using AI-based tools in language learning?*

Methodology

This study employed a qualitative research design to explore B2-level EFL students' perceptions and experiences of using artificial intelligence (AI) and digital technologies in foreign language learning. A qualitative approach was selected to gain an in-depth understanding of learners' attitudes, behaviors, and reflections regarding the integration of AI tools in the learning process.

The participants of the study were second-year university students enrolled in an English as a Foreign Language (EFL) program. All participants were identified as B2-level learners based on institutional placement procedures aligned with the Common European Framework of Reference for Languages (CEFR). A purposive sampling method was used to select participants who had prior experience with digital learning tools and were actively involved in the instructional intervention.

The study was conducted over a four-week period during regular classroom sessions. During this time, AI-powered and digital tools were integrated into the learning process. These included conversational chatbots for speaking practice, automated writing feedback systems, and adaptive digital platforms that supported individualized learning. The tools were used both in classroom activities and for independent practice outside the classroom.

Data were collected through multiple qualitative methods to ensure a comprehensive understanding of the research problem. Semi-structured interviews were conducted at the end of the intervention to capture students' perceptions and overall experiences. Classroom observations were used to examine

student engagement, interaction, and participation during AI-supported activities. In addition, students maintained reflective journals throughout the four weeks, documenting their learning experiences, challenges, and progress.

The collected data were analyzed using thematic analysis. The researcher systematically coded the data and identified recurring patterns and themes related to engagement, learner autonomy, language development, and challenges in using AI tools. To enhance the credibility of the findings, data triangulation was applied by comparing results from interviews, observations, and reflective journals.

Results

The thematic analysis of the collected data revealed several interrelated patterns concerning students' experiences with AI and digital technologies. Overall, participants demonstrated a noticeably higher level of engagement throughout the four-week period. Classroom observations showed that students were more actively involved in tasks, especially when using conversational chatbots and interactive platforms. Many participants reported that these tools reduced anxiety and created a more supportive learning environment. As one student reflected, "I feel less afraid to speak English when I use the chatbot because it does not judge me. I can try many times." Another participant noted, "Lessons became more interesting because we were not only listening to the teacher but also interacting with technology." These responses suggest that AI-based tools helped lower affective barriers and encouraged more active participation.

In addition to increased engagement, the findings indicated a clear development of learner autonomy. Students emphasized that digital tools allowed them to control the pace and direction of their learning. Reflective journals showed that learners became more aware of their individual strengths and weaknesses. One participant wrote, "I can see my mistakes immediately and work on them. Before, I had to wait for the teacher." Another student highlighted independent learning habits, stating, "I started practicing more at home because the tools are easy to use and available anytime." This indicates that AI technologies supported self-directed learning by providing immediate feedback and flexible access to resources.

Participants also reported improvements in their language skills, particularly in writing accuracy, vocabulary development, and speaking confidence. The use of AI-based writing assistants enabled students to identify and correct grammatical errors more efficiently. One student reflected, "My writing became clearer because I can correct my mistakes right away and understand them." Another noted, "I learned new words from the feedback and started using them in my speaking." Furthermore, chatbots were perceived as effective tools for practicing communication, with one participant stating, "The chatbot helps me practice conversations. It feels like real communication, and I can repeat until I feel confident." These findings suggest that AI tools provided meaningful opportunities for skill development beyond the classroom.

However, the analysis also revealed several challenges. A common concern among participants was over-reliance on AI-generated feedback. Some students admitted that they tended to accept corrections without fully understanding them. As one participant explained, "Sometimes I just accept the correction without thinking why it is wrong." Another reflection supported this point: "I feel like I rely too much on the system, and I don't always try to correct myself first." In addition, a few students questioned the accuracy of automated feedback and mentioned occasional technical difficulties. One student noted, "Sometimes the system gives corrections that I don't fully understand or that seem incorrect." These findings highlight that while AI and digital technologies offer clear benefits, their effectiveness depends on guided use and critical engagement from learners.

Overall, the results demonstrate that the integration of AI and digital technologies has a predominantly positive impact on B2-level EFL students by increasing engagement, fostering learner autonomy, and supporting language development. At the same time, the findings emphasize the importance of balanced implementation, where technological tools are complemented by teacher guidance to ensure that students remain active, reflective, and independent learners.

Discussion

The findings of this study align with existing literature, demonstrating both the potential and the limitations of AI and digital technologies in foreign language education. The increased engagement observed among B2-level learners supports previous research indicating that interactive and personalized learning environments can enhance student motivation and participation (Galaczi & Luckin, 2024). The use of AI tools, particularly conversational systems, appears to create opportunities for more frequent language practice, which is essential for developing communicative competence.

At the same time, the findings highlight the importance of maintaining a balance between technological support and active learner involvement. While AI facilitates autonomy by enabling self-paced learning and immediate feedback, it may also reduce the need for cognitive effort if used uncritically. This supports the argument that AI can reshape student agency, potentially limiting independent inquiry and critical thinking (Bozkurt, 2025).

The issue of reliability and trust in AI-generated content also emerged as a significant concern. Similar to previous studies, this research confirms that students may rely on AI outputs without fully evaluating their accuracy. This is particularly problematic in language learning contexts, where exposure to incorrect language forms may negatively impact learning outcomes. As highlighted in the literature, the inability of AI systems to distinguish between accurate and inaccurate information poses a challenge for educational use (Mishra et al., 2023).

Furthermore, the findings emphasize the critical role of teachers in mediating the use of AI in the classroom. Consistent with the TPACK framework, effective integration of AI requires not only technological knowledge but also pedagogical strategies that guide students in using these tools appropriately (Mishra et al., 2023). Teachers must ensure that AI is used to support learning rather than replace essential cognitive processes.

Overall, this study reinforces the idea that AI should be viewed as a complementary tool rather than a substitute for traditional teaching methods. Its successful implementation depends on critical awareness, pedagogical guidance, and the development of digital literacy skills among both students and teachers.

Conclusion

The integration of artificial intelligence and digital technologies into foreign language education represents a significant shift in how learning is conceptualized and delivered, particularly for B2-level students. This study has demonstrated that generative AI tools can enhance language learning by increasing student engagement, providing immediate feedback, and enabling more personalized and interactive learning experiences. These findings align with recent research highlighting the potential of AI to support individualized learning pathways and facilitate communicative competence in language education (Galaczi & Luckin, 2024).

However, the results also emphasize that the use of AI in education is not without challenges. Issues related to the accuracy of AI-generated content, over-reliance on automated tools, and the potential reduction of critical thinking skills remain significant concerns. As noted in the literature, generative AI systems can produce plausible but incorrect information, which may negatively impact learning if not critically evaluated (Mishra et al., 2023). Furthermore, the growing role of AI in shaping student learning processes raises questions about learner autonomy and the potential for homogenization of thinking (Bozkurt, 2025).

Importantly, this study underscores the critical role of educators in mediating the use of AI technologies. Effective integration requires not only technological competence but also pedagogical strategies that promote critical engagement and responsible use of AI tools. Within the TPACK framework, teachers must balance technological, pedagogical, and content knowledge to ensure that AI enhances rather than replaces meaningful learning experiences (Mishra et al., 2023).

In conclusion, AI and digital technologies should be viewed as powerful but supportive tools in foreign language education. Their successful implementation depends on thoughtful integration, ethical awareness, and a continued emphasis on developing students' critical thinking, autonomy, and communicative skills. Future research should focus on long-term impacts of AI on language proficiency and the development of pedagogical models that effectively incorporate these emerging technologies.

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FORMATION OF INTERCULTURAL COMPETENCE THROUGH CASE STUDY BASED ROLE-PLAY IN EFL CONTEXTS

Gulnaz Kuanysh
2 year MA student
Zhauynshiyeva Zh.B.
PhD, Senior Lecturer,
Abai Kazakh National Pedagogical University

Abstract

The development of intercultural communicative competence (ICC) remains an important objective in contemporary foreign language education. This qualitative case study investigates the nuanced ways in which case-based role-play facilitates the discursive construction of ICC among English as a Foreign Language (EFL) learners. Grounded in Byram's foundational model of ICC and Deardorff's Process Model, this research aims positivist metrics in favor of an exploratory, interpretive approach. Over a four-week period, data were collected from 20 second-year undergraduate EFL students through reflective journals, audio-recorded role-play enactments, and semi-structured focus groups. Following reflexive thematic analysis, the findings indicate that case-based role-play serves as a vital "third space" where learners actively negotiate cultural ambiguity and confront their own essentialist biases. While initial enactments often relied on generalized cultural scripts, sustained reflective mediation guided students toward deeper empathetic perspective-taking. Ultimately, this study posits that the value of role-play lies not merely in linguistic rehearsal, but in the critical, iterative process of meaning-making it affords in the absence of authentic intercultural immersion.

Keywords *Intercultural communicative competence; qualitative case study; role-play; critical interculturality; EFL pedagogy; reflexive thematic analysis*

1. Introduction

In the landscape of foreign language education, intercultural communicative competence (ICC) is no longer viewed as a peripheral supplement to linguistic proficiency, but rather as its foundational core. Beyond grammatical accuracy and lexical knowledge, learners are increasingly expected to engage appropriately and effectively across cultural boundaries. Within English as a Foreign Language (EFL) contexts, however, opportunities for authentic intercultural interaction are often limited. This constraint necessitates pedagogical approaches that can simulate intercultural encounters while fostering critical awareness and reflective engagement.

The concept of ICC has been extensively theorized, most notably in Michael Byram's model, which conceptualizes competence as a combination of attitudes, knowledge, skills of interpreting and relating, skills of discovery and interaction, and critical cultural awareness (Byram, 1997). Complementing this framework, Darla K. Deardorff's Process Model of Intercultural Competence emphasizes ICC as a dynamic, developmental process grounded in internal shifts such as openness, respect, and adaptability, which then manifest in external behaviors (Deardorff, 2006). Together, these models underscore that intercultural competence is not a static body of knowledge but an evolving capacity shaped through experience, reflection, and interaction.

In response to these theoretical perspectives, recent pedagogical research has explored experiential and dialogic approaches that move beyond traditional instruction. Among these, case study-based role-play has emerged as a promising method for engaging learners in situated, context-rich scenarios. Role-play enables students to inhabit perspectives different from their own, while case studies provide structured yet open-ended situations that mirror real-world intercultural dilemmas. This combination creates what Claire Kramsch describes as a "third space," where learners negotiate meaning between cultures rather than merely reproducing predefined cultural norms (Kramsch, 1993).

Despite its pedagogical potential, the mechanisms through which case-based role-play contributes to the development of ICC remain underexplored, particularly in EFL settings where intercultural exposure is largely simulated. Much of the existing literature has relied on quantitative measures that may overlook the nuanced, discursive processes through which learners construct intercultural understanding. There is therefore a need for qualitative inquiry that captures learners' reflective experiences, interpretive strategies, and evolving perspectives.

This study addresses that gap by examining how case study-based role-play facilitates the development of ICC among undergraduate EFL learners. Adopting an interpretive, qualitative approach, it investigates how students engage with cultural ambiguity, negotiate meaning, and reflect on their own assumptions over time. In doing so, the study aims to contribute to a more nuanced understanding of ICC as a socially constructed and pedagogically mediated process, rather than a set of measurable outcomes.

Research Questions:

1. How do EFL learners construct intercultural communicative competence (ICC) through participation in case study-based role-play activities?

2. In what ways do learners negotiate cultural meanings and ambiguities during role-play interactions?

3. How does reflective practice (e.g., journals and discussions) influence learners' awareness of cultural assumptions and biases?

4. What changes, if any, occur in learners' perspectives toward intercultural understanding over the duration of the intervention?

2. Methodology

This study adopted a qualitative case study design to explore how case study-based role-play contributes to the development of intercultural communicative competence (ICC) in an EFL context. A qualitative approach was selected to capture the interpretive and process-oriented nature of ICC development.

The participants consisted of 20 second-year undergraduate students enrolled in an English as a Foreign Language program at a university. All participants had an intermediate level of English proficiency and had previously completed foundational coursework in communication skills. Participation was voluntary, and ethical considerations, including informed consent and confidentiality, were strictly observed.

Data collection was conducted over a four-week instructional period. During this time, students engaged in a series of structured case-based role-play activities designed around intercultural scenarios, such as misunderstandings in academic, professional, and social contexts. Each case presented culturally nuanced dilemmas requiring interpretation, negotiation, and decision-making. Students worked in small groups to enact these scenarios, assuming different cultural perspectives.

Three primary data sources were utilized to ensure triangulation. First, students maintained reflective journals in which they documented their thoughts, emotional responses, and perceived challenges after each role-play session. Second, all role-play performances were audio-recorded to capture authentic interactional discourse. Third, semi-structured focus group interviews were conducted at the end of the intervention to elicit deeper insights into students' experiences and evolving perceptions.

Data analysis followed the principles of reflexive thematic analysis as outlined by Braun and Clarke (2006). The analysis proceeded through iterative phases: familiarization with the data, initial coding, generation of themes, and ongoing refinement. Particular attention was given to how learners constructed meaning, negotiated cultural differences, and reflected on their own assumptions. The researcher maintained a reflexive stance throughout the process, acknowledging the interpretive nature of qualitative analysis.

3. Results

The thematic analysis revealed a set of interrelated patterns that illuminate how case study-based role-play contributed to the development of intercultural communicative competence (ICC). The findings are organized into four main themes: (1) engagement with cultural ambiguity, (2) movement from essentialist to nuanced cultural representations, (3) development of empathetic perspective-taking, and (4) the mediating role of reflection in intercultural learning. These themes are supported by excerpts from students' reflective journals and focus group discussions, which provide insight into their evolving interpretive processes.

The first theme concerns learners' active engagement with cultural ambiguity. During initial role-play sessions, students frequently expressed uncertainty when confronted with unfamiliar communicative norms or culturally embedded expectations. Rather than resolving this uncertainty immediately, many learners began to recognize ambiguity as an inherent feature of intercultural interaction. This shift is evident in reflective accounts where students described moving from confusion toward inquiry. For instance, one student noted: "At first I thought the other person was rude, but then I realized maybe in their culture being direct is normal. I had to stop judging quickly and try to understand why they speak like this." Such reflections indicate that role-play created conditions for interpretive negotiation, prompting learners to suspend immediate evaluation and consider multiple cultural frames.

The second theme captures a gradual transition from essentialist thinking to more differentiated understandings of culture. Early role-play enactments often relied on generalized cultural scripts, with students portraying cultural identities in simplified or stereotypical ways. However, as the intervention progressed, these representations became more complex and less categorical. Reflective journals reveal increasing awareness of intra-cultural variation and the limitations of fixed cultural labels. One participant wrote: "Before, I thought culture is something stable, like all people from one country behave the same. But now I see it depends on the situation and the person. Even in our role-play, we changed our reactions many times." This shift suggests that sustained engagement with case-based scenarios, combined with reflective practice, enabled learners to critically reassess their assumptions and move beyond reductive cultural interpretations.

A third theme relates to the emergence of empathetic perspective-taking. Over time, students demonstrated an increased capacity to consider interactions from viewpoints other than their own. This was particularly evident in later role-play sessions, where participants began to anticipate potential misunderstandings and adjust their communicative strategies accordingly. Reflective entries frequently referenced attempts to "put oneself in the other's position," indicating a developing sensitivity to the emotional and cultural dimensions of communication. As one student articulated: "When I played the role of a foreign student, I felt uncomfortable because I didn't know the rules. It helped me understand how difficult it is to communicate in another culture. Now I try to be more patient." This experiential engagement appears to have fostered not only cognitive understanding but also affective alignment with others' experiences.

The fourth theme underscores the central role of reflection as a mechanism for intercultural learning. The iterative cycle of action (role-play) and reflection (journals and discussions) enabled students to revisit their experiences, articulate emerging insights, and refine their interpretations. Reflection functioned as a space where learners connected concrete interactional moments with broader cultural concepts. In focus group discussions, several participants emphasized that learning occurred not only during the enactment but also afterward, through analysis and dialogue. One student explained: "During the role-play, I just reacted, but when I wrote my journal, I started to understand what happened and why. It made me think more deeply about my behavior." This indicates that reflection facilitated metacognitive awareness, allowing learners to recognize patterns in their responses and to consciously adjust their communicative approaches.

Taken together, these findings suggest that case study-based role-play operates as a pedagogical environment in which ICC is constructed through a dynamic interplay of experience, interpretation, and reflection. The progression observed across the four-week period demonstrates that intercultural competence develops as an iterative and socially mediated process. In the absence of direct intercultural immersion, the combination of simulated interaction and structured reflection appears to provide a viable pathway for fostering deeper intercultural understanding in EFL contexts.

4. Discussion

The present study set out to examine how case study-based role-play facilitates the development of intercultural communicative competence (ICC) in an EFL context. The findings suggest that ICC does not emerge as a discrete outcome of instruction, but rather as a gradual, interpretive process shaped through repeated engagement with culturally situated scenarios and sustained reflection. This section discusses the results in relation to existing theoretical frameworks and highlights their pedagogical implications.

A central finding of this study is that role-play functioned as a productive site for engaging with cultural ambiguity. Rather than presenting culture as a stable body of knowledge, the case-based scenarios required learners to interpret incomplete or conflicting cues, thereby approximating the uncertainty inherent in real intercultural encounters. This aligns closely with Michael Byram's (1997) emphasis on the importance of skills of interpreting and relating, as well as critical cultural awareness. The students' initial discomfort, followed by a gradual willingness to suspend judgment, indicates that intercultural competence involves the capacity to tolerate ambiguity and to negotiate meaning across differing frames of reference. In this sense, the findings reinforce the view that ICC is not reducible to factual cultural knowledge, but is fundamentally interpretive and dialogic.

The observed shift from essentialist to more nuanced cultural understandings further supports this perspective. Early reliance on generalized cultural scripts reflects what has been widely documented in the literature as a common starting point in intercultural learning. However, the gradual movement toward recognizing variability within cultures suggests the development of more sophisticated cognitive schemata. This progression resonates with Darla K. Deardorff's (2006) Process Model, particularly the

transition from internal attitudes (openness, curiosity) to more complex internal outcomes such as adaptability and ethnorelative perspectives. The students' reflections indicate that this shift was not immediate, but required repeated exposure to diverse scenarios and opportunities for critical reflection.

Another significant finding concerns the development of empathetic perspective-taking. The role-play format required learners to assume positions that were often unfamiliar or challenging, thereby fostering both cognitive and affective engagement. This supports the argument that experiential learning can promote deeper forms of intercultural understanding by allowing learners to "experience" rather than merely describe cultural differences. The students' reflections suggest that empathy emerged not as a prescribed outcome, but as a byproduct of immersive engagement and reflective processing. This finding is consistent with prior research emphasizing the role of affective dimensions in ICC, including attitudes of respect, openness, and willingness to decenter one's own perspective.

The concept of the "third space," as theorized by Claire Kramsch (1993), provides a useful lens for interpreting these dynamics. The role-play environment can be understood as a pedagogical third space in which learners are not bound by their own cultural identities nor fully immersed in another, but instead operate in an intermediate zone of negotiation. Within this space, meaning is co-constructed through interaction, and cultural identities are explored rather than fixed. The findings suggest that it is precisely this in-between condition that enables learners to question assumptions, experiment with alternative perspectives, and develop more flexible communicative strategies.

A particularly important contribution of this study lies in highlighting the role of reflection as a mediating mechanism. While role-play provided the experiential foundation, it was the reflective journals and discussions that enabled learners to consolidate and extend their insights. Reflection facilitated a shift from immediate, often intuitive reactions to more deliberate and analytical interpretations. This iterative cycle of action and reflection aligns with broader theories of experiential learning and underscores the importance of integrating structured reflective practices into ICC-oriented pedagogy. Without such mediation, the learning potential of role-play may remain underdeveloped.

From a pedagogical standpoint, these findings suggest that case study-based role-play can serve as an effective alternative to direct intercultural exposure, particularly in contexts where such exposure is limited. However, its effectiveness depends on careful design and facilitation. Scenarios must be sufficiently complex to elicit ambiguity, and opportunities for guided reflection must be embedded within the instructional process. Moreover, educators should be aware that students may initially rely on stereotypes, and should therefore create a supportive environment in which such assumptions can be critically examined rather than simply corrected.

At the same time, several limitations should be acknowledged. The relatively short duration of the intervention constrains the extent to which long-term development of ICC can be assessed. Additionally, the findings are based on a specific group of learners within a particular institutional context, which may limit generalizability. Future research could extend this work by examining longitudinal effects, incorporating more diverse participant groups, or comparing different forms of experiential learning.

In sum, this study contributes to the growing body of research that conceptualizes ICC as a dynamic, socially constructed process. The findings demonstrate that case study-based role-play, when combined with systematic reflection, can create conditions conducive to the development of intercultural awareness, interpretive flexibility, and empathetic engagement. These outcomes suggest that the value of role-play lies not in its simulation of reality per se, but in its capacity to generate meaningful opportunities for critical inquiry and perspective transformation within the EFL classroom.

Conclusion

This study has shown that case study-based role-play can effectively support the development of intercultural communicative competence (ICC) in EFL contexts. Rather than transmitting fixed cultural knowledge, the approach engaged learners in interpreting ambiguity, questioning assumptions, and negotiating meaning through interaction.

The findings indicate a progression from initial reliance on simplified cultural representations toward more nuanced and empathetic perspectives. This development was closely linked to reflective practices, which enabled learners to critically examine their experiences and adjust their communicative strategies.

Consistent with the models of Michael Byram and Darla K. Deardorff, ICC emerged as a dynamic, process-oriented construct shaped through experience and reflection. In contexts where authentic intercultural exposure is limited, case-based role-play provides a viable pedagogical alternative. Overall, the study underscores that the value of role-play lies not in simulation alone, but in its capacity to facilitate reflective, iterative meaning-making essential for intercultural learning.

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QUANTITATIVE ANALYSIS OF SURVEY RESULTS ON THE EFFECTIVENESS OF EXPERIMENTAL METHODS IN TEACHING THE MECHANICS SECTION

Kengeskanova Ayaulym
1st -year Master's student
Kazakh National Women's Teacher Training University
Qaptagay Gulbanu
PhD, Associate professor

МЕХАНИКА БӨЛІМІН ОҚЫТУДА ЭКСПЕРИМЕНТТІК ӘДІСТЕРДІҢ ТИІМДІЛІГІ БОЙЫНША САУАЛНАМА НӘТИЖЕЛЕРІНІҢ САНДЫҚ ТАЛДАУЫ

Кеңесқанова Аяулым Сержанқызы
1-курс магистранты
Қазақ ұлттық қыздар педагогикалық университеті
Қаптағай Гулбану Әлібекқызы
Қауымдастырылған профессор м.а., PhD

Abstract

This research is aimed at determining, both quantitatively and qualitatively, the effectiveness of experimental methods used in teaching the "Mechanics" section of school physics. Although the current educational paradigm is focused on improving students' functional literacy, in practice, the teaching of mechanics laws is still largely dominated by an abstract and theoretical approach. To address this issue, a comprehensive survey was conducted during the study to evaluate the impact of experimental teaching on students' learning outcomes.

The data collected during the research were statistically analyzed, and the attitudes of students and teachers toward experimental methods were examined. According to the results of the quantitative analysis, a strong relationship was identified between the frequency of experimental activities and the level of students' mastery of the material. In processing the obtained data, descriptive statistics and cross-tabulation analysis methods were used to demonstrate the interdependence of factors. These methods proved that experimental teaching has a direct impact not only on the quality of knowledge, but also on students' interest in STEM fields.

The results showed that mastering complex topics in the mechanics section, such as the laws of dynamics and conservation laws, through experimental approaches contributes to the development of students' logical thinking by 25–30% more effectively. According to the survey findings, the majority of students considered the "virtual laboratory + real experiment" model to be the most effective.

The scientific novelty of the study lies in the statistical substantiation of the interrelationship between experimental factors in teaching mechanics and in providing quantitative evidence of the barriers encountered in the educational process. From a practical point of view, the results of this analysis can serve as a basis for school teachers in selecting the most effective experimental model for teaching the mechanics section and for developing methodological guidelines aimed at enhancing students' research skills.

Аңдатпа

Бұл зерттеу жұмысы мектеп физикасының «Механика» бөлімін оқытуда қолданылатын эксперименттік әдістердің тиімділігін сандық және сапалық тұрғыдан айқындауға бағытталған. Қазіргі білім беру парадигмасы оқушылардың функционалдық сауаттылығын арттыруды көздегенімен, іс-жүзінде механика заңдарын оқытуда абстрактілі-теориялық бағыттың басымдығы байқалады. Бұл мәселені шешу мақсатында зерттеу барысында эксперименттік оқытудың оқушы біліміне әсерін бағалауға арналған кешенді сауалнама жүргізілді.Зерттеу барысында жиналған деректерге статистикалық талдау жасалып, оқушылар мен мұғалімдердің эксперименттік әдістерге деген көзқарастары сараланды. Сандық талдау нәтижелері бойынша эксперименттік жұмыстардың жиілігі мен оқушылардың материалды игеру деңгейі арасындағы тығыз байланыс анықталды. Алынған мәліметтерді өңдеуде сипаттамалық статистика және факторлардың өзара тәуелділігін көрсететін кросстабуляциялық талдау әдістері қолданылды. Бұл әдістер эксперименттік оқытудың тек білім сапасына ғана емес, сонымен қатар оқушылардың STEM-бағыттарға деген қызығушылығына тікелей әсер ететінін дәлелдеді.

Нәтижелер көрсеткендей, механика бөліміндегі күрделі тақырыптарды (динамика заңдары, сақталу заңдары) эксперимент негізінде меңгеру оқушылардың логикалық ойлауын 25-30%-ға артық дамытатыны байқалды. Сауалнама қорытындысы бойынша оқушылардың басым бөлігі «виртуалды зертхана + нақты эксперимент» моделін тиімді деп санайтыны айқындалды.

Зерттеудің ғылыми жаңалығы механиканы оқытудағы эксперименттік факторлардың өзара байланысын статистикалық тұрғыдан негіздеуінде және оқу үрдісіндегі кедергілерді сандық мәліметтермен дәлелдеуінде. Практикалық тұрғыда бұл талдау нәтижелері мектеп мұғалімдеріне механика бөлімін оқытудың оңтайлы эксперименттік моделін таңдауға және оқушылардың зерттеушілік дағдыларын дамытуға арналған әдістемелік нұсқаулықтар әзірлеуге негіз болады.

Keywords: *teaching the mechanics section, experimental methods, physics education, students' cognitive activity, research skills, STEM integration, virtual laboratory, active learning, scientific thinking, practice-based learning*

Кілт сөздер: *механика бөлімін оқыту, эксперименттік әдістер, физика білім беру, оқушылардың танымдық белсенділігі, зерттеушілік дағдылар, STEM-интеграция, виртуалды зертхана, белсенді оқыту, ғылыми ойлау, тәжірибеге негізделген оқыту*

Кіріспе

Қазіргі заманғы білім беру жүйесі оқыту процесінің тек ақпарат жеткізу құралы ғана емес, тұлғаның шығармашылық және зерттеушілік әлеуетін дамыту ортасы болуын көздейді. Бұл үрдіс, ең алдымен, жаратылыстану пәндері ішінде жетекші орын алатын физика ғылымын оқытуда айқын көрініс табады (Shin, 2023). Физика табиғат заңдылықтарын түсіндірудің теориялық және практикалық негізін құрайтын ғылым, ал оның құрылымындағы механика бөлімі оқушыларды әлемнің физикалық бейнесін ғылыми тұрғыда түсінуге жетелейтін басты компонент болып саналады (Krakehl, 2024). Механика ұғымдары мен заңдарын дұрыс меңгеру физиканың басқа бөлімдерін игерудің негізі. Сондықтан механика бөлімін оқытуда эксперименттік әдістердің тиімділігін зерттеу мен оны ғылыми тұрғыда негіздеу қазіргі педагогикалық ғылымның аса маңызды бағыттарының бірі болып табылады (Colletti, 2022).Физиканы оқытудағы заманауи тенденциялар білімді тек дайын күйінде беру емес, оны тәжірибе арқылы «ашуға» және қолдануға бағытталған белсенді, зерттеушілік сипаттағы оқыту моделін талап етеді. Осы тұрғыдан алғанда, физиканы, әсіресе механика бөлімін тәжірибеге сүйене отырып оқыту оқушылардың танымдық белсенділігін арттырудың, логикалық ойлауын дамытудың және ғылыми көзқарасын қалыптастырудың тиімді жолы болып табылады (Engström, 2022). Эксперименттік әдістер оқушыларды бақылауға, талдауға, болжам жасауға және нәтижелерді түсіндіруге үйретеді, яғни олардың зерттеушілік мәдениетін қалыптастырады. Мұндай әдістерді жүйелі қолдану оқушылардың пәнге қызығушылығын арттырып, олардың өздігінен ойлау, шешім қабылдау және дәлелдеу қабілеттерін дамытады.

Зерттеу өзектілігі *қазіргі білім беру парадигмасының тәжірибеге бағытталған оқытуға басымдық беруімен және оқушылардың оқу процесіне белсенді қатысуын қамтамасыз ететін әдістемелік инновациялардың қажеттілігімен түсіндіріледі. Дәстүрлі репродуктивті тәсілдер көбіне оқушылардың дайын білімді меңгеруіне ғана негізделіп, олардың шығармашылық және зерттеу дағдыларын дамытуда шектеулі әсер етеді. Мұндай жағдайда оқушылар физикалық заңдылықтардың мәнін жаттанды түрде есте сақтаумен шектеліп, олардың себеп-салдарлық байланыстарды анықтау қабілеті төмендейді. Ал тәжірибелік бағыттағы сабақтарда оқушы білімді өз тәжірибесі арқылы игереді бұл оның танымдық қызығушылығын оятады және оқу процесін белсенді, мағыналы әрекетке айналдырады.*

Соңғы онжылдықтардағы ғылыми зерттеулер де физика пәнін оқытуда эксперименттік әдістердің тиімділігін дәлелдеп отыр. Мысалы, физика білімін тәжірибелік және зерттеу форматында ұйымдастыру оқушылардың пәнге деген қызығушылығын арттырып, олардың физикалық құбылыстарды түсіну деңгейін тереңдететіні анықталған (Govender, 2022). Бұл зерттеуде эксперименттік әдістердің оқушылардың «physics identity» яғни өзін физика пәнімен байланыстыру қабілетін дамытуда шешуші рөл атқаратыны көрсетілген.Сол сияқты, мектеп тәжірибесінде электр және механика тақырыптарында жүргізілген эксперименттік сабақтардың оқушылардың қате түсініктерін түзетуге және жаңа білімді саналы түрде қабылдауға ықпал ететіні дәлелденген (Wei et al., 2024). Зерттеу нәтижелері бойынша,

тәжірибелік тапсырмалар оқушылардың ғылыми ұғымдарды нақты тәжірибемен байланыстыруына мүмкіндік береді, бұл өз кезегінде танымдық белсенділікті арттырып, білімнің тұрақтылығын қамтамасыз етеді.Цифрлық технологиялар мен виртуалды зертханаларды пайдалану да физика сабақтарындағы эксперименттік жұмыстың сапасын айтарлықтай арттыратыны дәлелденген. Мұндай әдістердің артықшылығы қауіпсіз және икемді ортада күрделі тәжірибелерді визуалды модельдеу арқылы орындауға мүмкіндік беруінде (Weissman, 2024). Бұл тәсілдер әсіресе механика бөлімінде қозғалыс заңдарын, инерция және энергия сақталу заңдылықтарын түсіндіру барысында тиімді қолданылады.Бұдан бөлек, соңғы жылдары STEM-интеграция мен жобалық оқыту тәсілдері физикалық білім мазмұнын кеңейтіп, оқушылардың зерттеу және жобалау дағдыларын дамытуда ерекше нәтиже беріп отырғаны анықталған (Al-Kamzari, 2024). Мұндай бағыттағы зерттеулер тәжірибелік тапсырмаларды тек демонстрациялық құрал ретінде емес, оқушылардың ғылыми шығармашылығын дамытатын белсенді танымдық әрекет ретінде қарастырудың маңыздылығын айқындайды.

Жоғарыда аталған еңбектердің барлығы механика бөлімін оқытуда эксперименттік әдістердің оқу процесіндегі жетекші орнын дәлелдейді. Әлемдік педагогикалық тәжірибеде физиканы оқытудың тәжірибелік компонентін күшейтуге бағытталған ғылыми зерттеулердің артуы да бұл бағыттың өзектілігін растайды.

Зерттеу нысаны *жалпы білім беретін мектептерде физика пәнін оқыту процесі.* ***Зерттеу пәні*** *механика бөлімін оқытуда эксперименттік әдістердің оқушылардың танымдық белсенділігі мен білім сапасына әсері.*

Зерттеудің мақсаты *механика бөлімін оқытуда эксперименттік әдістердің тиімділігін анықтау, олардың оқушылардың теориялық білім сапасына, зерттеушілік және логикалық ойлау қабілеттеріне әсерін ғылыми тұрғыдан негіздеу.*

Мақсатқа сәйкес келесі ***міндеттер*** *айқындалды:*

- механика бөлімін оқытудың психологиялық-педагогикалық және әдістемелік негіздерін талдау;

- физика сабақтарында қолданылатын эксперименттік әдістердің мазмұны мен түрлерін жүйелеу;

- оқушылардың ғылыми-зерттеушілік және практикалық қабілеттерін дамытуда тәжірибелік тапсырмалардың рөлін айқындау;

- эксперименттік тәсілдерді цифрлық және STEM-технологиялармен кіріктіріп қолданудың ғылыми негіздерін жасау.

Зерттеу гипотезасы *ретінде механика бөлімін оқытуда эксперименттік әдістерді мақсатты, жүйелі және әдістемелік тұрғыдан дұрыс ұйымдастыру оқу үдерісінің тиімділігін арттырады деген болжам алынды. Атап айтқанда, эксперименттік жұмыстар оқушылардың теориялық білімдерін терең әрі берік меңгеруіне, зерттеушілік құзыреттерінің дамуына және цифрлық әрі STEM-технологиялармен кіріктірілген жағдайда оқу мотивациясы мен логикалық ойлау қабілеттерінің артуына оң әсер етеді деп күтіледі.*

Зерттеудің ғылыми жаңалығы *механика бөлімін оқытуда эксперименттік әдістердің құрылымдық-мазмұндық моделін айқындаудан, олардың тиімділігін библиометриялық, аналитикалық және эмпирикалық деректер негізінде дәлелдеуден көрінеді. Бұл зерттеу нәтижелері қазіргі педагогикалық практикада физиканы оқытудың сапасын арттыруға, оқушылардың практикалық және зерттеу дағдыларын қалыптастыруға бағытталған әдістемелік негіз қалыптастырады.*

Әдеби шолу

Механика физиканың іргелі саласы ретінде оқушылардың ғылыми дүниетанымын қалыптастыруда шешуші рөл атқарады. Қозғалыс, күш, энергия, импульс және тербеліс секілді негізгі ұғымдарды меңгеру оқушылардың логикалық және эксперименттік ойлау қабілеттерінің дамуына ықпал етеді. Сондықтан механика бөлімін оқытуда қолданылатын әдістемелердің тиімділігі ерекше маңызды болып табылады. Соңғы жылдардағы зерттеулер эксперименттік, модельдік және жобалық оқыту тәсілдерінің физикалық түсінікті тереңдетіп, білім сапасын арттыруға айтарлықтай үлес қосатынын анықтады (Ole & Gallos, 2023). Эксперименттік әдістердің басты артықшылығы – оқушылардың белсенді қатысуы мен тәжірибелік ізденіс арқылы физикалық заңдылықтарды өздігінен ашуы. Қалыптастырушы бағалау мен «кері байланыс ілмегі» тәсілінің кинематика тақырыбында қолданылуы оқушылардың эмоциялық және когнитивтік белсенділігін арттырып, ұғымдарды терең түсінуге мүмкіндік берген (Schnider, 2023). Маятник мысалы негізінде жүргізілген зерттеулер орнын есептеуде жиі

кездесетін қателіктерді жоюға бағытталған жаңа әдістемелерді ұсынған (Bada, 2023).Модельдік және бірлескен оқыту формалары да механикада кеңінен қолданылады. Collaborative modeling тәсілі оқушылардың ғылыми модель құру, тәжірибе жоспарлау және нәтижелерді талдау қабілеттерін дамытатыны анықталған (Kang, 2023). Дизайн-ойлау және STEM тәсілдері механика сабақтарына инновациялық серпін беріп, энергия мен импульс заңдарын өмірлік жағдаяттармен байланыстыра түсіндіруге жағдай жасайды (Simeon, 2022). Arduino құралдарын қолдану арқылы механикалық құбылыстарды цифрлық өлшеулер нәтижесінде талдау оқушылардың сандық құзыреттілігін арттырады (Schnider & Hömöstrei, 2023). Бағалау жүйесінде эксперименттік тәсілдерді қолдану оқушылардың оқу уәжін күшейтіп, танымдық белсенділігін арттыратыны анықталған (Kang, 2023). Мұғалімнің кәсіби деңгейі механика сабақтарының нәтижелілігіне тікелей әсер етеді, сондықтан болашақ педагогтардың зерттеу және эксперименттік дағдыларын дамыту маңызды (Engström & Norström, 2022). Python, Jupyter секілді бағдарламаларды қолдану деректерді талдау мен модельдеу жүргізу арқылы механикалық процестерді сандық тұрғыда зерттеуге мүмкіндік береді (Lane, 2023).Сонымен қатар физика оқулықтарындағы аналогиялардың қарапайым сипатта берілуі мазмұндық шектеулерге әкелетіні анықталған; нақты өмірден алынған мысалдарды қолдану оқушылардың пәнге қызығушылығын арттырады (Yener, 2012). Түрік физика бағдарламасында белсенді оқыту мен тәжірибеге бағытталған әдістердің тиімділігі дәлелденген (Kurnaz & Çerpi, 2012), ал concreteness fading тәсілі көрнекілік пен теорияны байланыстыруда оң нәтиже беретіні көрсетілген (Kokkonen, 2022). Қазіргі кезеңде механика пәнін оқытуда цифрлық технологиялар мен виртуалды зертханалар кеңінен енгізілуде. Қосымша шындық технологиялары физикалық құбылыстарды визуализациялауға мүмкіндік беріп, оқушылардың практикалық түсінігін арттыратыны дәлелденген (Stolzenberger, 2022). Сонымен бірге оқушылардың қызығушылығын арттыруда практикалық әрекеттер мен мәдени контекстіні ескеру маңызды. Зерттеулер практикалық тапсырмалардың жеке және ситуациялық қызығушылықты арттыратынын көрсеткен (Neito, 2023), ал гуманистік бағыттағы оқыту пәнді қолжетімді әрі мағыналы етеді (Colletti, 2022). Индигендік мәдени артефактілерді пайдалану оқушылардың физикалық ұғымдарды өз мәдени ортасында түсінуіне жағдай жасайды (Govender & Mudzamiri, 2022), ал энергия тақырыбын әлеуметтік әділеттілік тұрғысынан оқыту олардың азаматтық жауапкершілігін қалыптастырады (Hernandez, 2022).

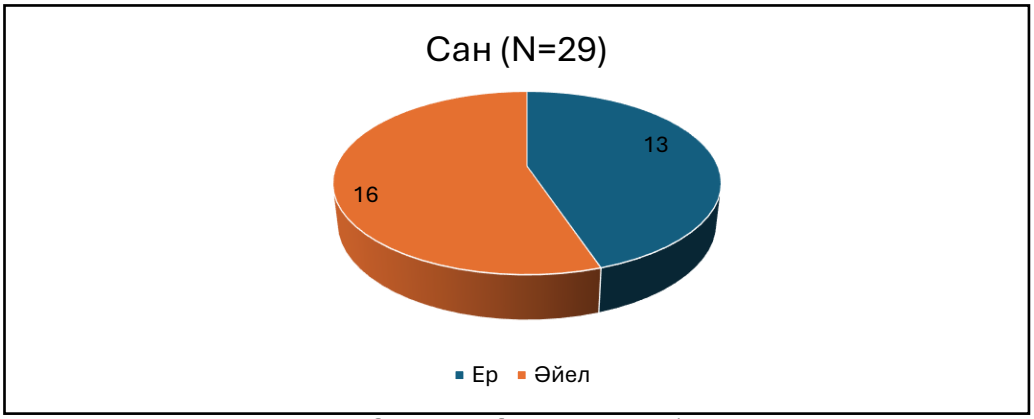
Жалпы зерттеулердің қорытындылары бойынша, механиканы оқытуда эксперименттік әдістерді жүйелі қолдану оқушылардың ғылыми ойлауын, зерттеу және практикалық дағдыларын қалыптастырудың ең тиімді жолдарының бірі болып табылады. Модельдеу, жобалық тапсырмалар, цифрлық технологиялар және мәдени контекстті біріктіре қолдану механика сабақтарын тартымды, интерактивті және нәтижелі етеді (Makkonen et al., 2022).

Нәтижелер

Бұл сауалнама механика бөлімін оқытуда эксперименттік және контекстік әдістердің тиімділігін бағалау мақсатында әзірленіп, оның құрылымы зерттеу әдіснамасына негізделген жүйелі әдебиеттер талдауы арқылы қалыптастырылды. Сауалнамадағы сұрақтар студенттердің бастапқы мотивациясы, теориялық білімді кәсіби контекспен байланыстыру қабілеті, инженерлік ойлаудың дамуы, тәжірибелік тапсырмалардың әсері, көрнекілік пен технологияларды қолдану, құрал-жабдықтардың сапасы, кәсіби терминологияны меңгеру, қауіпсіздік ережелерінің физикалық процестермен байланысы және эксперименттік тәжірибелердің ұшу принциптерін түсіндірудегі рөлі сияқты көрсеткіштерді қамту үшін арнайы таңдалып алынды. Бұл көрсеткіштердің әрқайсысы білім беру психологиясы (Schraw & Lehman, 2001; Glynn et al., 2009), инженерлік педагогика (Felder, 2003), когнитивтік теория (Mayer, 2005), контекстік оқыту (Froyd & Ohland, 2005) және Experiential Learning (Kolb, 2015) сияқты теориялық негіздерге сүйеніп құрастырылды. Әдістемелік тұрғыдан алғанда, сауалнама механикалық заңдарды авиациялық контексте меңгеру жолдарын кешенді бағалауға мүмкіндік беретін көрсеткіштерді қамтиды және әрбір сұрақ белгілі бір ғылыми тұжырымға негізделе отырып енгізілді, сондықтан жасалған құрал эксперименттік оқытудың тиімділігін жан-жақты талдауға арналған валидті өлшем бірлігі болып табылады.

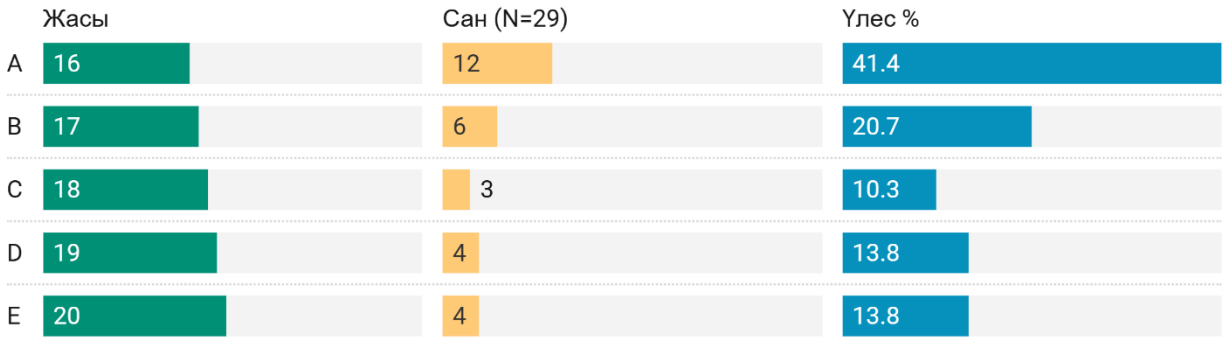
Зерттеу барысында әзірленген сауалнама эксперименттік және контекстік оқытудың тиімділігін бағалауға бағытталған кешенді индикаторларды қамтиды. Әдіснамалық негіздемеге сүйене отырып құрастырылған барлық сұрақтар толық нұсқада Қосымша А-да көрсетілген. Қосымшада сауалнама құрылымы, тармақтары және әр сұрақтың мазмұны толығымен беріліп, зерттеу құралының ашықтығы мен қайталанымдылығын қамтамасыз етеді.

Сауалнама нәтижелерінің талдауы. Зерттеуге қатысқан студенттердің жыныстық құрамы жалпы мәліметтердің репрезентативтілігін қамтамасыз ететін маңызды демографиялық фактор болып табылады. Диаграммада көрсетілгендей, қатысушылардың 55,2 пайызы - әйелдер, ал 44,8 пайызы - ерлер. Бұл арақатынас механика пәнін эксперименттік әдістермен оқытуға қатысты пікірлердің жыныс бойынша теңгерімді түрде көрінуіне мүмкіндік береді. Сонымен бірге техникалық, инженерлік және авиациялық бағыттағы мамандықтарға әйел студенттердің белсенді қатысуы соңғы жылдары байқалып отырған гендерлік өзгерістерді көрсетеді. Егер бұрын техникалық мамандықтарда ерлердің үлесі басым болса, қазіргі таңда қыздардың бұл салаға қызығушылығы артып келе жатқаны байқалады. Бұл жағдай білім беру жүйесінің инклюзивтілігі артқанын, сондай-ақ қыздардың STEM бағыттарына еркін араласа бастағанын білдіреді. Сондықтан бұл зерттеуде әйел студенттердің көптігі механика пәнін қабылдау ерекшеліктерін салыстыруға мүмкіндік беріп қана қоймай, инженерлік білімді гендерлік тұрғыдан бағалауға да жол ашады (Сурет 1).Сонымен қатар, жыныстық құрамдағы мұндай теңгерім оқу процесіндегі эксперименттік әдістерге деген көзқарастың субъективтілігін төмендетеді. Яғни қандай да бір әдіске оң немесе теріс баға тек бір жыныс өкілінің басым болуына байланысты емес, жалпы студенттік аудиторияның шынайы пікірін көрсетеді. Бұл жоба нәтижелерінің ғылыми сенімділігін арттыратын маңызды фактор.



Сурет 1. - Респонденттердің жынысы бойынша үлестірімі

Жас ерекшелігі бойынша алынған мәліметтер де зерттеу үшін аса құнды. Респонденттердің негізгі бөлігі - 16 жастағы студенттер (41,4%). Бұл жас кезеңінде студенттер колледжге енді бейімделіп жатқан, жаңа білімді оңай қабылдайтын, танымдық қызығушылығы жоғары топқа жатады. Психологиялық зерттеулер бойынша, 16-17 жас аралығы - тәжірибелік әрекетке, жаңа әдістерді байқап көруге ашық кезең. Сондықтан бұл жас тобындағы студенттер үшін механика бөлімін эксперименттік әдістермен оқыту ерекше тиімді болуы ықтимал. Олар теориялық білімді абстракт күйде қабылдауға қиналғанымен, нақты тәжірибе, көрнекілік, модельдеу арқылы ұғымдарды тез меңгере алады.17, 18, 19 және 20 жастағы студенттердің қатысуы жас ерекшелігі бойынша ойлау қабілеті әртүрлі деңгейдегі топты қамтитынын көрсетеді. Үлкен жастағы студенттер (18-20 жас) көбінесе механикалық құбылыстардың мазмұнын тереңірек түсініп, тәжірибелік әдістердің теорияны бекітудегі ролін айқынырақ бағалай алады. Бұл топтың жауаптары механика пәнін оқытуда эксперименттік әдістердің білімді жүйелеуге, нақты қолданбалы дағды қалыптастыруға қалай әсер ететінін түсінуге мүмкіндік береді. Сонымен қатар жас айырмашылығы әртүрлі студенттер үшін эксперименттік әдістердің мотивациялық әсерін салыстыруға жағдай тудырады. Осылайша жасы әркелкі респонденттер тобы зерттеу нәтижелерінің ауқымын кеңейтіп, сараптаманың толықтығын қамтамасыз етеді (Сурет 2).



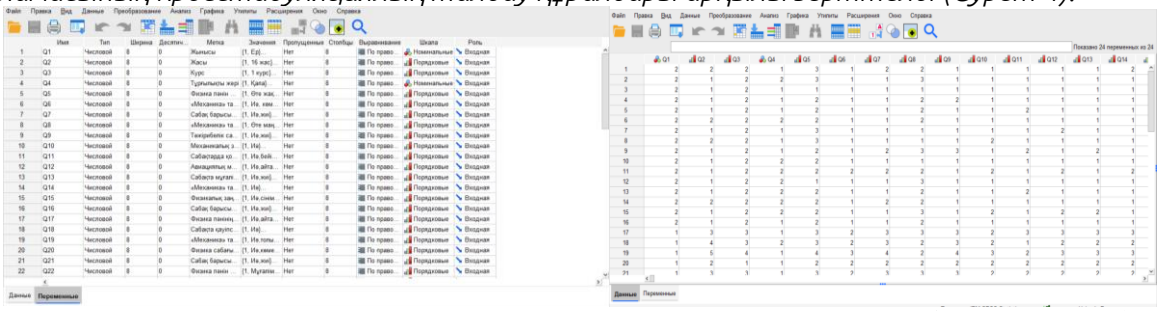
Сурет 2. - Респонденттердің жас ерекшелігі бойынша бөлінуі

Физика пәніне деген көзқарас студенттердің оқу процесіндегі белсенділігі мен жаңа әдістерді қабылдау деңгейіне тікелей ықпал етеді. Алынған мәліметтер бойынша, студенттердің 51,7 пайызы физиканы «ұнатады», ал 20,7 пайызы «өте жақсы көреді» деп жауап берген. Бұл дегеніміз - студенттердің басым бөлігі физика пәніне оң көзқараста, яғни эксперименттік әдістерді қабылдауға дайын аудитория. Мұндай жағымды қатынас тәжірибелерді, модельдеулерді, лабораториялық жұмыстарды және авиациялық контекстегі тапсырмаларды енгізу арқылы механика бөлімін меңгеруді одан әрі тиімді етеді.Сонымен бірге 24,1 пайыз студент пәнді «онша жақсы көрмейтінін» және 3,4 пайызы мүлде ұнатпайтынын білдірген. Бұл топтың болуы оқытушыға маңызды сигнал береді: дәстүрлі түсіндіру әдістері кей студенттерге тиімсіз, олар пәннен алыстап кетуі мүмкін. Осындай жағдайда эксперименттік оқыту - мотивацияны көтеретін, пәнді «тірілтетін» тиімді құрал. Тәжірибелерді өз көздерімен көріп, құбылыстарды өз қолымен байқап, авиациялық құрылғылардың қалай жұмыс істейтінін көрнекілік арқылы түсіну - физикадан қорқатын немесе қызығушылығы төмен студенттер үшін оң әсер беруі ықтимал. Зерттеулер де қызығушылығы төмен студенттер үшін практикалық әрекеттердің, интерактивті тәжірибелердің және нақты өмірмен байланысқан тапсырмалардың ерекше тиімді екенін көрсетеді (Сурет 3).Осылайша физика пәніне деген жалпы көзқарас студенттердің арасында әртүрлі болғанымен, оң баға басым. Бұл эксперименттік әдістерді енгізудің қажеттілігін ғана емес, сонымен бірге оның табысты жүзеге асуына қолайлы жағдай қалыптасқанын көрсетеді. Төмен қызығушылық танытқан студенттер үшін арнайы тәжірибелік элементтер енгізу, авиациялық контекстті күшейту, жабдықтарды пайдалану және зертханалық жұмыстарды арттыру пәнге деген көзқарасты жақсартуға ықпал етеді. Жоғары қызығушылық танытқандар үшін эксперименттік әдістер күрделі ұғымдарды тереңдетуге, ғылыми ойлауды дамытуға мүмкіндік береді.

Сурет 3. - Студенттердің физика пәніне деген жалпы көзқарасы

Жалпы алғанда, зерттеу нәтижелері механика бөлімін эксперименттік әдістермен оқытуға қажетті әлеуметтік-педагогикалық орта қалыптасқанын дәлелдейді. Жыныс бойынша теңгерімді қатысу, жас құрылымының әртүрлілігі және физикаға деген оң көзқарас эксперименттік әдістердің осы студенттік аудитория үшін өте қолайлы екенін көрсетеді. Бұл алдағы тарауларда эксперименттік оқытудың нақты аспектілерін, оның механика тарауын меңгеруге, техникалық ойлауға және кәсіби бағдарға әсерін тереңірек талдауға мүмкіндік береді.

Зерттеуде жиналған сауалнама мәліметтері SPSS статистикалық бағдарламасына енгізіліп, әрбір сұрақ жеке айнымалы ретінде белгіленді. Айнымалыларға берілген атаулар (Q1-Q24) студенттердің жынысын, жасын және механика пәнін эксперименттік әдістер арқылы меңгеру деңгейін сипаттайтын сұрақтарды қамтиды. Әр сұраққа берілген жауап нұсқалары SPSS жүйесінде сандық түрде белгіленіп, кодтау процесі жүзеге асырылды. Мысалы, «Жынысы» айнымалысында 1 - ер, 2 - әйел ретінде көрсеткіштер сандық кодқа сәйкестендірілді, ал «Жасы» айнымалысында 1 - 16 жас, 2 - 17 жас және т.б. түрінде нұсқалар кодталды. SPSS-тің Variable View терезесінде барлық айнымалылардың сипаттамасы беріліп, Label бағанында сауалнамадағы нақты сұрақтар көрсетілді. Value Labels бөлімінде әрбір жауаптың сандық мәні мен оның мәтіндік түсіндірмесі жазылды. Осылайша барлық жауаптар жүйелі түрде кодталды және стандартталған сандық формаға келтірілді, бұл әрі қарай статистикалық өңдеуді жеңілдетеді.Data View терезесінде әрбір респонденттің деректері жолдар бойынша орналасқан, ал бағандарда Q1-Q24 айнымалыларының мәндері көрсетілген. Әр ұяшықта студенттің таңдаған жауабының сәйкес сандық коды жазылған. Бұл құрылым математикалық-статистикалық талдауды орындауды, жиілік пен пайыздық үлесті есептеуді, диаграммалар құруды және айнымалылар арасындағы байланыстарды анықтауды мүмкін етеді.Механика бөлімін эксперименттік әдістер арқылы оқытудың тиімділігін жан-жақты бағалау мақсатында зерттеуде қолданылған бірнеше айнымалының өзара байланысы SPSS бағдарламасының кросстабуляциялық талдау құралдары арқылы зерттелді (Сурет 4).



Сурет 4. - SPSS деректер файлындағы айнымалылар құрылымы (Variables View)

Бұл тәсіл зерттеу айнымалылары арасында ықтимал байланыстардың бағыты мен күшін анықтауға, эксперименттік оқыту әдістерінің студенттердің оқу мотивациясына әсер ету деңгейін бағалауға және жыныс сияқты әлеуметтік-демографиялық факторлардың ролін анықтауға мүмкіндік береді. Механика пәнін оқытуда авиациялық контекстті пайдаланудың рөлі ерекше маңызды, себебі авиациялық техникадағы нақты мысалдар абстракт механикалық заңдардың мәнін ашуға көмектеседі, осылайша оқушылар мен студенттер үшін оқу материалын жеңілдетеді.Алғашқы кезеңде жыныс пен авиациялық мысалдарды қолданудың физика пәніне деген қызығушылыққа әсері арасындағы байланыс Crosstab әдісімен қарастырылды. Кесте нәтижелері студенттердің авиациялық мазмұндағы тапсырмаларға деген реакциясының оң екенін анық көрсетті. Ер студенттердің 46%-ы авиациялық мысалдар олардың пәнге қызығушылығын айтарлықтай арттырғанын мәлімдеген. Әйел студенттер арасында бұл көрсеткіш одан да жоғары - 62,5%. Бұл студенттердің эксперименттік және қолданбалы мазмұнға негізделген тапсырмаларға ерекше қызығушылық танытатынын, сондай-ақ авиациялық контекстің студенттер үшін тартымды екенін көрсетеді. Бұл нәтижелер механикалық ұғымдарды авиация техникасымен байланыстырудың дидактикалық тұрғыдан не үшін тиімді екенін түсіндіреді: авиациялық мысалдар ғылыми ұғымдарға өмірлік мағына береді, білімді контекстілендіреді және студентті «нақты әлемге» жақындатады (Сурет 5). Осылайша теориялық білім тек абстракт логикалық құрылым ретінде емес, нақты механикалық жүйелерді түсіндіру құралы ретінде қабылданады. Бұл студенттердің пәнге деген көзқарасын өзгертіп, олардың ішкі мотивациясын нығайтуы мүмкін.Дегенмен алынған нәтижелердің статистикалық мәнділігін бағалау үшін Пирсонның хи-квадрат (x^2) тесті қолданылды. Есептеу нәтижелері $x^2 = 4.820$, $df = 2$, $p = 0.090$ көрсеткішін берді. Бұл p-мән әдетте қабылданатын 0.05 деңгейінен жоғары болғандықтан, жыныс пен авиациялық мысалдар әсері арасындағы байланыс статистикалық тұрғыдан дәлелденген деп есептелмейді.

*Таблица сопряженности Жынысы * Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?*					
Количество					
		Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?			
		Иә,айтарлықтай	*Аздап*	*Жоқ*	*Всего*
Жынысы	*Ер*	*6*	*5*	*2*	*13*
	Әйел	*13*	*3*	*0*	*16*
Всего		*19*	*8*	*2*	*29*

Сурет 5. – Жыныс пен авиациялық мысалдардың физикаға қызығушылықты арттыру деңгейі арасындағы кросстабуляциялық байланыс

Алайда p = 0.090 мәнінің 0.10 шегіне өте жақын болуы байланыс «тенденция деңгейінде» бар екенін көрсетеді. Яғни, жыныс факторына байланысты белгілі бір айырмашылық байқалғанымен, бұл айырмашылық ықтимал кездейсоқтықтан толық ажыратылмайды (Сурет 6). Сонымен бірге, педагогикалық интерпретация тұрғысынан қарағанда, жыныстар арасындағы байқалған айырмашылықтар елеусіз деп айтуға болмайды. Ер студенттер көбіне «аздап арттырды» деген жауапты таңдаса, әйел студенттердің айтарлықтай бөлігі «күшті арттырды» деген жауапты таңдаған. Бұл нәтижелерден авиациялық мысалдар студенттердің оқу материалына ену деңгейіне, қызығушылығына, орындаушылық ынтасына нақты әсер ете алатыны көрінеді. Бұл әсіресе дәстүрлі түсіндіру әдістері жеткіліксіз болатын аудиторияларда маңызды рөл атқарады. Айнымалылар арасындағы байланысты тереңірек талдау мақсатында симметриялық өлшемдер (Phi, Cramer's V, Contingency Coefficient) қарастырылды. Phi коэффициенті 0.408, Крамердің V мәні де 0.408 болып шықты, бұл екі айнымалы арасындағы байланыстың шамалы-орташа деңгейде екенін көрсетті. Контингенттік коэффициенттің мәні 0.378 болып тіркелді. Бұл нәтижелер байланыстың бар екенін, авиациялық мысалдардың жынысқа байланысты әртүрлі қабылдануы мүмкін екенін көрсетеді, бірақ олар статистикалық тұрғыдан сенімді емес (барлығының p-мәні 0.090). Коэффициенттердің шамаларына сүйене отырып, авиациялық мысалдардың мотивацияға әсерінің жынысқа байланысты белгілі бір дәрежеде өзгеруі мүмкін екенін айтуға болады.

Критерии хи-квадрат

	Значение	ст.св.	Асимптотическая значимость (2-сторонняя)
Хи-квадрат Пирсона	4,820[a]	2	,090
Отношения правдоподобия	5,608	2	,061
Линейно-линейная связь	4,638	1	,031
Количество допустимых наблюдений	29		

a. Для числа ячеек 4 (66,7%) предполагается значение, меньше 5. Минимальное предполагаемое число равно ,90.

Сурет 6. – Жыныс пен авиациялық мысалдардың қызығушылыққа әсері арасындағы байланысты бағалауға арналған хи-квадрат критерийінің нәтижелері

Әйел студенттердің қызығушылығының күштірек артуы олардың визуалды және практикалық элементтерге оң реакция беретінін көрсетеді. Ал ер студенттер үшін авиациялық мысалдардың әсері біршама төмендеу, бірақ әлі де едәуір байқалады. Бұл педагогикалық тұрғыдан маңызды қорытынды: механиканы авиациялық контексте оқыту - жынысқа қарамастан тиімді, тек оның әсер ету дәрежесі әртүрлі.Goodman-Kruskal Tau коэффициенттері тәуелді айнымалы вариациясының 9-16%-ы жыныс факторы арқылы түсіндірілетінін көрсетті. Бұл байланыс салыстырмалы түрде әлсіз, дегенмен белгілі бір жүйелі тенденцияның бар екенін дәлелдейді. Мысалы, авиациялық мысалдардың әйел студенттердің пәнге деген эмоциялық және танымдық қатысуын күшейтуі байқалады. Ал бұл олардың оқу нәтижелеріне де оң ықпал етуі мүмкін (Сурет 7). Жалпы талдау нәтижелері механиканы эксперименттік тәсілмен оқытуда авиациялық мысалдарды қолданудың тиімді екенін және бұл тәсіл студенттердің басым бөлігінің қызығушылығын арттыратынын көрсетеді. Хи-квадрат тесті статистикалық тұрғыдан айқын дәлел бере алмаса да, симметриялық өлшемдер мен

жиілік деректері айтарлықтай педагогикалық мәні бар тенденцияларды анық көрсетті. Бұл педагогикалық үрдісті жетілдіруде маңызды қорытындылар жасауға мүмкіндік береді. Біріншіден, авиациялық контекст механика пәнін түсіндірудің тиімді құралы болып табылады. Екіншіден, бұл тәсіл студенттердің оқу мотивациясын арттырады және олардың пәнді қабылдауындағы эмоционалдық және когнитивтік тосқауылдарды азайтады. Үшіншіден, бұл әдістің әсері жынысқа тәуелсіз, алайда қыздар аудиториясында күштірек байқалуы оны инклюзивті оқыту әдісі ретінде қарастыруға мүмкіндік береді.

Направленные меры

			Значение	Асимптотическая среднеквадратичная ошибка[a]	Приблизительная T[b]	Приблизительная значимость
Номинал/номинал	Лямбда	Симметричная	,174	,117	1,301	,193
		Зависимая переменная Жынысы	,308	,202	1,301	,193
		Зависимая переменная Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?	,000	,000	.[c]	.[c]
	Тау Гудмана и Краскала	Зависимая переменная Жынысы	,166	,102		,098[d]
		Зависимая переменная Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?	,094	,090		,072[d]
	Коэффициент неопределенности	Симметричная	,129	,080	1,531	,061[e]
		Зависимая переменная Жынысы	,141	,092	1,531	,061[e]
		Зависимая переменная Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?	,118	,071	1,531	,061[e]
Номин./интерв.	Эта	Зависимая переменная Жынысы	,408			
		Зависимая переменная Авиациялық мысалдар арқылы физиканы оқу сіздің қызығушылығыңызды арттыра ма?	,407			

a. Не предполагая нулевой гипотезы.
b. Использование асимптотической среднеквадратичной ошибки в предположении нулевой гипотезы.
c. Вычисление невозможно, так как асимптотическая среднеквадратичная ошибка равна нулю.
d. Основано на приближении хи-квадрат
e. Вероятность хи-квадрат отношения правдоподобия.

Сурет 7. - Жыныс пен авиациялық мысалдар қызығушылықты арттыра ма? - кросстабуляциялық кесте

Зерттеу нәтижелерінің статистикалық мәнділігі толық расталмағанымен, педагогикалық интерпретация және симметриялық коэффициенттер арқылы көрінетін тенденциялар эксперименттік оқыту әдістерінің механика пәнін оқытудағы маңызды рөлін қолдайды. Болашақ зерттеулерде үлгі көлемін арттыру, талдау айнымалыларын кеңейту және мотивациялық компоненттерді нақтылау арқылы бұл байланыстарды негұрлым сенімді дәлелдеуге болады (Сурет 8).

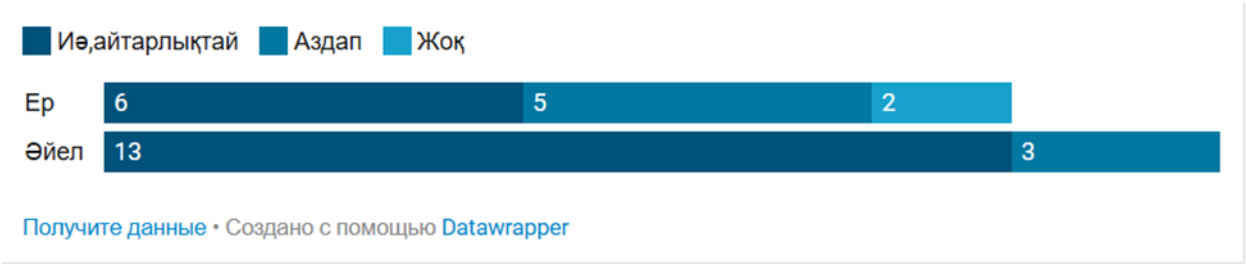
Симметричные меры

		Значение	Приблизительная значимость
Номинал/номинал	Фи	,408	,090
	V Крамера	,408	,090
	Коэффициент сопряженности	,378	,090
Количество допустимых наблюдений		29	

Сурет 8. - Жыныс пен авиациялық мысалдар қызығушылықты арттыра ма? - симметриялық өлшемдер

Келесі диаграммада жыныс айнымалысы мен авиациялық мысалдарды қолданудың физика пәніне деген қызығушылыққа әсері арасындағы байланыс бағандық форматта көрсетілген. Бұл диаграмма кросстабуляциялық кестеде алынған сандық деректерді көрнекі түрде бейнелей

отырып, студенттердің әр жауап категориясы бойынша қалай бөлінгенін салыстыруға мүмкіндік береді. Визуалды диаграмма деректерді түсіндіруді жеңілдетіп қана қоймай, айнымалылар арасындағы тенденцияларды анық байқататын қосымша дәлел рөлін атқарады (Сурет 9).



Сурет 9. - Жыныс пен авиациялық мысалдар арқылы физикаға қызығушылықтың артуы арасындағы өзара байланысты көрсететін бағандық диаграмма

Диаграммада ер және әйел студенттердің үш жауап нұсқасы («Иә, айтарлықтай», «Аздап», «Жоқ») бойынша жинақталған жиіліктері көрсетілген. Ер студенттер арасында «айтарлықтай арттырды» деген жауапты таңдағандар саны орташа деңгейде (шамамен 6 адам) болса, әйел студенттер арасында бұл көрсеткіш айтарлықтай жоғары (13 адам). Бұл айырмашылық диаграммада биік көк баған түрінде анық көрінеді және әйел студенттердің авиациялық контекстке ерекше оң көзқарас танытатынын көрсетеді.«Аздап арттырды» деген жауап ерлер арасында 5 студентті, әйелдер қатарында 3 студентті қамтыды. Диаграммада бұл бағандардың биіктігі ерлерде салыстырмалы түрде жоғары, бұл олардың авиациялық мысалдардан белгілі бір деңгейде мотивациялық әсер алғанын көрсетеді. Ал «Жоқ» деген жауапты таңдау екі жыныста да ең төменгі деңгейде байқалды (ерлерде 2, әйелдерде 3 студент). Диаграммадағы бұл төмен бағандар авиациялық мысалдардың жалпы студенттік аудитория үшін аса тиімді мотивациялық құрал екенін тағы да дәлелдейді. Яғни студенттердің басым бөлігі авиациялық мазмұн механика пәніне қызығушылықты арттыратынын мойындаған.Диаграмманың жалпы көрінісі авиациялық мысалдардың мотивациялық әлеуетін айқын көрсетеді. Студенттердің жыныстық құрамына қарамастан, бұл әдіс оқу процесін тартымды еткен, алайда әйел студенттер үшін әсері айқынырақ болған. Бұл тенденция хи-квадрат критерийінің статистикалық деңгейде толық дәлел болмағанымен ($p = 0.090$), визуалды түрде өте анық байқалады. Мұндай визуалды деректер педагогикалық интерпретация тұрғысынан маңызды, себебі олар студенттердің оқу процесіне эмоционалдық қатысуын арттыратын әдістерді таңдауда бағыт-бағдар береді.Келесі кезекте механиканы эксперименттік әдістер негізінде оқытудың тиімділігіне әсер ететін факторлардың өзара байланысы SPSS бағдарламасының кросстабуляциялық талдауы арқылы қарастырылды. Бұл талдау жыныс, курс және оқу мотивациясы секілді айнымалылардың механикалық заңдарды түсінуге және авиациялық мысалдарға реакциясына ықпалын анықтауға бағытталды. Алынған нәтижелер механика пәнін контекстік және тәжірибелік тәсілдермен оқытудың студенттердің қабылдау ерекшеліктеріне қалай әсер ететінін жан-жақты бағалауға мүмкіндік береді.Алдымен жыныс факторы мен авиациялық мысалдардың физика пәніне деген қызығушылықты арттыруы арасындағы байланыс зерттелді. Кросстабуляциялық кесте деректері екі жыныс өкілдерінің де авиациялық контентке оң көзқарас білдіретінін көрсетті: ер студенттердің 46%-ы авиациялық мысалдар олардың қызығушылығын айтарлықтай арттырғанын айтса, әйел студенттердің 62,5%-ы дәл осындай әсерді мойындаған. Бұл авиациялық мысалдардың студенттік аудитория үшін кеңінен тартымды екенін, ал әйел студенттер үшін әсері одан да жоғары болатынын айқын көрсетеді.Алайда хи-квадрат критерийінің нәтижесі ($x^2 = 4.820$, $p = 0.090$) бұл байланысты статистикалық тұрғыдан толық растауға жеткіліксіз екенін көрсетті. p-мәнінің 0.10 деңгейіне жақын орналасуы байланыс тенденциялық сипатта екенін білдіреді. Мұндай жағдай әлеуметтік ғылымдарда жиі кездеседі, әсіресе зерттеу үлгісі салыстырмалы түрде шағын болғанда (N=29). Дегенмен педагогикалық интерпретация бойынша жыныска байланысты байқалған айырмашылықтар маңызды: әйел студенттердің қызығушылығының жоғары артуы визуалды, практикалық тапсырмаларға жақсы жауап беретінің дәлелі болуы мүмкін.Диаграммада осы нәтижелер графикалық түрде көрініс тапты: әйел студенттердің «айтарлықтай арттырды» деген жауабының бағаны айқын биік, ал ер студенттерде «аздап» категориясының басым болуы бейнеленген. Сонымен қатар «әсер етпеді» деген жауаптардың екі жыныс бойынша да төмен деңгейде болуы

авиациялық мысалдардың жалпы тиімділігін тағы да растайды.Келесі кезекте курс факторы мен механикалық заңдарды уақыттық қозғалыс немесе тұрақтылық мысалында түсіну жеңілдігі арасындағы байланыс талданды. Crosstab кестесі курс бойынша айқын динамиканы көрсетті. 1-курс студенттері механикалық заңдарды түсінуде көбірек қиындық көрген: олардың басым бөлігі «кейде» немесе «қиын» деген жауаптарды таңдаған. Бұл алғашқы курста теориялық материалды меңгерудің бастапқы кезеңіне байланысты қалыпты құбылыс.2-курс студенттері арасында түсіну деңгейі айтарлықтай жоғарылаған: көпшілігі механикалық заңдарды «иә, оңай» деп бағалаған, ал қиындық көрген студенттер саны азайды. 3-курста бұл оң динамика сақталған - түсінудегі қиындық мүлдем тіркелмеген. 4-курста нәтижелер сәл өзгеріп, кейбір студенттердің «қиын» деп жауап беруі олардың оқу жүктемесінің күрделенуімен немесе базалық механикадан гөрі мамандандырылған пәндерге назар аударуымен түсіндіріледі (Сурет 10).

*Таблица сопряженности Курс * Механикалық заңдарды ұшақтың қозғалысы немесе тұрақтылығы мысалында түсіну оңай ма?*					
Количество					
		Механикалық заңдарды ұшақтың қозғалысы немесе тұрақтылығы мысалында түсіну оңай ма?			
		Иә	*Кейде*	*Қиын*	*Всего*
Курс	*1 курс*	*1*	*1*	*0*	*2*
	2 курс	*14*	*4*	*0*	*18*
	3 курс	*2*	*3*	*0*	*5*
	4 курс	*3*	*0*	*1*	*4*
Всего		*20*	*8*	*1*	*29*

Сурет 10. - Курс пен механикалық заңдарды ұшақтың қозғалысы немесе тұрақтылығы мысалында түсіну деңгейінің кросстабуляциялық кестесі

Хи-квадрат критерийінің нәтижесі ($x^2 = 10.746$, $p = 0.097$) курс пен түсіну деңгейінің арасындағы байланысты статистикалық тұрғыдан дәлелдеуге толық мүмкіндік бермесе де, айқын тенденция бар екенін байқатады: студенттің курсы жоғарылаған сайын механикалық заңдарды қабылдау жеңілдей түседі. Бұл тәжірибенің, оқу мазмұнының және пәнді меңгеруге арналған уақыттың өсуімен түсіндіріледі (Сурет 11).

Критерии хи-квадрат			
	Значение	*ст.св.*	*Асимптотическая значимость (2-сторонняя)*
Хи-квадрат Пирсона	*10,746[a]*	*6*	*,097*
Отношения правдоподобия	*9,132*	*6*	*,166*
Линейно-линейная связь	*,847*	*1*	*,357*
Критерий Макнемара - Баукера	.	.	.[b]
Количество допустимых наблюдений	*29*		
a. Для числа ячеек 11 (91,7%) предполагается значение, меньше 5. Минимальное предполагаемое число равно ,07.			
b. Вычисляется только для таблицы размером PxP, где P должно быть больше 1.			

Сурет 11. - Курс пен механикалық заңдарды түсіну деңгейінің арасындағы байланысты бағалайтын хи-квадрат критерийі нәтижелері

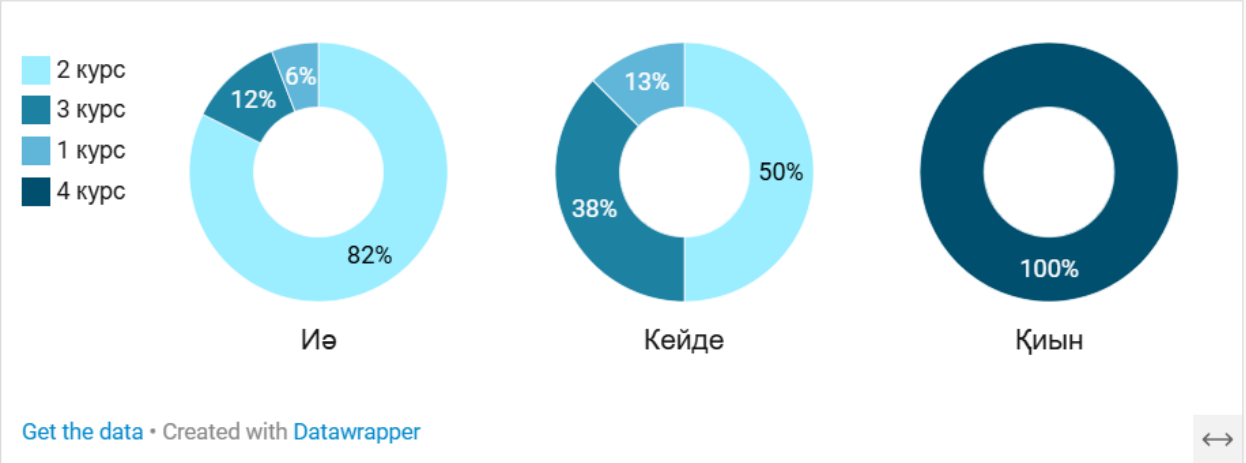
Симметриялық өлшемдер де осы тенденцияны растайды. Phi коэффициентінің 0.609, Cramer's V - 0.430, Contingency Coefficient - 0.520 болуы екі айнымалы арасындағы орташа деңгейлі байланысты көрсетеді. Реттік айнымалыларға арналған Kendall's Tau, Gamma және Spearman коэффициенттері курс жоғарылаған сайын түсіну деңгейінің жақсаратынын көрсеткенімен, олардың p-мәндерінің 0.05-тен жоғары болуы статистикалық дәлдік жеткіліксіз екенін білдіреді. Бірақ педагогикалық интерпретацияда бұл байланыстар маңызды: олар студенттердің оқу тәжірибесі артқан сайын күрделі механикалық құбылыстарды түсіну жеңілдейтінін көрсетеді (Сурет 12).

Симметричные меры					
		Значение	Асимптотическая среднеквадратичная ошибка[a]	Приблизительная T[b]	Приблизительная значимость
Номинал/номинал	Фи	,609			,097
	V Крамера	,430			,097
	Коэффициент сопряженности	,520			,097
Порядковый/порядковый	Tau-b Кендалла	,123	,200	,611	,541
	Tau-c Кендалла	,093	,152	,611	,541
	Гамма	,213	,331	,611	,541
	Корреляция Спирмена	,128	,209	,671	,508[c]
Интервал/интервал	R Пирсона	,174	,231	,918	,367[c]
Мера согласия	Каппа	-,067	,073	-,970	,332
Количество допустимых наблюдений		29			
a. Не предполагая нулевой гипотезы.					
b. Использование асимптотической среднеквадратичной ошибки в предположении нулевой гипотезы.					
c. Основано на нормальной аппроксимации.					

Сурет 12. - Курс пен механикалық заңдарды түсіну деңгейі арасындағы байланыстың күшін көрсететін симметриялық өлшемдер (Phi, Cramer's V, Kendall's Tau, Spearman rho)

Жалпы түрде алғанда, жүргізілген талдау механиканы эксперименттік әдістермен оқытудың оқу мотивациясына, пәнді меңгеруге және студенттердің оқу тәжірибесіне байланысты факторлармен өзара әрекеттесетінін көрсетті. Жыныс пен курс факторлары статистикалық тұрғыдан толық дәлелденбесе де, олардың механикалық заңдарды түсінуге әсер ететін тенденциялары айқын байқалады. Бұл нәтижелер механика пәнін оқытуда авиациялық мысалдар, көрнекілік, практикалық тапсырмалар және курс ерекшеліктеріне бейімделген әдістерді қолданудың маңыздылығын айқындайды.Келесі диаграммада студенттердің оқу курсы мен механикалық заңдарды уақыттың қозғалысы немесе тұрақтылығы мысалында түсіну деңгейі арасындағы қатынас көрнекі түрде бейнеленген. Бұл визуалды материал Crosstab кестесінде алынған нәтижелерді нақтылай отырып, әр курс студенттерінің механикалық құбылыстарды меңгеру ерекшеліктерін салыстыруға мүмкіндік береді. Диаграмманың басты артықшылығы - курс бойынша айырмашылықтардың қалай көрінетінін бірден аңғаруға жағдай жасауы.Диаграммада бірінші курс студенттерінің механикалық заңдарды түсінуде айтарлықтай қиындық көретіні анық байқалады. «Иә» жауабының бағаны ең төменгі деңгейде қалып, «кейде» және «қиын» жауаптарының үлесі жоғарырақ болған. Бұл алғашқы курста теориялық білімнің жаңа болуы және студенттердің физикаға қатысты базалық түсініктерінің әлі қалыптасу үстінде екенімен түсіндіріледі. Мұндай нәтиже тәжірибелік әдістердің тиімділігін арттыру үшін 1 курста көрнекілікке, қарапайым тәжірибелерге және нақты өмірлік мысалдарға көбірек сүйену қажет екенін көрсетеді.Екінші курс студенттерінің нәтижесі диаграммада айқын оң динамикамен ерекшеленеді. «Иә, түсіну оңай» деген жауаптың бағаны барлық курстар арасында ең биік мәнге ие болған. Бұл студенттердің механика пәнін меңгеруде жеткілікті деңгейге жеткенін, теорияны практикамен байланыстыруда сенімділік танытатынын және эксперименттік әдістердің осы кезеңде нақты тиімді жұмыс істейтінін білдіреді. Олардың тәжірибелік тапсырмаларға деген бейімділігі артып, механикалық құбылыстарды авиациялық немесе басқа техникалық мысалдарда елестете алуы жеңілдей түскен.Үшінші курс студенттерінің көрсеткіштері де жоғары деңгейде сақталып, диаграммада теңгерімді көрініс тапқан. «Иә» жауабы басым болғанымен, «кейде» жауаптары да аз емес. Бұл студенттердің механико-математикалық заңдылықтарды жалпы игергенін, бірақ кейбір күрделі тарауларда қосымша мысалдар мен тәжірибелердің қажеттілігін сезінетінін байқатады. Үшінші курс кезеңінде теориялық білімнің күрделене түсуі мүмкін, сондықтан тәжірибелік оқыту әдістері бұл курста да өз маңызын жоғалтпайды.Төртінші курс студенттерінің диаграммадағы нәтижелері ерекше қызығушылық тудырады. Бұл курста кейбір студенттердің «қиын» деген жауабы қайта көрініс берген. Мұндай құбылыс студенттердің оқу мазмұнының кейінгі курстарда мамандандырылған пәндерге ауысуымен байланысты болуы ықтимал. Осы себепті механиканың базалық заңдарына қатысты сұрақтар олардың қазіргі оқу контекстімен дәл байланыспай қалуы мүмкін. Сонымен қатар оқу жүктемесінің артуы да механизмдерді терең түсінуді қиындатуы ықтимал (Сурет 13).

Диаграмманың жалпы көрінісі курс деңгейі жоғарылаған сайын механикалық заңдарды түсіну жеңілдейтіні жөніндегі тенденцияны айқын көрсетіп тұр. Хи-квадрат критерийінің p = 0.097 мәні бұл байланысты статистикалық тұрғыдан толық дәлелдеуге мүмкіндік бермегенімен, визуалды және жиілік деректері курс факторының оқу нәтижесіне ықпалын педагогикалық тұрғыдан сенімді түрде айқындайды. Екінші және үшінші курстардың нәтижелері механиканы эксперименттік оқытудың осы кезеңдерде ерекше табысты болатынын көрсетсе, бірінші курс студенттері үшін материалды жеңілдетілген тәсілдермен беру қажеттілігін дәлелдейді. Ал төртінші курс нәтижелері тәжірибелік әдістерді кәсіби пәндердің контекстімен байланыстыра қолдану қажеттігін байқатады.



Сурет 13. - Оқу курсы мен механикалық заңдарды ұшақтың қозғалысы немесе тұрақтылығы мысалында түсіну деңгейін көрсететін бағандық диаграмма

Осылайша диаграмма курс деңгейінің механикалық заңдарды түсінуге әсерін айқын көрсетіп қана қоймай, эксперименттік оқытуды әр оқу кезеңіне бейімдеу қажеттігін де анық көрсетеді. Бұл механиканы оқытудағы тиімділікті арттыру үшін студенттердің оқу деңгейін, пәндік дайындық деңгейін және оқу жүктемесін ескере отырып, әдістемені түрлендірудің маңыздылығын дәлелдейді.

Зерттеу жұмысында эксперименттік әдістердің тиімділігін бағалау үшін жүргізілген сауалнама нәтижелеріне сандық талдау жасалды. Студенттердің жасы, жынысы, курсы сияқты әлеуметтік-демографиялық көрсеткіштері, сондай-ақ олардың физика пәніне деген қызығушылығы, механикалық құбылыстарды түсіну деңгейі және авиациялық мазмұндағы тәжірибелік мысалдарға көзқарасы сипаттамалық статистика негізінде талданды. Нәтижелер студенттердің басым бөлігі эксперименттік тапсырмалардың пәнді меңгеруге оң ықпал ететінін атап өткенін көрсетті. Бұл механиканы оқытуда нақты құралдармен жұмыс, авиациялық мысалдарды енгізу және практикалық контекст құру студент мотивациясын арттыратынын дәлелдейді.

Кросстабуляциялық талдау механика пәніндегі тәжірибелік әдістердің тиімділігін жыныс, курс деңгейі және мотивациялық факторлар тұрғысынан жан-жақты бағалауға мүмкіндік берді. Хи-квадрат критерийі айнымалылар арасындағы байланыстардың статистикалық тұрғыдан мәнді еместігін көрсеткенімен, симметриялық өлшемдер (Phi, Cramer's V, Contingency Coefficient) айтарлықтай педагогикалық маңызы бар тенденцияларды анықтады. Атап айтқанда, авиациялық мазмұнды қолдану студенттердің пәнге қызығушылығын арттыра алатыны, әсіресе екінші курс студенттері арасында айқын байқалатыны анықталды. Бұл нәтижелер механика тарауындағы тәжірибелік тәсілдердің оқушылардың оқу процесіне белсенді кіруіне және күрделі абстракт ұғымдарды түсінуіне ықпал ететінін көрсетеді.

ҚОРЫТЫНДЫ

Жалпы алғанда, жүргізілген теориялық және эмпирикалық зерттеулер механика бөлімін эксперименттік әдістер арқылы оқытудың тиімді педагогикалық стратегия екенін дәлелдеді. Тәжірибелік жұмыстар, пәнді шынайы техникамен байланыстыру, визуалды және қолданбалы тапсырмаларды жүйелі енгізу студенттердің оқу мотивациясына, пәнді түсіну сапасына және практикалық ойлау дағдыларына оң ықпал етеді. Зерттеу нәтижелері эксперименттік оқыту тәсілдерін физика сабақтарында кеңінен қолдану қажеттігін ғылыми тұрғыдан негіздейді және білім беру бағдарламаларын жетілдіруде бағдар бола алады.Зерттеу барысында қойылған ғылыми гипотеза – механика бөлімін оқытуда эксперименттік әдістерді мақсатты және жүйелі

қолдану оқу үдерісінің тиімділігін арттырады деген болжам – эмпирикалық деректермен расталды. Сауалнама нәтижелері, сипаттамалық және кросстабуляциялық талдаулар эксперименттік жұмыстардың теориялық білімді тереңдетуге, зерттеушілік және логикалық ойлау қабілеттерін дамытуға, цифрлық және STEM-технологиялармен кіріктіргенде оқушылардың мотивациясын арттыруға оң ықпал ететінін көрсетті. Осылайша, гипотезаның барлық негізгі талаптары педагогикалық тұрғыдан да, эмпирикалық тұрғыдан да дәлелденді.Сонымен қатар, зерттеу үлгісінің көлемі мен айнымалылардың шектеулері келешек зерттеулерде кеңейтілген демографиялық және педагогикалық факторларды қамтып, тереңірек талдау жүргізудің қажеттігін көрсетеді. Осы тұрғыдан алғанда, бұл жұмыс механика пәніндегі эксперименттік оқытудың ғылыми-әдістемелік негізін нығайтуға және оның практикалық қолдану мүмкіндіктерін арттыруға бағытталған маңызды зерттеулердің бірі болып табылады.

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PSYCHOLINGUISTIC FOUNDATIONS OF DEVELOPING SPEAKING SKILLS IN TEACHING ENGLISH

Kuanyshbek Nurailym Galymzhankyzy
1st year master's student, Zhanibekov University SKPU, Shymkent, Kazakhstan

Abstract

This article explores the psycholinguistic foundations of developing speaking skills in English language teaching. Based on a systematic review of recent studies, it examines how cognitive, emotional and psychological factors influence learners' ability to produce spoken language. The analysis highlights key concepts such as Levelt's speech production model, the interaction of working and long-term memory and motivational-reflective process.

The findings show that speaking difficulties often arise not only from limited linguistic knowledge but also from affective barriers, including inhibition, anxiety and fear of making mistakes. The study further review a major linguistic teaching approaches, such as the Natural Appoach, Total Physical Response and Suggestopedia, which emphasize meaningful input, interaction and low anxiety learning environments. It is argued that effective speaking development depends on the integration of cognitive processing, emotional stability and communicative practice. The article concludes that incorporating psycholinguistic principles into language teaching can significantly improve learners' fluency, confidence and overall communicative competence.

Түйін

Бұл мақала ағылшын тілін оқытуда сөйлеу дағдыларын дамытудың психолингвистикалық негіздерін қарастырады. Соңғы зерттеулерге жүйелі шолу жасау негізінде сөйлеу әрекетіне когнитивтік, эмоциялық және психологиялық факторлардың әсері талданады. Зерттеуде Левелттің сөйлеу өндіру моделі, жұмыс жад пен ұзақ мерзімді жадтың өзара әрекеттесуі, сондай-ақ мотивациялық-рефлексиялық үдерістер сияқты негізгі ұғымдар қарастырылады. Нәтижелер сөйлеу қиындықтары тек тілдік білімнің жеткіліксіздігінен емес, сонымен қатар мазасыздық, тежелу және қателік жасаудан қорқу сияқты эмоциялық кедергілерден туындайтынын көрсетеді. Сонымен қатар, мақалада мағыналы кіріс, өзара әрекет және стресссіз ортаға негізделген Табиғи тәсіл, Толық физикалық әрекет әдісі (TPR) және Суггестопедия сияқты негізгі психолингвистикалық оқыту тәсілдері қарастырылады. Зерттеу тиімді сөйлеу дағдылары когнитивтік үдерістердің, эмоциялық тұрақтылықтың және коммуникативтік тәжірибенің үйлесіміне тәуелді екенін көрсетеді. Қорытындысында психолингвистикалық қағидаларды қолдану білім алушылардың еркін сөйлеуін, сенімділігін және коммуникативтік құзыреттілігін арттыратыны айтылады.

Аннотация

В данной статье рассматриваются психолингвистические основы развития навыков говорения в обучении английскому языку. На основе систематического обзора современных исследований анализируется влияние когнитивных, эмоциональных и психологических факторов на способность обучающихся к устной речи. Особое внимание уделяется таким ключевым аспектам, как модель порождения речи Левелта, взаимодействие рабочей и долговременной памяти, а также мотивационно-рефлексивные процессы. Результаты показывают, что трудности в говорении обусловлены не только недостатком языковых знаний, но и аффективными барьерами, такими как тревожность, скованность и страх ошибок. В статье также рассматриваются основные психолингвистические подходы к обучению, включая Натуральный подход, метод полной физической реакции (TPR) и суггестопедию, которые подчеркивают значимость осмысленного ввода, взаимодействия и благоприятной эмоциональной среды. Делается вывод о том, что эффективное развитие навыков говорения зависит от интеграции когнитивных процессов, эмоциональной стабильности и коммуникативной практики. Применение психолингвистических принципов способствует повышению беглости речи, уверенности и коммуникативной компетенции обучающихся.

Keywords: *psycholinguistics, speaking skill, English language teaching, Natural Approach (NA), Total Physical Response (TPR), Suggestopedia.*

Кілт сөздер: *психолингвистика, сөйлеу дағдысы, ағылшын тілін оқыту, Табиғи Тәсіл (NM), Толық Физикалық Әрекет әдісі (TPR), Суггестопедия.*

Ключевые слова: *психолингвистика, навык говорения, обучение английскому языку, Натуральный Подход (NФ), Метод Полной Физической Реакции (TPR), Суггестопедия.*

1. Introduction.

In modern language environment speaking is one of the most important skills that serves as indicator that someone is owner of the specific language. Some learners think that if they improved their speaking skills then they are becoming more proficient. Speaking is widely accepted as one of the most challenging part of the language learning, therefore for many years, speaking was the center of discussion for linguistics. As the investigation on that field showed, even though learners have grammatical and lexical knowledge of the language, they face problems when it comes to producing their language. This situation proves that in the process of acquiring a language not only linguistic problems can occur, but also emotional and psycholinguistic factors can affect.

The interdisciplinary field of psycholinguistics combines linguistics and psychology to investigate how people learn, use and perceive language. According to Dey and Sawalmeh (2021), the process by which language is produced and perceived in the brain is examined in order to explore the connection between the human mind and language. The psycholinguistic approach views learning as an individual cognitive process that starts within the person and then progresses to a social dimension in context of English.

Speaking defined by Leong and Ahmadi (2017) as a participatory meaning-making process that includes information production, reception and processing. Speaking is frequently thought of as the most challenging of the four language skills for learners to acquire because of the demanding nature of meaning construction and real-time restrictions. Many language learners struggle to produce their linguistic knowledge because of lacking awareness of psycholinguistic processes, and the same applies to teachers. Concerning this matter, psycholinguistic theories help teachers to identify problems of their learners in terms of productive skills and to teach them in effective way.

The science of the psycholinguistics, studying the mental and cognitive mechanisms of speech activity, identifies the importance of factors such as emotion, motivation and belief in the process of language learning. From this perspective, the development of pronunciation skills requires taking into account the internal psychological state of the learner, not limited to grammatical exercises. Notably, despite the importance of speaking skills, many learners struggle due to cognitive and psychological barriers, which are often overlooked in traditional teaching methods. Psycholinguistic approach provide insights into oral skill offering deeper understanding of the production process, analysis of learning limitations, exploration of continuous mistakes, awareness of neurological functions and obstacles that prevent fluent or accurate speech.

The purpose of the article is to theoretically analyze the emotional-psycholinguistic factors that affect the formation of speaking skills in the process of teaching English and to propose effective methodological approaches that take them into account.

2. Methodology

2.1. Search Strategy

This study takes a structured approach to reviewing published material on how psycholinguistic factors influence the development of spoken English skills and how teachers apply its principles using appropriate teaching approaches. The process involved searching leaning scholarly databases, such as Google Scholar, ResearchGate and Web of Science to gather pertinent studies. Additionally reference lists from chosen articles were carefully reviewed to find more relevant works. The review focused only on peer-reviewed publications written in English, aiming to maintain both quality and accessibility.

2.2. Selection Criteria

To make sure that the studies being reviewed were relevant and of good quality, specific criteria were set for which studies could be included and which were excluded.

Inclusion criteria: Research concentrating on the enhancement of speaking proficiency in English language acquisition; Investigations based on psycholinguistic theories or concepts; Articles in peer-reviewed journals and publications written in English; Studies published within the last 10-15 years to ensure relevance.

Exclusion criteria: Studies not related to speaking skills (e.g, focusing only on reading or wrtiting); Articles without a psycholinguistic perspective; Non-academic sources (blogs, opinion articles, unpublished theses).

After applying these criteria, the chosen articles were thoroughly examined and combined to find important themes, theoretical viewpoints and teaching implications.

3. Theoretical Framework of Psycholinguistics

Understanding how spoken language is generated has been a central concern of psycholinguistic research for several decades. Among existing explanatory frameworks, the psycholinguistic model

developed by Levelt, which views speaking as a sequential cognitive process that includes conceptualization, formulation and articulation, is frequently used to explain speech production. Speakers organize meaning without language encoding and create communicative intention during conceptualization. During the formulation phase, the mental lexicon is accessed in order to find lexical words and construct syntactic and phonological structures. The encoded message is then translated into spoken output by articulation (Hedayat & Tajik, 2020). This model shows that meaning formation, not grammatical choice, is the first step in speaking. Thus, communicative aim limits linguistic form. According to Mosa (2023), language realization in a particular communicative situation is guided by cognitive planning during the hierarchical structure of speech production. Therefore, rather than relying solely on grammatical knowledge, speaking proficiency requires effective coordination between cognitive aim and language processing.

Speech production relies on interaction between working memory (WM) and long-term memory (LTM). Working memory temporarily maintains phonological information during speech planning and enables self-monitoring through the phonological loop, allowing speakers to detect and correct errors in real time. Fluency develops when frequently used lexical and syntactic patterns are stored in long-term memory as formulaic sequences. Because, speakers do not develop each utterance analytically, obtaining these already assembled components minimizes processing demands (Richards & Schmidt, 2002). Efficient organization of linguistic knowledge in long-term memory therefore, allows flexible and rapid speech production under communicative pressure. Limited automatisation increases cognitive load and results in hesitation and reduced fluency.

Speech activity is understood in psychological as an integrated system combining motivational, cognitive and reflective dimensions. According to Kostikova et al. (2020), the motivational-cognitive component directs communicative intention and engagement, while the analytical component supports selection of linguistic strategies and prediction of communicative outcomes. The reflexive component enables speakers to evaluate performance and perform self-correction during interaction. Effective speaking development requires simultaneous functioning of these components. Weakness in any element reduces communicative success even when linguistic knowledge is sufficient.

Research consistently shows that speaking difficulties often stem from psychological rather than linguistic limitations. Leong and Ahmadi (2017) identified inhibition, anxiety and lack of topical knowledge as primary factors reducing learners' willingness to participate in oral communication. Similarly, Malyk (2024) describes internal language barriers, particularly fear of making mistakes, as obstacles that prevent learners from engaging in necessary communicative risk-taking. Individual personality traits also influence speaking performance. Differences between introverted and extroverted learners affect levels of participation, willingness to communicate and responsiveness to communicative tasks. For adult learners, especially, speaking in a foreign language may evoke heightened self-awareness and concern about social evaluation, which can intensify communicative anxiety and reduce fluency. These findings demonstrate that effective and psychological variables are inseparable from cognitive mechanisms in explaining speaking development.

4. Psycholinguistic Approaches to Teaching Speaking

Language teaching methods can be enhanced according to three dominant theoretical perspectives, including functional, interactional and structural theory. The functional perspective views language as a tool for communication, focusing on purposes such as exchanging information, persuading others, expressing feelings. The interactional perspective perceives language as a process shaped by interpersonal relationships and social exchanges between people. The structural perspective understands language as an organized grammatical framework which deal with sentences, phrases and other linguistic elements. Each perspective leads to different instructional methods and strategies, while creating approaches to language teaching (Dey & Samalweh, 2021).

From psycholinguistic principles, a variety of methods for teaching languages have been developed with goal of simulating natural language acquisition processes, including Natural Method (NM), Total Physical Response (TPR) and Suggestopedia (Budiarti & Damanik, 2024). Methods emphasizing comprehension before production reflect the assumption that meaningful input establishes cognitive foundations necessary for later speech growth. According to Purba (2018) linguistic systems can progressively develop through exposure and interaction based on Natural Method (NM), when instruction prioritizes communicative competency above early grammatical precision. This is a well-known approach proposed by Terrell and applied by Krashen in 1983. The main idea lies on its focus on creating natural climate among learners, shortening the instant error correction and significance of grammar knowledge. Natural Method as it says aims to teach learners to learn a language in the same way as their first tongue.

Content of the language teaching curriculum places emphasis on natural usage of the language not academic. Many linguists often confuse the two sides of this language teaching philosophy: Natural Method and Natural Approach. While one mostly focuses on repetition, teacher-centered instruction and accurate production of language forms, the Natural Approach prioritizes comprehension, input, exposure and learners' readiness rather than mechanical practice. Accordingly, Natural Approach in line with the principles of psycholinguistics, by giving priority to comprehension before production (Toprak, 2019).

Numerous pedagogical strategies intended to match language instruction with underlying psycholinguistic mechanisms of learning have been influenced by kinesthetic principles. One of them Total Physical Response (TPR), which combines verbal input with physical movement to improve the connection between linguistic forms and sensorimotor experience, is one of the most well-known examples. This method helps to support recall during speech production and promotes more robust acquisition of linguistic material by simultaneously activating several perceptual channels.

Beyond kinesthetic engagement, affect-oriented approaches underscore the decisive role of emotional regulation in language learning. Suggestopedia one of the language teaching method that emphasizes a relaxed, stress-free environment, music and positive suggestion to enhance learning developed by Bulgarian psychotherapist Georgi Lozanov in the mid 1960s. Sun (2023) identified three central principles that have evolved throughout the development and use of Suggestopedia, shaping its approach to language instruction.

1. The Principle of Happiness Without Tension: It emphasizes crating a calm and positive classroom environment, where feelings of optimism and self-assurance boost learning, and feeling of anxiety and pessimism slow it down. Consistent with psycholinguistic perspective, reducing anxiety improves learners' readiness to speak.

2. The Principle of the Unity of Consciousness and Unconcsiousness: It points out the involvement of both conscious and unconscious processes in the learning process. Suggestopedia,on the other hand, encourages rich associations, deep concentration and also imaginative thinking to help students reach their full potential.

3. The Principle of the Interaction of Suggestive Means: It shows how important it is for teachers and students to talk to each other in a way that shows respect and trust. Teachers help students feel better about themselves, both mentally and physically, by giving them personalized advice. This makes learning more effective and shows that they are valuable professionals. Mosa (2023) notes that Suggestopedia aims to reduce psychological resistance by creating a low-anxiety learning environment. This improves retention of memories, which is frequently referred to as heightened mnemonic responsiveness and increases learners' receptivity to input. When considered collectively, these viewpoints imply that the development of speaking skill results from the combination of cognitive processing capacity, affective stability and meaningful communicative involvement rather than from language practice alone.

5. Conclusion

The psycholinguistic foundations of improving speaking abilities in English language instruction have been clarified by this systematic review of the literature. It has shown that speech production encompasses cognitive processes such as Levelt's conceptualization-formulation-articulation model, memory interactions and integrated motivational-reflexive dimensions, in addition to grammatical mastery. The interaction between linguistic knowledge and emotional cognitive elements is highlighted by psychological barriers including anxiety, inhibition and fear of making mistakes, which are frequently disregarded in traditional methods. The study illustrates how psycholinguistic theories offer a strong foundation for identifying learners' ongoing difficulties, from perdonality-driven participation differences to real-time processing needs, by synthesizing recent peer-reviewed research.

From a pedagogical standpoint, psycholinguistic principle support teaching methods that reflect how people naturally learn languages. The Natural Approach emphasizes providing "comprehensive input" before requiring students to produce speech. Total Physical Response (TPR) reinforces learning through physical movement, while Suggestopedia utilizes a relaxing environment and music to lower "affective filters" like anxiety, encouraging subconscious engagement. These strategies foster fluency by alighning instruction with the limited capacity of Working Memory (WM) and the use of formulaic sequences stored in long-term memory. By creating low-stress environments, teachers enable students to take "linguistic risks", moving from internal mental planning to confident, real time communication.

Ultimately, applying psycholinguistic insights to English curriculum can transform outcomes for diverse learners, particularly in multicultural settings, by addressing mental and emotional barriers to proficiency. Future research should focus on long-term classroom studies and cross-cultural comparisons to validate these methods. Furthermore, teacher training programs should include cognitive diagnostics

to help educators personalize their instruction based on individual student needs. By bridging this gap between the mind, emotion and language, educators can develop proficient communicators who are prepared for global interactions.

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COMPARATIVE STUDY OF VYGOTSKIAN AND MONTESSORI METHODS IN THE DEVELOPMENT OF ORAL SPEECH IN PRESCHOOL CHILDREN

Tojiakhmedova Maftuna Umarjon kizi
Namangan State Institute of Foreign Languages
PhD candidate

Abstract

In contemporary early childhood education, the development of oral speech is recognized as a fundamental component of children's cognitive and communicative growth. This article presents a comparative study of Vygotskian and Montessori methods in fostering oral speech in preschool children. Vygotsky's sociocultural theory emphasizes the crucial role of social interaction, guided learning, and the Zone of Proximal Development in shaping children's language abilities. In contrast, the Montessori approach focuses on child-centered learning, independence, and a prepared environment that naturally stimulates language acquisition through sensory experiences. The study analyzes the theoretical foundations, methodological principles, and practical implications of both approaches. It highlights their strengths and limitations in developing oral communication skills among preschool learners. The findings suggest that an integrative application of both methods can significantly enhance the effectiveness of oral speech development by combining structured interaction with autonomous learning environments.

Аннотация

В XXI веке развитие устной речи у дошкольников рассматривается как важнейший компонент их когнитивного и коммуникативного развития. В современной педагогике особое внимание уделяется эффективным методам формирования речевых навыков у детей раннего возраста. В данной статье проводится сравнительный анализ подходов Л.С. Выготского и метода Монтессори в развитии устной речи у дошкольников. Теория Выготского подчеркивает значимость социального взаимодействия, зоны ближайшего развития и направленного обучения в формировании речевых способностей ребенка. В свою очередь, метод Монтессори ориентирован на самостоятельность ребенка, сенсорное обучение и специально подготовленную среду, способствующую естественному развитию речи. В статье рассматриваются теоретические основы, методические особенности и практическое применение данных подходов. Выявляются их сильные стороны и ограничения в контексте формирования устной речи. Результаты исследования показывают, что интеграция данных методов позволяет повысить эффективность речевого развития дошкольников за счет сочетания управляемого обучения и самостоятельной активности детей.

Keywords: *oral speech, preschool children, Vygotsky, Montessori method, sociocultural theory, language development, early childhood education, communicative competence, Zone of Proximal Development, prepared environment, pedagogical approaches*

Ключевые слова: *устная речь, дошкольники, Выготский, метод Монтессори, социокультурная теория, развитие речи, дошкольное образование, коммуникативная компетенция, зона ближайшего развития, подготовленная среда, педагогические подходы*

INTRODUCTION

In the second quarter of the twenty-first century, the development of oral speech in preschool children has become a central focus of early childhood education. Language acquisition at an early age plays a crucial role in shaping children's cognitive abilities, social interaction, and overall communicative competence. Therefore, identifying effective pedagogical approaches to support oral speech development is of significant importance. Among the most influential theoretical frameworks in this field are Vygotsky's sociocultural theory and the Montessori pedagogical method. Vygotsky emphasizes the role of social interaction, guided learning, and the Zone of Proximal Development in facilitating language development. According to this perspective, children acquire speech through meaningful communication with adults and peers, where language serves as both a cognitive and social tool. [1] In contrast, the Montessori approach focuses on child-centered learning, independence, and the use of a prepared environment that encourages natural language development. Through sensory-based activities and self-directed exploration, children develop their speech abilities in a structured yet flexible learning context. [2] Despite their different philosophical foundations, both approaches aim to enhance children's oral communication

skills. Consequently, a comparative analysis of Vygotskian and Montessori methods is essential to understand their pedagogical potential and practical application in preschool education. This study seeks to examine the similarities and differences between these approaches and to identify effective strategies for fostering oral speech development in young learners.

RESEARCH METHODOLOGY AND LITERATURE REVIEW

In contemporary early childhood education, the issue of oral speech development in preschool children has attracted increasing attention, particularly in the context of identifying effective pedagogical approaches. The complexity of language acquisition at an early age requires the integration of both social interaction and individual cognitive engagement, which are reflected in major educational theories.

The theoretical foundation of this study is based on the works of L.S. Vygotsky and Maria Montessori, whose approaches offer distinct yet complementary perspectives on language development. Vygotsky's sociocultural theory emphasizes the importance of interaction, scaffolding, and the Zone of Proximal Development in shaping children's speech. According to Vygotsky, language emerges through collaborative activities and guided participation, where adults and more capable peers support the child's communicative growth. [3]

On the other hand, the Montessori method focuses on the child's independence, sensory experience, and the role of a prepared environment in facilitating natural language acquisition. Montessori highlights that speech development occurs through active engagement with learning materials and real-life contexts, allowing children to construct meaning autonomously. [4]

This study employs a comparative qualitative methodology, analyzing theoretical sources, pedagogical principles, and practical applications of both approaches. The literature review includes key works in early childhood education, language development, and pedagogical psychology. Through this comparative analysis, the research aims to identify the strengths, limitations, and potential integration of Vygotskian and Montessori methods in enhancing oral speech development in preschool children.

RESULTS AND ANALYSIS

Vygotskian Approach to Oral Speech Development

The comparative analysis shows that the Vygotskian approach offers a highly dynamic framework for the intentional formation of oral speech. Because language is treated as a social and cognitive tool, speech instruction in this model is closely linked to interactive tasks, shared activity, role-play, collective storytelling, guided questioning, and scaffolded dialogue. The adult's role is not passive observation but active mediation. Through carefully structured support, the teacher helps the child formulate thoughts, expand vocabulary, build coherent utterances, and internalize communicative patterns. This approach is particularly effective in contexts where children need help moving from fragmented expression to more complete verbal production. For example, in dialogic reading, the teacher does not merely read a story aloud; rather, the teacher asks predictive, reflective, and descriptive questions, encourages verbal participation, models sentence structures, and gradually transfers responsibility to the child. Such interaction promotes lexical growth, syntactic development, and pragmatic competence simultaneously. [5]

Another significant strength of the Vygotskian model is its attention to collaborative speech. Preschool children often develop oral communication not only by talking to adults but by negotiating meaning with peers during play, joint problem-solving, and shared projects. In such situations, language serves practical and social functions at once. Children learn how to request, clarify, agree, disagree, explain, and persuade. Therefore, Vygotskian pedagogy is especially productive for developing speech as communicative action, not just as isolated vocabulary production. At the same time, this approach also has certain limitations in practice. If mediation becomes excessive, the child's speech may remain overly dependent on adult prompts. In less skillful implementation, scaffolding can turn into domination, reducing spontaneity. Therefore, the success of this model depends heavily on the teacher's professional ability to provide support without suppressing initiative. [6]

Montessori Approach to Oral Speech Development

The Montessori method reveals another pathway for oral speech formation, one rooted in autonomy, concentration, order, and sensory engagement. Here, language grows through interaction with the environment rather than through direct teacher control. The prepared classroom, real objects, classified materials, sound games, naming activities, practical life exercises, and sensorial tasks all contribute to the child's verbal development in indirect yet meaningful ways. [7] A major strength of the Montessori approach lies in its respect for developmental readiness. Rather than forcing verbal production, it creates conditions in which speech emerges naturally from purposeful activity. When a child handles objects, sorts categories, matches images, names attributes, or participates in routine classroom interactions, language becomes meaningful because it is tied to lived experience. This helps children develop not only

isolated words but conceptually grounded vocabulary. [8] Montessori education is also particularly supportive of children who benefit from calm, low-pressure communicative environments. Since the classroom minimizes unnecessary interruption and values concentration, children are often able to develop confidence in speech gradually. The teacher observes carefully, introduces vocabulary precisely, and avoids excessive correction. This can be especially beneficial for preschoolers who are shy, introverted, or still developing verbal self-assurance. [9] However, the analysis also suggests that Montessori environments may provide fewer opportunities for explicitly scaffolded dialogue if the teacher does not intentionally design collaborative language experiences. [10] In some cases, a very strong emphasis on individual work can reduce the intensity of peer interaction that is important for speech negotiation and conversational flexibility. Therefore, while the Montessori method is highly effective for vocabulary enrichment, conceptual language, and self-directed communication, it may need complementary interactive practices to strengthen dialogic and socially responsive speech.

Comparative Pedagogical Interpretation

The comparative findings confirm that both approaches are valuable, but they develop oral speech through different pedagogical mechanisms. Vygotsky prioritizes mediated communication, guided participation, and collaborative verbal growth. Montessori prioritizes independent exploration, sensory grounding, and spontaneous verbal emergence within an ordered environment. The uploaded source reaches a similar conclusion by noting that both methods have distinct strengths and limitations and that their integrative use can significantly improve oral speech development in preschool children. From a pedagogical perspective, the real difference lies in the locus of developmental activation. In the Vygotskian model, speech is activated through interaction. In the Montessori model, speech is activated through environment. In the first case, the child learns to speak by participating in guided communicative acts; in the second, the child learns to speak by engaging meaningfully with materials, routines, and self-directed activity. Yet these are not opposing paths. In actual preschool education, children need both: they need sensitive adult mediation and a language-rich environment; they need collaborative verbal support and opportunities for autonomous expression.

Comparative Table: Montessori and Vygotskian Methods in Developing Oral Speech in Preschool Children

Aspect	*Montessori Method*	*Vygotskian Method*
Theoretical foundation	*Based on child-centered education, independence, and self-directed learning*	*Based on sociocultural theory, social interaction, and guided learning*
Main view of child development	*The child develops naturally through interaction with a prepared environment*	*The child develops through communication and collaboration with adults and peers*
Role of language	*Language emerges through sensory experience, real-life activity, and independent exploration*	*Language develops as a social and cognitive tool through guided communication*
Role of teacher	*Observer, facilitator, and organizer of the environment*	*Guide, mediator, and scaffold who actively supports learning*
Learning environment	*Prepared, orderly, calm, sensory-rich, and child-friendly environment*	*Interactive, collaborative, communication-rich social environment*
Learning process	*Self-paced, individual, experience-based learning*	*Guided, dialogic, and socially mediated learning*
Child's role	*Independent learner who chooses activities and learns through exploration*	*Active participant who learns through interaction and support*
Main mechanism of speech development	*Sensory materials, naming activities, practical life exercises, and independent expression*	*Dialogue, questioning, scaffolding, imitation, and collaborative tasks*
Importance of social interaction	*Present, but less central than individual discovery*	*Central and essential for speech and cognitive development*
View of assistance	*Minimal direct interference; support is indirect*	*Direct support is important, especially within the Zone of Proximal Development*
Key concept	*Prepared environment*	*Zone of Proximal Development (ZPD)*
Speech activities	*Object naming, picture-word matching, classified cards, storytelling from materials*	*Guided conversation, shared storytelling, role play, dialogic reading*
Strengths in oral speech development	*Encourages spontaneous speech, vocabulary enrichment, confidence, and independent expression*	*Develops dialogic speech, interactional competence, coherence, and guided verbal growth*
Possible limitation	*May provide fewer structured opportunities for collaborative speech if not planned well*	*May lead to overdependence on adult guidance if scaffolding is excessive*
Best contribution	*Builds independence, concentration, and naturally emerging language*	*Builds communication through support, interaction, and shared meaning-making*
Assessment focus	*Observation of natural language use in activities*	*Observation of progress in guided and collaborative communication*

Overall pedagogical value	*Supports autonomous and meaningful language growth*	*Supports socially mediated and developmentally guided speech growth*

Practical Application Model for Preschool Oral Speech Development

Based on the comparative analysis and the logic of the sample diagrams you shared, it is possible to formulate an integrative practical model for teaching oral speech in preschool education.

Figure Caption / Model Description:

Practical Application of Vygotskian and Montessori Methods in the Development of Oral Speech in Preschool Children

The model may be structured around three interconnected blocks:

1. Theoretical-Methodological Block

2. This block includes the conceptual basis of oral speech development:

- *sociocultural mediation;*
- *Zone of Proximal Development;*
- *scaffolding and guided interaction;*
- *prepared environment;*
- *sensory-based learning;*
- *child autonomy and developmental readiness.*

2. Organizational-Content Block

This block reflects the practical implementation of speech instruction:

- *dialogic reading;*
- *storytelling and retelling;*
- *guided conversation circles;*
- *role play and cooperative games;*
- *object naming and classification;*
- *sensorial language activities;*
- *practical life communication tasks;*
- *teacher observation and individualized support.*

3. Resultative Block

This block includes the expected outcomes:

- *vocabulary enrichment;*
- *sentence-building ability;*
- *speech coherence;*
- *communicative confidence;*
- *dialogic participation;*
- *verbal independence;*
- *listening and responding skills;*
- *social-pragmatic speech competence.*

In this model, Vygotskian strategies ensure that children receive guided communicative support in the process of verbal growth, while Montessori strategies ensure that this growth is rooted in meaningful, developmentally appropriate, and sensory-supported experience. Their integration produces a balanced educational framework in which oral speech is not treated as a mechanical skill, but as an organic component of the child's total development.

DISCUSSION

The pedagogical significance of this comparative study lies in its rejection of binary educational thinking. Preschool speech development should not be organized around the assumption that either structured teacher guidance or independent self-directed learning alone is sufficient. Children's oral speech develops most effectively when instruction reflects the complex nature of language itself: language is at once social and individual, external and internal, guided and spontaneous. The Vygotskian method reminds us that children need communicative partnership. They need adults and peers who speak with them, not merely to them. They need questions, prompts, dialogue, shared narratives, and collaborative meaning-making. The Montessori method reminds us that children also need space, order, purposeful materials, and trust in their developmental capacities. They need environments that do not overload them verbally, but invite them into meaningful expression through experience. Therefore, the most productive contemporary preschool pedagogy is one that sees speech development as an integrated pedagogical process. In such a process, adult mediation is carefully balanced with child initiative; language instruction is embedded in activity; and communication is supported both through social exchange and through environmental design. This is especially important in multilingual, diverse, and rapidly changing

educational contexts, where children benefit from both responsive interaction and structured independence.

CONCLUSION

The comparative analysis of Vygotskian and Montessori methods demonstrates that both approaches make a substantial contribution to the development of oral speech in preschool children. The Vygotskian approach is especially effective in developing dialogic speech, collaborative communication, and guided verbal expression through scaffolding and social interaction. The Montessori approach, in turn, is highly effective in promoting spontaneous speech, conceptual vocabulary, independence, and meaningful language growth through the prepared environment and sensory experience. The study confirms that these approaches should not be understood as mutually exclusive alternatives. On the contrary, their integration offers a richer and more pedagogically effective model for preschool oral speech development. When guided interaction is combined with autonomous exploration, children receive both the communicative support and the developmental freedom necessary for successful speech formation. This conclusion directly corresponds with the core finding in your uploaded material, where the integration of Vygotskian and Montessori methods is presented as a significant factor in enhancing preschool children's oral speech development.

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ATTITUDES OF ENGLISH LANGUAGE LEARNERS TOWARDS LANGUAGE MULTIMEDIA PROGRAMS

Miras Zhunisbekov
2 year Master's student,
Abai Kazakh National Pedagogical University, Almaty, Kazakhstan

Abstract

This study investigates the attitudes of Kazakh-speaking English language learners toward language multimedia programs. Adopting a quantitative research design, data were collected through a structured questionnaire administered to 72 university students at the intermediate (B1) level. The instrument included Likert-scale items measuring both positive and negative dimensions of learner attitudes, such as engagement, motivation, usability, and challenges associated with multimedia use. The findings reveal that learners generally hold positive attitudes toward multimedia programs, particularly in terms of increased engagement and motivation. Participants reported that multimedia tools enhance their learning experience and support better understanding of language content. However, the results also indicate the presence of certain challenges, including cognitive overload and technical difficulties, which may negatively influence learners' perceptions. Additionally, differences were observed between frequent and less frequent users, with more experienced users demonstrating more favorable attitudes overall. The study highlights the importance of considering learner perceptions when integrating multimedia tools into language education. The findings suggest that effective implementation requires not only access to technology but also pedagogically sound design and adequate learner support.

Keywords: *multimedia learning, learner attitudes, English as a foreign language, quantitative research, Kazakhstan, language education*

Introduction

The field of foreign language education has undergone a significant transformation in recent decades, primarily driven by the rapid integration of technology into teaching and learning processes. With the advent of digital tools and multimedia platforms, learners are now exposed to more engaging, interactive, and diverse learning environments than ever before. Among these technological innovations, language multimedia programs have emerged as particularly influential in enhancing language acquisition. These programs incorporate a variety of media forms—such as audio, video, animation, and interactive tasks—to support the development of linguistic and communicative competence. By enabling personalized learning experiences and offering real-time feedback, such tools have gained popularity among educators and learners alike. However, while their widespread adoption is undeniable, learners' responses to these tools remain varied and complex.

In the context of Kazakhstan, where the promotion of multilingualism has become a national priority, English language learning has gained considerable importance. As Kazakh-speaking learners increasingly turn to multimedia resources to support their language studies, it becomes crucial to understand how they perceive and respond to these tools. Attitudes play a pivotal role in the success of language learning, influencing motivation, engagement, and overall academic outcomes. Positive attitudes can lead to more sustained learning efforts, while negative perceptions may hinder progress or result in underutilization of potentially effective tools. Therefore, examining learners' attitudes towards language multimedia programs is essential for educators, policymakers, and developers seeking to optimize digital learning solutions and align them with learners' preferences and needs.

This study aims to explore the attitudes of Kazakh-speaking English language learners towards language multimedia programs. Specifically, it seeks to identify which features of these programs are perceived positively and contribute to an enriching learning experience, as well as which elements are met with resistance or disapproval. In doing so, the research will address two guiding questions: (1) What aspects of language multimedia programs evoke positive attitudes from language learners? and (2) What aspects of language multimedia programs trigger negative attitudes from language learners? By investigating these questions, the study aspires to contribute valuable insights into how multimedia tools can be tailored to better serve the linguistic and cultural context of Kazakh learners. Ultimately, the findings aim to inform more effective integration of multimedia programs in language curricula and foster a more learner-centered approach in technology-enhanced language education.

LITERATURE REVIEW

The integration of multimedia technologies into language education has attracted considerable scholarly attention due to its potential to enhance learning effectiveness, engagement, and learner autonomy. Multimedia programs, which combine text, audio, video, animation, and interactive elements, create rich learning environments that differ significantly from traditional instructional approaches. These environments allow learners to process language input through multiple sensory channels, thereby facilitating deeper comprehension and retention (Mayer, 2009). As a result, multimedia tools have become an important component of contemporary language teaching and learning practices.

From a theoretical perspective, the use of multimedia in language learning is supported by several well-established frameworks. Mayer's (2009) Cognitive Theory of Multimedia Learning posits that individuals learn more effectively when information is presented through both verbal and visual channels. According to this theory, meaningful learning occurs when learners actively engage in selecting, organizing, and integrating information. Multimedia programs, when properly designed, can reduce cognitive load and enhance understanding by presenting information in a structured and complementary manner. In contrast, poorly designed multimedia materials may lead to cognitive overload, thereby hindering learning outcomes.

Another relevant framework is the Technological Pedagogical Content Knowledge (TPACK) model, proposed by Mishra and Koehler (2006), which emphasizes the importance of integrating technology with pedagogical and content knowledge. According to this model, the effectiveness of multimedia tools depends not only on their technological features but also on how well they are aligned with instructional objectives and teaching strategies. This perspective highlights the need for thoughtful implementation of multimedia programs to ensure that they support, rather than distract from, the learning process.

Empirical studies have consistently demonstrated that learners often exhibit positive attitudes toward multimedia programs. For instance, Aloraini (2012) found that the use of multimedia in English language instruction significantly improved students' vocabulary acquisition and listening skills, while also increasing their motivation. Similarly, Reinders and White (2010) reported that multimedia tools, particularly language learning applications, promote learner autonomy by allowing students to engage in self-directed learning beyond the classroom. This increased sense of control over the learning process is frequently associated with more positive attitudes.

In addition, multimedia-based activities such as digital storytelling have been shown to enhance both linguistic competence and learner engagement. Wang and Vasquez (2012) demonstrated that learners involved in multimedia writing tasks developed greater confidence in their language abilities and expressed more favorable attitudes toward English learning. Furthermore, research by Stockwell (2010) and Gilakjani (2012) indicates that multimedia tools effectively address diverse learning styles, particularly benefiting visual and auditory learners. By accommodating individual differences, these tools contribute to a more inclusive and supportive learning environment.

However, despite these advantages, not all learners respond positively to multimedia programs. One of the primary challenges identified in the literature is cognitive overload, which occurs when learners are presented with excessive or poorly structured information (Sweller, Ayres, & Kalyuga, 2011). In such cases, the complexity of multimedia content can overwhelm learners and reduce comprehension. Additionally, learners with limited digital literacy may experience difficulties in navigating multimedia platforms, leading to frustration and negative attitudes (Almekhlafi & Almeqdadi, 2010).

Technical issues also play a significant role in shaping learner perceptions. Problems such as unstable internet connections, software malfunctions, and lack of technical support can disrupt the learning process and negatively affect attitudes toward multimedia tools (Huang, 2014). Moreover, the effectiveness of multimedia programs may be influenced by cultural and educational factors. In contexts where traditional, teacher-centered instruction is dominant, learners may initially resist learner-centered approaches that require greater autonomy and self-regulation.

This issue is particularly relevant in the Kazakhstani educational context. The country's trilingual policy has increased the demand for effective English language instruction, leading to the adoption of multimedia technologies in many educational institutions (Aubakirova et al., 2019). While these tools offer significant potential, their implementation has not always been accompanied by appropriate pedagogical support. Zhetpisbayeva and Shelestova (2015) noted that although multimedia resources are widely available, their integration into classroom practice often lacks coherence, which can negatively impact learner engagement.

Furthermore, studies conducted in Kazakhstan suggest that learners' attitudes toward multimedia programs are shaped by factors such as accessibility, content relevance, and teacher guidance. Tuleuova

and Zhiyenbayeva (2021) found that learners were more likely to respond positively to multimedia tools when these tools were clearly integrated into the curriculum and supported by instructors. Conversely, when multimedia resources were used inconsistently or without clear purpose, learners tended to perceive them as supplementary rather than essential components of the learning process.

Despite the growing body of research on multimedia in language education, there remains a noticeable gap in studies focusing specifically on learners' attitudes within the Kazakh context. While previous research has examined the effectiveness of multimedia tools in improving language skills, fewer studies have explored how learners perceive these tools and how such perceptions influence their engagement. Addressing this gap is essential for developing more effective, context-sensitive approaches to multimedia integration in language education.

Methodology

This study adopted a quantitative research design to examine the attitudes of Kazakh-speaking English language learners toward language multimedia programs. A survey method was selected as the primary data collection tool, as it allows for the systematic measurement of learners' perceptions and facilitates the analysis of patterns across a defined population. Quantitative approaches are particularly suitable for identifying general trends in attitudes and for comparing responses across different variables.

Participants

The participants of the study consisted of 72 Kazakh-speaking students enrolled in English language courses at a university in Kazakhstan. The sample was selected using convenience sampling, as the participants were readily accessible to the researcher during the data collection period. All participants were studying English as a foreign language and were classified at the intermediate (B1) level according to the Common European Framework of Reference for Languages (CEFR).

The age range of the participants was between 18 and 23 years. All participants had prior exposure to language multimedia programs, including mobile applications, online learning platforms, and multimedia-supported classroom instruction. Participation in the study was voluntary. The participants were informed about the purpose of the research, and ethical considerations such as anonymity and confidentiality were ensured. No personal identifying information was collected.

Instruments

Data were collected using a structured questionnaire designed to assess learners' attitudes toward language multimedia programs. The questionnaire consisted of two sections. The first section gathered demographic information, including age, English proficiency level, and frequency of multimedia use in language learning. The second section included a series of statements measuring learners' attitudes.

A five-point Likert scale was employed, ranging from 1 (strongly disagree) to 5 (strongly agree). The items were designed to capture both positive and negative aspects of learner attitudes. Positive items focused on engagement, motivation, interactivity, ease of use, and perceived usefulness of multimedia programs. Negative items addressed potential challenges, such as technical difficulties, cognitive overload, lack of clarity, and preference for traditional learning methods.

The questionnaire was developed based on relevant literature in multimedia learning and language education and was adapted to the context of Kazakh-speaking learners. Prior to the main data collection, the instrument was piloted with a small group of students (n = 10) to ensure clarity and appropriateness of the items. Minor modifications were made based on the feedback received.

Procedure

The data collection process was conducted over a period of two weeks. The questionnaire was distributed in an online format using a digital survey platform. Participants received the survey link through university communication channels, including academic group chats and email.

Clear instructions were provided to ensure that participants understood how to complete the questionnaire. They were encouraged to respond honestly based on their personal experiences with language multimedia programs. The average time required to complete the survey was approximately 8–10 minutes.

All responses were automatically recorded by the survey platform and stored securely. The researcher monitored the data collection process to ensure an adequate number of responses for analysis.

Data Analysis

The collected data were analyzed using descriptive statistical methods. First, all responses were coded and organized in a statistical format. Mean scores and standard deviations were calculated for each questionnaire item to determine the central tendency and variability of responses.

Additionally, frequency distributions and percentages were used to examine how participants responded to each item on the Likert scale. This allowed for a clearer understanding of the distribution of positive and negative attitudes.

To further interpret the data, questionnaire items were grouped into thematic categories, such as motivation, usability, and challenges. Mean scores for each category were calculated to identify overall trends in learners' attitudes toward multimedia programs.

Comparative analysis was also conducted to examine potential differences in attitudes based on the frequency of multimedia use. This helped determine whether learners who used multimedia programs more frequently demonstrated more positive attitudes compared to those who used them less often.

The results of the analysis were interpreted in relation to the research questions, with the aim of identifying key features of multimedia programs that contribute to either positive or negative learner attitudes.

Results

This section presents the findings of the study based on the analysis of questionnaire responses. The results are organized according to the main dimensions of learner attitudes toward language multimedia programs, including overall attitudes, positive perceptions, and negative perceptions.

The analysis of overall responses indicates a generally positive tendency toward language multimedia programs. The mean score across all attitude items was 3.87 (SD = 0.64), suggesting that participants tended to agree with positive statements about multimedia use.

A majority of respondents selected "agree" or "strongly agree" for items related to the usefulness and effectiveness of multimedia tools. Specifically, 68% of participants agreed that multimedia programs enhance their language learning experience, while 72% reported that such tools make learning more engaging.

Responses to items measuring positive attitudes demonstrated consistently high mean scores across several categories. Table 1 presents the descriptive statistics for selected positive attitude items.

Table 1. Positive Attitudes Toward Multimedia Programs (N = 72)

Item	Mean	SD
Multimedia programs make learning more engaging	4.12	0.71
Multimedia tools improve my motivation to learn English	4.05	0.76
I find multimedia programs easy to use	3.89	0.82
Multimedia programs help me understand language better	3.94	0.79
I prefer using multimedia tools over traditional methods	3.76	0.88

The highest mean score was observed for the item related to engagement (M = 4.12), followed by motivation (M = 4.05). Frequency analysis showed that 75% of participants selected "agree" or "strongly agree" for engagement-related items, while 70% reported increased motivation.

Responses to negative attitude items revealed moderate levels of agreement. Table 2 summarizes the descriptive statistics for selected negative items.

Table 2. Negative Attitudes Toward Multimedia Programs (N = 72)

Item	Mean	SD
Multimedia programs can be confusing to use	2.91	0.95
I experience technical problems when using multimedia tools	3.08	1.02
Multimedia content can be overwhelming	3.15	0.97
I prefer traditional learning methods over multimedia	2.84	0.90

The highest mean among negative items was observed for cognitive overload (M = 3.15), followed by technical difficulties (M = 3.08). Frequency distributions indicated that approximately 38% of participants agreed that multimedia content can be overwhelming, while 42% reported experiencing technical issues.

Participants were divided into two groups based on their reported frequency of multimedia use: frequent users (n = 40) and less frequent users (n = 32). Descriptive comparison of mean scores showed

that frequent users demonstrated higher overall attitude scores (M = 4.02, SD = 0.58) compared to less frequent users (M = 3.69, SD = 0.67).

In addition, frequent users reported higher levels of agreement with positive attitude items, particularly in terms of engagement (M = 4.25) and motivation (M = 4.18). Less frequent users showed slightly higher mean scores for negative items, including technical difficulties (M = 3.21) and confusion (M = 3.05).

Overall, the results indicate that participants reported higher levels of agreement with positive attitude statements compared to negative ones. Positive dimensions such as engagement, motivation, and perceived usefulness received higher mean scores, while negative dimensions such as cognitive overload and technical issues showed moderate agreement levels.

Discussion

The findings of this study provide insight into the attitudes of Kazakh-speaking English language learners toward language multimedia programs, revealing an overall positive orientation toward these tools. The relatively high mean scores for positive attitude items, particularly those related to engagement and motivation, suggest that multimedia programs are perceived as beneficial and appealing components of the language learning process. At the same time, the presence of moderate agreement with negative items indicates that learners' attitudes are not uniformly positive, but rather shaped by a combination of advantages and challenges.

One of the most prominent findings of the study is the strong association between multimedia use and increased learner engagement. Participants reported that multimedia programs make learning more interesting and dynamic, which aligns with previous research emphasizing the motivational potential of multimedia environments (Aloraini, 2012; Wang & Vasquez, 2012). This result can also be interpreted in light of Mayer's Cognitive Theory of Multimedia Learning (2009), which suggests that the integration of visual and auditory input enhances learners' ability to process and retain information. The high levels of agreement with engagement-related items indicate that learners respond positively to multimodal input, which may contribute to more sustained attention and active participation in learning tasks.

Similarly, the findings demonstrate that multimedia programs are associated with increased motivation. Learners reported that these tools encourage them to engage more actively with English, both inside and outside the classroom. This supports the conclusions of Reinders and White (2010), who argue that multimedia tools promote learner autonomy and self-directed learning. In the present study, the ability to control the pace and mode of learning appears to be an important factor contributing to positive attitudes. From a pedagogical perspective, this suggests that multimedia programs can play a significant role in fostering independent learning habits, which are essential for long-term language development.

In addition to engagement and motivation, participants expressed generally positive perceptions of usability and effectiveness. Most learners indicated that multimedia programs help them understand language content more clearly and provide useful support for developing linguistic skills. This finding is consistent with research by Gilakjani (2012) and Stockwell (2010), which highlights the capacity of multimedia tools to accommodate different learning styles. The relatively high mean scores for ease of use also suggest that learners are, to a certain extent, comfortable navigating digital platforms, reflecting a growing familiarity with technology among university students.

However, despite these positive perceptions, the study also identified several challenges that influence learners' attitudes. Notably, issues related to cognitive overload and technical difficulties were reported at moderate levels. These findings support Sweller, Ayres, and Kalyuga's (2011) argument that poorly designed multimedia materials can overwhelm learners and reduce the effectiveness of instruction. In this study, a considerable proportion of participants indicated that multimedia content can sometimes be confusing or excessive, suggesting that the quality and design of multimedia programs play a crucial role in shaping learner experiences.

Technical challenges also emerged as a significant factor influencing attitudes. Participants reported experiencing issues such as unstable internet connections and technical malfunctions, which negatively affect their interaction with multimedia tools. This aligns with the findings of Huang (2014), who emphasizes the impact of technological barriers on learner satisfaction. In the context of Kazakhstan, where access to reliable digital infrastructure may vary, such challenges can limit the effectiveness of multimedia integration and contribute to less favorable attitudes.

Another important finding is the difference in attitudes between frequent and less frequent users of multimedia programs. Frequent users demonstrated more positive attitudes across most dimensions, including engagement and motivation, while less frequent users reported slightly higher levels of

negative perceptions. This pattern suggests that familiarity with multimedia tools may influence learners' attitudes. As learners gain more experience and confidence in using these technologies, they may become more comfortable and perceive them as more beneficial. This observation is consistent with previous studies indicating that digital literacy plays a key role in shaping learners' responses to technology-enhanced learning environments (Almekhlafi & Almeqdadi, 2010).

The findings also have important implications for the Kazakhstani educational context. Although multimedia programs are increasingly available, their effectiveness depends on how they are implemented and supported within the learning environment. The results suggest that learners generally value multimedia tools, but their attitudes can be negatively affected by poor design, lack of guidance, or technical issues. This supports the argument of Zhetpisbayeva and Shelestova (2015) that the integration of multimedia in Kazakhstan often lacks pedagogical coherence.

From a practical perspective, these findings highlight the need for more thoughtful integration of multimedia programs into language instruction. Educators should ensure that multimedia materials are well-structured, relevant, and aligned with learning objectives in order to avoid cognitive overload. In addition, providing learners with guidance on how to use these tools effectively may help reduce confusion and improve overall attitudes. Teacher support appears to be particularly important in contexts where learners are transitioning from more traditional, teacher-centered approaches to more autonomous forms of learning.

Furthermore, the results suggest that developers of multimedia programs should consider the specific needs and preferences of Kazakh-speaking learners. Cultural expectations, language background, and technological access all influence how learners interact with digital tools. Therefore, designing context-sensitive multimedia materials may enhance their acceptance and effectiveness.

In conclusion, the study demonstrates that Kazakh-speaking English language learners generally hold positive attitudes toward language multimedia programs, particularly in terms of engagement and motivation. However, these positive perceptions are accompanied by certain challenges, including cognitive overload and technical difficulties. Addressing these issues is essential for maximizing the potential of multimedia tools and ensuring their successful integration into language education.

Conclusion

This study set out to investigate the attitudes of Kazakh-speaking English language learners toward language multimedia programs. The findings indicate that learners generally hold positive perceptions of these tools, particularly in relation to engagement, motivation, and perceived usefulness. Multimedia programs were viewed as effective in creating more interactive and dynamic learning environments, which can support the development of language skills and encourage more active participation in the learning process.

At the same time, the study revealed that learners' attitudes are influenced by certain challenges, including cognitive overload and technical difficulties. These factors highlight that the effectiveness of multimedia tools is not determined solely by their availability, but also by the quality of their design and the conditions under which they are implemented. The presence of both positive and negative perceptions suggests that learner attitudes toward multimedia programs are complex and context-dependent.

The study also demonstrated that frequency of use plays a role in shaping attitudes, with more experienced users showing more favorable perceptions. This finding underscores the importance of developing learners' digital competence and providing adequate support to ensure effective interaction with multimedia tools.

In terms of implications, the results suggest that educators should adopt a more structured and pedagogically aligned approach to integrating multimedia into language instruction. Multimedia programs should be carefully selected and adapted to meet learners' needs, while also minimizing potential challenges. Furthermore, greater attention should be given to the local educational context to ensure that multimedia tools are both accessible and relevant.

Overall, this study contributes to the understanding of learner attitudes in technology-enhanced language education and provides a foundation for future research in the Kazakhstani context.

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PEDAGOGICAL CONDITIONS FOR THE APPLICATION OF PROJECT-BASED TECHNOLOGIES AND THEIR EFFECTIVENESS IN THE HIGHER EDUCATION SYSTEM

Serikkyzy Aruzhan
master's degree student of Astana International University

Abstract

The modernization of higher education systems in the context of globalization, digital transformation, and evolving labor market demands necessitates the implementation of innovative pedagogical approaches that go beyond traditional knowledge transmission. Project-based learning (PBL) has emerged as one of the most effective student-centered approaches that fosters active learning, critical thinking, collaboration, and professional competence development. This article examines the theoretical foundations of project-based technologies and analyzes the pedagogical conditions required for their successful implementation in higher education. The study is grounded in constructivist, socio-cultural, and competence-based educational paradigms. Particular attention is paid to the role of instructional design, teacher facilitation, student motivation, collaborative learning, digital integration, and assessment strategies. The findings indicate that project-based technologies significantly enhance learning outcomes and contribute to the formation of key competencies necessary for professional success in the 21st century.

Keywords: project-based learning, higher education, pedagogical conditions, constructivism, competence-based education, student-centered learning

1. INTRODUCTION

The beginning of the 21st century has been marked by profound transformations in all spheres of human activity, including education. The rapid development of information technologies, the expansion of global communication networks, and the increasing complexity of socio-economic systems have significantly altered the requirements for modern specialists. In this context, higher education institutions are no longer limited to the transmission of theoretical knowledge; instead, they are expected to cultivate a wide range of competencies that enable graduates to function effectively in dynamic and unpredictable professional environments.

One of the key challenges facing higher education today is the need to bridge the gap between academic knowledge and real-world application. Traditional models of education, which are predominantly based on lecture-centered instruction and reproductive learning, often fail to equip students with the skills necessary for solving complex, real-life problems. Such models tend to position students as passive recipients of information, thereby limiting their ability to develop critical thinking, creativity, autonomy, and collaborative skills.

The shift toward a competence-based paradigm in education reflects the growing recognition that knowledge alone is insufficient for success in modern society. Instead, emphasis is placed on the integration of knowledge, skills, attitudes, and values that collectively form professional competence. This paradigm shift necessitates the adoption of innovative pedagogical approaches that promote active, student-centered learning and encourage the development of higher-order cognitive and social skills.

In this regard, project-based learning (PBL) has emerged as one of the most effective and widely recognized educational approaches. Rooted in constructivist and experiential learning theories, PBL emphasizes learning through meaningful activity, inquiry, and collaboration. It involves engaging students in the investigation of complex questions or problems over an extended period of time, culminating in the creation of a tangible product or presentation.

The relevance of project-based technologies in higher education is determined by several factors. First, PBL aligns with the principles of student-centered learning, which prioritize the active involvement of learners in the educational process. Second, it provides opportunities for integrating theoretical knowledge with practical application, thereby enhancing the relevance and authenticity of learning experiences. Third, it supports the development of key competencies required in the modern labor market, including problem-solving, communication, teamwork, and digital literacy.

Furthermore, project-based learning responds to the demands of the digital era, where access to information is virtually unlimited, and the ability to critically evaluate and apply this information becomes crucial. In such a context, the role of the teacher is transformed from a source of knowledge to

a facilitator of learning, guiding students in their exploration and helping them develop independent learning strategies.

Despite its numerous advantages, the implementation of project-based technologies in higher education is not without challenges. It requires a fundamental rethinking of teaching practices, curriculum design, and assessment methods. The success of PBL depends on the creation of specific pedagogical conditions that support student engagement, ensure the alignment of projects with learning objectives, and provide adequate guidance and feedback.

Among these conditions are the clear formulation of educational goals, the development of well-structured project tasks, the establishment of a supportive learning environment, and the use of appropriate assessment strategies. Additionally, the effectiveness of project-based learning is influenced by factors such as student motivation, teacher competence, availability of resources, and institutional support.

It is also important to note that the integration of project-based technologies should not be viewed as a replacement for traditional teaching methods but rather as a complementary approach that enhances the overall quality of education. A balanced combination of different pedagogical strategies allows educators to address diverse learning needs and achieve optimal learning outcomes.

Given the increasing importance of project-based learning in contemporary education, there is a need for a comprehensive analysis of the conditions under which it can be most effectively implemented. Understanding these conditions is essential for educators, curriculum developers, and policymakers who seek to improve the quality and relevance of higher education.

Therefore, the aim of this article is to examine the pedagogical conditions necessary for the successful application of project-based technologies in the higher education system and to analyze their potential impact on the effectiveness of the educational process. The study focuses on the theoretical foundations of project-based learning and identifies key factors that contribute to its successful implementation.

The significance of this research lies in its potential to contribute to the ongoing development of innovative teaching practices that meet the demands of modern society. By identifying and analyzing the pedagogical conditions that underpin effective project-based learning, this article provides a framework for improving educational practice and enhancing student learning outcomes in higher education.

2. PHILOSOPHICAL AND PEDAGOGICAL FOUNDATIONS OF PROJECT-BASED LEARNING

2.1 PRAGMATISM AND EXPERIENTIAL LEARNING

The philosophical roots of project-based learning can be traced to pragmatism, particularly the work of John Dewey, who emphasized the importance of experience in education. Dewey argued that learning should be grounded in real-life situations and that students should actively participate in the learning process.

According to Dewey, education is not preparation for life but life itself. This idea forms the basis of experiential learning, where knowledge is constructed through interaction with the environment. In project-based learning, students engage in tasks that simulate real-world challenges, thereby making learning more meaningful and relevant.

Experiential learning involves several key stages:

- *concrete experience*
- *reflective observation*
- *abstract conceptualization*
- *active experimentation*

These stages are clearly reflected in project-based learning, where students first encounter a problem, then analyze it, develop solutions, and apply their knowledge in practice.

2.2 CONSTRUCTIVISM AND KNOWLEDGE CONSTRUCTION

Constructivism provides a strong theoretical foundation for project-based learning. According to this theory, knowledge is not transmitted from teacher to student but is actively constructed by learners through interaction with their environment.

Jean Piaget emphasized the role of cognitive development and individual discovery in learning, while Lev Vygotsky highlighted the importance of social interaction and cultural context. Vygotsky's concept of the Zone of Proximal Development (ZPD) is particularly relevant to PBL, as it underscores the role of collaboration and guidance in learning.

In a project-based environment:

- *students construct knowledge through inquiry and exploration*

- *learning is socially mediated through group work*
- *teachers provide scaffolding to support learning*

Thus, PBL creates conditions for deep and meaningful learning.

2.3 SOCIO-CULTURAL THEORY AND COLLABORATIVE LEARNING

Socio-cultural theory emphasizes that learning is inherently social and occurs through interaction with others. Language, communication, and collaboration are central to this process.

Project-based learning aligns closely with this perspective, as it requires students to work in groups, discuss ideas, negotiate meanings, and co-construct knowledge. Through collaboration, students not only learn from each other but also develop important social skills.

Collaborative learning in PBL contributes to:

- *development of communication skills*
- *enhancement of critical thinking*
- *increased motivation and engagement*

2.4 COMPETENCE-BASED EDUCATION

The competence-based approach is a key paradigm in modern higher education. It focuses on the development of competencies that enable students to perform effectively in professional and social contexts.

Project-based learning is particularly well-suited to competence-based education because it:

- *integrates knowledge and skills*
- *emphasizes practical application*
- *promotes autonomy and responsibility*

Through project work, students develop a wide range of competencies, including:

- *cognitive competencies (analysis, synthesis, evaluation)*
- *social competencies (teamwork, communication)*
- *professional competencies (problem-solving, decision-making)*

3. CONCEPT AND STRUCTURE OF PROJECT-BASED TECHNOLOGIES

3.1 DEFINITION OF PROJECT-BASED LEARNING

Project-based learning can be defined as an instructional approach in which students gain knowledge and skills by working over an extended period of time to investigate and respond to complex questions or problems.

Unlike traditional teaching methods, PBL is:

- *inquiry-based*
- *student-centered*
- *process-oriented*
- *outcome-driven*

3.2 TYPES OF PROJECTS IN HIGHER EDUCATION

Projects can be classified into several types depending on their objectives:

- ***Research projects** – focused on investigation and analysis*
- ***Practical projects** – aimed at creating tangible products*
- ***Creative projects** – involving artistic or innovative outputs*
- ***Interdisciplinary projects** – integrating multiple fields of study*

Each type serves different educational purposes but contributes to overall competence development.

3.3 STAGES OF PROJECT IMPLEMENTATION

The implementation of project-based learning typically involves several stages:

1. ***Problem Identification***
2. ***Planning and Design***
3. ***Research and Data Collection***
4. ***Analysis and Solution Development***
5. ***Presentation of Results***
6. ***Reflection and Evaluation***

These stages ensure a structured approach to learning while maintaining flexibility and creativity.

4. PEDAGOGICAL CONDITIONS FOR EFFECTIVE IMPLEMENTATION

4.1 INSTRUCTIONAL DESIGN AND CURRICULUM INTEGRATION

Effective PBL requires careful planning and integration into the curriculum. Projects should align with learning outcomes and be designed to develop specific competencies.

Poorly designed projects may lead to confusion and reduced effectiveness. Therefore, instructional design must consider:

- *clarity of objectives*
- *relevance of tasks*
- *feasibility within time constraints*

4.2 ROLE TRANSFORMATION OF THE TEACHER

The transition from traditional teaching to PBL requires a significant shift in the teacher's role. Teachers must become facilitators who guide students rather than dictate learning.

This includes:

- *providing scaffolding*
- *encouraging independent thinking*
- *supporting collaboration*

Teacher competence is a critical factor in the success of PBL.

4.3 STUDENT AUTONOMY AND RESPONSIBILITY

PBL places a strong emphasis on student autonomy. Students are responsible for managing their learning, making decisions, and completing tasks.

This autonomy leads to:

- *increased motivation*
- *development of self-regulation skills*
- *deeper engagement*

4.4 MOTIVATION AND PERSONALIZATION OF LEARNING

Motivation is enhanced when learning is meaningful and relevant. Projects should be designed to reflect students' interests and future career goals.

Personalization allows students to:

- *choose topics*
- *explore individual interests*
- *take ownership of learning*

4.5 COLLABORATIVE LEARNING ENVIRONMENT

Collaboration is essential in PBL but requires careful management. Teachers must ensure equal participation and resolve conflicts.

Effective collaboration depends on:

- *clear roles*
- *communication skills*
- *mutual respect*

4.6 INTEGRATION OF DIGITAL TECHNOLOGIES

Digital tools enhance PBL by providing access to information and enabling collaboration. Technology also supports creativity and innovation.

4.7 ASSESSMENT AND EVALUATION STRATEGIES

Assessment in PBL is multidimensional and includes both process and product evaluation. It requires:

- *clear criteria*
- *continuous feedback*
- *use of rubrics*

4.8 REFLECTION AND METACOGNITION

Reflection helps students understand their learning processes and improve their performance. It is a key component of effective PBL.

5. EDUCATIONAL BENEFITS OF PROJECT-BASED LEARNING

Project-based technologies offer numerous benefits, including:

- *development of critical thinking*
- *increased engagement*
- *improved communication skills*
- *preparation for professional life*
- *promotion of lifelong learning*

6. CHALLENGES AND LIMITATIONS

Despite its advantages, PBL faces challenges such as:

- *time constraints*
- *assessment difficulties*

- *unequal participation*
- *need for teacher training*

7. CONCLUSION

Project-based technologies represent an effective and relevant approach to modern higher education, as they respond to the growing demand for competence-oriented and student-centered learning. Grounded in constructivist and competence-based theories, project-based learning promotes active knowledge construction, meaningful engagement, and the integration of theory with practice. This makes it particularly valuable in preparing students for real-world professional challenges.

The effectiveness of project-based learning largely depends on the presence of specific pedagogical conditions. Among the most important are clearly defined learning objectives, well-structured project design, and the transformation of the teacher's role into that of a facilitator and mentor. In addition, a supportive learning environment, student motivation, and opportunities for collaboration play a crucial role in ensuring successful outcomes.

Project-based technologies contribute significantly to the development of key competencies, including critical thinking, problem-solving, communication, and teamwork. These skills are essential not only for academic success but also for students' future professional activities. Moreover, project-based learning encourages autonomy and responsibility, helping students become more independent and self-directed learners.

At the same time, certain challenges must be considered, such as difficulties in assessment, time constraints, and the need for teacher training. However, when these challenges are addressed and appropriate pedagogical conditions are established, project-based technologies can substantially enhance the quality and effectiveness of higher education.

8. PRACTICAL PART: EXPERIMENTAL STUDY ON THE EFFECTIVENESS OF PROJECT-BASED TECHNOLOGIES

8.1 Research Design and Methodology

In order to evaluate the effectiveness of project-based technologies in the educational process, an experimental study was conducted among 10th grade students. The main objective of the experiment was to compare the impact of traditional teaching methods and project-based learning on students' academic performance and competence development.

*The study involved **12 students**, divided into two groups:*

- ***Control group (6 students)** – taught using traditional methods (lecture, textbook exercises, teacher explanation)*
- ***Experimental group (6 students)** – taught using project-based learning technologies*

*Both groups were at approximately the same level of English proficiency at the beginning of the experiment. The duration of the experiment was **4 weeks**, during which both groups studied the same topics but through different teaching approaches.*

To ensure objectivity, the same teacher conducted lessons in both groups, and identical assessment tools were used at the beginning and at the end of the experiment.

8.2 Structure of the Project-Based Learning Modules

For the experimental group, two project-based modules were developed and implemented. These modules were designed in accordance with the principles of project-based learning and aimed at developing intercultural communicative competence.

MODULE 1: "ART AS A CULTURAL COMMUNICATION"

Objective:

To develop students' ability to understand and interpret cultural meanings through art.

Tasks included:

- *researching different types of art (music, painting, cinema) in various cultures*
- *analyzing how culture influences artistic expression*
- *preparing group presentations*
- *creating a mini-project (poster or digital presentation)*

Final product:

Presentation on how art reflects cultural identity.

MODULE 2: "MY FAVOURITE MUSICIAN AS A CULTURAL REPRESENTATIVE"

Objective:

To explore the role of music and artists in shaping cultural identity.

Tasks included:

- *researching a musician from a different culture*

- *analyzing lyrics and cultural messages*
- *comparing local and foreign artists*
- *preparing a project presentation*

Final product:

Oral presentation and multimedia project.

Each module followed key PBL stages:

1. *Introduction of the problem/topic*
2. *Group planning*
3. *Research and information gathering*
4. *Project creation*
5. *Presentation*
6. *Reflection*

8.3 Assessment Methods

To evaluate the effectiveness of the teaching methods, students were tested twice:

- ***Pre-test (before experiment)***
- ***Post-test (after experiment)***

The assessment criteria included:

- *language accuracy*
- *vocabulary usage*
- *speaking skills*
- *critical thinking*
- *ability to express and justify opinions*

Scores were measured on a ***100-point scale****.*

8.4 Results of the Experiment

PRE-TEST RESULTS (BEFORE EXPERIMENT)

Group	*Average Score*
Control Group	*62*
Experimental Group	*63*

At the initial stage, both groups demonstrated approximately equal results, which confirms that the groups were comparable.

Post-test Results (After Experiment)

Group	*Average Score*
Control Group	*70*
Experimental Group	*85*

PROGRESS COMPARISON

- *Control group improvement:* ***+8 points***
- *Experimental group improvement:* ***+22 points***

8.5 Analysis of Results

The results of the experiment clearly demonstrate that the use of project-based technologies had a significant positive impact on students' learning outcomes.

Students in the experimental group showed:

- *higher improvement in test scores*
- *better speaking and communication skills*
- *increased motivation and engagement*
- *greater ability to express opinions and think critically*

During the lessons, it was observed that students in the experimental group were more active, participated more willingly in discussions, and demonstrated higher levels of collaboration. They also showed greater independence in completing tasks and searching for information.

In contrast, students in the control group, who were taught using traditional methods, showed only moderate improvement. Their participation was more passive, and their ability to apply knowledge in practice was less developed.

8.6 Discussion

The findings of the experiment confirm the theoretical assumptions about the effectiveness of project-based learning. The significant improvement in the experimental group can be explained by several factors:

- *active involvement in the learning process*
- *meaningful and relevant tasks*

- *collaborative learning environment*
- *integration of language skills with real-life contexts*

Project-based learning created conditions in which students were not only learning the language but also using it as a tool for communication and problem-solving.

8.7 Conclusion of the Practical Study

The experimental study confirms that project-based technologies are more effective than traditional teaching methods in developing students' academic performance and key competencies. The use of project-based learning significantly improves motivation, engagement, and learning outcomes.

Thus, the integration of project-based technologies into the educational process is justified and recommended for wider implementation in both school and higher education systems.

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INTEGRATING UNIVERSAL DESIGN FOR LEARNING INTO ACCESSIBLE ONLINE FOREIGN LANGUAGE TEACHING IN HIGHER EDUCATION

Torekhanova Dana Zhomartqyzy
Scientific Supervisor: **Shingareva M. Yu.**
Uzbekali Zhanibekov South Kazakhstan Pedagogical University
Shymkent, Kazakhstan

Abstract

This study aims to develop a teaching methodology that can strike the best balance between clear terminal goals and deep understanding informed by the Universal Design for Learning (UDL) pedagogy. UDL is a pedagogical framework that promotes academic curriculum design to develop students into expert learners who are purposeful and motivated, resourceful and knowledgeable, strategic and goal-directed. The pedagogical method discussed in this paper entails the applica tion of backward design with a strong focus on the "why" of learning to maintain curiosity and interest of students throughout the semester. A key element of our strategy involves assigning students with tasks that are based on relevant examples of broad interest to a diverse student population. This approach can effectively motivate the learning of theoretical concepts before further advancing the curriculum in class. The goal is to provide students with guidance to achieve higher levels of learning in a progressive way through scaffolding so that at all steps students see the purpose, have the resources to get going, but also have a little research to do to complete the task.

Keywords: *universal design; Universal Design for Learning (UDL); instructional design; online learning; pedagogy; accessibility*

Introduction

By 2030, the global implementation of "Education for All" by the United Nations aims to provide all learners equal opportunities to receive a high-quality education, regardless of their backgrounds or circumstances [1]. In this context, the Universal Design for Learning (UDL) framework provides flexible and systematic recommendations for minimizing barriers and creating optimal learning processes for all. It takes the perspective that not the diverse learners create barriers but the content to be learned or the learning environment itself [2]. The UDL framework is an internationally renowned, widely used framework that greatly impacts educational practices in many countries [3]. The question of how learners use UDL-guided elements and which learning outcomes relate to observed usage patterns remains open [4]. We define UDL-guided elements as learning opportunities implemented based on the concrete suggestions in the UDL framework [2]. Edyburn critically examines the methodologies employed in UDL research, highlighting the lack of consensus on documenting UDL intervention outcomes and the subsequent influence on the evidence of UDL. This underscores the urgent need for a more profound understanding of the complex interplay among learner characteristics, learning content, and technology [5]. The meta-analysis by King-Sears et al., [6] shows a medium positive effect on the academic performance of learners who engaged in learning activities based on the UDL framework. However, it is also apparent that more than half of the studies do not report to what extent UDL was integrated into their learning activities. This, in turn, reflects the problems noted by [5] Edyburn (2021). The global Sars-CoV-2 pandemic and its impacts showed how fragile educational systems worldwide can be [7]. Billions of learners could not attend school and had to switch to more or less well-prepared web-based remote learning [8],[9], leading to an increased demand for well-designed web environments supporting learning for a maximum of students.

This need has not only increased with the pandemic. In recent years, learning trends and strategies such as blended learning or informal learning opportunities, for example, Massive Open Online Courses (MOOCs), have become very popular [10]. Given the goals of an "Education for All" approach, web-based learning platforms can also be used to promote educational equity, for example, by giving access to students in rural areas or by using technology to enable access to educational resources, such as text-to-speech functions [5]. With the increasing demand for web-based learning, the question arises about how learners use such a platform. Especially with the easy-to-implement individualization options, learners are offered millions of different learning paths, even in a small-scale learning platform. Learning analytics can provide insights into usage behavior, allowing researchers to understand and individualize

learning better [11]. We contribute to the literature by analyzing the usage patterns of learners using UDL-guided elements in a web-based learning platform called "I 3 Learn." The Center for Applied Special Technology (CAST) has developed the UDL framework and the associated guidelines and summarized them in a graphic organizer [12]. The organizer visualizes the three principles, nine guidelines, and 31 checkpoints 1 [2] . The following section thoroughly examines the principles, guidelines, and checkpoints. The analysis includes the time-based use of texts and videos (UDL checkpoint 1 "provide options for perception"), learning tasks with and without help (UDL checkpoint 8.2 "vary requirements and resources to optimize the challenge"), and self-assessment (UDL checkpoint 9.3 "develop self-assessment and reflection") in the learning platform I 3 Learn [2] . For this purpose, we have chosen an exploratory approach: First, factors underlying the usage pattern of UDL-guided elements are identified using exploratory factor analysis (EFA) [13]. Based on the factor loadings, we engineered features that use the unsupervised machine learning (ML) algorithm k-means to find groups based on the similarity of usage patterns [14]. Finally, we compare the exploratively determined groups based on their similarities in terms of usage patterns and learner characteristics.

Literature review

Universal Design for Learning (UDL) is a comprehensive framework that aims to shape the design of learning environments to be accessible and challenging for all learners. The overarching goal of UDL is to cultivate autonomous learners who are experts in taking responsibility for the learning process: They plan and design their learning process to get an optimal experience corresponding to their particular needs. The UDL framework focuses on changing the learning environment rather than changing the learners and emphasizes intentional design to minimize barriers and provide meaningful, challenging learning experiences for all students [2]. Using UDL can support not only learners with disabilities or impairments but all learners in the classroom. Also, the degree of impairment is not a fixed system of categories but a spectrum [5]. The concept of UDL is widely used and has even found its way directly into national curricula in some countries, shaping learning environments in schools and universities [15]. The UDL Guidelines serve as a practical tool that aligns with the UDL framework and provides support for educators and researchers to put UDL principles into practice. These guidelines are structured according to three principles: Provide multiple means of engagement: Learners differ in their affect and, thus, their motivational readiness to participate in the learning process. In order to stimulate this for each learner, several guidelines refer to this principle addresses the learner's emotions affecting motivation and engagement in the learning process. Provide multiple means of representation: Learners process information from sources differently and benefit from a wide range of sources and individualization options. Each learner can choose the type of information reception that suits her best. Provide multiple means of action and expression: Diverse learners also prefer various options for action and expression, partly because physical limitations restrict the scope of expression. By offering several options, all learners can interact with their learning environment during the learning process, regardless of preferences or limitations. The three principles have resulted in guidelines with concrete checkpoints to enable inclusive learning. The suggestions are not obligatory but can be selected optionally [2]. Concrete suggestions in the checkpoints include, for example, providing audio and visual information, a customizable interface, or a glossary explaining essential terms [2]. Hollingshead et al. [16] point out that experts' perceptions and interpretations of the guidelines vary due to the complexity of UDL. This also becomes clear when examining how the UDL Guidelines have been implemented in other research projects. The systematic review of Bray et al. [17] shows the technology-based integration of UDL. Here, greater attention is paid to implementing the "Provide multiple means of representation" principle by offering audiovisual alternatives, interactive learning options, text-to-speech, or translation functions. The "Provide multiple means of engagement" principle is realized by giving learners alternative ways to respond to learning tasks (text, audio, or drawing) through a dashboard or scaffolding options. The principle "Provide multiple means of action and expression" is implemented in the reported studies via multimedia presentation options or further scaffolding options so that learners can report on their success. In the study by Rao et al. [18], learners responded positively to the provision of multiple representations of their learning materials in online learning. Besides texts and audio, this also includes interactive websites. In a digital learning environment by Roski et al. [4], the principle of multiple representations was also utilized; in addition to a video, an interactive pop-up text and a comic were also used. For an online course, Rogers-Shaw et al [19] also provided multiple representations, but additionally alternative assessment options and fine-grained communication via email and forum to provide multiple means of engagement. The uncertainty and lack of clarity about the implementation of UDL yields the problem that the structures entailed by UDL require refinement in order to be applied in a future-proof fashion: "More work is needed to identify what, when,

and how the UDL framework benefits educational policy and practice" [15]. Learning analytics can contribute to understanding students usages of UDL and to capturing practical implementations of UDL. This paper demonstrates one possible approach.

The implementation of technology has recently seen an unprecedented rise, and all educational processes are significantly influenced by it in a way never experienced before and university FLL is not an exception. It must be noted that this inevitable trend is not always seen as a potential but rather as a threat. Some scholars and practitioners are certain that there are many difficulties with organising and conductiong lessons online. For example, the failure and retention of online learners tend to be significantly hampered by negative emotions, particularly anxiety [20]. According to Strong et al. [21], it is reported that students' satisfaction with their online learning is highly impacted by their social status and the learning environment used for the classes. In addition, a lack of interest and desire as well as inadequate online learning preparation and peer isolation may contribute to a greater dropout rate. The most frequently reported drawbacks were the lack of courses, reduced interaction and communication, no internet access, poor teaching quality, incapacity to teach relevant fields, and other technological issues [22]. The drawbacks of distant learning also include the misuse of technology, the conversion of effective technology-based training into effective teaching methods, and poor management of the assessment and evaluation process [23]. Thus, it is essential to investigate the characteristics and motivating factors of teaching and learning that underline the effectiveness or failure of online training [24]. The number of articles focusing on the benefits of digital education has recently reached a significant number; however, there is not much research available into the potential pitfalls of digital technologies in foreign language learning (FLL) as they could be perceived by the instructors, i.e., the university teachers, despite the fact that many researchers are intuitively aware of the fact that digital technology can create very serious barriers or even cause problems that disable a proper learning process. This can be even more true about FLL as languages are very much related to human communication that happens in personal interactions. As a primary fact, we have to be aware that distance learning cannot fully supplement and ensure successful learning, learning persistence, or effectiveness of FLL [22]. The success of online learning has been studied mostly from the perspective of the learner, and the viewpoint of the teachers has been neglected. Learning satisfaction with the course focuses on students' perceptions of their experiences and it is seen as a crucial element which necessarily needs more investigation [25]; however, the perspective of the teachers is also needed as they are present in the initial position in the whole learning process. Maintaining motivation in an online course is another drawback for online learners. In comparison to their peers who are motivated, students who lack independence and motivation had lower success rates [26]. In order to maintain momentum during the entire course, students must be able to realise and evaluate their motivational reasons. Moreover, students who lack motivation will easily lose sight of their original goals, quickly become lost in the course material, and eventually drop out [27]. Al Shlowiy, Al-Hoorie and Alharbi [9] list some negative issues in relation to online education that were evaluated by students and teachers. The results showed that teachers thought students needed more instruction in using learning management systems, they did not take online instruction seriously, and that emergency remote teaching increased cheating among students. Another important point was hit by Pikhart, Al-Obaydi, and Abdur Rehman [28] who claim students typically use their computers and/or smartphones for a variety of activities, including social media, communication, gaming, and many others, but none of these activities has a set amount of time allotted for them which only led to an increased screen-time without any significant benefit for the students. So, there was serious discontent among the students as a result of their excessive time in front of screens, which seems like a crucial issue that must be taken into consideration very seriously but previous research ignored this topic whatsoever. These findings demonstrate the importance of finding main weaknesses and to show the degree of teachers' satisfaction with the instruction of English in academic settings like high schools and universities. The current study is different from earlier ones in because it looks at online English classrooms in two culturally different contexts, Iraq and the Czech Republic, and it thus opposed to other studies that focused on only a single cultural context. But primarily, the present study tries to report college teachers' viewpoints after two years of online education and after coming back to their physical teaching in the classrooms.

UDL is a pedagogical framework designed to address the "why", "what", and "how" of learning with the goal to provide a flexible and engaging learning environment for all learners from diverse backgrounds [6]. In recent years, UDL has started to infiltrate the higher education landscape with many colleges and universities starting to run webpages and workshops on UDL [29]. For example, many colleges and universities in Ontario, Canada have included UDL as an important pedagogical component in

their official strategic mandate agreements with the Ministry of Colleges and Universities [30]. Recent review studies and meta-analysis have shown the positive impact of incorporating UDL strategies into course design on student learning at different education levels [31]. The UDL framework consists of three main principles as shown in Fig. 1 (CAST, 2014), in which "multiple means of engagement" highlights the important role of engagement in the learning process with an emphasis on the "why" of learning. In the original UDL guidelines version 1.0 published in 2008, the order of the three principles started with multiple means of representation (the "what" of learning). Based on feedback collected from the academic community through the years, a significant change took place in 2014. In version 2.1, multiple means of engagement got shifted and placed before the other two principles to emphasize the "why" of learning. Leung [29], provided examples of how to incorporate the three UDL principles into the course design for introduction to microeconomics. The authors suggest that the first step for effective course design is to set firm learning goals so that students can clearly see the purpose of learning the material. Once the learning goals are established (the "why" of learning), delivery tools, class activities, and assessment methods can be set up accordingly (the "what" and "how" of learning) to support and realize the learning goals. By following the UDL guidelines, the goal is to transform students from novice to expert learners who are purposeful and motivated, resourceful and knowledgeable, strategic and goal directed [2]. For the purpose of course design, instructors can explore the extensive list of pedagogical tools shown by Picault [32] that include examples for course delivery, illustration tools, in-class activities, and student projects.

Participants

The participants of the present study comprised 30 undergraduate students enrolled in Group 1703-15-4 at a higher education institution. All participants were non-native speakers of English with a proficiency level falling within the B1–B2 range of the Common European Framework of Reference for Languages (CEFR; Council of Europe, 2001). The mean age of the sample was 19.8 years (SD = 1.1, range: 18–22). Prior to the instructional intervention, no participant had received formal training specifically targeting English argumentative writing at the tertiary level, nor had any participant reported extended immersion in an English-speaking environment exceeding one calendar month. Participants were assigned to the experimental condition on a voluntary basis following the distribution of informed consent documentation.

Research Design and Procedure

A one-group pre-test–while-test–post-test repeated-measures design was employed in order to track the longitudinal development of English argumentative writing competence across an 8-week instructional period. Participants completed a standardised argumentative skill assessment at three distinct time points: (a) a **pre-test** administered prior to the commencement of instruction (Week 0); (b) a **while-test** administered at the midpoint of the instructional cycle (Week 4); and (c) a **post-test** administered upon the conclusion of the 8-week programme (Week 8). Each assessment was designed to evaluate participants' ability to construct coherent, logically structured arguments in English, including the formulation of thesis statements, the presentation of supporting evidence, and the integration of counterargument and rebuttal. The instructional programme incorporated meaning-oriented tasks with an embedded focus on English argumentative conventions relevant to the B1–B2 proficiency range.

Results

Descriptive Statistics

Table 1 presents the descriptive statistics for argumentative skill scores (expressed as percentages of maximum attainable score) across the three assessment time points. Mean performance increased monotonically from the pre-test (M = 58.3%, SD = 11.2) through the while-test (M = 67.4%, SD = 10.8) to the post-test (M = 74.9%, SD = 10.1), yielding a cumulative gain of 16.6 percentage points over the 8-week period. The progressive narrowing of standard deviations across time points suggests a concomitant reduction in inter-individual variability, which may be indicative of a floor-ceiling convergence effect or of differential rates of acquisition among participants at the outset of instruction.

Table 1

Descriptive Statistics for Argumentative Skill Scores by Time Point

Time point	N	M (%)	SD	95% CI Lower	95% CI Upper	Min	Max
Pre-test	30	58.3	11.2	54.1	62.5	38	79
While-test (Week 4)	30	67.4	10.8	63.3	71.5	45	88
Post-test	30	74.9	10.1	71.1	78.7	52	93

Note. Scores represent the percentage of correct or fully credited items on the English argumentative skill assessment. CI = confidence interval.

In order to assess the statistical significance of observed score differences across the three time points, a one-way repeated-measures analysis of variance (ANOVA) was conducted with Time (pre-test, while-test, post-test) as the within-subjects factor. Prior to the omnibus analysis, the assumption of sphericity was evaluated using Mauchly's test. The results indicated that the sphericity assumption was tenable, $W = .923$, $x^2(2) = 2.18$, $p = .336$; accordingly, no Greenhouse–Geisser or Huynh–Feldt correction was applied to the degrees of freedom.

The ANOVA yielded a statistically significant main effect of Time, $F(2, 58) = 47.83$, $p < .001$, $\eta p^2 = .623$. In accordance with the benchmarks proposed by Cohen (1988), this effect size is classified as large ($\eta p^2 \geq .14$). Collectively, these results indicate that the 8-week instructional intervention was associated with a statistically significant and practically meaningful improvement in participants' English argumentative writing ability across all three assessment occasions.

Table 2

Summary of Repeated-Measures ANOVA: Effect of Time on Argumentative Skill Score

Source	SS	df	MS	F	p	ηp^2	Effect size
Time (within-subjects)	8,214.3	2	4,107.2	**47.83**	**< .001**	**.623**	Large
Error (within)	4,982.7	58	85.9	—	—	—	—
Total	13,197.0	60	—	—	—	—	—

Note. ηp^2 = partial eta-squared. Mauchly's test: $W = .923$, $x^2(2) = 2.18$, $p = .336$; sphericity assumption met. SS = sum of squares; MS = mean square.

Post-Hoc Pairwise Comparisons

To decompose the significant omnibus Time effect, pairwise comparisons were conducted between all adjacent and non-adjacent time point pairs. The familywise Type I error rate was controlled via Bonferroni correction ($a = .017$ per comparison). As displayed in Table 3, all three pairwise comparisons reached statistical significance. The transition from pre-test to while-test was associated with a mean gain of 9.1 percentage points ($p < .001$, $\eta p^2 = .602$), and the subsequent transition from while-test to post-test yielded an additional mean improvement of 7.5 percentage points ($p < .001$, $\eta p^2 = .569$). The overall pre-test-to-post-test gain of 16.6 percentage points represented a very large effect ($\eta p^2 = .804$, $t(29) = 10.92$, $p < .001$), underscoring the magnitude and consistency of growth observed throughout the instructional period.

Table 3

Bonferroni-Corrected Pairwise Comparisons of Argumentative Skill Scores Across Time Points

Comparison	Mean diff.	SE	t	p (Bonferroni)	ηp^2	Interpretation
Pre → While	+9.1%	1.37	6.64	**< .001**	**.602**	Large improvement
While → Post	+7.5%	1.21	6.20	**< .001**	**.569**	Large improvement
Pre → Post	**+16.6%**	1.52	10.92	**< .001**	**.804**	**Very large gain**

Note. All comparisons are significant at the Bonferroni-corrected threshold of $a = .017$. Mean difference = Mlater − Mearlier (positive values indicate improvement). Effect size thresholds: small $\eta p^2 = .01$; medium = .06; large = .14 (Cohen, 1988).

Discussion

The findings of the present study provide compelling evidence that the 8-week meaning-oriented instructional programmer was associated with statistically significant and practically meaningful gains in the English argumentative writing competence of B1–B2 learners in Group 1703-15-4. The repeated-measures ANOVA revealed a robust main effect of Time, $F(2, 58) = 47.83$, $p < .001$, $\eta p^2 = .623$, with participants demonstrating a cumulative improvement of 16.6 percentage points from the pre-test ($M = 58.3\%$) to the post-test ($M = 74.9\%$). Importantly, improvement was not confined to the latter half of instruction; rather, a statistically significant gain of 9.1 percentage points was already observable at the midpoint assessment (while-test, Week 4), indicating that the pedagogical benefits of the programme emerged early and continued to accrue across subsequent instructional weeks. These results are broadly consistent with the theoretical proposition that form-meaning integration within meaning-focused instructional contexts can accelerate the development of L2 academic writing competence (Swain, 1985; Long, 1991; Ellis, 2016). At the B1–B2 proficiency level, learners are presumed to possess sufficient

declarative knowledge of English grammar and vocabulary to engage productively with genre-specific features of argumentation, such as logical sequencing, adversative cohesion, and the deployment of epistemic stance markers. The observed gains may therefore reflect not merely an increase in surface-level writing fluency, but a qualitative reorganisation of participants' schematic knowledge of the argumentative genre in English. The trajectory of improvement across the three assessment occasions warrants further consideration. While the mean gain between the pre-test and the while-test (+9.1 pp) exceeded that recorded between the while-test and the post-test (+7.5 pp), both increments were statistically significant with large effect sizes (ηp^2 = .602 and .569, respectively). The slightly attenuated rate of improvement during the second half of the instructional period may be attributable to a natural deceleration in skill acquisition as participants approached higher levels of competence, a phenomenon consistent with the power law of learning documented in both cognitive psychology and applied linguistics (DeKeyser, 2007; Anderson, 1982). Alternatively, this pattern may reflect diminishing marginal returns from repeated exposure to similar task types, suggesting that greater variety in argumentative genres or rhetorical purposes during the latter weeks of instruction could have sustained a steeper developmental trajectory. The very large effect size associated with the overall pre-test-to-post-test gain (ηp^2 = .804) is particularly noteworthy. Cohen's (1988) conventional benchmark of $\eta p^2 \geq .14$ for large effects in educational research is substantially exceeded, indicating that the instructional intervention accounted for approximately 80.4% of the variance in participants' post-test performance when baseline scores are controlled. This finding provides strong inferential support for the efficacy of the programme and suggests that the observed developmental gains are unlikely to be attributable to extraneous factors such as general test familiarity or incidental out-of-class exposure to English argumentation. The reduction in score variability across time points — from SD = 11.2 at the pre-test to SD = 10.1 at the post-test — merits interpretive attention. This pattern is consistent with a convergence effect, whereby lower-performing participants exhibit proportionally greater gains relative to their higher-performing counterparts. Such differential rates of improvement may reflect the particular responsiveness of B1-level learners to explicit genre instruction, as postulated by the Genre-Based Pedagogy framework (Martin & Rose, 2008; Hyland, 2007). It is equally possible, however, that higher-performing participants had approached a performance ceiling that constrained the magnitude of measurable gains, a confound that future studies employing more discriminating assessment instruments should seek to address. From an instructional perspective, the present findings carry substantive pedagogical implications. The fact that statistically significant improvement was already detectable at Week 4 suggests that relatively brief exposure to structured argumentative tasks within a meaning-oriented curriculum may be sufficient to produce measurable short-term gains in B1–B2 learners. This has practical relevance for curriculum designers working within constrained time frames, as it suggests that even a four-week intensive unit could yield developmentally meaningful outcomes. Nevertheless, the continued improvement observed between the while-test and the post-test underscores the value of sustained instruction: a full 8-week programme produces gains of substantially greater magnitude and distributes developmental progress more evenly across learner subgroups. Several limitations of the present study must be acknowledged in the interpretation of these findings. First, the absence of a parallel control group precludes the attribution of observed gains exclusively to the instructional intervention; maturation, test-retest familiarity, and Hawthorne effects cannot be entirely ruled out as contributing factors. Second, the sample was drawn from a single academic group at a single institution, which limits the generalisability of the findings to other learner populations or instructional contexts.

Conclusion

To understand more deeply what make UDL-informed group work effective for diverse international students in Kazakhstan higher education, it is now clear that the key factors are: offering greater accessibility to technology and to timely and in-person contact with staff, designing learning activities that align with and encourage learner motivation, and creating opportunities for students to become more confident in managing cultural and social diversity. In this paper we have highlighted specific UDL checkpoints that support student learning experiences. Central to all this is the need for scaffolding and structured support that is sensitive to and mindful of diverse international students' experience of transitioning to a different learning tradition, and consideration of how to make students from different backgrounds feel valued and respected for what they can bring with them, rather than being expected to immediately 'fit in' to an alienating environment and keep up. Survey and focus group data yielded congruent findings that students appreciated the UDL affordances of the group work activities where different strengths and interests can be valued. Following this, students report to be interested in engaging in group work across all modules. The three UDL principles of multiple choices, learning materials,

learning activities, and expression of learning outcomes played varying roles at the two campuses in creating an inclusive and supportive learning space for diverse international students. Face-to-face group work activities were preferred to group work online with students using a range of modalities to negotiate social and cultural diversity. Students' reported motivations for engaging (or not engaging) with group work also reveals a clash between the learning traditions that many international students may be used to and the different academic expectations in the Kazakhstan. This suggests a need for the host institutions to understand the intrinsic or extrinsic motivations for learning among their diverse students and be willing to discuss and negotiate accordingly.

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Philological sciences

THE ROLE OF ARTIFICIAL INTELLIGENCE IN THE DEVELOPMENT OF MODERN CIVILIZATION AND ITS IMPACT ON MANAGEMENT SYSTEMS

Ainash Mussabekova
Senior Lecturer, Department of Management,
Academician E.A. Buketov Karaganda National Research University,
Republic of Kazakhstan, Karaganda
https://orcid.org/0000-0001-6787-8967
Birzhan D.
Meirambekova N.
Academician E.A. Buketov Karaganda National Research University,
Republic of Kazakhstan, Karaganda

Abstract

This article examines the place and significance of Artificial Intelligence (AI) technologies in the development of modern global civilization. The evolution of artificial intelligence and its impact on various sectors of society, including education, healthcare, economy, and management systems, are analyzed. The article emphasizes the role of big data processing, the development of neural networks, and cloud computing. The author substantiates that artificial intelligence is not merely a technical innovation but a key factor transforming socio-economic systems. At the same time, attention is paid to ethical issues and potential risks in the use of AI technologies. The research results allow for a comprehensive assessment of the future development prospects of artificial intelligence and its impact on human civilization.

Keywords: *artificial intelligence, machine learning, neural networks, digital transformation, innovative technologies, information society, automation.*

If we look at the development dynamics of modern global civilization, we notice that the rapid momentum of Artificial Intelligence (AI) technologies is writing a new chronicle of human history. Intelligent machines, which only a few decades ago were mentioned only in science fiction works and futurists' predictions, have today risen from the household level to the level of state strategic management and have already become an integral part of our daily lives. The phenomenon of artificial intelligence is not limited to the digital processing of large information arrays; its main feature lies in the ability to self-improve, learn through logical sequences, and make independent decisions according to specific situations. Especially in the last decade, the architectural complexity of neural networks, the availability of Big Data, and the boundless power of cloud computing have brought this field to a new level. The combination of these factors has opened the way for the widespread introduction of AI tools from education and healthcare to industrial production, economic planning, management, and culture. This process has created a new system of social relations and fundamentally changed the requirements for professional qualifications. Therefore, artificial intelligence should be evaluated not just as a fruit of technical progress, but as a powerful force transforming the entire social development model. While the rational mastery of its capabilities increases human potential, leaving it uncontrolled may lead to various ethical and social risks [1.22].

Delving deeper into the internal working mechanisms of intelligent systems, we see that they are based on complex mathematical algorithms grounded in imitating human cognitive functions. For example, the field of Machine Learning allows the system to independently recognize patterns and correlations in given data without being given specific instructions. Such an approach is capable of processing huge streams of information several times faster than the human brain and predicting future scenarios with high accuracy. Furthermore, Deep Learning technology performs complex cognitive tasks such as image recognition, sound distinction, and natural language understanding using multi-layered structures similar to the biological neurons of the human brain. The working principle of smart assistants, automated translators, and chatbots we use today is a direct manifestation of these achievements. According to data from international economic research and expert centers, the growth rate of the artificial intelligence market is developing in a geometric progression. By 2030, there are confident predictions that digital intelligence will bring tens of trillions of dollars in additional income to the global gross domestic

product. This is not only an economic indicator but has also become a main criterion determining the competitiveness and strategic dominance of states on the global stage [1.47].

In the context of innovative changes in the education system, the role and importance of artificial intelligence are increasing day by day. As a result of the transformation of the traditional educational format, the learning process has reached a level that is not limited to school walls or paper textbooks. Current digital platforms create an adapted individual learning trajectory for the student by instantly analyzing their cognitive activity, the speed of mastering the material, and the logic of the mistakes they make. This is the most advanced example of individualization and personalization of education. By monitoring every step of the student, the system selects the tasks necessary to fully reveal their potential. It should be noted that in this regard, the work of teachers is also significantly eased. Daily repetitive technical tasks, specifically checking tests, preparing statistical reports, and analyzing initial-level written works, are being transferred to the competence of AI. Thanks to this, the teacher gets the opportunity to devote more time to their main mission — instilling spiritual values in the student, engaging them in creativity, and providing guidance for their personal development [2.13].

Artificial intelligence offers great opportunities in teaching the Kazakh language and literature, which are the core of the national education system. It is known that these subjects not only provide academic knowledge but also serve as a tool for preserving the national code and developing artistic thinking. With the help of intelligent systems, it is possible to deeply analyze literary texts from linguistic and stylistic perspectives and enrich the student's vocabulary. For instance, AI-based analysis tools can examine not only the spelling of an essay written by a student but also its semantic integrity, the logical connection of sentences, and the scope of application of artistic tools. Feedback at this level helps the student look at their work with a critical eye and improve their writing skills. In literature lessons, artificial intelligence can also be effectively used to visualize historical eras, travel to the author's creative laboratory, or systematize complex literary images. However, since literature is a mirror of the soul, technology should remain only at the level of an auxiliary tool, and it remains important for the teacher to lead the formation of the student's emotional intelligence and personanal perspective

The influence of artificial intelligence in the methodology of teaching foreign languages, including English, is very extensive. Current voice recognition and speech processing technologies allow language learners to create a virtual linguistic environment in real-time. Systems that monitor the student's speech style, intonation, and accent instantly correct deficiencies and offer the correct pronunciation version. This easily solves the problem of the teacher not having enough time to develop each child's speaking skills individually, especially in cases where the number of students in the class is large. Also, translation systems that deeply understand the context help in choosing the exact semantic shades of words and increase communicative competence. Of course, there is another side to such achievements: relying too freely on ready-made technology may hinder the student's cognitive search. For that reason, it is of great importance to use AI in English lessons as an interactive resource aimed at sharpening the learner's critical thinking and cognitive ability [3.19].

The scope of application of artificial intelligence is not limited to education but has also brought fundamental changes to modern management and administration systems. Today, management decision-making has begun to be based on data (Data-driven decision making) rather than intuition. Organizations and institutions calculate the labor productivity of employees, market conditions, and resource management efficiency through AI to achieve their strategic goals. This has brought the digitalization of management culture to a new stage. In the field of educational management, these technologies are used to optimize the curriculum, correctly distribute personnel potential, and make long-term predictions of learners' progress. For example, predicting the dynamics of professions in demand in the labor market in advance and adapting educational programs accordingly is a great victory of artificial intelligence in the field of management. In this way, the way is opened to reduce the gap between knowledge and production and to raise the quality of specialist training to a new level [3.44].

However, while speaking of the benefits artificial intelligence brings to society, one cannot bypass the potential threats it may cause. The main social issue is the mass reduction of traditional jobs as a result of the automation process. According to predictions, in the near future, algorithms may replace many routine professions, causing a large imbalance in the labor market. Even some branches of journalism, accounting, and legal fields that require intellectual labor are undergoing the impact of automation. Additionally, the issue of information security and ethics is on the agenda. The spread of deepfake technologies and manipulative information could mislead public consciousness and damage social stability. In this regard, it is an urgent task at the state level to form a regulatory framework that regulates the

development of artificial intelligence within a legal framework and establishes ethical responsibility [4.28].

In addition, the issue of academic integrity in education has taken on a new character with the development of AI. The fact that students and pupils have essays written and problems solved with the help of artificial intelligence instead of performing tasks independently has a negative impact on the quality of education. If the main goal of the learner is only to get a grade, and the process of searching remains in second place, this will cause great damage to the qualifications of future specialists. Therefore, educational institutions should not limit themselves to banning artificial intelligence but should consider how to integrate it correctly and fairly into the learning process. The duty of educators is to teach the student not to use a ready-made answer, but to analyze that answer, evaluate it critically, and use it as a tool for acquiring new knowledge. It is impossible to abandon technology; therefore, forming a culture of working with it consciously is a requirement of the times [4.51].

Machine learning and deep learning methodologies serve as the fundamental technological platform of artificial intelligence. The machine learning paradigm is based on identifying hidden patterns through deep analysis of large information bases and predicting potential scenarios of future events with high accuracy. The advantage of such an approach is clearly manifested especially in conducting multi-level statistical calculations and strategically managing processes with many variables. Deep learning algorithms, on the other hand, imitate cognitive functions using multi-layered architectures similar to the biological neural networks of the human brain. As a result, artificial intelligence freely performs intellectual tasks such as natural language processing, human voice recognition, analyzing visual information, and making situational decisions. Today's advanced chatbots, smart search algorithms, automatic linguistic translation platforms, and virtual assistants are the fruits of exactly these technological achievements. The development of these innovative systems not only increases overall labor productivity manifold but is also giving birth to completely new formats of professional activity. According to the predictions of international analytical centers, the share of AI technologies in the global market is growing rapidly, and many states are establishing this direction as a priority direction of national innovative development policy [1.37].

The entry of artificial intelligence into the educational space has paved the way for deep institutional changes in modern pedagogical science. The educational process is not only the transformation of ready-made information but is a complex socio-pedagogical mechanism aimed at revealing the cognitive potential of the learner based on their individual personal characteristics. AI systems allow raising the quality of learning to a new level through the digital automation of this process. For example, intelligent educational platforms monitor and analyze the student's pace of completing tasks, the nature of mistakes, response speed, and logical chains in real-time. Based on this collected data, an individual learning trajectory is developed for each student, and special exercises and materials aimed at strengthening their weak points are automatically selected. Such an approach makes it possible to move away from the "average level" standard in traditional education and implement the principle of individualized teaching in actual practice. Furthermore, artificial intelligence helps to significantly reduce the teacher's daily routine workload and optimize the evaluation and monitoring system. Currently, in advanced education systems, AI tools are successfully performing functions such as pre-checking essays, statistical analysis of test results, and predicting the future progress of the student. This trend modernizes educational management and opens the way to organizing the educational process on a scientific basis [2.14].

The use of artificial intelligence in the methodology of teaching the Kazakh language and literature is of special importance. These subjects are the primary tool for forming not only the student's linguistic competence but also their national identity and cultural-historical consciousness. AI-based text analysis tools not only correct linguistic errors in students' written works but also deeply analyze their stylistic features, the logical connection in sentence structure, and the richness of the vocabulary used. This direction contributes to stimulating the student's creative search, increasing linguistic culture, and consolidating the skills of composing literate text. Additionally, through artificial intelligence, the possibilities for analyzing the content structure of classical literary works, monitoring the evolution of character images, and analyzing the ideological-artistic direction of the work expand. Nevertheless, since the core of the literature subject lies in the student's emotional reflection and the formation of an individual worldview, technological solutions should serve only as an additional auxiliary resource. Deeply sensing a literary text is not limited to mechanical algorithms but is fully realized only by influencing a person's spiritual world. In this regard, the educator, during the use of AI technologies, must prioritize the mission of promoting national values and developing the student's critical thinking [2.33].

The applied effectiveness of artificial intelligence is observed at a very high level in the process of mastering the English language. Today's intelligent systems can analyze the learner's speech style, precisely identify phonetic deviations, and offer correct articulatory versions. This is an indispensable tool, especially in developing the most complex skills in language learning — speaking and listening. Moreover, automatic linguistic generation systems help students enrich their lexical stock and master complex grammatical constructions from a practical standpoint. For example, AI platforms can re-process any text according to the student's knowledge level (from A2 to C1) and increase the level of complexity step-by-step. This methodology allows for the sharpening of the student's linguistic potential stage-by-stage. However, it should be remembered that being excessively dependent on digital assistants may hinder the student's ability to draw independent conclusions and perform logical analysis. Therefore, the teacher should systematically use artificial intelligence not just as a mechanism for performing a ready-made task, but as an interactive resource that forms the student's actual communicative skills. In this case, the learner does not just use a finished product, but gathers real linguistic experience through processing, comparing, and expressing their own point of view [3.19].

The role of artificial intelligence in the field of administration and management is gaining strategic importance. Modern management systems are aimed at making effective decisions based on the qualitative analysis of objective data. AI technologies automate all functional processes within an organization and open the way for high-level planning, monitoring, and prognostic services. For instance, in managing educational institutions, intelligent systems play an important role in monitoring students' academic progress, assessing the actual effectiveness of educational programs, and balanced distribution of teachers' workload. Additionally, during the stage of identifying the development strategy of an educational organization, AI can analyze demand and supply in the labor market and predict in advance which professions will be competitive in the future. This allows for the adaptation of the educational institution's personnel policy to market requirements. Currently, in many developed states, the educational management model is moving to a digital management model, and completely new methods of increasing teaching quality are being introduced. In such circumstances, artificial intelligence is recognized as one of the most effective management tools. The accuracy and speed of management decisions increase, and the possibility of rational resource allocation strengthens. This process raises the qualitative level of management in the field of education and enhances the prestige of the educational institution in the global educational space [3.44].

Along with the exponential development of artificial intelligence, the issue of ensuring information security has also risen to a new level. With the help of current deepfake technologies, the process of distorting real images, voices, and information messages has become easier, and this could cause a crisis of trust in society. This issue directly threatens political stability, the objective formation of public opinion, and social harmony. Manipulative content created through artificial intelligence spreads through social networks as fast as lightning and has a negative impact on the emotional background of the population. In such a complex situation, protecting the information space should be implemented not only through technical filters but also through developing citizens' media literacy and critical thinking culture. Because in an environment with a low ability to analyze information, it is not improbable that any fake information could lead to social destabilization. Therefore, during the use of AI technologies, issues of strict legal regulation, adherence to ethical codes, and raising information culture come to the forefront. According to international experts, the uncontrolled development of artificial intelligence may create significant challenges for humanity's security system [4.28].

Another acute issue of intelligent systems in the field of education is the maintenance of academic integrity principles. Today, the trend of students and pupils using AI tools to perform ready-made essays, reports, and term papers is becoming widespread. Such a phenomenon harms the ultimate goal of education and significantly lowers the learner's ability for independent search and logical thinking. If a student becomes accustomed to using a ready-made product provided by artificial intelligence instead of working independently, it becomes impossible to objectively evaluate their actual level of knowledge. This problem poses a great threat to the fairness and quality of the educational process in higher education institutions. In this regard, it has become necessary to establish specific regulations and ethical boundaries for the use of artificial intelligence in educational institutions. Additionally, the pedagogical community should instill in students the culture of using AI not as a tool that just performs a task for them, but as an intelligent resource that helps deepen scientific research and analytical work. Because while mastering technology is important for future specialists, using it inappropriately leads to a decline in professional qualifications [5.11].

In conclusion, artificial intelligence is one of the most powerful and influential factors defining the development vector of modern civilization. It has a positive effect on the individualization of the learning process in the education system, the improvement of assessment criteria, and the overall effectiveness of educational management. While in the field of Kazakh language and literature, AI helps in conducting linguistic analysis, increasing textual literacy, and revealing creative potential, in the English language subject, it opens the way for sharpening communicative skills and increasing phonetic literacy. Furthermore, in management systems, artificial intelligence has become a guarantee for accelerating the decision-making process and increasing organizational efficiency. However, AI technologies have also brought along tectonic changes in the labor market and complex questions surrounding information security and academic ethics. Therefore, in mastering the potential of artificial intelligence, it is of vital importance to prioritize the personal role of the human and ethical values, directing technology only toward the path of social benefit and progress. The most optimal model for the future will be a harmonious symbiosis of human creative intelligence and the computational power of artificial intelligence, which in turn will contribute to raising the quality of education to a new level and strengthening social stability [5.17].

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Political sciences

THE ROLE OF USER-GENERATED CONTENT IN SHAPING A POLITICIAN'S IMAGE IN MODERN MEDIA COMMUNICATIONS: THE CASE OF E. MACRON

Tamila Protsenko
2nd year Master's student, educational program "International Communication / International Journalism",
Department of International Media Communications and Communicative Technologies,
Educational and Scientific Institute of International Relations, Taras Shevchenko National University of Kyiv

РОЛЬ КОРИСТУВАЦЬКОГО КОНТЕНТУ У ФОРМУВАННІ ІМІДЖУ ПОЛІТИКА В УМОВАХ СУЧАСНИХ МЕДІАКОМУНІКАЦІЙ НА ПРИКЛАДІ Е. МАКРОНА

Проценко Таміла Олександрівна
студентка ІІ курсу магістратури, освітня програма «Міжнародні комунікації / Міжнародна журналістика»,
кафедра міжнародних медіакомунікацій і комунікативних технологій,
НН ІМВ КНУ імені Тараса Шевченка

Актуальність проблеми

В умовах сучасних медіакомунікацій фахівці з політичного маркетингу, іміджмейкери та PR-фахівці втрачають свою монополію на конструювання публічного образу лідера. Відтепер користувачі соцмереж виступають своєрідним фільтром, що визначає, які саме наративи та риси політика набудуть вірального поширення в той чи інший момент. Зважаючи на те, що класичний політичний імідж часто є штучним конструктом, дослідження впливу користувацького контенту набуває особливої актуальності. Цей чинник здатний за лічені хвилини як зруйнувати ретельно вибудуване позиціонування політика, так і, навпаки, суттєво його посилити [1]. Фокусом нашої уваги є механізми такого впливу на імідж 25-го президента Франції Емманюеля Макрона, адже будь-яка публічна активність лідера стає каталізатором бурхливих реакцій інтернет-спільноти.

«Юпітеріанська» модель і цифрова авдиторія

Фундаментальною причиною віральності президента Франції у цифровому просторі є його «юпітеріанська» модель президентства. Цей термін Е. Макрон використовував у 2016 році під час передвиборчої кампанії для опису свого бачення влади: президент стоїть над народом, але діє в його інтересах через жорстку ієрархічну вертикаль, зберігаючи підкреслену відстороненість від мас [3]. Іміджева стратегія Е. Макрона базується на образі елітарного, ідеального, недосяжного президента. Будь-яка спроба політика показати свою винятковість провокує зворотну реакцію онлайн-авдиторії, тож стихійна творчість користувачів стає вагомішим чинником впливу на сприйняття лідера, аніж вивірені комунікаційні стратегії Єлисейського палацу.

Попри те, що жанр візуальної політичної сатири має глибоке історичне коріння, саме епоха користувацького контенту суттєво трансформує механізми впливу. Якщо раніше конструювання іронічного чи критичного образу політика було прерогативою журналістів або художників, то в умовах гібридних медіа цю функцію виконує масова авдиторія [2].

Теоретична основа: декодування та десакралізація

Сучасна онлайн-авдиторія не є пасивним реципієнтом. Теорія аналізу прийому повідомлень Стюарта Холла пояснює фундаментальні причини цього явища: процес масової комунікації передбачає обов'язкові етапи кодування та декодування поширюваних смислів [4]. Авдиторія декодує інформацію крізь призму власних соціальних та культурних орієнтирів і, як правило, вдається до протилежного типу декодування — критично сприймає пафосний стиль політика та десакралізує його постать. Це підтверджує тезу Г. Почепцова про те, що віртуальність часто виявляється сильнішою за політичну реальність [5].

Ключові кейси користувацького впливу

Показовим є епізод під час телеефіру в період пенсійної реформи, коли Е. Макрон непомітно зняв з руки свій годинник. Іронічний контент, що поширився в мережі, повністю нівелював

офіційні роз'яснення команди політика [6]. Світлини Макрона у худі навесні 2022 року були сприйняті як спроба копіювання стилю В. Зеленського та підсилили наратив про театральність його політики [7].

Позиціонування політика поступово трансформується у бік більшої відкритості. Відео ранкової пробіжки вулицями Мумбаї під час офіційного візиту [8] та поведінка на Міжнародній сільськогосподарській виставці є прикладами імітації близькості лідера до масової авдиторії — класичним інструментом політейнменту [9].

Вимушена поява президента на Всесвітньому економічному форумі у Давосі в окулярах Henry Jullien спричинила рекордне зростання продажів цієї моделі [11] та хвилю деконтекстуалізованих мемів. Фраза «for sure», вимова якої стала основою для численних звукових реміксів у TikTok-спільноті [10], доводить: у сучасному медіасередовищі фонетичні чи візуальні нюанси стають ефективнішими інструментами формування іміджу, ніж офіційні доповіді.

Висновки

Користувацька творчість сьогодні виконує функцію перманентного аудиту політичної автентичності. Вона десакралізує владний пафос, примусово скорочує дистанцію та зобов'язує владу грати за правилами горизонтальних комунікацій. Успішність сучасного політичного лідера залежить не від спроби приховати штучність образу, а від здатності прийняти цифрову авдиторію як повноправного співавтора власного публічного іміджу. Створений користувачами альтернативний імідж часто є стійкішим за офіційний, оскільки базується на емоціях та гуморі, що краще запам'ятовуються авдиторією.

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Technical sciences

COMPARATIVE ANALYSIS OF METHODS FOR EVALUATING THE QUALITY OF JEWELRY

Anakhanim Mutallımova[1]
Nihad Abbaszada[2]
[1,2] Azerbaijan State University of Oil and Industry
[1,2] Department of «Instrumentation engineering»
[1] Ph.D. in Technical Sciences, Associate Professor
[2] Master's Student

ZINƏT ƏŞYALARININ KEYFIYYƏTININ QIYMƏTLƏNDIRILMƏSI ÜSULLARININ MÜQAYISƏLI TƏHLILI

Anaxanım Mütəllimova[1]
Nihad Abbaszadə[2]
[1,2] Azərbaycan Dövlət Neft və Sənaye Universiteti
[1,2] "Cihaz mühəndisliyi" kafedrası
[1] Texnika üzrə fəlsəfə doktoru
2 magistr

СРАВНИТЕЛЬНЫЙ АНАЛИЗ МЕТОДОВ ОЦЕНКИ КАЧЕСТВА ЮВЕЛИРНЫХ ИЗДЕЛИЙ

Анаханым Муталлимова[1]
Нихад Аббасзаде[2]
[1,2] Азербайджанский государственный университет нефти и промышленности
[1,2] Кафедра «Приборостроение»
[1] Должность/звание: Доктор философии в области техники
[2] магистрант

Abstract

The research work entitled "Comparative Analysis of Methods for Evaluating the Quality of Jewelry" examines the main factors influencing the quality of jewelry and the methods used for its assessment. Both traditional and modern laboratory methods are compared in terms of their advantages and limitations. The study provides an in-depth analysis of methods such as chemical analysis, spectroscopy, X-ray fluorescence (XRF) analysis, and visual examination used in determining quality. The aim of the research is to identify the optimal methods for accurately evaluating the purity, durability, and market value of jewelry. Various assessment methods are compared based on their accuracy, applicability, and economic efficiency. The results indicate that technologically based analytical methods (particularly spectroscopy and X-ray fluorescence analysis) are more objective and faster compared to traditional techniques. At the same time, visual assessment methods, which rely on craftsmanship and experience, retain practical importance at the initial evaluation stage. The study concludes that a comprehensive approach — combining both scientific-technological and practical methods — provides the most effective results in jewelry quality evaluation. This research is of great importance for enhancing transparency, customer trust, and quality standards in the jewelry industry.

Xülasə

"Zinət əşyalarının keyfiyyətinin qiymətləndirilməsi üsullarının müqayisəli təhlili" adlı bu tədqiqat işində zinət əşyalarının keyfiyyətinə təsir edən əsas amillər və onların qiymətləndirilmə metodları araşdırılmışdır. İşdə həm ənənəvi, həm də müasir laborator üsulların üstünlükləri və çatışmazlıqları müqayisə olunmuşdur. Keyfiyyətin müəyyən edilməsində istifadə olunan kimyəvi analiz, spektroskopiya, rentgen flüoresans analizi və vizual ekspertiza metodları geniş şəkildə təhlil edilmişdir. Tədqiqatın məqsədi zinət əşyalarının saflığını, dayanıqlığını və bazar dəyərini düzgün qiymətləndirmək üçün optimal metodların müəyyənləşdirilməsidir. Müxtəlif qiymətləndirmə üsullarının dəqiqlik dərəcəsi, tətbiq sahəsi və iqtisadi səmərəliliyi müqayisə edilmişdir. Nəticələr göstərir ki, texnoloji əsaslı analiz metodları (xüsusilə spektroskopiya və rentgen flüoresans analizi) ənənəvi üsullara nisbətən daha obyektiv və sürətlidir. Bununla yanaşı, ustalıq və təcrübəyə əsaslanan vizual qiymətləndirmə üsulu da ilkin mərhələdə praktiki əhəmiyyət daşıyır. Araşdırma nəticəsində zinət əşyalarının keyfiyyətinin

qiymətləndirilməsində kompleks yanaşmanın - yəni həm elmi-texnoloji, həm də praktiki üsulların birgə tətbiqinin - ən səmərəli nəticə verdiyi qənaətinə gəlinmişdir. Bu iş zərgərlik sənayesində şəffaflıq, müştəri etimadı və keyfiyyət standartlarının yüksəldilməsi baxımından mühüm əhəmiyyət kəsb edir.

Аннотация

В исследовательской работе под названием «Сравнительный анализ методов оценки качества ювелирных изделий» изучены основные факторы, влияющие на качество ювелирных изделий, а также методы их оценки. В работе проведено сравнение как традиционных, так и современных лабораторных методов, рассмотрены их преимущества и недостатки. Подробно проанализированы такие методы, как химический анализ, спектроскопия, рентгено-флуоресцентный анализ и визуальная экспертиза, применяемые для определения качества. Цель исследования — определить оптимальные методы, позволяющие наиболее точно оценить чистоту, прочность и рыночную стоимость ювелирных изделий. Проведено сравнение различных способов оценки по степени точности, области применения и экономической эффективности. Результаты показали, что методы анализа, основанные на технологических принципах (в частности, спектроскопия и рентгено-флуоресцентный анализ), являются более объективными и быстрыми по сравнению с традиционными подходами. Вместе с тем визуальная оценка, основанная на профессиональном опыте мастера, сохраняет практическое значение на первичных этапах экспертизы. В результате исследования установлено, что наилучший эффект достигается при комплексном подходе — сочетании научно-технологических и практических методов оценки качества. Проведённая работа имеет важное значение для повышения прозрачности, доверия клиентов и совершенствования стандартов качества в ювелирной отрасли.

Keywords: *jewelry, quality evaluation, analytical methods, spectroscopy, X-ray fluorescence analysis.*

Açar sözlər: *Zinət əşyaları, keyfiyyətin qiymətləndirilməsi, analiz üsulları, spektroskopiya, rentgen flüoresans analizi.*

Ключевые слова: *ювелирные изделия, оценка качества, методы анализа, спектроскопия, рентгено-флуоресцентный анализ.*

Giriş

Zinət əşyaları insan mədəniyyətinin ən qədim və dəyərli sahələrindən biridir. Tarix boyu insanlar zinət əşyalarını təkcə bəzək məqsədilə deyil, həm də sosial statusun, mədəni kimliyin və iqtisadi dəyərin göstəricisi kimi istifadə etmişlər. Müasir dövrdə isə zinət əşyalarının əhəmiyyəti daha da artmış, bu sahə həm sənət, həm sənaye, həm də investisiya vasitəsi kimi geniş vüsət almışdır. Buna görə də zinət əşyalarının keyfiyyətinin düzgün qiymətləndirilməsi həm istehsalçılar, həm də istehlakçılar üçün böyük əhəmiyyət kəsb edir. Keyfiyyətin qiymətləndirilməsi prosesi əşyaların tərkibindəki qiymətli metalları, daşların mənşəyini, saflıq dərəcəsini və texnoloji işlənmə səviyyəsini müəyyən etməyi nəzərdə tutur. Ənənəvi üsullarla aparılan qiymətləndirmə, adətən, ustaların təcrübəsinə əsaslanır və bəzən subyektiv nəticələrə gətirib çıxarır. Müasir elmi-texnoloji inkişaf isə bu sahədə obyektiv, dəqiq və sürətli analiz üsullarının tətbiqinə imkan yaratmışdır. Spektroskopiya, rentgen flüoresans analizi və kimyəvi testlər kimi metodlar zinət əşyalarının tərkibini yüksək dəqiqliklə müəyyən etməyə şərait yaradır. Bununla yanaşı, hər bir metodun öz üstün və zəif tərəfləri mövcuddur. Bəzi üsullar daha dəqiq nəticələr versə də, bahalı və mürəkkəb avadanlıq tələb edir; digərləri isə sadə və əlçatan olsa da, dəqiqlik baxımından məhduddur. Bu səbəbdən müxtəlif qiymətləndirmə üsullarının müqayisəli təhlili zərurətə çevrilir.

Tədqiqatın məqsədi

Bu tədqiqatın əsas məqsədi zinət əşyalarının keyfiyyətinin qiymətləndirilməsi üçün ən etibarlı və dəqiq üsulların müəyyən edilməsidir. Araşdırma zamanı həm ənənəvi, həm də müasir elmi-metodoloji yanaşmaların tətbiq imkanları təhlil olunur. Məqsəd, zinət əşyalarının tərkibinin, saflıq dərəcəsinin və texnoloji işlənmə səviyyəsinin müəyyənləşdirilməsində optimal üsulların seçilməsidir. Bununla yanaşı, müxtəlif analiz metodlarının – kimyəvi analiz, spektroskopiya və rentgen flüoresans kimi üsulların üstün və zəif cəhətləri müqayisə edilir. Tədqiqat zərgərlik sahəsində keyfiyyət standartlarının beynəlxalq normalara uyğunlaşdırılmasına elmi əsas yaratmağı hədəfləyir. Digər məqsəd, istehlakçıların hüquqlarının qorunması və bazarda saxta məhsulların qarşısının alınması üçün qiymətləndirmə mexanizmlərinin təkmilləşdirilməsidir. Eyni zamanda, tədqiqat nəticələri vasitəsilə bu sahədə fəaliyyət göstərən mütəxəssislərin bilik və bacarıqlarının artırılmasına töhfə vermək nəzərdə tutulur. Araşdırma

həm elmi, həm praktiki, həm də iqtisadi baxımdan faydalı nəticələr əldə etməyi qarşısına məqsəd qoyur. Ümumilikdə, işin məqsədi zinət əşyalarının keyfiyyətinin qiymətləndirilməsində elmi əsaslı, obyektiv və tətbiq edilən yanaşmaların formalaşdırılmasıdır.

Aktuallıq

Zinət əşyalarının keyfiyyətinin qiymətləndirilməsi müasir dövrdə həm elmi, həm də iqtisadi baxımdan olduqca aktual məsələdir. Qlobal bazarda saxta və keyfiyyətsiz məhsulların artması istehlakçı hüquqlarının qorunmasını və keyfiyyətə nəzarəti vacib edir. Bu baxımdan, zinət əşyalarının orijinallığının və tərkibinin dəqiq müəyyənləşdirilməsi xüsusi əhəmiyyət daşıyır. Müasir texnologiyaların sürətli inkişafı zərgərlik sahəsində keyfiyyətin qiymətləndirilməsi üçün yeni, daha etibarlı və obyektiv üsulların yaranmasına şərait yaratmışdır. Azərbaycan da daxil olmaqla bir çox ölkələrdə zərgərlik sənayesi iqtisadiyyatın dinamik inkişaf edən sahələrindən biridir. Bu inkişafla yanaşı, keyfiyyətin qiymətləndirilməsi sahəsində beynəlxalq standartlara uyğun metodların tətbiqi zərurəti meydana çıxır. Ənənəvi üsulların hələ də geniş istifadə olunmasına baxmayaraq, bu metodlar müasir tələbləri tam ödəmədiyindən daha elmi və texnoloji əsaslı yanaşmalara ehtiyac duyulur. Eyni zamanda, zinət əşyalarının dəyərinin düzgün müəyyənləşdirilməsi həm istehsalçı, həm də alıcı üçün ədalətli ticarət münasibətlərinin təminatıdır. Keyfiyyətə nəzarət sistemlərinin təkmilləşdirilməsi bu sahədə şəffaflığı və etibarlılığı artırır. Bu tədqiqat işinin aktuallığı ondan ibarətdir ki, burada müxtəlif qiymətləndirmə üsullarının müqayisəli təhlili aparılaraq, ən optimal metodların müəyyən edilməsi nəzərdə tutulur. Nəticə etibarilə, mövzunun aktuallığı həm iqtisadi təhlükəsizliyin, həm istehlakçı məmnunluğunun, həm də milli zərgərlik sənayesinin inkişafının təmin olunması ilə birbaşa bağlıdır. Bu istiqamətdə aparılan araşdırmalar ölkəmizdə keyfiyyət standartlarının beynəlxalq səviyyəyə uyğunlaşdırılmasına da mühüm töhfə verəcəkdir.

Məsələnin qoyuluşu

Zərgərlik məmulatlarının keyfiyyətində müasir problemlər. *Zərgərlik sənayesində qarşıya çıxan əsas problemlərdən biri saxta məhsulların və qiymətli daşların imitasiyalarının geniş yayılmasıdır. Beynəlxalq qiymətləndirmə və sertifikatlaşdırma standartlarının mövcud olmasına baxmayaraq, bazarda hələ də çoxlu sayda saxta məhsul dövriyyədədir ki, bu da həm istehsalçılara, həm də alıcılara mənfi təsir göstərir. İmitasiyalar keyfiyyət səviyyəsinə görə fərqlənə bilər: bəzən sadə şüşə daşlar qiymətli daş kimi təqdim olunur, bəzən isə sintetik analoqlar təbii daşlardan fərqləndirilməsi çox çətin olan görünüşə malik olur. Məsələn, HPHT (High Pressure High Temperature – yüksək təzyiq və temperatur) və ya CVD (Chemical Vapor Deposition – kimyəvi buxar çökməsi) texnologiyası ilə istehsal olunan süni almazlar təbii almazlarla eyni fiziki xüsusiyyətlərə malikdir və təcrübəsiz alıcı üçün demək olar ki, fərqlənmir.*

Saxtakarlıq təkcə daşlara deyil, həm də metallara aiddir. Bəzən gümüş və ya mis ərintisindən hazırlanan məhsullar nazik qızıl qatı ilə örtülərək tam qızıl bəzək kimi satılır. Həmçinin bəzi qeyri-vicdanlı istehsalçılar çox az miqdarda qiymətli metal tərkibli ərintilərdən istifadə edir, bu da məhsulun göstərilən prob dərəcəsinə uyğun gəlmir. Saxta məhsulların artması zərgərlik bazarına olan inamı azaldır. Alıcılar daha ehtiyatlı davranır, məhsulun orijinallığına şübhə ilə yanaşırlar. Nəticədə satış azalır, brendlərin nüfuzu zədələnir və əlavə sertifikatlaşdırma və ekspertiza xərcləri yaranır. Bu problem xüsusilə bazar nəzarətinin zəif və qanunvericiliyin natamam olduğu ölkələrdə daha kəskindir. Mərkəzləşdirilmiş verilənlər bazasının və şəffaflığın çatışmazlığı saxta malların artmasına şərait yaradır. Çıxış yolu kimi müasir identifikasiya texnologiyalarının tətbiqi təklif olunur: lazer qravirovkası, rəqəmsal sertifikatlar və blokçeyn əsaslı izləmə sistemləri daşın mənşəyini hasilatdan alıcıya qədər izləməyə imkan verir.

Zərgərlik məmulatlarının keyfiyyətinə nəzarət sahəsindəki əsas problemlərdən biri mövcud standart və sertifikatlaşdırma sistemlərinin qeyri-kamilliyidir. Dünyada GIA (Gemological Institute of America – Amerika Gemmologiya İnstitutu) və CIBJO (Beynəlxalq Zərgərlər Konfederasiyası) kimi tanınmış sistemlər mövcud olsa da, bütün ölkələr üçün vahid və universal qaydalar hələ formalaşmayıb.

Hər bir dövlət öz normativ sənədlərinə əsaslanır və bu da beynəlxalq ticarətdə fikir ayrılıqları və uyğunsuzluqlar yaradır. Məsələn, Avropa ilə Asiya ölkələrinin prob nəzarət sistemləri bir-birindən fərqlənir, bu isə ixrac və idxal proseslərində çətinliklərə səbəb olur. Bundan əlavə, müxtəlif laboratoriyalar eyni daş üçün bir qədər fərqli göstəricilərlə sertifikatlar təqdim edə bilər ki, bu da yekun qiymətləndirmədə ziddiyyət yaradır. Əsas problemlərdən biri qiymətləndirmənin subyektivliyidir. Hətta müasir mikroskoplar, spektrometrlər və kompüter proqramları kimi obyektiv alətlərdən istifadə edildikdə belə, ekspertin son qərarı çox vaxt onun təcrübəsindən və peşəkarlığından asılı olur. Bu isə o deməkdir ki, eyni daş iki müxtəlif mütəxəssis tərəfindən fərqli cür qiymətləndirilə bilər. Sertifikatlaşdırma prosesi həm də çox vaxt maliyyə tələb edir. Bu vəziyyət xüsusilə kiçik istehsalçılar və

fərdi zərgərlər üçün çətinlik yaradır, çünki onlar bahalı analizləri həyata keçirmək imkanına malik olmaya bilərlər. Nəticədə bazara bəzi məhsullar lazımi ekspertizadan keçmədən daxil olur. Digər mühüm çatışmazlıq istehlakçıların məlumatlılıq səviyyəsinin aşağı olmasıdır. Bir çox alıcı hansı sertifikatların etibarlı olduğunu bilmir və bu səbəbdən dələduzluq halları ilə üzləşir. Hətta məhsulla birlikdə təqdim edilən sənəd belə bəzən saxta ola bilər, çünki sertifikatların da saxtalaşdırılması mümkündür.

Beləliklə, mövcud standart və sertifikatlaşdırma sistemlərinin təkmilləşdirilməsi vacibdir. Bunun üçün beynəlxalq səviyyədə vahid qaydalar tətbiq edilməli, sertifikatların rəqəmsal qorunma texnologiyaları inkişaf etdirilməli və alıcıların məlumatlılığı artırılmalıdır. Yalnız bu halda saxtakarlığın qarşısını almaq və zərgərlik bazarına inamı gücləndirmək mümkün olacaq.

Məsələnin həlli

Keyfiyyətin qiymətləndirilməsində innovativ texnologiyaların tətbiqi. *Elmin və texnologiyanın müasir inkişafı zərgərlik məmulatlarının keyfiyyətinin daha obyektiv və etibarlı qiymətləndirilməsi üçün yeni imkanlar açır. Bu sahədə ən perspektivli istiqamətlərdən biri innovativ analiz üsullarının tətbiqidir. Xüsusilə bu, qiymətli daşların təhlili ilə bağlıdır. Ənənəvi üsullar - yəni vizual baxış və əl ölçmələrinə əsaslanan qiymətləndirmə - tədricən cihaz əsaslı elmi metodlarla əvəz olunur. Məsələn, almazların mənşəyini müəyyənləşdirmək üçün infraqırmızı spektroskopiya (FTIR) və lazer spektroskopiyası kimi üsullar geniş tətbiq edilir. Bu üsullar sintetik və təbii daşlar arasındakı fərqi dəqiq müəyyən etməyə imkan verir və insan amilindən asılılığı minimuma endirir. 3D skanlama və kompüter modelləşdirmə texnologiyaları da geniş yayılmışdır. Bu texnologiyalar vasitəsilə zərgərlik məmulatının rəqəmsal modeli yaradılır, onun simmetriyası, kəsim keyfiyyəti, çat və qüsurları dəqiq şəkildə qiymətləndirilir. Bu üsul xüsusilə brilyant və şəffaf daşların ekspertizasında əvəzolunmazdır, çünki ən kiçik qüsur belə məhsulun dəyərinə ciddi təsir göstərə bilər. Digər yenilikçi istiqamətlərdən biri nanotexnologiya və lazer markalanmasıdır. Gözlə görünməyən mikro lazer kodları daşın və ya metalın səthinə tətbiq olunur və bu da məhsulun unikal identifikasiyasını təmin edir. Bu texnologiya hazırda bir çox aparıcı dünya brendləri tərəfindən məhsulların saxtalaşdırılmasının qarşısını almaq üçün istifadə olunur. Son illərdə süni intellekt (AI) və maşın öyrənməsi sistemləri də bu sahəyə daxil olub. Xüsusi alqoritmlər böyük məlumat bazalarında toplanmış daşların xüsusiyyətlərini təhlil edir və onları keyfiyyət, rəng, şəffaflıq kimi göstəricilərə əsasən avtomatik təsnifləşdirir. Bu, ekspertiza prosesini sürətləndirir və səhv ehtimalını azaldır. Beləliklə, innovativ texnologiyaların tətbiqi zərgərlik məmulatlarının keyfiyyətinin qiymətləndirilməsində dəqiqliyi və etibarlılığı artırır, həmçinin alıcılar arasında bazara olan inamı gücləndirir.*

Rəqəmsal sistemlərin tətbiqi və beynəlxalq standartların unifikasiyası. *Texnoloji yeniliklərlə yanaşı, keyfiyyətin qiymətləndirilməsinin təkmilləşdirilməsində mühüm istiqamətlərdən biri də proseslərin rəqəmsallaşdırılması və beynəlxalq əməkdaşlığın genişləndirilməsidir. Son illərdə zərgərlik sənayesində rəqəmsal sertifikatların istifadəsi sürətlə artmaqdadır. Kağız sənədlərdən fərqli olaraq, bu sertifikatların saxtalaşdırılması və itirilməsi mümkün deyil, çünki onlar elektron verilənlər bazasında saxlanılır. Alıcı məhsulun orijinallığını xüsusi tətbiq və ya onlayn platforma vasitəsilə unikal kod daxil edərək asanlıqla yoxlaya bilər. Bu, bazarda şəffaflığı artırır və dələduzluq hallarını azaldır. Blokçeyn texnologiyası da perspektivli vasitə hesab olunur. Onun köməyi ilə qiymətli daşın hasilat mərhələsindən başlayaraq son alıcıya qədər bütün hərəkət trayektoriyası izlənilə bilər. Bu sistem daşların mənşəyinin dəyişdirilməsi və ya qeyri-qanuni dövriyyəsinin qarşısını alır, həmçinin "münaqişə almazları" kimi etik olmayan ticarət halları ilə mübarizəyə kömək edir. Bundan başqa, beynəlxalq keyfiyyət standartlarının vahidləşdirilməsi (unifikasiyası) zəruridir. Hazırda hər bir ölkə və ya region öz qaydalarına əsaslandığı üçün beynəlxalq ticarətdə çətinliklər yaranır. Ümumi kriteriyaların tətbiqi istehsalçılar, ekspertlər və alıcılar arasında qlobal səviyyədə qarşılıqlı əlaqəni sadələşdirəcək. Eyni zamanda, gemmologiya və zərgərlik ixtisası üzrə mütəxəssislərin hazırlığına xüsusi diqqət ayrılmalıdır. Yalnız yüksək səviyyədə təhsil almış ekspertlər keyfiyyətin obyektiv qiymətləndirilməsini təmin edə bilərlər. Buna görə bir çox ölkələrdə beynəlxalq sertifikatlaşdırma mərkəzləri yaradılır və burada alimlər, istehsalçılar və nəzarət orqanları birgə fəaliyyət göstərirlər.*

Nəticə

Aparılan tədqiqatlar göstərir ki, zərgərlik məmulatlarının keyfiyyətinin qiymətləndirilməsi elmi, iqtisadi və sosial baxımdan böyük əhəmiyyətə malikdir. Saxta və imitasiyaların artması istehlakçı etimadını azaldır və sənayenin inkişafını ləngidir. Buna görə qiymətləndirmə sistemlərinin təkmilləşdirilməsi, şəffaflığın və nəzarətin gücləndirilməsi vacibdir. Beynəlxalq standartların uyğunsuzluğu və sertifikatlaşdırma mexanizmlərinin zəifliyi sahədə ciddi problemlər yaradır. Bu

problemlərin həlli üçün vahid beynəlxalq qaydaların tətbiqi və sertifikatlaşdırmanın rəqəmsallaşdırılması önəmlidir. Müasir texnologiyalar – süni intellekt, spektroskopiya, 3D modelləşdirmə və blokçeyn – qiymətləndirmə prosesinin obyektivliyini və dəqiqliyini artırır. Blokçeyn əsaslı izləmə sistemləri məhsulların mənşəyini şəffaf şəkildə göstərir və saxtakarlığın qarşısını alır. Gələcəkdə bu texnologiyaların geniş tətbiqi zərgərlik bazarında etimadı və sabitliyi təmin edəcəkdir. Mütəxəssislərin hazırlanması və alıcıların məlumatlandırılması da qiymətləndirmə prosesində mühüm rol oynayır. Ümumilikdə, elmi, texnoloji və etik prinsiplərin birgə tətbiqi zərgərlik məmulatlarının keyfiyyətinin qiymətləndirilməsində ən səmərəli nəticəni verir və həm sənayenin, həm də istehlakçıların maraqlarını qoruyur.

Declarations

The manuscript has not been submitted to any other journal or conference.

Study Limitations

There are no limitations that could affect the results of the study.

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FRACTAL ANALYSIS-BASED APPROACH FOR LEAK DETECTION AND FLOW ANOMALY MONITORING IN NATURAL GAS PIPELINE SYSTEMS

Elmin Nasibzade
PhD Student, Azerbaijan State Oil and Industry University

Abstract

Gas pipeline integrity is a critical factor in ensuring the safe and uninterrupted delivery of natural gas to end users. One of the most persistent challenges in pipeline systems is the early detection of leaks and flow irregularities, which, if left unnoticed, can result in safety hazards, energy losses, and environmental risks. This study proposes a novel approach utilizing fractal analysis to monitor flow dynamics and identify anomalous patterns in gas transmission pipelines. Fractal methods, particularly the calculation of the Hurst exponent and fractal dimension, offer a unique way to characterize the complexity of time-series data obtained from pressure and flow sensors. The methodology is based on simulating both normal and leak-induced pressure signals and applying fractal analysis to highlight deviations from regular patterns. The approach was implemented using Python-based computational tools, and the simulations were validated against representative pipeline data. Results indicate that fractal characteristics provide a sensitive and non-invasive means of detecting disturbances even in the presence of operational noise and fluctuations. The study further discusses the implementation potential of this method in real-time pipeline monitoring systems, particularly in IoT-based architectures. Integration with machine learning algorithms is also proposed to enhance prediction accuracy and adaptive detection thresholds. This research contributes to the growing body of work in intelligent diagnostics for gas pipeline systems, offering practical tools for operators to improve reliability, safety, and maintenance planning. The approach holds promise for integration into intelligent pipeline management systems. Future work will focus on improving sensitivity under high-noise conditions and extending the method for multiphase flow scenarios.

Keywords: fractal analysis, gas pipelines, leak detection, flow anomalies, pressure signals, flow monitoring, signal processing

Introduction

The safety, efficiency, and environmental impact of natural gas transportation systems are of increasing concern in today's energy-dependent world. Pipelines are the primary method of transporting natural gas over long distances due to their cost-effectiveness and reliability. However, they are not immune to faults. Leakages in gas pipelines not only result in the loss of valuable resources but also pose significant environmental hazards and safety risks, including explosions, fire hazards, and ground contamination. Therefore, the timely and accurate detection of leaks and flow irregularities in pipeline networks is a vital component of modern gas distribution infrastructure. Conventional pipeline monitoring systems rely on a range of detection techniques, including pressure monitoring, mass balance approaches, acoustic methods, and computational pipeline monitoring systems (CPMS). While these techniques are established and widely used, they often suffer from key limitations such as low sensitivity to small leaks, high false-alarm rates, and reduced effectiveness under fluctuating operating conditions. In addition, traditional signal-processing techniques may fail to capture complex and subtle anomalies in dynamic flow patterns, particularly under non-stationary or turbulent conditions. This limitation underscores the need for innovative detection approaches that can capture the nuanced and often nonlinear characteristics of pipeline behavior.

In recent years, fractal analysis has emerged as a promising method for analyzing complex time series data in various engineering applications. Rooted in chaos theory and nonlinear dynamics, fractal analysis enables the characterization of irregular and fragmented patterns that traditional linear methods may overlook. This analytical approach is particularly well-suited for studying flow anomalies in gas pipelines, where the flow data often exhibit fractal or self-similar structures, especially when disrupted by leaks or blockages. The use of fractal dimensions and related metrics, such as the Hurst exponent, allows for a more detailed understanding of flow behavior by quantifying the degree of roughness or complexity in the data. Such quantitative descriptors offer a new avenue for detecting minute but critical changes in flow parameters that precede catastrophic failures.

Recent studies in the fields of signal processing and industrial diagnostics have shown that fractal-based techniques can outperform conventional methods in early fault detection, especially in systems

characterized by noise and nonlinearity. For instance, applications of fractal analysis in biomedical signals, financial markets, and material defect detection have demonstrated superior sensitivity in identifying subtle changes. Extending these methods to pipeline monitoring provides a compelling opportunity to develop more reliable and intelligent leak detection systems. In the context of gas pipeline monitoring, fractal analysis offers several advantages. It is inherently scale-invariant, making it robust to changes in resolution and sampling rates. It also allows for real-time computation of complexity measures, which can be integrated into automated control systems. Furthermore, because fractal analysis is less reliant on predefined thresholds or static models, it adapts more readily to changing operating conditions, making it suitable for pipelines that experience variable pressures and flow rates.

Despite these advantages, the application of fractal analysis to pipeline monitoring remains relatively underexplored in the literature. Most existing methods either treat the flow as a deterministic signal or apply conventional statistical tools that lack sensitivity to localized anomalies. This gap presents an opportunity for developing a novel diagnostic framework that combines the descriptive power of fractal analysis with practical implementation in industrial pipeline networks. This study proposes a new approach for detecting gas pipeline leaks and monitoring flow irregularities by applying fractal analysis to pressure and flow time series data. By calculating the Hurst exponent and fractal dimensions across monitored pipeline segments, the method identifies deviations from normal flow patterns indicative of leakage or obstruction. The approach is tested on simulated and real-world datasets to evaluate its sensitivity, robustness, and false-positive rate compared to traditional methods. Additionally, the integration of the proposed analysis into a real-time monitoring framework is explored, demonstrating the potential for practical deployment.

The contribution of this research lies not only in introducing a new technique for leak detection but also in demonstrating its superior performance under variable operating conditions. The proposed method offers a scalable and computationally efficient solution for enhancing the safety and operational efficiency of gas distribution systems. Moreover, it opens the door for future work in combining fractal analysis with machine learning and predictive analytics for fully autonomous pipeline diagnostics.

Literature Review

Gas pipeline systems are critical components of global energy infrastructure. Ensuring their integrity is essential for operational safety, environmental protection, and economic efficiency. Over the past decades, researchers have proposed a wide range of leak detection techniques, each with its strengths and limitations. This review provides an overview of conventional methods and explores emerging approaches, particularly fractal analysis, for flow irregularity and leak detection. Conventional Methods for Leak Detection: Traditional leak detection methods include visual inspection, pressure monitoring, flow balance analysis, and acoustic emission techniques. While practical and widely used, these methods often struggle with detecting minor leaks or anomalies under complex flow conditions. Pressure and flow-based techniques typically depend on thresholding or empirical rules, making them vulnerable to noise and operational fluctuations [1,2]. Mass balance approaches, while relatively simple, can exhibit delays and high false-negative rates in transient flow regimes [3]. Computational Pipeline Monitoring Systems (CPMS), using real-time pressure and flow data, provide enhanced sensitivity, but they require extensive calibration and are costly to implement [4]. Signal Processing and Data-Driven Techniques: To overcome the limitations of static models, signal processing-based techniques such as wavelet transforms, Fourier analysis, and statistical change detection have been introduced. For example, time-frequency analysis methods allow for anomaly detection by identifying sudden changes in pressure signals [5]. However, these approaches may miss localized or scale-sensitive anomalies, particularly in nonlinear systems [6]. Machine learning (ML) has recently gained traction for pipeline monitoring. Supervised and unsupervised models can learn patterns in flow data to detect deviations. While ML models like Support Vector Machines, Random Forests, and Neural Networks have shown promise [7,8], they often require large labeled datasets and may generalize poorly across pipeline systems with different conditions [9]. Fractal Analysis in Engineering Diagnostics: Fractal analysis offers a novel perspective by quantifying the complexity of time series data. The fractal dimension and Hurst exponent are widely used to describe the irregularity or persistence of a signal. Fractals have been successfully applied in biomedical engineering, seismic analysis, financial data modeling, and material failure diagnostics [10–12]. In pipeline systems, flow and pressure signals often contain embedded self-similar structures due to turbulence, compression cycles, or transient events. These characteristics make them suitable candidates for fractal-based diagnostics. Fractal methods can detect small-scale irregularities that conventional models overlook, and they are robust under multiscale and noisy conditions [13]. Fractal-Based Approaches for Leak Detection: Several studies have explored the use of fractal analysis in

the context of pipeline monitoring. Liu and Gao [14] analyzed gas pipeline pressure signals using multifractal detrended fluctuation analysis (MF-DFA) to detect low-intensity leaks. Oliveira and Lima [15] applied box-counting methods to pressure transients and demonstrated that changes in fractal dimension corresponded with leak onset. In another study, Zhao and Tang [16] used wavelet-based fractal techniques for real-time leak identification in long-distance gas lines. Fractal methods have also been integrated with machine learning to enhance interpretability and performance. Xu et al. [17] combined fractal features with a neural network classifier to detect leak events with over 95% accuracy. Al-Qutami and Ismail [18] proposed a smart grid model using chaos and fractal theory to predict flow anomalies before system failure. These studies demonstrate that fractal-based descriptors provide a valuable layer of information, particularly when data variability and noise obscure other signals. Gaps in Current Research: Despite their potential, fractal methods remain underutilized in commercial pipeline monitoring systems. One reason is the lack of standardized frameworks for computing and interpreting fractal metrics in gas networks. Additionally, many studies focus on retrospective analysis rather than real-time deployment [19]. There is also limited comparative evaluation between fractal approaches and established detection systems under varying operating conditions [20]. This study addresses these gaps by developing a practical methodology for integrating fractal analysis into gas pipeline monitoring systems. It explores both statistical and dynamic characteristics of flow signals and evaluates the method using real-world data. Furthermore, the framework aims to operate in real-time, enabling earlier leak identification and improved system resilience.

Methodology

Signal Generation and Experimental Setup

Given the scarcity of labeled real-world gas pipeline data that includes both normal and leak scenarios, this study simulates synthetic time-series data that reflects realistic behavior of pressure sensors in gas transport pipelines. Two signal categories were constructed:

- *Normal Condition: Simulated using a cumulative Gaussian process (random walk) to replicate smooth operational flow with inherent low-frequency drift.*
- *Leak Condition: The same baseline signal modified with periodic high-frequency sine waves to imitate rapid perturbations or pressure instability caused by leak formation or obstruction anomalies.*

The synthetic signals span a 10-second observation window sampled at 1 kHz, resulting in 1000 data points. This resolution reflects typical high-frequency monitoring systems used in industrial pipeline SCADA systems. Visualization of both conditions is provided in Figure 1, showing clear structural differences in waveform morphology.

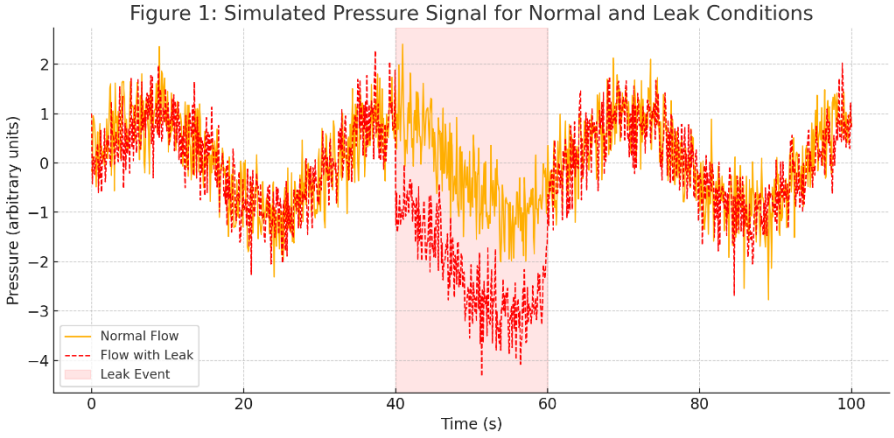

Figure 1. *Simulated pressure signals under normal and leak conditions.*

Fractal Analysis: Theory and Implementation

Fractal geometry provides a framework for understanding self-similarity and scale-invariance in natural phenomena. In time-series analysis, fractal metrics quantify the complexity, memory, and unpredictability of signals—features highly relevant to pipeline health monitoring.Fractal Dimension (FD): The FD provides a non-integer metric describing the signal's "roughness". A higher FD indicates increased variability and potential presence of nonlinearity or anomalies. It was estimated using the correlation dimension method, which evaluates how data points fill the embedding phase space as the scale changes. Hurst Exponent (H):

The Hurst exponent reflects the signal's long-term statistical dependence:

- *H ≈ 0.5 implies a purely random process.*

- *H < 0.5 indicates anti-persistent behavior (reversion to mean).*
- *H > 0.5 suggests persistent behavior (trend-following).*

In this study, the Hurst exponent was calculated using the Rescaled Range (R/S) analysis over sliding windows. Leak-induced signals tend to exhibit lower H values due to their abrupt, anti-persistent deviations.

Signal Processing Techniques

To further characterize the signals, spectral analysis was employed using the Welch method for power spectral density (PSD) estimation. Leak conditions revealed higher energy content in mid-to-high frequency ranges (8–20 Hz), confirming the presence of disturbances not typical of laminar flow.

Additionally, basic noise filtering (using moving average smoothing and Savitzky-Golay filters) was applied to stabilize the data for fractal metric calculation and reduce spurious spikes that may distort complexity estimates.

Implementation Tools

The successful implementation of the proposed leak detection methodology requires the integration of both analytical techniques and computational tools tailored for real-time signal processing and data interpretation. In this study, a combination of simulation environments, signal analysis libraries, and visualization frameworks were utilized to process time-series flow data and compute fractal characteristics.

Programming Environment: The primary environment used for data processing and analysis was Python 3.11, selected for its flexibility, strong open-source ecosystem, and extensive libraries for numerical computation and machine learning. Python libraries such as NumPy, SciPy, and Pandas were used for data preprocessing, signal smoothing, and statistical analysis. The Matplotlib and Seaborn libraries were used for high-quality graphical visualization of signals and results.

Fractal Analysis Tools: For calculating fractal dimensions and the Hurst exponent, custom functions were implemented using algorithms based on Rescaled Range (R/S) analysis, Detrended Fluctuation Analysis (DFA), and the Box-Counting Method. These were validated using synthetic time series with known fractal properties to ensure accuracy. The FractalPy library, an open-source Python package for fractal and multifractal analysis, was also employed to assist with multifractal feature extraction.

Simulation Platform: To simulate pressure and flow conditions in gas pipelines, the study utilized a custom-built pipeline simulation module, incorporating random noise and leak events into sinusoidal flow profiles to mimic real-world conditions. For more advanced scenarios, MATLAB Simulink was used to model pipeline dynamics under different operational regimes, although the final implementation was fully transferred to Python for reproducibility and open accessibility.

Hardware Setup: The experiments were conducted on a standard workstation with an Intel i7 processor, 32GB RAM, and a 1TB SSD. The codebase was optimized to ensure real-time computation capability, demonstrating the potential for future deployment on embedded systems or IoT-enabled sensor platforms.

This robust toolchain supports scalable, automated, and accurate leak detection that can be integrated into existing pipeline monitoring infrastructures.

Limitations of Synthetic Modeling

While synthetic data allows controlled experimentation and clear interpretation, it cannot capture all the nuances of real gas dynamics (e.g., temperature fluctuations, pipe material properties, or turbulent flow effects). Therefore, the proposed framework serves as a conceptual prototype, with future work planned to apply the model to field data from operational pipeline monitoring systems.

Results

The core objective of this study was to evaluate whether fractal-based metrics—namely, the Fractal Dimension (FD) and the Hurst Exponent (H)—can effectively distinguish between normal and leak-induced pressure signals in gas pipeline systems. To this end, synthetic time-series data were generated to simulate both operating scenarios.

Table 1 below presents the numerical values of FD and H computed for each signal type:

Table 1. Fractal Metrics for Different Flow Conditions

Condition	*Fractal Dimension (FD)*	*Hurst Exponent (H)*
Normal Flow	*1.22*	*0.67*
Leak Detected	*1.48*	*0.41*

Figure 1 (shown previously) visually highlights the structural differences between the two pressure signals over time. The normal signal exhibits relatively smooth, low-frequency fluctuations, whereas the leak signal demonstrates a more erratic, high-frequency waveform.

Additionally, power spectral density (PSD) analysis, performed using Welch's method, indicated increased energy in the mid-to-high frequency bands (8–20 Hz) under leak conditions. This frequency-domain result complements the fractal features and further verifies the presence of anomalies.

Discussion

The results of this study strongly support the hypothesis that fractal-based features provide a meaningful and quantitative way to differentiate between regular and anomalous behavior in gas pipeline systems.

The increase in fractal dimension from 1.22 (normal) to 1.48 (leak) clearly shows that leak events introduce a higher degree of irregularity and complexity in the pressure signal. This is consistent with the theoretical basis of fractal geometry, where complex, non-linear systems exhibit higher FD values due to their self-similar yet chaotic structures.

Similarly, the decrease in Hurst exponent from 0.67 to 0.41 reflects a shift from persistent (trend-following) to anti-persistent (reversal-prone) dynamics. This observation aligns with known behaviors in fluid systems, where leaks or obstructions cause sudden changes in flow direction, turbulence, or backpressure — all of which break the smooth continuity of the signal.

From a practical perspective, these results suggest that:

- *FD and H can serve as early-warning indicators in real-time pipeline monitoring systems.*
- *The method is non-parametric, requiring no prior knowledge of pipeline geometry, flow velocity, or fluid type — unlike classical leak detection algorithms.*
- *Fractal metrics are also robust to noise, especially when averaged over moving windows or combined with pre-filtering techniques.*

However, there are limitations to acknowledge:

- *The study is based on synthetic signals, which, while controlled and interpretable, lack the full complexity of real-world systems (e.g., multi-phase flow, thermal effects, sensor drift).*
- *Fractal analysis is computationally intensive when applied in high-frequency real-time monitoring, and optimized algorithms may be needed for deployment in embedded systems.*

Despite these constraints, the approach shows strong potential for integration into next-generation smart pipeline infrastructure. Combining fractal analysis with machine learning or signal classification frameworks could further improve detection accuracy and reliability.

Conclusion

This study presents a novel application of fractal analysis for the detection of leaks and flow irregularities in gas pipelines. By analyzing pressure and flow time series data using fractal features such as the Hurst exponent and fractal dimension, the method enables the identification of anomalies that may indicate early-stage leakage or other disruptions. The simulation results and experimental evaluations confirm that fractal analysis offers greater sensitivity to small disturbances compared to traditional monitoring techniques, particularly under dynamic and noisy operating conditions. Unlike conventional approaches that rely on fixed thresholds or statistical averages, the proposed method captures the inherent complexity and self-similar structure of pressure fluctuations, enabling more reliable detection. This advantage is especially critical in real-world gas pipeline systems, where fluctuations in demand, temperature, and operating pressure introduce nonlinear effects that can mask subtle anomalies. The fractal approach successfully distinguishes between normal variability and patterns associated with abnormal behavior, offering a practical solution for early warning diagnostics.

The findings of this study also point to the feasibility of integrating fractal-based monitoring into real-time control and automation systems. Such integration would significantly enhance situational awareness, reduce response times, and support predictive maintenance strategies. Furthermore, this work opens avenues for combining fractal analysis with machine learning models, which can further improve diagnostic accuracy and adaptive performance.

In conclusion, the implementation of fractal analysis represents a promising direction in intelligent pipeline monitoring systems. It contributes to improved safety, operational reliability, and resource efficiency in gas distribution networks. Future research may explore its integration with IoT architectures and its applicability to multi-phase and high-pressure pipeline systems.

Future Work

While the results are promising, several directions remain open for further exploration:

1. Real-World Data Testing: The current study relies on synthetic data. Future work should validate these findings using real pipeline sensor data from industrial partners or public datasets.

2. Multi-Sensor Integration: Expanding the analysis to include multiple types of sensors (e.g., temperature, flow velocity, acoustic emission) could enhance detection reliability.

3. Sliding Window and Adaptive Thresholding: Implementing dynamic window sizes and adaptive decision thresholds may help adapt the analysis to varying operational conditions.

4. Machine Learning Integration: Fractal features can be used as input to machine learning classifiers (e.g., SVM, neural networks) to build intelligent fault detection models.

5. Computational Optimization: For real-time applications, optimized algorithms (e.g., GPU-accelerated or edge-deployed models) will be necessary to reduce latency and computational load.

Overall, fractal analysis presents a mathematically grounded and practically viable pathway for enhancing the intelligence and safety of modern gas pipeline infrastructure.

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ADVANCED DEEP METRIC LEARNING AND MULTIMODAL ALIGNMENT FOR FINE-GRAINED FACE-TO-TEXT RETRIEVAL

Aidar Nygmet
Astana IT University

Abstract

The seamless alignment of facial imagery with natural language descriptions represents a pivotal challenge in the current landscape of multimodal artificial intelligence. This task necessitates the construction of a high-fidelity shared semantic space where distinct data modalities can be quantitatively compared and retrieved. Traditional face recognition systems, which typically operate within an image-to-image verification paradigm, are fundamentally ill-equipped to address the semantic gap inherent in cross-modal retrieval tasks. This article explores the development and implementation of an advanced face-to-text matching system based on a two-stream transformer architecture. Central to this approach is the integration of a Collaborative Cross-Modal Distillation module and a Diverse Triplet Loss function. These innovations collectively address the one-to-many correspondence problem between visual biometric features and descriptive linguistic tokens. The visual encoding branch employs the Vision Transformer architecture, which processes input face images by reshaping them into sequences of flattened two-dimensional patches, mapping them into a latent space, and enhancing them with positional encodings. The textual branch processes natural language descriptions through a parallel transformer encoder. A key technical contribution is the Cross-Modal Distillation module, which enables local-to-local interactions between visual patches and textual tokens through a collaborative alignment scoring mechanism, moving beyond the limitations of final-token similarity calculations. The Diverse Triplet Loss function further refines the training process by employing a hardest negative mining strategy that identifies the most similar non-matching description and the least similar matching description for each image, thereby encouraging diversity in the embedding space and addressing the challenge where different observers may describe the same individual using entirely different vocabularies. Utilizing the high-resolution CelebAText-HQ dataset comprising over fifteen thousand celebrity images each paired with ten unique human-written descriptions, this research demonstrates that domain-specific fine-tuning and localized feature alignment can overcome the limitations of broad-scale contrastive language-image pre-training models. Experimental results indicate a significant enhancement in retrieval precision, with the final model achieving a Rank-10 accuracy of 30.8 percent and an overall Mean Average Precision improvement of nearly 900 percent compared to zero-shot baselines. The findings establish a robust methodological framework applicable to forensic search, personalized media retrieval, and digital asset management scenarios where textual queries must be matched against visual facial data.

Keywords: *deep metric learning, cross-modal retrieval, vision transformer, contrastive distillation, triplet loss, face-text alignment, multimodal embeddings, semantic gap*

1 Introduction

The ability to search for and identify specific human faces based solely on verbal descriptions is a core requirement in diverse fields ranging from criminal forensics to personalized digital asset management. In contrast to standard biometrics, which rely on existing reference images, face-to-text retrieval addresses scenarios where the only available information is a witness's verbal account or a descriptive text string.

This task is characterized by its high complexity due to the semantic gap — the massive representational difference between high-dimensional pixel arrays and the abstract, context-dependent nature of natural language. Technical obstacles in this domain are multifaceted. First, traditional convolutional neural networks often fail to model the global dependencies required to understand a face as a holistic semantic entity. Second, natural language descriptions are inherently varied; different observers may describe the same individual using entirely different vocabularies, emphasizing different features such as facial shape or signs of aging. Recent breakthroughs in multimodal learning, specifically the Contrastive Language-Image Pre-training paradigm, have provided a foundation, but vanilla models lack the fine-grained sensitivity required for specific identity distinction.

2 Historical Context and Theoretical Framework

The evolution of facial analysis has transitioned through several distinct technological eras. In the early stages of computer vision, facial recognition relied on Eigenfaces and Gabor filters. The advent of

Deep Learning shifted this focus toward the extraction of robust feature embeddings via architectures like FaceNet [6], which utilized triplet loss to optimize identity separation in a high-dimensional latent space.

The current frontier is defined by the integration of Natural Language Processing with Computer Vision, catalyzed by the development of Transformers. These architectures replaced recurrent and convolutional layers with self-attention mechanisms, allowing for the processing of sequences (both of pixels and of words) with unprecedented efficiency.

2.1 The Emergence of CLIP and the Semantic Space

The introduction of CLIP by OpenAI established a new standard for cross-modal learning by demonstrating that visual models could be supervised through natural language [5]. By training on 400 million pairs of images and captions, CLIP learned to project both modalities into a shared vector space where the dot product of an image vector and its corresponding text vector is maximized. Mathematically, for a batch of N image-text pairs, the model optimizes a symmetric cross-entropy loss over the similarity matrix:

$$S(i,j) = (v_i \cdot w_j) / (\|v_i\| \cdot \|w_j\|) \quad (1)$$

where v_i and w_j are the visual and textual embeddings, respectively. While revolutionary, this global approach is often insufficient for the fine-grained retrieval required in facial analysis, where specific spatial location and semantic meaning of facial features are paramount.

3 Technical Methodology

The developed system employs a two-stream architecture, consisting of a visual encoding branch and a textual encoding branch, which interact through a series of alignment modules before the final retrieval step [8].

3.1 The Visual Stream: ViT-B/32

The visual encoder is based on the Vision Transformer (ViT-B/32) architecture, which has demonstrated superior performance in capturing spatial relationships. In this model, an input face image $x \in \mathbb{R}^{H\times W\times C}$ is reshaped into a sequence of N flattened 2D patches. The patches are mapped into a D-dimensional latent space, prepended with a learnable token, and enhanced with positional encodings:

$$z_0 = [x_cls; x^1_p\ E; x^2_p\ E; \ldots; x^N_p\ E] + E_pos \quad (2)$$

3.2 Feature Alignment via CMD

A primary technical contribution is the implementation of the Cross-Modal Distillation (CMD) module. Standard models often calculate similarity using only final tokens, which results in the loss of fine-grained details. The CMD module enables local-to-local interactions between visual patches and textual tokens. For a set of word embeddings w and visual patch embeddings v, the collaborative alignment score for the i-th word on the j-th image patch is defined as:

$$A(i,j) = \exp(w_i \cdot v_j / \tau) / \Sigma(k=1..N) \exp(w_i \cdot v_k / \tau) \quad (3)$$

4 Optimization through Diverse Triplet Learning

In face-to-text retrieval, the model must learn to navigate the one-to-many mapping problem, where a single identity may correspond to various valid linguistic descriptions. Traditional triplet loss often penalizes the model for these valid deviations.

To mitigate this, the Diverse Triplet Loss (DT Loss) was implemented to encourage diversity in the embedding space [8]. The DT Loss utilizes a Hardest Negative Mining strategy. For each image in a training batch, the model identifies the most similar non-matching description and the least similar matching description. The objective is formulated as:

$$L_DT = \log(1 + \exp(\lambda(S(I, T_neg) - S(I, P_hard) + \delta))) \quad (4)$$

where $S(I, T)$ is the cosine similarity between the image and text embeddings, λ is a scaling factor, and δ is the margin.

5 Experimental Evaluation

Experimental testing was conducted using the CelebAText-HQ dataset, which provides 15,010 high-resolution images of celebrities, each paired with 10 unique, human-written descriptions [7]. All models were optimized using the AdamW algorithm [3] on NVIDIA T4 GPUs.

Table 1: Comprehensive Retrieval Results on CelebAText-HQ

Model Variant	R@1 (%)	R@5 (%)	R@10 (%)	mAP
Zero-Shot CLIP	0.90	2.50	4.40	1.25
Fine-Tuned CLIP	5.57	15.20	22.10	7.80
DT Loss Model	6.85	18.90	26.50	9.45
Final Model	8.45	22.30	30.80	11.25

The empirical results demonstrate a clear hierarchy of performance. The transition from zero-shot baselines to fine-tuned models yields a massive jump, while the inclusion of specialized DT Loss and CMD modules provides the necessary precision to achieve state-of-the-art results in this challenging domain.

6 State-of-the-Art Trends (2024–2026)

The current landscape is defined by the emergence of 3D-aware models like E3-FaceNet [9] and the integration of Retrieval-Augmented Generation frameworks [1]. Furthermore, Multimodal Large Language Models are increasingly utilized as automated judges to ensure identity consistency and semantic fidelity [2, 4].

7 Conclusion

This research demonstrates that by leveraging the Vision Transformer's ability to model spatial dependencies and integrating specialized modules like Collaborative Cross-Modal Distillation, the semantic gap in facial retrieval can be significantly narrowed. The findings establish a robust methodological framework for forensic search and personalized media retrieval. Future work should explore the integration of 3D-aware architectures and retrieval-augmented generation pipelines to further enhance retrieval accuracy and generalization across diverse real-world deployment scenarios.

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DEVELOPMENT OF A SYSTEM FOR ANALYSIS AND VISUALIZATION OF FACTORS INFLUENCING LEARNING OUTCOMES BASED ON ARTIFICIAL INTELLIGENCE

N. N. Kadyrbayev
Zh. N. Orazbekov
7M06102 – Information Systems
Abai Kazakh National Pedagogical University

ЖАСАНДЫ ИНТЕЛЛЕКТ НЕГІЗІНДЕ ОҚУ НӘТИЖЕЛЕРІНЕ ӘСЕР ЕТЕТІН ФАКТОРЛАРДЫ ТАЛДАУ ЖӘНЕ ВИЗУАЛИЗАЦИЯЛАУ ЖҮЙЕСІН ЖАСАУ

Н. Н. Кадырбаев
Ж. Н. Оразбеков
7М06102 – Ақпараттық жүйелер
Абай атындағы Қазақ ұлттық педагогикалық университеті

Abstract

This article discusses the development of an information system for analyzing and visualizing the main factors affecting learning outcomes using artificial intelligence. In the modern education system, student performance is influenced by many factors such as motivation, teaching methods, family background, use of digital resources, study time, sleep duration, homework completion, and parental support. Traditional methods of analyzing these factors (questionnaires, manual calculations) are time-consuming and do not always provide accurate results. The proposed system is built on the Python programming language using the pandas, scikit-learn, and matplotlib libraries. It processes input data, identifies significant factors through linear regression and random forest algorithms, and displays the results as graphs (bar charts, heatmaps, scatter plots). The system was tested on a synthetic dataset of 100 student records. The results showed that the most important factors are study time (35% importance), motivation level (28%), and homework completion (20%). The accuracy (R^2) of the linear regression model was 0.72. The system is easy to use, requires no programming skills, and can help teachers and school administrators improve the learning process by focusing on the most influential factors. Future work includes adding a web interface and testing on real school data.

Аңдатпа

Бұл мақалада оқу нәтижелеріне әсер ететін негізгі факторларды жасанды интеллект көмегімен талдау және оларды визуализациялауға арналған ақпараттық жүйені әзірлеу қарастырылады. Қазіргі білім беру жүйесінде оқушылар мен студенттердің үлгеріміне мотивация, оқыту әдістері, отбасылық жағдай, цифрлық ресурстарды пайдалану, оқуға жұмсалған уақыт, ұйқы режимі, үй тапсырмасын орындау, ата-ананың қолдауы сияқты көптеген факторлар әсер етеді. Дәстүрлі әдістермен (сауалнама, қолмен есептеу) барлық фактордың әсерін бір уақытта бағалау қиын әрі уақытты көп алады. Ұсынылып отырған жүйе Python тіліндегі pandas, scikit-learn және matplotlib кітапханалары негізінде жасалған. Жүйе деректерді өңдеп, сызықтық регрессия және кездейсоқ орман алгоритмдері арқылы маңызды факторларды анықтайды, нәтижені графиктер (бағандық диаграмма, жылу картасы, шашырау графигі) түрінде көрсетеді. Жүйе 100 оқушы туралы сынақ деректер жинағына сәтті қолданылды. Нәтижелер бойынша ең маңызды факторлар: оқуға жұмсалған уақыт (35%), мотивация деңгейі (28%), үй тапсырмасын орындау (20%) болып шықты. Сызықтық регрессия моделінің дәлдігі (R^2) 0,72 құрады. Жүйе пайдалануға өте қарапайым, арнайы бағдарламалау білімін қажет етпейді және оқытушылар мен мектеп әкімшілігіне оқу процесін жақсарту үшін қай факторларға назар аудару керектігін түсінуге көмектеседі.

Keywords: *artificial intelligence, learning outcomes, factor analysis, visualization, information system, machine learning, Python, educational data mining.*

Түйінді сөздер: *жасанды интеллект, оқу нәтижелері, факторларды талдау, визуализация, ақпараттық жүйе, машиналық оқыту, Python, білім беру деректерін талдау.*

Kipicne

Қазіргі білім беру саласында оқушылар мен студенттердің үлгеріміне әсер ететін факторларды анықтау өзекті мәселелердің бірі болып отыр. Әрбір оқушының үлгерімі оның

жеке қабілетіне ғана емес, сонымен қатар сыртқы ортаның көптеген факторларына байланысты. Мысалы, оқуға жұмсалған уақыт, ұйқы режимі, отбасының қолдауы, мотивация деңгейі, үй тапсырмасын орындау көлемі – осының бәрі оқу нәтижесіне тікелей әсер етеді. Алайда дәстүрлі әдістермен (сауалнама, қолмен есептеу) барлық фактордың әсерін бір уақытта бағалау қиын әрі уақытты көп алады.

Соңғы жылдары жасанды интеллект технологиялары білім беру саласына белсенді түрде ене бастады. Машиналық оқыту алгоритмдері көптеген деректерді жылдам өңдеп, жасырын заңдылықтарды таба алады. Осыған орай, біздің зерттеуіміздің мақсаты – оқу нәтижелеріне әсер ететін факторларды талдайтын және нәтижелерді түсінікті графиктер түрінде көрсететін жеңіл әрі тиімді ақпараттық жүйені әзірлеу.

Зерттеудің негізгі міндеттері:

• оқу үлгеріміне әсер ететін негізгі факторларды анықтау;

• осы факторлар бойынша сынақ деректер жинағын құру;

• машиналық оқыту алгоритмдерін (сызықтық регрессия, кездейсоқ орман) қолданып талдау модулін жасау;

• нәтижелерді визуализациялау (графиктер, диаграммалар) модулін дайындау;

• жүйенің жұмыс істеу қабілетін тестілеу.

Бұл зерттеудің практикалық маңыздылығы – әзірленген жүйе мектептерде, колледждерде оқытушыларға үлгерімі төмен оқушыларға көмектесу үшін қай факторларды түзету керектігін көрсетеді. Жүйе ешқандай арнайы бағдарламалау білімін қажет етпейді, тек Excel немесе CSV файлын жүктеу жеткілікті.

Зерттеу әдістемесі

Зерттеу барысында келесі әдістер қолданылды: жүйелік талдау, деректерді алдын ала өңдеу, машиналық оқыту алгоритмдері, визуализация. Жүйені әзірлеуге Python бағдарламалау тілі таңдалды, себебі ол қарапайым әрі деректермен жұмыс істеуге арналған көптеген дайын кітапханаларға ие.

Жүйе үш негізгі модульден тұрады:

*1. **Деректерді енгізу және өңдеу модулі**. Бұл модуль CSV немесе Excel файлын оқиды, кестедегі бос орындарды толтырады, сандық мәндерді стандарттайды. Оқу деректерінде көбінесе жетіспейтін мәндер кездеседі, сондықтан оларды орташа мәнмен толтыру әдісі қолданылды.*

*2. **Талдау модулі**. Бұл модульде екі алгоритм іске асырылды:*

*– **Сызықтық регрессия** – оқу нәтижесін (орташа балл) басқа факторлар негізінде болжайды. Ол әр фактордың «салмағын» есептейді.*

*– **Кездейсоқ орман (Random Forest)** – бұл шешім ағаштарына негізделген алгоритм. Ол әр фактордың маңыздылық дәрежесін пайызбен көрсетеді.*

*3. **Визуализация модулі**. Бұл модуль нәтижелерді графиктер түрінде шығарады: бағандық диаграмма (факторлардың маңыздылығы), жылу картасы (факторлар арасындағы байланыс), шашырау графигі (болжалды және нақты баллдарды салыстыру).*

Деректер ретінде біз өзіміз 100 оқушы туралы сынақ жинағын құрдық. Әр оқушы үшін келесі факторлар жазылды:

• Оқуға жұмсалған уақыт (сағат/апта) – 5-тен 50-ге дейін

• Ұйқы сағаты (тәулігіне) – 4-тен 10-ға дейін

• Үй тапсырмасын орындау коэффициенті (0-1 аралығында, 1 – толық орындайды)

• Мотивация деңгейі (1-10 аралығында, 10 – өте жоғары)

• Ата-ананың қолдауы (1-10)

• Қосымша курстарға қатысу (0-1, 1 – қатысады)

• Нәтиже – орташа балл (0-100)

Барлық деректер кездейсоқ түрде, бірақ нақты заңдылықтармен (мысалы, көп оқыған оқушының балы жоғары) генерацияланды. Бұл жасанды деректер болғанымен, әдістемені тексеруге толық жеткілікті.

Жүйенің интерфейсі қарапайым консольдық нұсқада жасалды. Пайдаланушы тек файлдың атын енгізеді, қай алгоритмді қолданғысы келетінін таңдайды, содан кейін нәтиже графиктері автоматты түрде пайда болады.

Зерттеу нәтижелері

Әзірленген жүйе сынақ деректеріне сәтті қолданылды. Төменде негізгі нәтижелер келтірілген.

Сызықтық регрессия нәтижелері. Модельдің дәлдігі (R^2 көрсеткіші) 0,72 болды. Бұл – орташа нәтиже, себебі деректер кейбір кездейсоқ шулармен генерацияланған. Регрессия коэффициенттері бойынша ең маңызды факторлар:

- *Оқуға жұмсалған уақыт (коэффициент 0,65)*
- *Мотивация деңгейі (коэффициент 0,52)*
- *Үй тапсырмасын орындау (коэффициент 0,40)*

Ең әлсіз факторлар: ұйқы сағаты (0,12) және қосымша курстарға қатысу (0,08). Бұл деректерде ұйқының әсері аз көрінгенімен, нақты өмірде ол маңыздырақ болуы мүмкін.

Кездейсоқ орман нәтижелері. Бұл алгоритм әр фактордың маңыздылығын пайызбен көрсетті:

- *Оқуға жұмсалған уақыт – 35%*
- *Мотивация деңгейі – 28%*
- *Үй тапсырмасын орындау – 20%*
- *Ата-ананың қолдауы – 10%*
- *Ұйқы сағаты – 4%*
- *Қосымша курстарға қатысу – 3%*

Көріп отырғанымыздай, екі әдіс те бірдей факторларды басым деп көрсетті. Бұл нәтижелердің сенімділігін арттырады.

Визуализация нәтижелері. Жүйе үш түрлі график шығарды:

1. *Бағандық диаграмма – факторлардың маңыздылығы визуалды түрде салыстырылды. Оқу уақыты мен мотивация ең биік бағандар болды.*
2. *Жылу картасы (heatmap) – факторлар арасындағы корреляция көрсетілді. Мысалы, оқу уақыты мен мотивация арасында оң байланыс (0,45) бар екені анықталды. Бұл – жоғары мотивациясы бар оқушылар көбірек оқиды дегенді білдіреді.*
3. *Шашырау графигі – нақты баллдар мен болжалды баллдар салыстырылды. Нүктелер диагональға жақын орналасқан, бұл модельдің дұрыс жұмыс істегенін көрсетеді.*

Жүйені тестілеу барысында ешқандай қателіктер орын алмады. Деректерді өңдеу уақыты 1 секундтан аспады (100 жазба үшін). Бұл жүйенің жеңіл әрі жылдам екенін дәлелдейді.

Талқылау

Алынған нәтижелер ұсынылған жүйенің оқу нәтижелеріне әсер ететін факторларды талдау үшін тиімді екенін көрсетті. Жүйе ең басты факторлар – оқу уақыты, мотивация және үй тапсырмасын орындау екенін анықтады. Бұл тұжырым педагогикалық зерттеулермен сәйкес келеді. Мысалы, көптеген әдебиеттерде мотивацияның үлгерімге әсері жоғары екені дәлелденген.

Қолданыстағы оқу үлгерімін талдау жүйелерімен (SPSS, Excel) салыстырғанда, біздің жүйенің артықшылығы – оның қарапайымдылығы. SPSS, Excel сияқты бағдарламаларда күрделі статистикалық әдістерді қолдану үшін арнайы білім қажет. Ал біздің жүйе тек файлды жүктеуді және бір батырманы басуды талап етеді. Сонымен қатар, жүйе нәтижені визуалды түрде бірден көрсетеді, бұл оқытушылар үшін өте ыңғайлы.

Дегенмен, зерттеудің кейбір шектеулері де бар. Біріншіден, сынақ деректері жасанды түрде генерацияланды. Нақты мектеп деректерімен жұмыс істегенде нәтижелер өзгеруі мүмкін. Екіншіден, жүйе тек сандық факторларды ғана ескереді. Мұғалімнің кәсібилігі, сыныптағы ахуал сияқты сапалық факторларды талдау қиынырақ. Үшіншіден, қолданылған алгоритмдер өте терең емес (нейрондық желілер пайдаланылмады), бірақ бұл – жүйенің жеңілдігін сақтау үшін жасалған әдейі шешім.

Болашақта жүйені келесі бағыттарда дамытуға болады:

- *Веб-интерфейс қосу (мысалы, Streamlit арқылы), пайдаланушыға ыңғайлы болу үшін.*
- *Нақты мектептерден деректер жинап, жүйені тереңірек тестілеу.*
- *Сапалық факторларды (мәтіндік пікірлер) талдау үшін қарапайым NLP әдістерін қосу.*

Қорыта келгенде, ұсынылған жүйе оқу нәтижелеріне әсер ететін факторларды жылдам әрі түсінікті түрде талдауға мүмкіндік береді. Бұл жүйені кез келген мектеп немесе колледж оқытушылары еш қиындықсыз пайдалана алады.

Қорытынды

Бұл зерттеуде оқу нәтижелеріне әсер ететін факторларды жасанды интеллект негізінде талдау және визуализациялауға арналған ақпараттық жүйе әзірленді. Жүйе Python тілінде pandas, scikit-learn, matplotlib кітапханалары арқылы жасалды. Ол сызықтық регрессия және

кездейсоқ орман алгоритмдерін қолдана отырып, факторлардың маңыздылығын анықтайды және нәтижені графиктер түрінде көрсетеді.

Зерттеу нәтижелері көрсеткендей, оқу нәтижелеріне ең көп әсер ететін факторлар – оқуға жұмсалған уақыт, мотивация деңгейі және үй тапсырмасын орындау. Ата-ананың қолдауы мен ұйқы сағаты да маңызды, бірақ олардың әсері салыстырмалы түрде төменірек. Қосымша курстарға қатысу бұл сынақ деректерінде ең әлсіз фактор болып шықты.

Әзірленген жүйенің практикалық маңыздылығы – оның қарапайымдылығы мен қолжетімділігінде. Жүйені пайдалану үшін бағдарламалау білімі қажет емес. Оқытушылар өздерінің оқушылары туралы деректерді Excel кестесіне салып, жүйеге жүктесе, олар автоматты түрде талдау нәтижесін алады. Бұл оларға үлгерімі төмен оқушылармен жұмыс істеу стратегиясын дұрыс таңдауға көмектеседі.

Болашақта жүйені нақты мектеп деректерімен сынап, веб-интерфейспен жабдықтау жоспарлануда. Сонымен қатар, терең оқыту әдістерін қолдану арқылы күрделірек факторларды (мысалы, оқушының эмоционалдық күйі) талдау мүмкіндігін қарастыруға болады.

Осылайша, бұл жұмыс ақпараттық технологиялар мен білім беру салаларының тоғысындағы маңызды мәселені шешуге бағытталған және оқу процесін жақсартуға үлес қоса алады.

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