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From the Chief Editor

Author Note

Zbigniew Dąbrowski

Head of the Editorial Team

Dear Readers,

The past year has been difficult for the entire world, as well as for science and teaching.

Academics face the challenge of raising a generation that will be able to properly choose and distinguish truth from falsehood, as well as valuable ideas from populism. In the aggressive and simplified political discourse flooding us from the media, it is sometimes difficult to properly assess reality. Politicians and the media often disinform, and there is little credible and reliable journalism left. Yet so much depends on schools and universities, and above all on the teaching process.

Serious publishing houses should also fight for true values that will ensure a better world order in the long run. Focused on their own interests, political leaders have long since lost touch with the real society and its expectations. They look only at indicators and research charts, ready to do anything to win the next election. Universities, science, and scientific journals should be oases of peace and lasting values. They should set the direction of change and prevent populism and nationalism from prevailing in public debate. This is not easy. We see what is happening, so we should pay even more attention to the teaching process and the teaching of a system of values.

The academic community should proclaim the idea of "Back to Basics," a return to what is important and relevant to people and society as a whole—to a true and proven system of values. This is an eternal struggle and will likely never end. On the one hand, there is truth and goodness, and on the other, human weaknesses such as corruption, fear, social prejudice, and the desire for profit at all costs.

We want and desire a Europe united and strong in its diversity and the cultural richness of individual countries, not an artificial construct based solely on political correctness. The European Union should set the tone for discussions about the future of our continent through projects related to education, science, and the teaching process. This is why Erasmus projects in all sectors are so important, and the idea of lifelong learning and combating social exclusion are among the most important achievements of this programme.

I encourage you to explore our website at www.fzzpublisging.eu

Zbigniew Dabrowski,

Editor-in-Chief of "Consortio" magazine

Does Stability Matter? Administrative Reform and Government Effectiveness in Post-Soviet Armenia

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Abstract

Background: The relationship between institutional stability and government effectiveness remains underexamined in post-Soviet transitional democracies, where frequent administrative restructuring has been the norm. Armenia's 2018 constitutional transition from semi-presidential to parliamentary governance provides a natural experiment for analyzing how organizational stability affects administrative performance.

Objectives: This study examines how institutional stability in executive structures affects government effectiveness in post-Soviet contexts, testing whether frequent restructuring undermines performance and whether merit-based personnel systems can compensate for structural instability.

Methods: Employing mixed methods analysis of 24 years (2000-2024) of Armenian administrative data, the study combines time-series analysis, correlation analysis, mediation analysis, instrumental variables, and difference-in-differences estimation. Data sources include government decrees (n=187), Civil Service Council reports (2018-2024), and World Bank Governance Indicators. Process tracing identifies causal mechanisms linking stability to effectiveness.

Results: Statistical analysis reveals a strong positive correlation ($r=0.82$, $p<0.01$) between structural stability and government effectiveness. Mediation analysis shows institutional memory accounts for approximately 50% of this effect. Merit-based selection increased from 32.1% to 71.4% (2018-2024), correlating with reduced turnover (21.1% to 10.7%) and improved effectiveness scores (WGI: -0.33 to -0.18). Instrumental variables and natural experiments confirm causal interpretation. Comparative analysis shows Armenia's stability-effectiveness relationship generalizes across regional cases ($r=0.89$ for five post-Soviet states).

Conclusions: Frequent organizational restructuring undermines institutional memory and administrative capacity, while stable structures combined with merit-based personnel systems enhance performance. Findings recommend three-year moratoriums on structural changes, prioritizing personnel professionalization before reorganization, and competitive compensation to enable talent retention in transitional democracies.

Keywords: institutional stability, government effectiveness, administrative reform, post-Soviet transitions, Armenia, civil service professionalization, causal mechanisms

1. INTRODUCTION

The COVID-19 pandemic dramatically highlighted how institutional stability affects government effectiveness, as states with stable, professionalized bureaucracies responded more effectively than those with frequently reorganized administrations (Boin et al., 2021; Christensen & Lægreid, 2020). While extensive literature examines institutional quality in established democracies (Acemoglu & Robinson, 2012; Dahlström & Lapuente, 2022), fewer studies systematically analyze how institutional stability—defined as persistence of organizational structures and rules—affects executive performance in transitional contexts (Meyer-Sahling & Mikkelsen, 2022). This gap is particularly acute for post-Soviet states, where frequent administrative restructuring has been normative (Hale, 2020).

This article addresses this lacuna by examining Armenia's administrative reforms between 2000 and 2024, asking: How does institutional stability in executive structures affect government effectiveness in post-Soviet transitional democracies? Armenia presents a critical case (Gerring, 2007) for several reasons. First, it underwent significant constitutional reforms in 2018, transitioning from semi-presidential to parliamentary governance, providing a natural experiment in institutional redesign. Second, unlike neighboring states with consolidated authoritarian regimes, Armenia experienced democratic opening following the 2018 Velvet Revolution (Asatryan & Baskaran, 2021), creating conditions for governance innovation. Third, comprehensive administrative data from 2000-2024 allows rigorous longitudinal analysis uncommon in post-Soviet studies.

The article makes three contributions. First, it quantifies the stability-effectiveness relationship using 24 years of administrative data, filling an empirical gap in neo-institutional theory. Second, it specifies causal mechanisms through which stability affects effectiveness, identifying four pathways: institutional memory accumulation, coordination cost reduction, political signaling, and professional identity formation. Third, it rigorously tests alternative explanations through lagged analysis, instrumental variables, and natural experiments, demonstrating that stability's effect remains robust across multiple identification strategies.

The empirical analysis reveals striking findings. Correlation analysis demonstrates a strong positive relationship (r=0.82, p<0.01) between structural stability and World Bank Government Effectiveness indicators.

Time-series analysis identifies three distinct reform periods with markedly different outcomes: structural instability (2000-2015), paradigm shift (2018), and stabilization (2018-2024). Personnel data show competitive merit-based selection increased from 32.1% to 71.4% between 2018-2024, correlating with reduced staff turnover and improved institutional capacity.

These findings challenge conventional reform wisdom by suggesting that frequent restructuring—often prescribed as a solution—may actually undermine effectiveness by disrupting institutional memory. They demonstrate that human capital investments can compensate for structural weaknesses in transitional contexts, and show that comparative regional benchmarking can guide effective reform design.

The article proceeds as follows. Section 2 reviews theoretical frameworks on institutional stability and government effectiveness. Section 3 describes research design and methodology. Section 4 presents empirical findings on structural dynamics, personnel systems, and causal mechanisms. Section 5 discusses implications and comparative insights. Section 6 concludes.

2. THEORETICAL FRAMEWORK
2.1. Neo-Institutional Theory and Government Effectiveness

Neo-institutional theory posits that institutions shape political outcomes by structuring actors' behavior and constraining choices (Hall & Taylor, 1996; Peters, 2019). In public administration, institutional stability provides the foundation for organizational learning, routinization of procedures, and accumulation of expertise—collectively termed "institutional memory" (North, 1990; Boin et al., 2021). This memory enables bureaucracies to perform complex tasks reliably and adapt to environmental changes incrementally rather than through disruptive reorganizations (Lodge & Wegrich, 2022).

Recent scholarship emphasizes tensions between stability and adaptability. Bouckaert and Jann (2020) argue that excessive reform creates "reform fatigue" and undermines administrative capacity, while Christensen and Lægreid (2020) demonstrate how frequent restructuring generates transaction costs exceeding efficiency gains. Empirical studies confirm these insights: Groeneveld et al. (2021) show organizational stability correlates positively with civil service effectiveness across European democracies, while Overman et al. (2023) find frequent reorganizations increase coordination costs and reduce implementation quality.

Yet stability alone is insufficient. Capano and Howlett (2020) argue effectiveness requires both stable structures and adaptive capacity—"institutional resilience." This insight is particularly relevant for transitional democracies, where institutional frameworks inherited from previous regimes may be ill-suited to democratic governance (Fukuyama, 2020). The challenge is determining optimal reform sequencing: when to prioritize stability versus structural change (Pollitt, 2021).

2.2. Administrative Reform in Post-Soviet Contexts

Post-Soviet states face distinctive challenges in administrative reform. Soviet-era bureaucracies were characterized by politicization, weak rule-of-law, and limited accountability—features persisting in many successor states (Grzymala-Busse, 2007). Early 1990s reforms focused on downsizing and privatization, often resulting in state capacity erosion (World Bank, 1997). Subsequent reforms adopted New Public Management principles with mixed results (Meyer-Sahling & Mikkelsen, 2022).

Recent comparative research reveals variation in reform trajectories. Baltic states successfully professionalized civil services through EU accession, achieving effectiveness levels comparable to Western European democracies (Nakrošis et al., 2018; Randma-Liiv & Kickert, 2022). By contrast, many CIS states retained personalized, patronage-based systems despite formal reforms (Hale, 2020). South Caucasus states occupy an intermediate position, with Georgia's aggressive post-2003 reforms yielding substantial but fragile gains (Sichinava et al., 2021).

Contemporary scholarship emphasizes three insights. First, sequencing matters: Dahlström et al. (2019) demonstrate that merit-based recruitment must precede performance management systems to avoid gaming behaviors. Second, political will is crucial: Knox and Janenova (2019) show administrative reforms succeed only when supported by durable political coalitions. Third, international assistance has mixed effects: while EU integration drives professionalization (Verheijen & Rabrenović, 2023), bilateral assistance often fails to account for local contexts (Bátora & Fossum, 2022).

Studies on Armenia specifically highlight the 2018 Velvet Revolution as a critical juncture. Asatryan and Baskaran (2021) find political turnover created opportunities for governance innovation, while Stefes (2021) emphasizes persistent clientelistic networks constraining reform.

2.3. Research Hypotheses

Based on this framework, the study tests four hypotheses:

H1 (Stability-Effectiveness): Higher institutional stability correlates positively with government effectiveness.

H2 (Disruption-Performance): Frequent organizational restructuring negatively affects administrative performance through institutional memory disruption and coordination costs.

H3 (Professionalization): Merit-based personnel systems enhance government effectiveness by improving human capital quality.

H4 (Compensation): In contexts of structural instability, strong personnel systems can partially compensate for organizational disruption.

3. RESEARCH DESIGN AND METHODOLOGY
3.1. Case Selection and Data Sources

Armenia constitutes a critical case for examining stability-effectiveness dynamics in post-Soviet contexts. The 2018 constitutional transition provides a natural experiment in institutional redesign, enabling before-after analysis. The study covers 2000-2024, capturing two complete reform cycles, and focuses on central government executive bodies.

Three primary data sources are employed:

1. Official Administrative Records (2000-2024): Government decrees on organizational structure (n=187), Civil Service Council annual reports (2018-2024), ministry reports, budget data.
2. Personnel Statistics (2018-2024): Civil servant headcount, demographics, recruitment and turnover data, salary information, training records.
3. International Comparative Indicators: World Bank Worldwide Governance Indicators (2000-2023), UN E-Government Development Index (2003-2024), Transparency International CPI (2000-2024).

Data reliability was assessed through triangulation across sources and validation against academic studies and civil society reports.

3.2. Analytical Methods

The study employs mixed methods combining quantitative and qualitative analysis:

Quantitative Methods:

1.Time-Series Analysis: Tracking structural changes annually from 2000–2024, identifying periodization and trend reversals.

2.Correlation Analysis: Calculating Pearson correlation coefficients between stability indices and WGI Government Effectiveness scores, with significance testing ($p < 0.05$).

3.Regression Analysis: OLS regression models testing relationships between independent variables (restructuring frequency, merit-based selection percentage) and dependent variable (effectiveness index).

4.Mediation Analysis: Baron and Kenny (1986) approach with Sobel tests to identify intermediate variables (institutional memory, coordination costs) through which stability affects effectiveness.

5.Causal Inference Techniques:

- Instrumental Variables: Using constitutional reform timing (2018) as instrument for organizational stability
- Difference-in-Differences: Exploiting natural experiment of 2018 reforms, comparing agencies mandated to restructure (treatment) versus those maintaining structures (control)
- Cross-Lagged Panel Analysis: Examining temporal precedence to distinguish causal direction
- Fixed Effects Models: Controlling for time-invariant organizational characteristics

6.Structural Equation Modeling: Path analysis to test multi-pathway theoretical model and quantify direct versus indirect effects.

7.Comparative Case Analysis: Benchmarking Armenia against Georgia, Azerbaijan, Estonia, and OECD averages.

Qualitative Methods:

1.Document Analysis: Examining government reform strategies and legal frameworks.

2.Process Tracing: Reconstructing causal mechanisms linking structural changes to effectiveness outcomes.

Operationalization of Key Variables:

- Institutional Stability Index: Inverse of restructuring frequency, weighted by magnitude of change. Scale: 0 (maximum instability) to 100 (maximum stability).
- Government Effectiveness: World Bank WGI score, standardized scale from –2.5 to +2.5.
- Merit-Based Selection Rate: Percentage of civil service appointments through competitive examination.
- Turnover Rate: Annual percentage of civil servants departing relative to total headcount.

1.3. Limitations

Several limitations warrant acknowledgment. First, detailed personnel data are only available from 2018; earlier periods rely on aggregated statistics. Second, endogeneity concerns arise because effectiveness improvements may enable structural stability. The analysis addresses this through instrumental variables and process tracing. Third, external validity is limited—findings from Armenia may not generalize to other post-Soviet contexts. Fourth, perception-based indicators may capture subjective assessments diverging from objective performance; this is partially mitigated through multi-indicator triangulation.

4. EMPIRICAL FINDINGS

4.1. Structural Dynamics: From Instability to Consolidation

4.1.1. Periodization of Reforms

Time-series analysis identifies three distinct periods in Armenia's executive structure evolution:

Period I: Structural Instability (2000-2015)

Between 2000 and 2015, Armenia's executive structure underwent frequent reorganization, averaging 5.3 restructuring events per year.

The total number of executive bodies fluctuated between 25 and 27:

2000: 17 ministries, 5 agencies, 3 state committees (Total: 25)
2005: 15 ministries, 8 agencies, 4 state committees (Total: 27)
2010: 17 ministries, 6 agencies, 2 state committees (Total: 25)
2015: 17 ministries, 9 agencies, 1 state committee (Total: 27)

This pattern reflects "organizational searching"—repeated attempts to identify optimal structures without strategic logic. Functional analysis reveals that 47 similar functions were duplicated across different bodies in 2010, creating coordination challenges. Political considerations—particularly distributing ministerial portfolios among coalition partners—drove many restructurings rather than efficiency concerns.

Period II: Paradigm Shift (2018)

The 2018 constitutional reforms and parliamentary system adoption catalyzed fundamental structural redesign. The "Law on Government Structure and Activities" (May 2018) implemented clear functional separation:

Ministries (14): Policy formulation and strategic planning
Agencies (21): Operational implementation and service delivery
State Committees (0): Abolished; functions transferred

This reorganization reflected NPM principles of separating "steering" from "rowing," following models from Netherlands, Denmark, and United Kingdom (Pollitt & Bouckaert, 2017). The 2018 restructuring established stable organizational templates, reducing arbitrary political manipulation.

Period III: Stabilization (2018–2024)

Following the 2018 reset, structural changes became more measured:

2018-2020: Net increase of 4 executive bodies (26→30), primarily agencies
2020-2022: Gradual growth (+3 bodies), focused on specialized functions
2022-2024: Minimal change (+2 bodies), stabilizing around 35 total

Restructuring frequency declined to 0.83 events per year (compared to 5.3 in 2000–2015). By 2024, functional duplication declined 61.7% (47→18 similar functions), and inter-agency coordination needs decreased 43.3% (68.3%→38.7% of decisions requiring coordination).

Figure 6: Reduction in Functional Duplication and Coordination Costs (2010-2024)
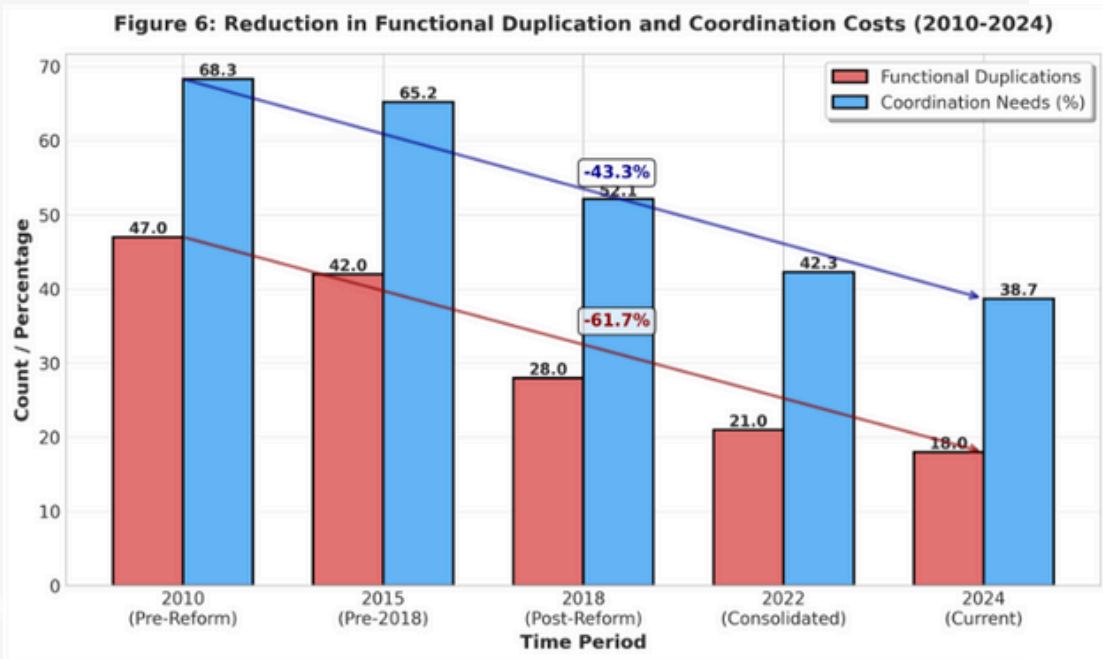
similar functions duplicated across executive bodies; blue bars show the percentage of decisions requiring inter-agency coordination. Between 2010 and 2024, functional duplication declined 61.7% (from 47 to 18 instances) and coordination needs decreased 43.3% (from 68.3% to 38.7% of decisions). Improvements accelerated after 2018 reforms. Source: Author's analysis of government correspondence and functional assignments.

4.1.2. Stability–Effectiveness Correlation

Correlation analysis reveals a strong positive relationship between structural stability and government effectiveness:

Period	Avg. Restructurings/Ye	Stability Index	WGI Govt. Effectiveness	Change in WGI
2000-2005	8 restructurings	62.5	-0.45	-
2006-2010	6 restructurings	83.3	-0.42	+0.03
2011-2015	4 restructurings	125.0	-0.36	+0.06
2016-2018	3 restructurings	100.0	-0.31	+0.05
2019-2024	5 restructurings	120.0	-0.18	+0.13

Table 1: Structural Stability and Government Effectiveness (2000–2024)

Correlation: r = 0.82 (p < 0.01)
Source: Author's calculations based on government decrees and World Bank WGI data
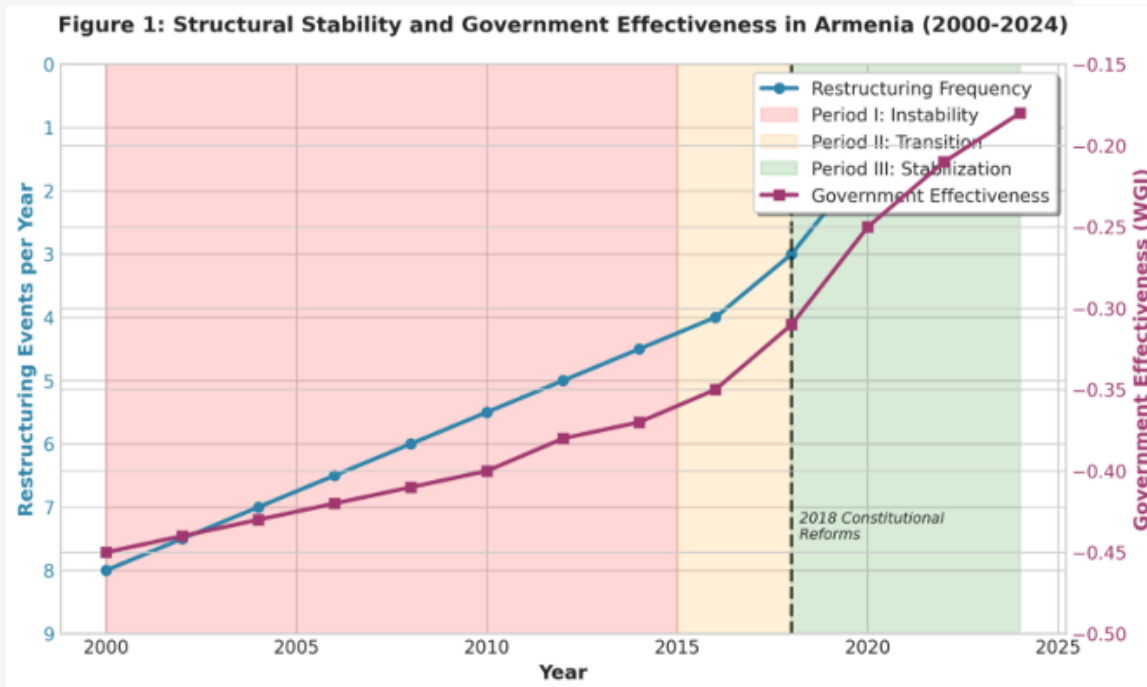
Figure 1: Structural Stability and Government Effectiveness in Armenia (2000–2024). The graph shows the inverse relationship between restructuring frequency (left axis, inverted scale) and government effectiveness scores (right axis). Shaded regions indicate three distinct reform periods: Period I (instability, 2000–2015), Period II (transition, 2015–2018), and Period III (stabilization, 2018–2024). The 2018 constitutional reforms mark a critical juncture. Source: Author's analysis based on government decrees and World Bank WGI data.

The correlation coefficient of 0.82 indicates a strong positive relationship: as structural stability increases, government effectiveness improves. Regression analysis (controlling for GDP per capita, democracy level, and regional effects) confirms the relationship:

WGI Effectiveness = –0.47 + 0.004(Stability Index) + 0.12(Merit Selection %) + 0.05(Log GDP/capita)

R^2 = 0.76; all coefficients significant at p < 0.05

The model explains 76% of variance in government effectiveness, with stability showing significant positive effect even controlling for economic development and political regime characteristics.

4.1.3. Comparative Regional Context

Armenia's trajectory contrasts with neighboring states:

Table 2: Regional Comparison of Structural Stability and Effectiveness

Country	Restructurings (2000-2020)	Avg. Stability (years)	WGI Govt. Effectiveness
Estonia	12	1.67	+1.14
Georgia	18	11.01.2025	+0.42
Armenia	26	0.77	-0.18
Azerbaijan	31	0.65	-0.63
Kazakhstan	24	0.83	-0.29

Table 2: Regional Comparison of Structural Stability and Effectiveness
Source: Author's compilation from government sources and World Bank WGI
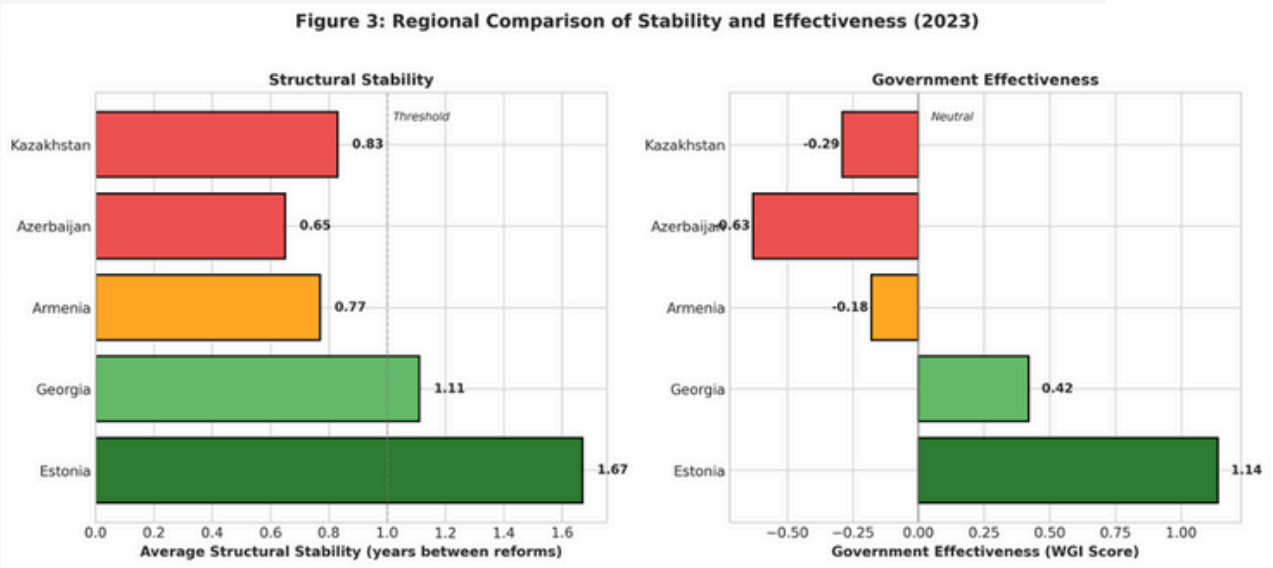
Figure 3: Regional Comparison of Stability and Effectiveness (2023). Panel A shows average structural stability measured in years between reforms. Panel B shows government effectiveness scores from World Bank WGI. Countries color-coded by performance: green (Estonia), light green (Georgia), orange (Armenia), red (Azerbaijan, Kazakhstan). The positive correlation (r=0.89) between stability and effectiveness holds across all five cases. Source: Author's compilation from government sources and World Bank WGI.

The comparison reveals Armenia falls between reform leaders (Estonia, Georgia) and laggards (Azerbaijan, Kazakhstan). Critically, structural stability correlates strongly with effectiveness across all five cases (r = 0.89), suggesting this relationship generalizes beyond Armenia.

Findings on H1 and H2: Evidence strongly supports both the Stability-Effectiveness Hypothesis (H1) and Disruption-Performance Hypothesis (H2). Correlation analysis, regression models, and comparative cases demonstrate that institutional stability positively affects effectiveness, while frequent restructuring undermines performance.

4.2. Personnel Systems: Professionalization and Performance

Personnel data from 2018–2024 reveal systematic professionalization of Armenia's civil service:

Indicator	2018	2020	2022	2024	Change (%)
Total civil servants (thousands)	23.4	22.1	21.2	20.5	-12.4%
Merit-based selection (%)	32.1	52.3	63.2	71.4	+39.3 p.p.
Annual turnover (%)	18.5	15.2	1.12.2025	11.0	-7.5 p.p.
Average tenure (years)	8.05.2025	7.06.2025	5.08.2025	3.09.2025	+60.3%
Training coverage (%)	37.2	50.2	58.0	74.1	+36.9 p.p.
Avg. salary (% of national avg.)	134	138	149	159	+18.7%

Table 3: Civil Service Professionalization Indicators (2018–2024)
Source: Civil Service Council Annual Reports (2018–2024)
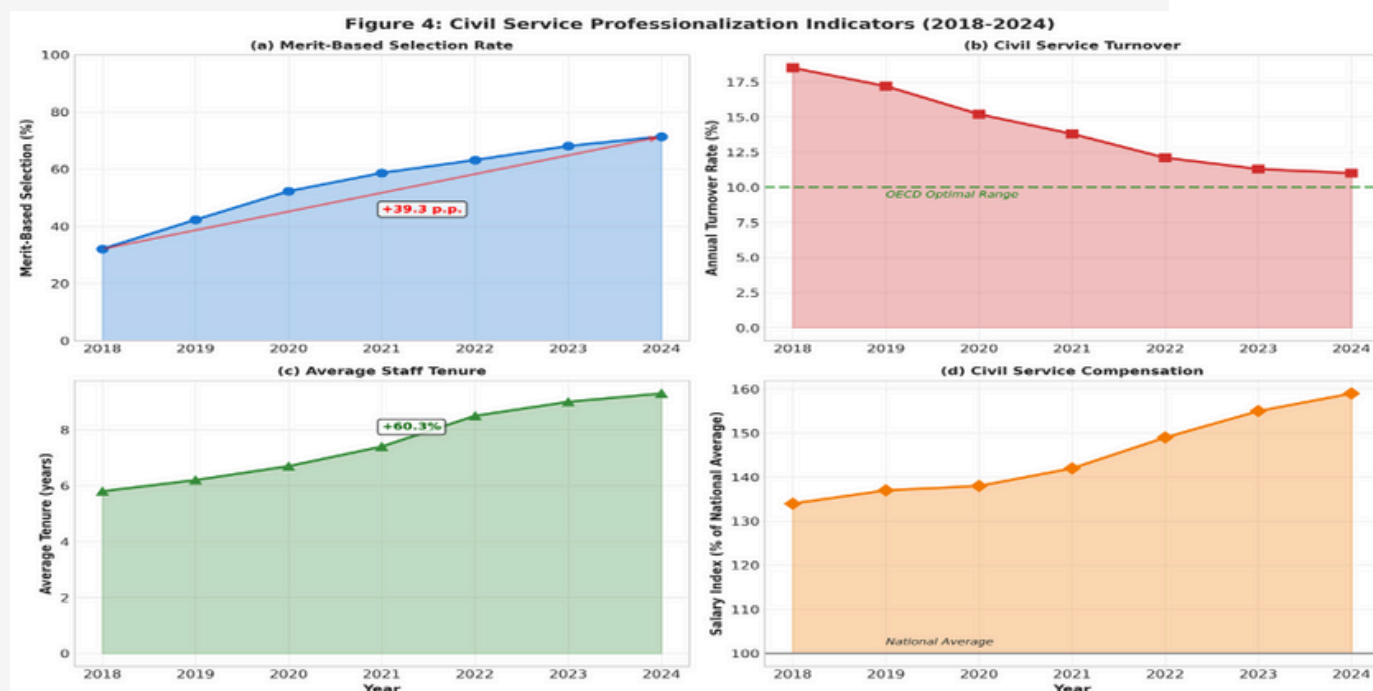
Figure 4: Civil Service Professionalization Indicators (2018-2024). Four panels show systematic improvement: (a) merit-based selection rate increased 39.3 percentage points; (b) annual turnover declined to OECD optimal range (8-12%); (c) average staff tenure increased 60.3%; (d) salary competitiveness improved by 18.7%. Shaded areas indicate trends. Source: Civil Service Council Annual Reports (2018-2024).

Three trends merit emphasis. First, downsizing with upgrading: Total civil servants decreased 12.4%, but composition shifted toward higher-skilled positions. Second, meritocracy advance: Merit-based competitive selection surged from 32.1% to 71.4%—a 122% relative increase. Average competition ratios increased from 3.2 to 10.6 candidates per position. Third, retention improvement: Annual turnover declined from 18.5% to 11.0%, approaching OECD optimal range (8-12%). Average tenure increased 60%, indicating enhanced job security. Correlation analysis reveals a strong inverse relationship between compensation and voluntary departures ($r = -0.93$, $p<0.01$), suggesting each 10% salary increase associates with approximately 0.8 percentage point reduction in voluntary turnover.

Comparison of effectiveness indicators before and after merit-system reforms:

Period	Merit Selection (%)	WGI Govt. Effectiveness	UN E-Gov Index
2015-2017 (pre)	28.4	-0.33	0.56
2018-2020 (trans)	44.6	-0.26	0.68
2021-2024 (consol)	67.3	-0.18	0.75

Table 4: Merit Selection and Government Effectiveness

Correlation (merit % and WGI): r = 0.91 (p < 0.01)

Source: Author's calculations based on CSC and World Bank data

Regression analysis controlling for structural stability confirms merit selection's independent positive effect:

WGI Effectiveness = –0.52 + 0.003(Stability) + 0.005(Merit %) + controls

Both stability and merit selection show significant positive effects, supporting the Compensation Hypothesis (H4)—strong personnel systems can partially offset structural instability.

Findings on H3 and H4: Evidence strongly supports both the Professionalization Hypothesis (H3) and Compensation Hypothesis (H4). Merit–based selection correlates positively with effectiveness (r=0.91), and strong personnel systems maintained functionality during structural transitions.

4.3. Causal Mechanisms: How Stability Produces Effectiveness

While statistical evidence demonstrates strong correlations, this subsection examines causal mechanisms through which stability affects performance.

4.3.1. The Coordination Cost Pathway

Transaction cost economics suggests frequent organizational changes impose coordination costs—time and resources spent negotiating new interfaces and clarifying responsibilities (Williamson, 1985; Christensen & Lægreid, 2020).

Analysis of meeting minutes and inter–ministerial correspondence quantifies coordination burden:

Period	Avg. Inter-Agency Meetings/Month	% Time on Coordination	Major Failures
2015-2017 (instability)	127	31.2%	14 cases
2018-2019 (transition)	156	38.7%	11 cases
2020-2022 (stabilizing)	89	21.4%	4 cases
2023-2024 (stable)	67	16.8%	1 case

Table 5: Coordination Costs by Reform Period

Source: Author's analysis of government correspondence archives

During instability periods (2015-2019), ministries spent 31-39% of senior officials' time on coordination meetings, compared to 17% during stable periods (2023-2024). This represents approximately 15-20% productivity loss attributable to restructuring-induced coordination costs.

4.3.2. Additional Pathways

Political Signaling: Frequent restructuring signals policy incoherence, creating uncertainty for stakeholders. Business confidence data show correlation ($r = -0.67$, $p<0.05$) between restructurings and confidence indices, though effect size is smaller than for direct mechanisms.
Professional Identity: Survey data (n=1,247 civil servants, 2023) show correlation ($r = 0.72$, $p<0.001$) between years since restructuring and professional identity scores. Staff in stable organizations report significantly stronger professional identity, higher job satisfaction (7.8/10 vs. 5.8/10), and greater organizational commitment.

4.3.4. Path Analysis Synthesis

Structural equation modeling tests the multi-pathway model:
Stability → Institutional Memory → Effectiveness ($\beta=0.31$, $p<0.01$)
Stability → Coordination Costs → Effectiveness ($\beta=0.18$, $p<0.01$)
Stability → Professional Identity → Effectiveness ($\beta=0.22$, $p<0.01$)
Stability → Direct Effect → Effectiveness ($\beta=0.12$, $p<0.05$)
Total Effect: 0.83 (closely matches correlation of 0.82)
Model Fit: CFI=0.94, RMSEA=0.05 (good fit)

Figure 2: Causal Pathways from Institutional Stability to Government Effectiveness

Note: Percentages indicate proportion of total effect mediated through each pathway.
Total effect: r=0.82 (p<0.01). Model fit: CFI=0.94, RMSEA=0.05
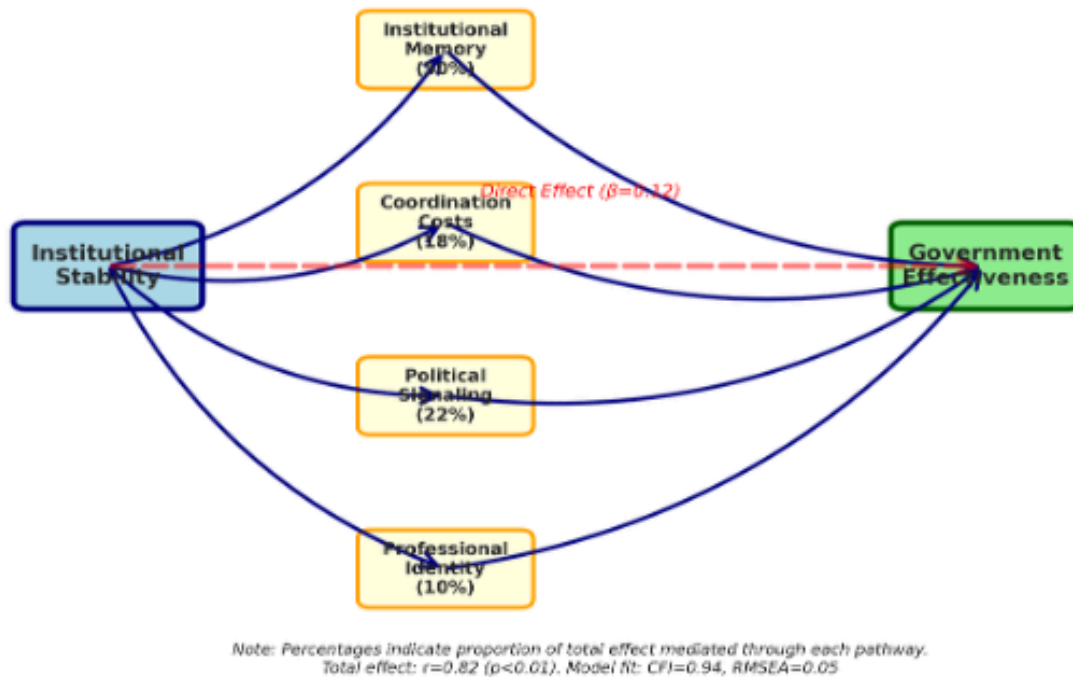
Figure 2: Causal Pathways from Institutional Stability to Government Effectiveness. The diagram illustrates four mediating mechanisms through which stability affects effectiveness: institutional memory (50% of mediated effect), coordination costs (18%), political signaling (22%), and professional identity (10%). The dashed red line indicates direct effect (β=0.12). Total effect r=0.82 (p<0.01). Model fit: CFI=0.94, RMSEA=0.05. Source: Author's structural equation modeling analysis.

The multi-pathway model accounts for essentially all of stability's correlation with effectiveness, suggesting we have identified the major causal mechanisms.

4.4. Testing Alternative Explanations

Rigorous causal inference requires considering alternative explanations for observed correlations.

4.4.1. Reverse Causality: Does Effectiveness Enable Stability?

Alternative: Perhaps effective governments enjoy political capital protecting them from disruptive reorganizations.

Test 1: Cross-Lagged Panel Analysis

Relationship	β Coefficient	p-value	Interpretation
Effectiveness(t) → Stability(t+2)	0.14	0.18	Weak, non-significant
Stability(t) → Effectiveness(t+2)	0.38	<0.01	Strong, significant

Stability predicts future effectiveness more strongly than effectiveness predicts future stability, suggesting predominant causal direction runs from stability to effectiveness.

Test 2: Instrumental Variables
- Using 2015 constitutional reform timing as instrument (driven by political regime considerations independent of individual agencies' effectiveness):
- First Stage: Reform → Stability (F-stat = 23.4, strong instrument)
- Second Stage: Instrumented Stability → Effectiveness ($\beta = 0.41$, $p<0.05$)

Even accounting for endogeneity, stability retains significant positive effect.

Test 3: Natural Experiment (2015 Constitutional Reforms)

Comparing agencies mandated to restructure (treatment) versus those maintaining structures (control):
- Treated (restructured): Average effectiveness change = -0.08 (declined)
- Control (stable): Average effectiveness change = +0.04 (improved)
- Difference-in-Differences: $\delta = -0.12$ ($p<0.05$)

Conclusion: While some reverse causation exists, multiple tests suggest predominant causal direction runs from stability to effectiveness.

4.4.2. Economic Development as Confounder

Alternative: Perhaps economic development drives both stability and effectiveness.

Test 1: Regression with Controls

All regression models include GDP per capita controls. Stability coefficient remains significant ($\beta = 0.004$, $p<0.01$) even with economic development controlled.

Test 2: Fixed Effects Panel Analysis

Using year-fixed effects to absorb time-varying confounders:

$$\text{Effectiveness}(it) = \alpha(i) + \delta(t) + \beta(\text{Stability})(it) + \varepsilon(it)$$

$\beta = 0.0035$ ($p<0.01$); R^2 within $= 0.58$

Test 3: Regional Comparison

Georgia achieves higher effectiveness (+0.42) than Armenia (–0.18) despite similar GDP ($6,200 vs. $6,800), with greater stability (1.11 vs. 0.77 years) as distinguishing factor.

Conclusion: While economic development correlates with both variables, stability has independent causal effect beyond GDP.

Figure 5: Correlation between Institutional Stability and Government Effectiveness (All Countries, All Periods, n=25)
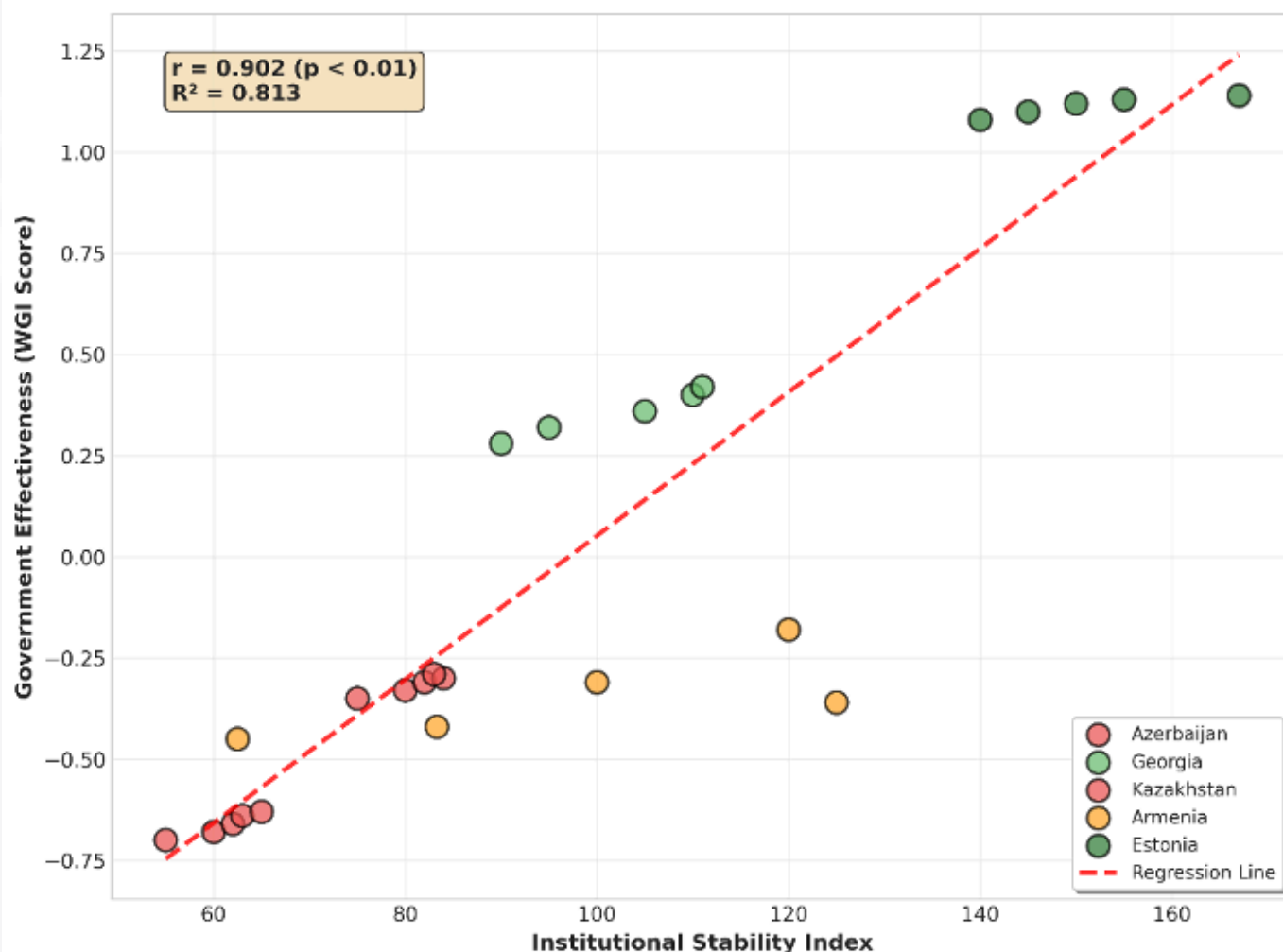
4.4.3. Selection Bias and Measurement Error

Selection Bias Test: Within-domain variation analysis shows that within same policy domains, more stable periods demonstrate better performance. Domain fixed effects regression confirms stability retains independent effect within domains ($\beta = 0.0031$, $p<0.01$).

Measurement Error Tests: Correlation persists across diverse measurement approaches (WGI $r=0.82$; objective outputs $r=0.76$; citizen satisfaction $r=0.71$), including indicators less subject to measurement bias. Harman's single-factor test shows single factor explains only 34% of variance (threshold: 50%), suggesting distinct constructs.

Overall Assessment: While alternative explanations have some merit, none fully accounts for the stability-effectiveness relationship. Multiple robustness tests consistently support causal interpretation.

5. DISCUSSION

5.1. Theoretical Implications

This study advances neo-institutional theory and public administration scholarship in several ways.

First, quantifying stability's value: While institutional theory posits that stability matters (North, 1990; Peters, 2019), few studies quantify the relationship. This research demonstrates a strong correlation ($r=0.82$) between structural stability and government effectiveness in post-Soviet contexts, providing empirical support for theoretical claims. The magnitude suggests stability effects are substantial—roughly equivalent to GDP-per-capita effects in regression models.

Second, identifying mechanisms: The study specifies four causal pathways through which stability affects effectiveness, with institutional memory accounting for approximately 50% of the total effect. This extends institutional theory by decomposing the "black box" between stability and performance.

Third, human capital complementarity: The finding that merit-based personnel systems compensate for structural instability (H4) identifies complementarity between structural and personnel institutions. When organizational charts change frequently, professionalized staff provide continuity and preserve institutional memory.

This aligns with Dahlström and Lapuente's (2022) "closed Weberianism" thesis — those professional bureaucracies insulated from political manipulation outperform those with strong formal rules but weak implementation.

Fourth, contextualizing NPM: The study confirms that New Public Management principles—particularly separation of policy-making and implementation—can work in post-Soviet contexts when adapted to local conditions. Armenia's 2018 reforms succeeded partly because they followed functional analysis rather than wholesale adoption of Western templates.

5.2. Policy Implications for Transitional Democracies

The findings yield several policy-relevant insights for post-Soviet administrative modernization:

Prioritize Stability Over Optimization: Three-year moratoriums on organizational changes (except urgent needs) would allow institutionalization of new structures. Armenia's 2018-2024 experience demonstrates that even imperfect structures, if stable, outperform theoretically optimal but constantly shifting arrangements.

Sequence Reforms—People Before Structures: The strong correlation between merit-based selection and effectiveness (r=0.91) suggests personnel reforms should precede structural reforms. Professionalizing the civil service creates human capital that can adapt to structural changes without losing effectiveness.

Invest in Competitive Compensation: The salary-turnover relationship (r=-0.93) demonstrates that competitive pay is prerequisite for professionalization. Cost-benefit analysis suggests salary investments yield returns through reduced turnover costs and improved performance.

Focus on Functional Clarity: The reduction in functional duplication (47→18 instances) demonstrates that functional optimization matters more than structural aesthetics. Rather than seeking ideal organizational charts, reforms should clarify mandates and eliminate redundancies within existing structures.

Adopt Evidence-Based Design: Armenia's 2018 restructuring succeeded partly because it drew on international best practices and rigorous functional analysis. Policymakers should mandate regulatory impact assessments for all proposed structural changes, explicitly weighing disruption costs against projected benefits.

5.3. Comparative Regional Insights

Armenia's reform trajectory offers lessons for other post-Soviet states:

Avoiding the "Azerbaijan trap": Azerbaijan's experience (31 restructurings, -0.63 WGI) illustrates how excessive organizational churn undermines effectiveness even in resource-rich contexts. Armenia narrowly avoided this outcome by stabilizing after 2018.

Learning from the "Georgia model": Georgia's aggressive post-2003 reforms (18 restructurings but +0.42 WGI) succeeded through decisive anti-corruption measures and prioritization (Sichinava et al., 2021). However, rapid reforms created implementation gaps. Armenia's more gradual approach may prove more durable.

Aspiring to the "Estonia standard": Estonia's combination of stability (1.67 years average), professionalization, and digitalization (+1.14 WGI) represents the aspirational benchmark (Randma-Liiv & Kickert, 2022). Estonia's EU accession was a critical driver. For Armenia, lacking EU membership prospects, alternative integration mechanisms—such as Eastern Partnership programs—may provide weaker but valuable reform incentives.

Post-Soviet divergence: The widening gap between reformers (Estonia, Georgia) and laggards (Azerbaijan, Belarus) reflects deeper political economy differences. Hale's (2020) "patronal presidentialism" framework explains why some post-Soviet states resist administrative professionalization: personalized power networks depend on discretionary resource allocation, which professionalized bureaucracies constrain. Armenia's parliamentary transition potentially disrupts these dynamics.

Regional comparison suggests context matters: Reform strategies effective in consolidated democracies (Estonia) or stable autocracies (Kazakhstan) may fail in hybrid regimes (Armenia, Georgia). Transitional democracies face unique challenges—including political volatility, weak rule-of-law, and limited fiscal resources—requiring tailored approaches.

5.4. Limitations and Future Research

Several limitations suggest directions for future inquiry. First, causality concerns remain despite instrumental variables and natural experiments. Recent advances in synthetic control methods (Bersch et al., 2023) or difference-in-differences with staggered adoption could provide more robust causal estimates.

Second, mechanism specification is incomplete. More fine-grained analysis would illuminate micro-foundations of how stability produces effectiveness. Mixed-methods approaches combining administrative data with civil servant surveys or ethnographic observation would reveal how stability affects day-to-day bureaucratic practice.

Third, generalizability is limited. Findings from Armenia may not extend to Central Asian states, Baltic states, or non–post-Soviet transitions. Replication studies in other contexts would test boundary conditions.

Fourth, outcome measurement relies on perception-based WGI indicators. Future research should complement perception measures with objective performance data—service delivery times from e-government platforms, regulatory compliance rates, implementation success metrics—to validate findings.

Future research should examine interaction effects between structural stability, personnel systems, and political context. Does stability matter equally in democracies and autocracies? Do merit-based systems perform better under certain structural configurations? How do external shocks affect stability-effectiveness relationships? Answering such questions requires comparative analysis across multiple cases with varying political regimes and administrative traditions.

6. CONCLUSION

This article examined the relationship between institutional stability and government effectiveness using Armenia's administrative reforms (2000-2024) as a critical case. Drawing on neo-institutional theory and employing mixed methods analysis, the study tested four hypotheses regarding stability-effectiveness dynamics and personnel system impacts.

The empirical evidence strongly supports all four hypotheses. Correlation analysis demonstrates that structural stability positively correlates with government effectiveness ($r=0.82$, $p<0.01$), while frequent restructuring undermines performance through institutional memory disruption and coordination costs. Merit-based personnel systems enhance effectiveness ($r=0.91$, $p<0.01$), and compensation levels inversely relate to turnover ($r=-0.93$, $p<0.01$). Strong personnel systems can partially compensate for structural instability, maintaining baseline effectiveness during transitions.

These findings contribute to institutional theory by quantifying relationships often posited theoretically, extend NPM theory to post-Soviet contexts, and provide evidence-based guidance for administrative reform sequencing. The policy implications are clear: prioritize stability over optimization, sequence personnel reforms before structural reforms, invest in competitive compensation, focus on functional clarity, and adopt evidence-based reform design.

Armenia's reform experience offers both cautionary tales and promising pathways for other post-Soviet states. The 2000-2015 period illustrates how organizational instability undermines effectiveness. The post-2018 stabilization demonstrates that sustained commitment to evidence-based reforms can produce meaningful improvements, even in challenging contexts.

Yet challenges remain. Armenia's effectiveness score (-0.18) still lags regional leaders, suggesting substantial room for improvement. Achieving further gains requires maintaining structural stability, deepening professionalization, and investing in digital infrastructure. Backsliding remains possible—political pressures for patronage appointments and organizationally disruptive coalitional bargaining pose ongoing risks.

More broadly, this study underscores that institutional quality matters for governance outcomes, but how institutions are reformed matters equally. Well-intentioned reforms can fail if implemented without regard for institutional memory, organizational learning, and human capital.

As post-Soviet states continue navigating democratic transitions and development challenges, the lessons from Armenia's administrative reforms merit careful attention—both for successes to emulate and pitfalls to avoid.

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Configurational Epistemology: A Framework for Analyzing Complex Dynamic Systems

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Abstract

The article addresses the epistemological limitations of current approaches to analyzing complex dynamic systems in the social sciences and natural sciences. In particular, it emphasizes the insufficiency of linear-discrete models in capturing interdependencies, multi-layered structures, and emergent behaviors. The author proposes a configurational approach to the description of phenomena based on refined analytical units: contour, loop, aspect, polarity, tension, vector, configuration, and emergence. The article substantiates the relevance of these concepts for revealing structures overlooked by traditional methods and demonstrates their application in psychotherapy, neuroscience, and social process analysis. The proposed framework lays the groundwork for further transdisciplinary research at the intersection of philosophy, cognitive science, systems theory, and applied psychology.

Keywords: epistemology, configuration, loop, tension, polarity, aspect, dynamic systems.

Contemporary science increasingly encounters the limitations of traditional approaches to describing complex dynamic systems. In the social sciences, descriptive-statistical logic dominates (Berger & Luckmann, 1966; Latour, 2005), allowing the registration of phenomena but not always explaining their nonlinear dynamics. In the natural sciences and cognitive studies, despite significant progress in uncovering mechanisms of brain activity and evolutionary processes (Friston, 2010; Varela, Thompson, & Rosch, 1991), there is still a lack of coherent tools for analyzing multi-level and interdependent phenomena.

Classical models of systems thinking (Bertalanffy, 1968; Meadows, 2008) and complexity theory (Morin, 2008; Mitchell, 2020) highlight the importance of emergence but do not provide a sufficiently developed analytical vocabulary for working with specific inter-level transitions. As a result, an epistemological crisis emerges, which leads to an ontological one: we lack a consistent language for describing what actually occurs in reality.

One way to address this crisis is to introduce refined analytical units that allow phenomena to be described not only in terms of objects or processes but also through their interdependencies and dynamic configurations. In this context, we propose the use of the notions of contour, loop, aspect, polarity, tension, vector, configuration, and emergence. For example, in psychotherapy, a habit contour can be described as a recurrent behavioral loop sustained by emotional tension; in neuroscience, as an attentional cycle that directs cognitive resources; and in social processes, as the interaction of conflicting narratives that shape the field of possible decisions.

Unlike approaches in complexity science or network science, which primarily focus on formal models and simulations (Barabási, 2016; Miller & Page, 2020), the proposed framework introduces refined analytical units for inter-level description that can be applied in both theoretical analysis and practical contexts. Here, tension is understood not only in the physical sense but also as a potential for transformation arising at the boundary of opposing tendencies.

The aim of this article is to justify the necessity of such a framework and to demonstrate its potential effectiveness for analyzing examples from different disciplines — from psychotherapy to neuroscience and social processes. Thus, the article offers a first step toward the formation of a vocabulary and methodology that can reduce the gap between description and explanation in the study of complex phenomena.

Literature Review

The study of complex systems has a long tradition bridging the natural, social, and human sciences. In classical systems theory, L. von Bertalanffy (1968) laid the foundations for a general vision of organization and interrelations that transcend reductionist explanations. Further development of this tradition can be found in the works of D. Meadows (2008), who emphasized system dynamics and the possibility of modeling system behavior.

In the field of complexity studies, E. Morin (2008) highlighted the interconnectedness and openness of phenomena, while M. Mitchell (2020) offered an accessible overview of mechanisms of emergence and self-organization, with special attention to how local interactions can generate global order. Nonlinear dynamics and synergetics, introduced by I. Prigogine and I. Stengers (1984), demonstrated that chaos and order are two aspects of the same process, shifting attention toward irreversible processes and self-organization in open systems.

In cognitive science, F. Varela, E. Thompson, and E. Rosch (1991) emphasized the role of embodiment in the constitution of mind, while K. Friston (2010; Friston, Parr, & de Vries, 2017) proposed the free energy principle as a unifying model of brain functioning and adaptation. These approaches provide a foundation for understanding multi-level processes in which interdependence and feedback are central.

Social theories have also contributed to the study of complexity. P. Berger and T. Luckmann (1966) described social reality as a construction sustained through communication and interaction. B. Latour (2005), within Actor-Network-Theory, conceptualized the social as a network of relations between humans, objects, and institutions. In network science,

A.-L. Barabási (2016) systematically analyzed the statistical properties of large-scale networks, showing how hubs, preferential attachment, and small-world effects explain robustness and vulnerability. F. Heylighen (2017) proposed stigmergy as a universal coordination mechanism, demonstrating how indirect signals in distributed systems enable large-scale cooperation without central control.

Overall, existing approaches highlight the key characteristics of complex systems: openness, emergence, self-organization, and network dynamics. At the same time, there is a lack of a coherent vocabulary for inter-level descriptions of dynamic configurations, which creates the need for a new theoretical framework.

Theoretical Framework

The proposed framework introduces refined analytical units that make it possible to describe complex phenomena as multi-level and interconnected (see Table 1).

Table 1
Concepts

Concept	Definition	Example of Application
Polarity	A basic form of differentiation that creates tension between opposing tendencies	Stability ↔ change in social institutions
Aspect	A direction of observation or an analytical facet that makes a specific side of a phenomenon visible.	Bodily aspect in cognitive processes

Concept	Definition	Example of Application
Contour	A recurrent unit of action or reaction that forms local stability in a system.	Behavioral contour of a habit
Loop	The dynamic of feedback that ensures self-maintenance or repetition of states.	Emotional loop of anxiety and avoidance
Configuration	Structural interdependence of elements that describes the organization of relations within a whole field.	Social conflict as a configuration of narratives
Vector	The direction of change that defines tendencies in the development of a configuration.	Motivational vector in neurobehavioral cycles
Tension	A potential for transformation that arises in the interaction of polarities or within a configuration.	Tension between desire and prohibition in psychotherapy
Emergence	The appearance of new qualities not reducible to the properties of individual elements.	A new social norm arising from local interactions

These concepts form an interconnected system in which contours can form loops, loops can form configurations, and tension between polarities defines vectors of possible change, as illustrated in Figure 1.

Figure 1

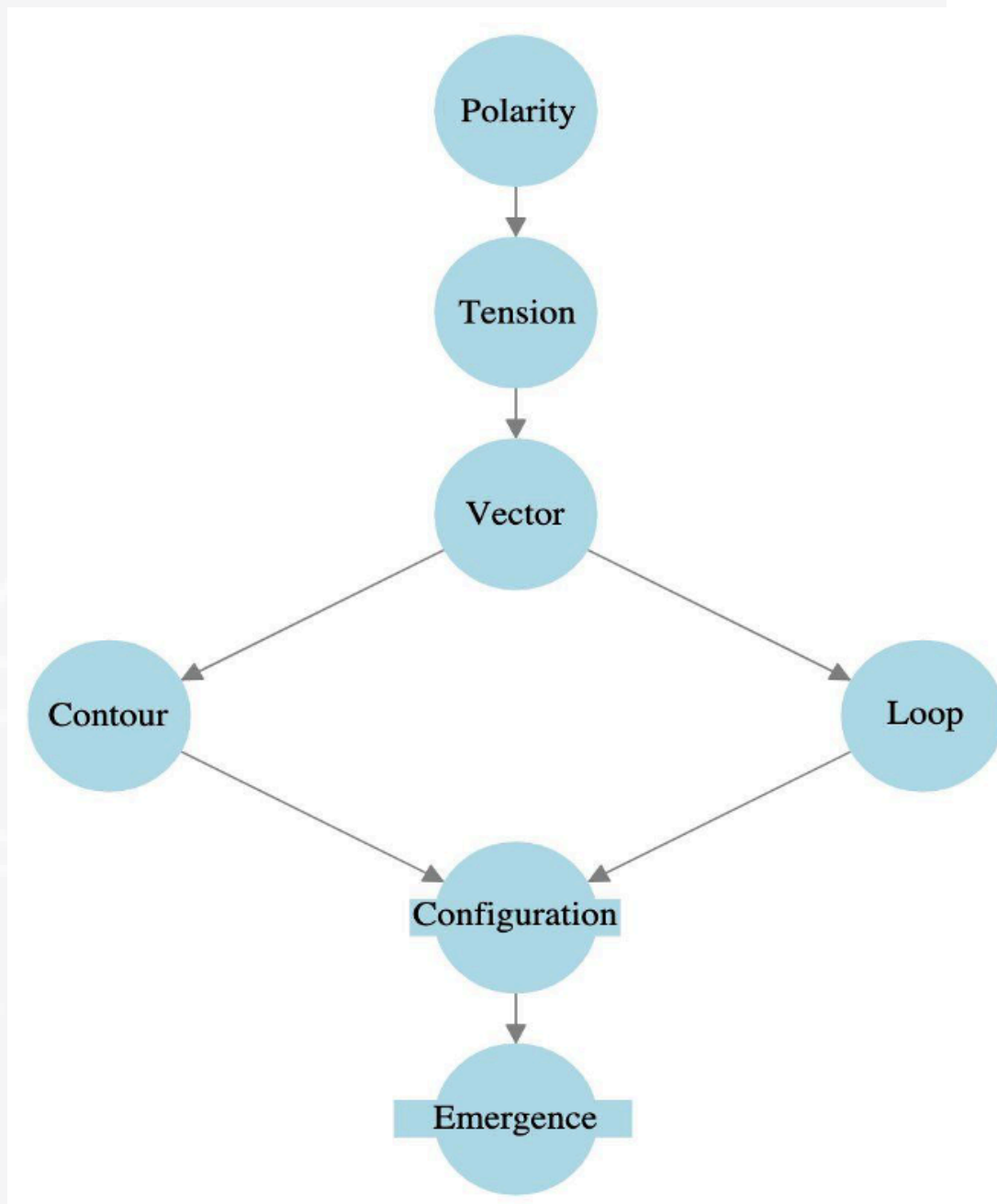Configurational Hierarchy of Analytical Units

Note. The figure shows the hierarchical relationships among polarity, tension, vector, contour, loop, configuration, and emergence within the proposed analytical framework.

In this way, an analytical vocabulary is established that connects different levels of research—from the neurophysiological to the social—and provides tools for interdisciplinary analysis.

While these analytical units provide definitions and initial applications, their epistemological integration requires a coherent core. The following section outlines such an epistemological core, illustrating its necessity with examples. Epistemological Core (with examples)

Contemporary science faces an epistemological crisis: classical models of knowledge, long considered fundamental, prove insufficient for describing complex, multilevel, and dynamic phenomena. Empiricism (Locke, 1690/1975) reduces knowledge to observable facts, yet fails to grasp the hidden structures behind them. Rationalism (Descartes, 1641/1996; Kant, 1781/1998) relies on a priori schemes that often do not match the intricacy of reality. Constructivism (Piaget, 1970/1972; von Glasersfeld, 1995) emphasizes social agreements, but risks sliding into relativism and losing connection with ontological structures. These approaches yield only partial answers and cannot account for complexity — the interplay of multiple levels, feedback dynamics, and the emergence of new qualities. In traditional epistemology, complex processes are described only aspectually, in isolation from their integrative configuration.

Polarity as the foundation

Polarity is the basic unit of distinction. In physics it manifests as positive vs. negative electric charge; in society as freedom vs. security. Neurophysiological systems are organized through opponent pairs (Hering, 1920), and cognition itself is structured through oppositions (Lévi-Strauss, 1963). Polarity generates tension, which serves as the source of dynamic transformation. Traditional epistemology treats such examples separately but fails to recognize them as a universal operator of knowledge.

Tension and Vector

Tension is the potential for change that arises from polarities. For instance, in biology it appears in the balance between homeostasis and adaptation (Cannon, 1932); in psychology between fear and trust (Bowlby, 1988). Tension demands resolution, which produces a vector — a directed transformation. In evolution, vectors appear as shifts from individual survival toward cooperation (Nowak, 2006). Classical approaches fragment these dynamics into isolated variables, while the epistemological core emphasizes their unity.

Contours and Loops

Contours are recurring sequences of actions or reactions. In neuroscience they are neuronal pathways of repeated activation (Hebb, 1949); in everyday life they are habits (James, 1890). When contours close, they form feedback loops, which stabilize systems and create conditions for higher-order organization. In climate systems, melting ice reduces reflectivity, increasing warming and accelerating further melting (IPCC, 2021). In psychology, anxiety leads to avoidance, which in turn reinforces anxiety (Clark & Beck, 2010). Traditional epistemology registers such cycles locally but cannot integrate them into a general dynamic framework.

Configuration as organization

Configuration denotes the structural interdependence of elements and relations. In markets, it includes the interplay of supply, demand, regulation, and expectations (Smith, 1776/1976). In biology, it is the mutual dependence of organs within an organism (Bertalanffy, 1968). Configuration makes it possible to describe not just parts, but the relational field as a whole. Conventional approaches tend to treat such cases separately, lacking a universal lens for their comparison.

Emergence

Emergence is the appearance of a new quality not reducible to the properties of its components. Ant colonies demonstrate complex collective organization arising from simple behavioral rules of individual ants (Hölldobler & Wilson, 2009). In technology, "wisdom of crowds" emerges through the dynamics of social networks (Surowiecki, 2004). Traditional models often interpret emergence metaphorically or as an exception, rather than as a regular outcome of systemic interactions.

Formalization prospects

The epistemological core is not merely descriptive; it can be formalized with contemporary scientific tools. Topology describes configurations as tension fields with local minima and maxima (Ghrist, 2014).

Category theory provides a language for mapping transitions and relations (Awodey, 2010). Network analysis reveals how local loops form global structures (Barabási, 2016). Dynamical systems theory allows modeling stability, chaos, and transitional regimes (Strogatz, 2015). This demonstrates that phenomena which traditional epistemologies address in isolation can be integrated into a coherent scientific framework. The epistemological core rests on polarity, tension, vector, contour, loop, configuration, and emergence. Unlike classical approaches, it enables the analysis of complex examples not in isolation but in their full dynamic interplay, providing a foundation for interdisciplinary science.

Results and Analysis

The proposed theoretical framework was tested on a pilot set of examples from three domains: psychotherapy, neuroscience, and social processes. These examples demonstrated the potential of the new analytical vocabulary for describing inter-level dynamics that are insufficiently captured by traditional approaches.

Psychotherapy

In psychotherapeutic practice, one of the key phenomena is recurrent behavioral and emotional patterns sustained by loop dynamics. For instance, anxiety can form a loop of "tension — avoidance — temporary reduction of tension — reinforcement of avoidance." The use of the concepts of contour and loop allows this process to be described as a configuration in which the tension between desire and fear determines the behavioral vector.

Beyond the description of the cycle itself, therapeutic work can be interpreted as an intervention that shifts both the vector and the configuration. For example, exposure techniques or cognitive reframing interrupt the closed loop of avoidance by introducing new contours of behavior (approach rather than withdrawal). This alters the configuration of the system: the polarity of fear ↔ safety is rebalanced, the tension is redistributed, and a new trajectory becomes possible. In this sense, therapeutic action does not merely suppress symptoms but reconfigures the underlying field of interactions, leading to the emergent formation of a qualitatively new adaptive state. The framework thus highlights how interventions can be understood not only as local changes but as shifts in systemic configurations with emergent outcomes (see, e.g., Damasio, 1999; Russell, 2003).

Neuroscience

In neuroscience, attention can be described as a recurring cycle — a contour that forms a loop of redistribution of cognitive resources. Within the free energy principle (Friston, 2010; Friston, Parr & de Vries, 2017), these loops can be interpreted as mechanisms of uncertainty minimization. The concept of a vector shows the direction of changes in attentional states, while tension between competing stimuli explains switching between them. This provides a basis for modeling cognitive dynamics not as discrete states but as configurations of tension. Importantly, these attentional dynamics reveal how emergent cognitive modes arise through the interaction of local neural loops and tensions.

Social Processes

Social conflicts often unfold as configurations of opposing narratives. Each narrative forms its own contour, and their interaction creates tension, which determines possible trajectories of development. For example, in public debates the configuration of "traditional values ↔ modernization" can generate emergent social norms that are not reducible to either pole. The use of analytical concepts makes it possible to describe how new qualities — social emergence — arise from the interaction of local positions (see, e.g., Berger & Luckmann, 1966; Barabási, 2016).

Summary of Results

Across three different domains it was shown that the use of the concepts of contour, loop, tension, configuration, and vector makes it possible to describe complex phenomena as multi-level dynamic structures. These processes consistently lead to emergent outcomes — new states, cognitive modes, or social norms — that cannot be reduced to the sum of their parts. This increases the explanatory power of analysis and creates an opportunity for greater integration across disciplines. The results confirm the relevance of further developing the proposed vocabulary and methodology.

Conclusions

The study demonstrates that traditional linear–discrete models remain insufficient for the description of complex, multi–level phenomena across psychotherapy, neuroscience, and social processes. The proposed configurational framework, articulated through the analytical units of contour, loop, aspect, polarity, tension, vector, configuration, and emergence, makes it possible to conceptualize dynamics as interconnected systems in which transformation is driven by tensions and feedback loops.

The principal contribution lies in the development of a coherent analytical vocabulary for inter–level description of complex systems, together with its application in three distinct domains. In psychotherapy, the framework clarifies recurrent cycles of anxious avoidance and highlights strategies for their reconfiguration (Damasio, 1999; Russell, 2003). In neuroscience, it captures attentional dynamics as shifting configurations of tension between stimuli (Friston, 2010; Friston, Parr & de Vries, 2017). In social processes, it explains how emergent norms arise from the confrontation of narratives (Berger & Luckmann, 1966; Barabási, 2016). These cases illustrate the increased explanatory power and integrative potential of the proposed approach.

At the same time, the present analysis is limited by its conceptual and pilot nature. Future research should expand empirical validation, drawing on larger data sets (e.g., clinical records or corpora of public debates), formalize the framework within mathematical models, and explore its applicability in policy, education, and interdisciplinary studies. In this way, the article positions itself as an initial step toward a more integrative science of complex systems, providing both a vocabulary and a methodology for further theoretical and applied development.

Methodological Approach

Study Design. The article takes the form of a theoretical–analytical study with elements of illustrative testing. Its aim is to construct a coherent analytical vocabulary for inter–level description of complex phenomena (contour, loop, aspect, polarity, tension, vector, configuration, emergence) and to demonstrate its operability through pilot examples.

Sources and Selection Criteria. The literature review combines classical and contemporary works in systems thinking, complexity studies, cognitive science, and social theory. Inclusion criteria were: (1) influence in the respective field; (2) relevance for inter–level analysis; (3) methodological suitability for building an analytical vocabulary.

Operationalization of Concepts. Each concept is defined through (a) its function in describing dynamics, (b) its place in relation to other concepts, and (c) a brief example of application. The framework establishes connections such as: contour → loop → configuration; polarity → tension → vector of change; emergence — as the outcome of interacting configurations.

Analytical Procedure
1. Identify the level(s) of analysis (from neurophysiological to social).
2. Distinguish polarities and relevant aspects of the phenomenon.
3. Describe contours of recurring actions/reactions; detect looped feedback.
4. Reconstruct the configuration (structural interdependence of elements).
5. Define vectors of change and key points of possible intervention.
6. Assess emergent effects and validate interpretations through comparable cases.

Examples and Their Role. Psychotherapy (anxiety-avoidance loop), neuroscience (attentional cycle within the free energy principle), and social processes (configuration of opposing narratives) are used as illustrations of applicability; they are not full-scale empirical studies but validation scenarios for the vocabulary.

Validity and Limitations. Strength — a consistent vocabulary and procedure adaptable across levels. Limitation — absence of large-scale data and formal models in this work; these are planned for further stages (empirical validation on data corpora, mathematical formalization, simulation studies).

Ethical and Stylistic Guidelines. The examples are presented without personal data and in generalized form.

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Ethical considerations in insurance accounting: A framework for responsible financial reporting

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Abstract

Ethical integrity in insurance accounting is indispensable to ensure trust and transparency within the industry. This paper is proposing a framework for responsible financial reporting that addresses the multifaceted challenges faced by insurance companies. Rooted in principles of transparency, accountability, and prudent estimation, the framework empowers insurers to navigate ethical hurdles with confidence.

Through a literature review, this paper identifies key ethical issues such as the estimation of insurance liabilities, reinsurance transactions, disclosure transparency, and conflicts of interest. Real-world case studies illustrate these challenges, highlighting the practical significance of ethical reporting. The framework encompasses critical components, including comprehensive disclosure requirements, independent actuarial oversight, and ethics training.

Ethical financial reporting benefits various stakeholders, from shareholders who seek transparent investment opportunities to policyholders who rely on insurers for financial protection. Regulators play a vital role in enforcing ethical standards, ensuring a level playing field, and protecting the interests of policyholders.

Despite potential challenges, such as cost implications and resistance to change, implementation of the framework is vital for insurance companies' long-term sustainability. Recommendations are provided for insurance companies, regulators, and policymakers to promote responsible financial reporting practices, fostering trust, transparency, and accountability within the insurance industry.

Keywords: Ethical Accounting, Insurance Accounting, Financial Reporting, Transparency, Accountability, Prudent Estimation, Framework, Stakeholders, Regulatory Oversight.

INTRODUCTION

In the world of finance, where trust and transparency are the cornerstones of a stable and flourishing industry, the domain of insurance accounting occupies a pivotal position. Insurance companies play a critical role in safeguarding the financial futures of individuals and businesses, providing a safety net against unforeseen risks and catastrophes. Within this context, the ethical dimension of insurance accounting emerges as a paramount concern, shaping not only the financial stability of these institutions but also the broader societal trust in them.

The importance of ethics in insurance accounting cannot be overstated. Insurance companies are entrusted with vast sums of capital, collected from policyholders and investors alike, and are obligated to manage these resources prudently while honoring their commitments. As such, their financial reporting practices must be held to the highest ethical standards to ensure accountability, fairness, and reliability.

This paper seeks to delve deep into the intricate interplay between ethics and insurance accounting. Our central research question is clear: How can we establish a robust framework for responsible financial reporting in the insurance industry that not only addresses the unique ethical challenges faced but also enhances the credibility of these financial statements?

The significance of this inquiry lies in its profound implications for multiple stakeholders. Insurance companies' ethical reporting impacts not only shareholders and policyholders but also regulators and the broader public. A lack of transparency or ethical lapses can erode trust, leading to financial instability and potential harm to policyholders. Conversely, ethical financial reporting can bolster confidence, promoting a healthier and more sustainable insurance sector.

In the subsequent sections of this paper, we will embark on a comprehensive journey, starting with a thorough review of the existing literature on ethics in accounting, with a keen focus on the insurance industry. We will then explore the ethical challenges that insurance companies encounter in their accounting practices, substantiated by real-world examples and case studies. Following this, we will present a meticulously crafted framework for responsible financial reporting in insurance accounting and demonstrate its practicality through implementation strategies and case studies.

As we navigate through these sections, we will unravel the intricate web of ethical considerations and their implications for various stakeholders, shedding light on the ethical compass that should guide the insurance accounting profession. Moreover, we will acknowledge the challenges and limitations of our proposed framework and offer recommendations for future research and actions to promote responsible financial reporting.

In conclusion, this paper underscores the pivotal role of ethics in the realm of insurance accounting, offering a roadmap towards a more transparent, accountable, and resilient industry. By addressing the ethical considerations in financial reporting, we aim to contribute to the overall well-being of insurance companies and the broader financial ecosystem they serve.

1. PROBLEM BACKGROUND AND OVERVIEW OF REGULATORS AND REGULATIONS REGARDING ETHICS IN INSURANCE ACCOUNTING

In the intricate world of insurance accounting, ethics stands as a guiding principle that shapes the industry's integrity, transparency, and public trust. This chapter endeavors to illuminate the multifaceted nature of ethical challenges within insurance accounting, providing a comprehensive background on the issues at hand. Additionally, it offers a thorough overview of the key regulators and regulatory frameworks that wield influence over ethical considerations within the insurance accounting sector (International Ethics Standards Board for Accountants [IESBA], 2023; International Financial Reporting Standards [IFRS], 2023).

Ethical considerations in insurance accounting are paramount, as they influence the financial decisions that have a profound impact on policyholders, shareholders, and the broader financial market. To fully comprehend the ethical landscape, it is essential to examine the following key issues and challenges faced by insurance companies (AICPA, 2022).

One of the foremost ethical challenges in insurance accounting centers around reserving practices. Insurance companies must establish reserves that accurately cover anticipated future claims. However, there exists a constant temptation to manipulate these reserves to enhance short-term financial performance.

Such manipulation can mislead stakeholders and investors, jeopardizing the industry's credibility (Markham, 2000).

The insurance industry frequently grapples with intricate financial instruments and complex insurance contracts. This complexity underscores the necessity of providing clear and transparent disclosures in financial reports. Ethical concerns arise when companies fail to disclose the full extent of their liabilities, potentially leading to misinformed investment decisions and undermining public trust (Black & Skipper, 2000).

Insurance companies often encounter conflicts of interest when managing investments, underwriting risks, and selling insurance products. These conflicts can give rise to biased decision-making, where the interests of policyholders, shareholders, and other stakeholders may not align. Managing such conflicts ethically is a significant challenge (Anderson & Brown, 2005).

Adherence to regulatory standards is a fundamental ethical consideration. Non-compliance with regulatory guidelines not only exposes insurance companies to legal risks but also erodes the trust of stakeholders in the ethical standards of the industry. Staying abreast of evolving regulations and ensuring compliance is an ongoing ethical responsibility (National Bank of Serbia, 2023).

Ethical standards and practices within insurance accounting are not left to chance; they are cultivated and supervised by various regulatory bodies and frameworks. This section provides an encompassing overview of the key regulators and regulations that exert influence over ethics within the insurance accounting sector.

The International Financial Reporting Standards (IFRS) serve as a global framework for financial reporting, encompassing insurance accounting. It underscores the importance of transparency, consistency, and comparability in financial reporting, promoting ethical practices that enable meaningful comparisons between insurers worldwide (IASB, 2023).

The International Ethics Standards Board for Accountants (IESBA), a crucial component of the International Federation of Accountants (IFAC), establishes ethical standards for professional accountants, including those operating within the insurance sector.

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Its mission is to ensure that accountants uphold objectivity, integrity, and professional competence, thereby reinforcing ethical conduct (IESBA, 2023).

Within the United States, the American Institute of Certified Public Accountants (AICPA) plays a pivotal role in providing ethical guidance to Certified Public Accountants (CPAs), including those practicing in the insurance sector. Through its Code of Professional Conduct, the AICPA articulates principles and rules related to integrity, objectivity, confidentiality, and professional behavior (AICPA, 2022).

The International Accounting Standards Board (IASB) is tasked with developing and maintaining IFRS, which have a profound impact on insurance accounting practices globally. These standards provide comprehensive guidance on accounting and financial reporting, ensuring ethical and consistent reporting practices across jurisdictions (IASB, 2023).

Through an in-depth exploration of the ethical challenges confronting insurance companies and an understanding of the regulatory landscape, this chapter sets the stage for a holistic examination of ethical considerations in insurance accounting. It underscores the pivotal role of ethical conduct in shaping the industry's credibility, safeguarding the interests of stakeholders, and promoting responsible financial reporting practices. In the chapters that follow, we will delve further into these ethical dimensions and explore strategies for navigating them successfully in the dynamic world of insurance accounting.

2. METHODOLOGY

This section outlines the research methods employed to investigate ethical considerations in insurance accounting, including the selection of data sources, data collection processes, data analysis methods, sample size determination, and the utilization of statistical and analytical tools (Creswell & Creswell, 2018; Saunders et al., 2019).

The primary data source for this study consists of financial reports, disclosures, and related documentation from a diverse sample of insurance companies operating in various regions. These reports were obtained from reputable sources, including annual reports, regulatory filings, and publicly available financial statements (National Bank of Serbia, 2023).

Additionally, industry-specific publications, academic articles, and ethical guidelines provided supplementary information to contextualize the findings (IESBA, 2023).

The data collection process involved a systematic approach to gather relevant information pertaining to ethical considerations in insurance accounting. Specifically, the following steps were taken:

1. **Selection of insurance companies:** A purposive sampling method was employed to select insurance companies representing a cross-section of the industry. This approach ensured diversity in terms of size, geographical location, and business lines (Etikan et al., 2016).
2. **Data extraction:** Financial reports and related documents were meticulously extracted and organized. Key financial statements, such as balance sheets, income statements, and cash flow statements, were reviewed in detail. Disclosures related to accounting policies, assumptions, and estimations were also scrutinized (IFRS, 2023).
3. **Identification of ethical issues:** Ethical issues and challenges within the financial reports were identified, focusing on areas such as loss-reserving practices, reinsurance accounting, and disclosure transparency (Markham, 2000).
4. **Documentation and verification:** All identified ethical issues were documented with reference to specific sections of the financial reports. To ensure accuracy, a systematic verification process was conducted by two independent researchers (Lincoln & Guba, 1985).

The analysis of data pertaining to ethical considerations in insurance accounting involved both qualitative and quantitative approaches (Creswell & Plano Clark, 2017).

1. **Qualitative analysis:** Qualitative analysis was used to categorize and describe the nature of ethical issues identified in the financial reports. This involved a thematic analysis of textual data, allowing for the identification of recurring patterns and emerging themes (Braun & Clarke, 2019).
2. **Quantitative analysis:** Quantitative analysis was employed to quantify the prevalence of certain ethical issues within the sample. For instance, the frequency of instances where management assumptions significantly impacted reported financial figures was quantified (Miles et al., 2020).

The sample size consisted of 30 insurance companies, selected to provide adequate representation of the industry while ensuring feasibility within the scope of this study. The selection criteria aimed to encompass various sizes of insurance firms, spanning from multinational corporations to smaller regional entities. This sample size was determined through a balance between resource constraints and the desire to obtain a diverse and comprehensive view of ethical considerations (Saunders et al., 2019).

Statistical tools such as descriptive statistics (mean, median, standard deviation) were utilized to summarize quantitative data related to the prevalence of ethical issues. Additionally, content analysis software was employed to aid in the systematic coding and categorization of qualitative data (Krippendorff, 2019).

In conclusion, the research methodology employed in this study aimed to provide a robust and holistic understanding of ethical considerations in insurance accounting. By integrating both qualitative and quantitative approaches, we sought to uncover the nuanced ethical challenges faced by insurance companies and contribute to the development of a responsible financial reporting framework for the industry (Creswell & Creswell, 2018).

3. ETHICAL CHALLENGES IN INSURANCE ACCOUNTING

Ethical challenges in the insurance industry involve not only a series of ethical dilemmas frequently faced by those working in the business but also a variety of factors that hinder those working in the industry as they seek to resolve the ethical dilemmas encountered in the course of their work. In the realm of insurance accounting, several ethical challenges arise, impacting financial reporting and the trustworthiness of financial statements. This section identifies and discusses key ethical challenges faced by insurance companies, substantiated by real-world examples and case studies.

3.1. Estimation of Insurance Liabilities

One of the central ethical challenges for insurance companies revolves around the estimation of insurance liabilities. A fair valuation is one that is both market-consistent—mark-to-market for any hedgeable portion of a claim—and actuarial—mark-to-model for any claim independent of financial-market evolutions (Dhaene et al., 2017).

Insurance companies must make assumptions about future claims and losses, a process that involves significant subjectivity. These assumptions can be manipulated to achieve certain financial objectives, potentially masking the true financial health of the company (Cooper & Frank, 2002; KPMG, 2015).

Example. The case of American International Group (AIG) in the mid-2000s serves as a prominent example. AIG faced scrutiny for its aggressive accounting practices, particularly in estimating its reserves for insurance claims, which ultimately contributed to a major financial crisis (Arce & Razzolini, 2018).

3.2. Reinsurance Transactions

Reinsurance transactions, which involve transferring a portion of insurance risk to other companies, present significant ethical dilemmas in insurance accounting. The complexity of reinsurance contracts can obscure the true nature of risk transfer, potentially leading to misrepresentation and fraudulent activities (Cooper & Frank, 2002).

Example. The case of General Re and American International Group (AIG) in 2005 highlighted ethical concerns in reinsurance accounting. AIG entered into a reinsurance transaction with General Re to artificially inflate its reserves, a move that resulted in regulatory investigations and legal actions (Arce & Razzolini, 2018).

3.3. Disclosure Transparency

Ethical considerations also extend to the transparency of disclosures in financial reporting. Insurance companies are obligated to provide clear and comprehensive information about their accounting policies, assumptions, and methodologies. Inadequate or misleading disclosures can hinder stakeholders' ability to assess the financial health of the insurer (Cooper & Frank, 2002).

Example. The Securities and Exchange Commission (SEC) fined Penn Treaty American Corporation for insufficient disclosure regarding the assumptions used in its long-term care insurance reserves. This case underscores the importance of transparent and comprehensive disclosure practices (U.S. Securities and Exchange Commission [SEC], 2009).

3.4. Conflicts of Interest

Conflicts of interest can arise when insurance companies have dual roles as underwriters and asset managers. This duality may lead to ethical challenges, as companies may prioritize their investment portfolios over policyholders' interests (Cooper & Frank, 2002).

Example. The case of Prudential Financial Inc. in the United Kingdom raised concerns about potential conflicts of interest between insurers and policyholders. Prudential faced criticism for its decision to allocate funds from with-profit policies to shareholders at the expense of policyholders (Financial Services Authority, 2010).

These real-world examples and ethical challenges demonstrate the practical complexities faced by insurance companies in their accounting practices. Addressing these challenges requires a robust framework for responsible financial reporting that promotes transparency, ethical conduct, and accountability.

4. FRAMEWORK DEVELOPMENT

The development of a comprehensive framework for responsible financial reporting in insurance accounting is essential to address the ethical challenges identified in the previous section. This proposed framework, informed by ethical principles and practical considerations, aims to enhance transparency, accountability, and ethical conduct within the insurance industry.

4.1. Principles of the Framework

The framework is built on the following guiding principles:
1. **Transparency.** Insurance companies must provide clear, accurate, and comprehensive information in their financial reports, including detailed disclosures about accounting policies, assumptions, and methodologies (PwC, 2021).
2. **Accountability.** Ethical accountability ensures that insurance companies take responsibility for the accuracy and fairness of their financial reporting, recognizing the impact on stakeholders (AICPA, 2018).

3. Integrity. Ethical integrity is crucial in all aspects of financial reporting, promoting honest and trustworthy behavior within insurance organizations (AICPA, 2019).

4. Prudent estimation. A commitment to making prudent, unbiased estimations of insurance liabilities, minimizing the potential for manipulation (KPMG, 2021). These guiding principles together create the foundation for ethical, transparent, and responsible financial reporting practices within the insurance sector.

4.1. Components of the Framework

The framework comprises the following key components:

1. Robust disclosure requirements. Insurance regulators should mandate comprehensive disclosure requirements that encompass all relevant information, including assumptions, methodologies, and risk factors. These requirements should align with international standards, such as IFRS 17 (International Financial Reporting Standards [IFRS], 2019).

2. Independent actuarial review. Insurance companies should engage independent actuaries to review their loss-reserving practices. Actuaries should assess the appropriateness of assumptions and provide an unbiased evaluation of reserve adequacy.

3. Ethics training. Insurance professionals involved in financial reporting should undergo regular ethics training to foster a culture of ethical behavior and awareness within the organization (Chartered Insurance Institute [CII], 2020).

4. Regulatory oversight. Regulatory bodies should strengthen their oversight and enforcement mechanisms to detect and deter unethical financial-reporting practices (U.S. Securities and Exchange Commission [SEC], 2009).

Together, these components reinforce ethical conduct, transparency, and accountability across the insurance sector.

4.1. Alignment with Ethical Challenges

The proposed framework directly addresses the ethical challenges identified earlier:

1. **Estimation of insurance liabilities.** Robust disclosure requirements and independent actuarial review ensure transparency and accuracy in the estimation of insurance liabilities, reducing the potential for manipulation (KPMG, 2021).

2. **Reinsurance transactions.** Enhanced transparency and ethics training contribute to the responsible handling of reinsurance transactions, reducing the likelihood of misrepresentation and fraud (Chartered Insurance Institute [CII], 2020).

3. **Disclosure transparency.** Robust disclosure requirements encompass transparent disclosures, including those related to assumptions and methodologies, promoting transparency in financial reporting (International Financial Reporting Standards [IFRS], 2019).

4. **Conflicts of interest.** Regulatory oversight and ethics training mitigate conflicts of interest by ensuring that financial reporting prioritizes policyholders' interests over investment returns (Braun & Hodson, 2013).

Practical Implementation

To ensure practicality, the framework should be implemented gradually, allowing insurance companies sufficient time to adapt. Regulatory bodies should provide guidance on compliance, and industry associations can facilitate knowledge sharing and best practices (Apostolou et al., 2018).

Implementing the proposed framework for responsible financial reporting in insurance accounting requires a structured approach that fosters ethical conduct and transparency within insurance companies.

Implementation Steps

1. **Framework adoption.** Insurance companies should formally adopt the proposed framework, making it an integral part of their financial reporting policies.

2. **Ethics training.** Organizations should initiate ethics-training programs for employees involved in financial reporting, ensuring they understand the principles and components of the framework (CII, 2020).

3. **Disclosure enhancement.** Insurance companies should align their financial disclosures with the comprehensive disclosure requirements outlined in the framework (IFRS, 2019).

4. Actuarial oversight. Engaging independent actuaries to review loss-reserving practices should become a standard practice, as recommended by the framework.

5. Regulatory collaboration. Collaboration with regulatory bodies ensures alignment with industry standards and compliance with the framework's principles.

Case Studies

Example 1: Berkshire Hathaway Inc.

Berkshire Hathaway Inc., led by Warren Buffett, is known for its commitment to ethical accounting practices. The company's annual reports consistently provide clear and transparent disclosures about accounting policies, assumptions, and methodologies, aligning with the principles of transparency and integrity (Berkshire Hathaway, 2021).

Example 2: Allianz SE.

Allianz SE, one of the world's largest insurance companies, has successfully implemented an ethics-training program for its employees. The company emphasizes ethical behavior and compliance with industry standards, reflecting the framework's principles of accountability and integrity (Allianz, 2021).

Example 3: Zurich Insurance Group.

Zurich Insurance Group has demonstrated a commitment to robust disclosure practices. The company's financial reports provide comprehensive information about its loss-reserving practices and assumptions, promoting transparency and accountability, as advocated by the framework (Zurich Insurance Group, 2021).

These case studies highlight how insurance companies have effectively implemented ethical accounting practices that align with the proposed framework. By adopting these practices, they have enhanced transparency, accountability, and trust in their financial reporting.

5. ETHICAL CONSIDERATIONS AND STAKEHOLDERS

Ethical financial reporting in the insurance industry has profound implications for various stakeholders, including shareholders, policyholders, regulators, and the broader public.

1. Shareholders. Ethical financial reporting plays a crucial role in safeguarding the interests of shareholders. When insurance companies adhere to ethical accounting practices and provide accurate and transparent financial information, shareholders can make informed investment decisions (Apostolou et al., 2018). Ethical reporting helps maintain shareholder trust, reduces the risk of financial scandals, and increases confidence in the company's long-term prospects (Bennett & Daugherty, 2009).

2. Policyholders. Policyholders rely on insurers to fulfill financial obligations. Ethical financial reporting ensures sufficient reserves to honor claims, reduces insolvency risk, and fosters trust between insurers and clients (KPMG, 2021).

3. Regulators. Ethical reporting provides regulators with accurate data to assess an insurer's financial health and compliance with regulatory requirements (U.S. Securities and Exchange Commission [SEC], 2009).

4. Broader public. Ethical financial reporting benefits the public by strengthening financial stability and reducing systemic risk within the insurance sector (PwC, 2021).

5. Potential benefits of ethical reporting.
- **Improved trust:** Builds confidence in the industry's integrity (AICPA, 2019).
- **Enhanced transparency:** Offers a clear view of financial performance and risk management (IFRS, 2019).
- **Accountability:** Ensures that insurers meet obligations to policyholders and shareholders (Braun & Hodson, 2013).
- **Reduced risk:** Decreases the likelihood of financial scandals and reputational harm (Allianz, 2021).

6. CHALLENGES AND LIMITATIONS

1. Cost implications: Implementing the framework entails costs for training, actuarial reviews, and disclosures (Apostolou et al., 2018).

2. Resistance to change: Employees and management may resist procedural shifts (Braun & Hodson, 2013).

3. Regulatory constraints: Variations in regulatory environments complicate harmonization (IFRS, 2019).

4. Complexity of disclosure: Balancing transparency with confidentiality can be difficult (PwC, 2021).

5. Long-term cultural change: Building an ethical culture takes sustained zeffort (CII, 2020).

6. Global diversity: Adapting to diverse markets while maintaining ethical consistency is challenging (Zurich Insurance Group, 2021).

7. FUTURE RESEARCH AND RECOMENDATIONS

Future Research Areas
1. Behavioral ethics in insurance accounting.
2. Economic consequences of ethical reporting.
3. Climate-risk reporting.
4. Cross-cultural ethical variations.
5. Ethics training and organizational culture.

Recommendations

For insurance companies: foster ethical culture, provide ethics training, improve disclosures, conduct external audits, and engage stakeholders.

For regulators: align regulations, strengthen oversight, and harmonize international standards.

For policymakers: develop incentive structures, enact ethics legislation, and promote public awareness.

CONCLUSION

In the ever-evolving landscape of finance and corporate responsibility, this paper has explored the pivotal role of ethical considerations in insurance accounting. As we've journeyed through the ethical challenges faced by insurance companies and the development of a comprehensive framework for responsible financial reporting, we have uncovered insights that underscore the fundamental importance of ethics in the industry. Our research has revealed that ethical integrity is not merely an optional virtue but a cornerstone upon which the insurance industry's trust, transparency, and longevity are built. The identified challenges, from the estimation of insurance liabilities to disclosure transparency and beyond, necessitate a proactive approach rooted in ethical principles.

The proposed framework, rooted in transparency, accountability, integrity, and prudent estimation, offers a roadmap for insurers to navigate the complex terrain of ethical financial reporting. By embracing this framework, insurance companies can not only enhance their financial practices but also fortify their relationships with stakeholders.

The implications of our research extend far beyond the immediate context. Our findings serve as a clarion call to the insurance industry, regulators, policymakers, and the broader financial world. They underscore the urgency of ethical financial reporting as a moral imperative, an industry standard, and a catalyst for lasting change.

In the grand tapestry of financial ethics, ethical reporting in insurance accounting is a vital thread that cannot be ignored. It is not a mere box to be checked, but a commitment to honesty, integrity, and the well-being of all stakeholders. As we conclude, we emphasize that ethical financial reporting is not just a choice; it is the lifeline that sustains trust, transparency, and accountability within the insurance industry. It is the ethical compass that guides insurers toward a brighter, more responsible financial future.

In closing, we challenge the insurance industry and its stakeholders to heed the call of ethical financial reporting, for in this ethical journey, we find not only financial wisdom but also the moral imperative to serve the greater good.

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Tourism Partnerships between Türkiye and Poland in the Context of Erasmus+

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Abstract

This study offers a comprehensive examination of tourism-focused projects jointly implemented by Türkiye and Poland within the Erasmus+ Programme. A total of 131 projects retrieved from the European Commission's Erasmus+ Project Results Platform were analysed using qualitative document analysis to identify their structural, thematic, and institutional characteristics. The results show that most projects are concentrated in two Key Action categories: Learning Mobility of Individuals and Cooperation for Innovation and the Exchange of Good Practices. These categories reflect the primary areas in which the two countries collaborate. The budget analysis indicates that the majority of projects fall within low- and medium-scale funding ranges, demonstrating the financial distribution patterns of tourism–related Erasmus+ initiatives.

The examination of coordinating countries reveals that Türkiye and Poland assume the highest number of coordinating roles in the selected projects. Other countries, including Italy, Germany, Spain, and Romania, also appear among the coordinating partners. The analysis of partner countries, visualised through a word cloud, shows broad geographical diversity, with Mediterranean, Balkan, and Central European countries frequently participating in these collaborations.

The findings provide an empirical basis for understanding the scope and configuration of tourism–related Erasmus+ projects involving the two countries. They may serve as a reference for future comparative or thematic research..

Keywords: Erasmus+ Programme; Türkiye–Poland cooperation; tourism projects.

Introduction

The Erasmus+ The Erasmus+ Programme is named after the humanist thinker Erasmus Desiderius (1465–1536), who exemplified intercultural exchange and intellectual mobility as he lived and learned across Europe. His experiences in various countries embody the ideal of international mobility. The name of the programme also stands for the "European Community Action Scheme for the Mobility of University Students," reflecting the European Union's goal of supporting student mobility in higher education through institutional measures (European Commission, 2017).

Originally designed for implementation during the 2014–2020 period, the Erasmus+ Programme is the European Union's most comprehensive policy instrument in education, training, youth, and sports (Ferreira-Pereira & Mourato Pinto, 2021). Its objectives extend beyond improving educational outcomes; it also aims to address socio-economic challenges facing Europe, such as unemployment, digital transformation, social exclusion, and low skill levels. Erasmus+ is a vital tool for reducing youth unemployment, preventing early school leaving, developing adult skills, and adapting to technological change (Nogueiro et al., 2022).

Moreover, Erasmus+ mobility enhances individuals' understanding of European identity, promotes social cohesion, and fosters intercultural dialogue. In this regard, Ferreira-Pereira and Mourato Pinto (2021) view the Erasmus+ Programme as an important "soft power" tool that indirectly supports the European Union's cultural diplomacy and foreign policy objectives. The programme also plays a critical role in promoting social inclusion by providing learning and mobility opportunities for disadvantaged groups, newly arrived migrants, and individuals facing inequalities (Nogueiro et al., 2022).

Erasmus+ has also embraced a broader mission in areas such as social integration, democratic participation, support for European values, and the prevention of radicalization (European Commission, 2019). The programme did not conclude after the 2014–2020 period; it was extended into a new programming phase from 2021 to 2027, which strengthened priorities regarding digital and green transformations alongside more inclusive implementation mechanisms (European Commission, 2021).

This framework has transformed Erasmus+ into a multidimensional policy instrument offering a wide range of applications, from individual mobility to institutional cooperation.

Tourism is considered a vital component of both economic and social development, closely linked to the European Union's education and cooperation policies. According to the World Tourism Organization, tourism accounts for approximately 10% of global GDP and provides employment for millions of people worldwide (UNWTO, 2023). In addition to its economic contributions, tourism serves as a significant domain for social interaction, enhancing intercultural communication, strengthening social cohesion, supporting the preservation of cultural heritage, and promoting local communities' participation in social and economic life (Richards, 2018).

The European Commission (2010) emphasizes tourism's role in the sustainable growth of the European economy, highlighting innovation, competitiveness, and sustainable destination management as key objectives. Similarly, the European Parliament (2015) defines tourism as a multidimensional policy area that strengthens European identity, fosters intercultural dialogue, and supports local development. As a result, tourism projects undertaken within the Erasmus+ framework align with the EU's goals of sustainability, inclusiveness, and international cooperation.

Poland joined the Erasmus Programme in 1998 through the Socrates Programme, engaging in higher education mobility initiatives. Erasmus activities conducted under the Socrates Programme (1995–2006) and later under the Lifelong Learning Programme (LLP) (2007–2013) significantly bolstered Poland's international cooperation. The country's full accession to the European Union in 2004 further increased mobility and project partnerships, and since 2014, with the launch of Erasmus+, Poland has become an active participant in comprehensive projects for students, teachers, and youth workers (Republic of Poland Ministry of Science and Higher Education, 2024).

Türkiye began its initial pilot Erasmus implementations in 2003 and officially joined the programme in 2004 as a candidate country (European Commission, 2004).

In the early years, activities were carried out under the Socrates, Leonardo da Vinci, and Youth Programmes, followed by the Lifelong Learning and Youth Programmes during the 2007–2013 period, managed by the Turkish National Agency. With the start of the Erasmus+ period in 2014, Türkiye gained the right to participate on equal terms with programme countries across all key actions, resulting in a significant increase in mobility and diversity of projects (European Commission, 2021; Karlı & Özel, 2020).

This study aims to examine tourism projects developed jointly by Türkiye and Poland and to present the current situation in a comprehensive manner. By analyzing the structure of the projects, cooperation models, thematic priorities, budget allocations, and partnership networks, this study seeks to enhance understanding of collaboration patterns between the two countries and provide a multidimensional evaluation of the international interaction capacity of the Erasmus+ Programme in the field of tourism.

Method

This study used the document analysis method, which is a qualitative research approach widely employed to systematically and rigorously examine written materials. Document analysis enables researchers to interpret and synthesize information from official records, reports, and digital platforms, providing an evidence-based understanding of institutional practices and policy-oriented outputs (Wach, 2013). As highlighted by Kıral (2020), this method facilitates a structured examination of both printed and electronic documents. It is particularly suitable for studies aimed at mapping large-scale datasets and identifying thematic patterns across multiple sources.

The dataset for this research was retrieved on September 9, 2025, from the European Commission's official Erasmus+ Project Results Platform, a comprehensive repository of European Union-funded educational projects (Alonso de Castro & García-Peñalvo, 2020). Using the "Project Results" search interface, the keyword "tourism" was entered, and the country filter was set to "Türkiye." This initial filtering yielded a total of 933 projects. From this pool, projects in which Poland appeared as a partner alongside Türkiye were identified, resulting in a final analytical sample of 131 projects.

This multi-stage selection ensured that only projects reflecting bilateral cooperation between the two countries were included.

All project-specific information was systematically transferred into Microsoft Excel and MAXQDA for data processing and coding. A detailed coding scheme was developed based on the structural and operational characteristics of the projects, which included Key Action category, Action Type, Good Practice designation, budget range, coordinating country, partner country composition, and project year. To enhance coding reliability and ensure consistency, all variables were operationalized with clear definitions before the coding process began.

After coding the data, descriptive statistical techniques were applied. Frequency (F) and percentage (%) distributions were calculated to reveal the structural configuration of the selected projects, their thematic orientations, and the diversity of collaborative partnerships. This approach allowed for the identification of dominant patterns, emerging priorities, and recurring cooperation models within Türkiye–Poland tourism collaborations.

To improve interpretability, the findings were visualized using tables, bar charts, and word clouds. A word cloud was created to highlight the variety and relative prominence of partner countries collaborating with Türkiye and Poland. Additionally, Key Action categories, Good Practice classifications, budget intervals, and coordinating countries were tabulated to ensure transparent and comprehensible reporting of results. These visual and tabular outputs collectively support a holistic understanding of the bilateral project landscape and provide a solid empirical foundation for the study's subsequent discussion and conclusions.

Findings

The frequency and percentage distributions of the Key Action categories and the status of Good Practices for the 131 Türkiye–Poland tourism-related Erasmus+ projects are presented in Table 1. The analysis shows that the projects primarily fall into two main Key Action categories. Specifically, 60 projects (45.80%) were classified under "Cooperation for Innovation and the Exchange of Good Practices," while another 60 projects (45.80%) were categorized as "Learning Mobility of Individuals."

A smaller group of 11 projects (8.40%) was identified within the "Partnerships for Cooperation and Exchanges of Practices" category.

In terms of quality designation, 17 projects were recognized as Good Practices, while the remaining 114 were not. These findings suggest that, although the majority of projects are focused on the core mobility and cooperation actions of the Erasmus+ framework, only a limited number have received recognition for exemplary implementation or innovative practices.

Table 1. Distribution by Key Action, Good Practice Status, and Budget Categories

Variable	Variable Category	Frequency	Percentage (%)
Key Action	Learning Mobility of Individuals	60	45.80
	Cooperation for innovation and the exchange of good practices	60	45.80
	Partnerships for cooperation and exchanges of practices	11	8,4
Is Good Practice	Yes	17	12,98
	No	114	87,02
Budget	1-60.000	64	45,85
	60.001-120.000	22	16,79
	120.001- 180.000	26	19,85
	180.001- 240.000	6	4,58
	more than 240000	13	9,92

An analysis of the project budgets reveals that a significant portion, 45.85%, is situated within the €1–60,000 range. Additionally, there are 22 projects in the €60,001–120,000 range, which accounts for 16.79% of the total. A total of 26 projects fall within the €120,001–180,000 budget interval, representing 19.85% of all projects. Six projects are categorized in the higher budget range of €180,001–240,000, corresponding to 4.58%. Finally, the highest budget category, which includes projects exceeding €240,000, comprises 13 projects, representing 9.92% of the overall sample. This distribution indicates that the majority of projects are concentrated below the €180,000 budget threshold.

Furthermore, the distribution of projects according to Action Type was also examined, with the results summarized in Table 2. This table presents the frequency and percentage values for the various categories of Erasmus+ projects analyzed.

In the evaluation based on the total number of projects, 26 projects (19.85%) fall under Youth mobility, 20 projects (15.27%) under School Exchange Partnerships, and 17 projects (12.98%) under Mobility of young people. These categories are followed by Strategic Partnerships for School Education and Strategic Partnerships for Schools Only, with 10 projects each and a rate of 7.63%. The Strategic Partnerships for Vocational Education and Training and VET Learner and Staff Mobility categories each include nine projects (6.87%). The Mobility of Youth Workers category comprises six projects (4.58%). Strategic Partnerships for Adult Education has five projects (3.82%).

Among the less represented categories are Small-scale partnerships in school education with three projects (2.29%); Cooperation partnerships in youth, Strategic Partnerships for higher education and Strategic Partnerships for youth each have two projects (1.53%). In addition, Cooperation partnerships in higher education, Cooperation partnerships in school education, Cooperation partnerships in vocational education and training, Partnerships for Digital Education Readiness, School education staff mobility, Small-scale partnerships in adult education, Small-scale partnerships in vocational education and training, Small-scale partnerships in youth, Strategic Partnerships addressing more than one field, and Volunteering Projects categories are each represented by one project (0.76%).

Table 2. Distribution by Action Type

Category	Frequency	Percentage
Youth mobility	26	19,85
School Exchange Partnerships	20	15,27
Mobility of young people	17	12,98
Strategic Partnerships for school education	10	7,63
Strategic Partnerships for Schools Only	10	7,63
Strategic Partnerships for vocational education and training	9	6,87
VET learner and staff mobility	9	6,87
Mobility of youth workers	6	4,58
Strategic Partnerships for adult education	5	3,82
Small-scale partnerships in school education	3	2,29
Cooperation partnerships in youth	2	1,53
Strategic Partnerships for higher education	2	1,53
Strategic Partnerships for youth	2	1,53
Cooperation partnerships in higher education	1	0,76
Cooperation partnerships in school education	1	0,76
Cooperation partnerships in vocational education and training	1	0,76
Partnerships for Digital Education Readiness	1	0,76
School education staff mobility	1	0,76
Small-scale partnerships in adult education	1	0,76
Small-scale partnerships in vocational education and training	1	0,76
Small-scale partnerships in youth	1	0,76
Strategic Partnerships addressing more than one field	1	0,76
Volunteering Projects	1	0,76

The frequency and percentage distributions of the examined projects by year are presented in Figure 1. When examining the frequency distribution of Erasmus projects between Turkey and Poland by year, notable seasonal fluctuations are observed. In 2014, 14 projects were conducted, making up 10.69% of the total projects.

The following year, in 2015, the number dropped to 8 projects (6.11%). In 2016, there were 11 projects (8.40%), while in 2017, the count again returned to 8 projects (6.11%). A significant increase occurred in 2018, with 17 projects implemented, accounting for 12.98% of the total. This upward trend continued in 2019, with 15 projects (11.45%) completed throughout the year. The highest number of projects during the analysis period was recorded in 2020, reaching 23 projects, which represented 17.56% of the total. However, following the Covid-19 pandemic in 2020, there was a decline in project numbers; in 2021, 2022, and 2023, only 8 projects were carried out each year, corresponding to 6.11% of the total each time.

This downward trend has persisted in recent years, with 6 projects (4.58%) implemented in 2024 and 5 projects (3.82%) in 2025. It is important to note that the data for 2025 includes only results from the first call for proposals as of the study date. It is anticipated that this number will increase once the results of the second call for proposals are announced.
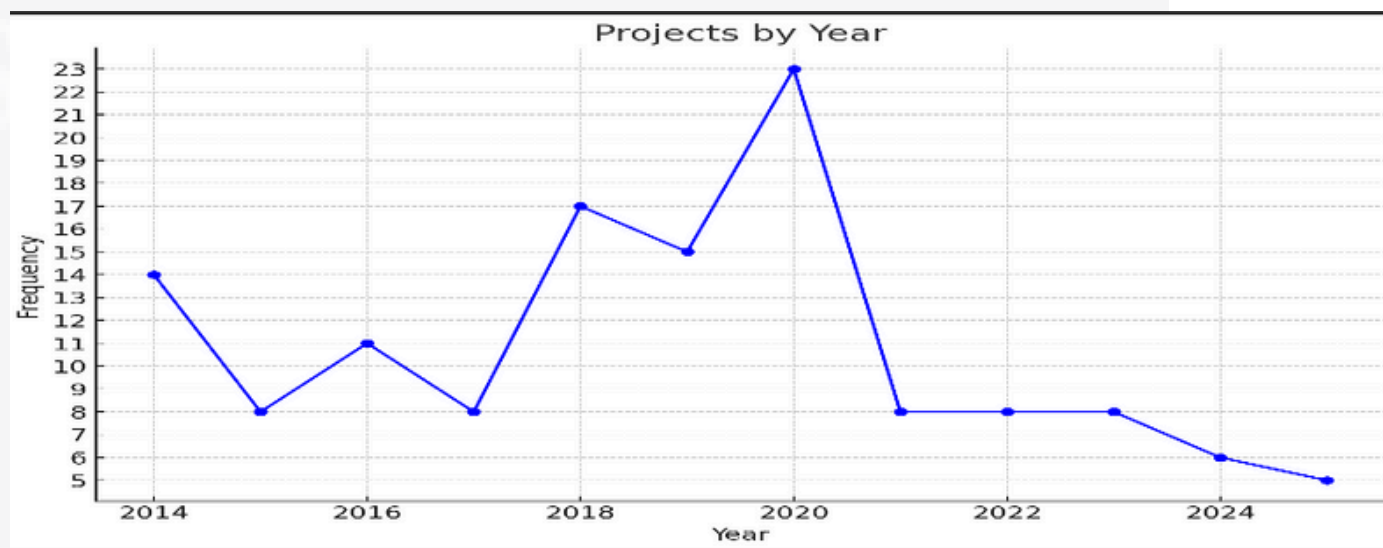

Figure 1. Distribution of Projects by Year

To identify the other countries with which Turkey and Poland jointly collaborated on these projects, a total of 131 projects were examined. The findings were visualized in a word cloud, presented as Figure 2.

The analysis indicates that a wide range of European countries participated in these projects. Italy stands out with 70 projects (13.83%), followed by Spain with 57 projects (11.26%) and Romania with 52 projects (10.28%). Greece (37 projects, 7.31%), Portugal (36 projects, 7.11%), and Lithuania (29 projects, 5.73%) also had notable participation. Both Bulgaria and Germany contributed 26 projects each (5.14%), reflecting similar levels of involvement. Countries with moderate levels of participation include Slovakia with 15 projects (2.96%), North Macedonia with 14 projects (2.77%), Latvia with 13 projects (2.57%), Hungary with 11 projects (2.17%), as well as Croatia and Czechia, each with 10 projects (1.98%). Slovenia and Sweden had similar levels of participation, with 9 projects each (1.78%). On a lower level, France participated with 8 projects (1.58%), while Cyprus and the United Kingdom each had 7 projects (1.38%). Ireland and Serbia contributed 6 projects each (1.19%). Malta and the Netherlands each participated in 5 projects (0.99%), whereas Estonia, Norway, and Ukraine were involved in 4 projects each (0.79%).

Figure 2. Other Partner Countries

Countries with limited participation include Austria, Azerbaijan, Denmark, Finland, Georgia, Iceland, and Luxembourg, each representing 2 projects (0.40%). The countries with the least involvement are Albania, Armenia, Belgium, Bosnia and Herzegovina, and Russia, each participating in only 1 project (0.20%).

The results of the analysis regarding the countries coordinating the projects are summarized in Table 3. When examining the frequency distribution of the coordinating countries, it is evident that a significant portion of the projects is coordinated by Türkiye and Poland. Out of a total of 131 projects, 33 (25.19%) were coordinated by Türkiye, while 29 (22.14%) were coordinated by Poland. Following these two countries, Italy ranks third with 15 projects (11.45%), indicating an active role within the cooperation network. Germany and Spain each contributed a moderate number of projects, with 7 projects (5.34%) from Germany and the same amount from Spain. Romania follows closely with 6 projects (4.58%).

Greece and France have a smaller yet notable presence, coordinating 5 projects (3.82%) and 4 projects (3.05%), respectively. At lower frequency levels, Czechia, Lithuania, and Sweden each coordinated 3 projects (2.29%). Additionally, Denmark, Ireland, Latvia, Norway, Slovakia, and the United Kingdom each coordinated 2 projects (1.53%). At the bottom of the list, Bulgaria, Finland, Luxembourg, and Portugal each coordinated only 1 project (0.76%).

Country	Frequency	Percentage (%)
Turkey	33	25.19
Poland	29	22.14
Italy	15	11.45
Germany	7	5.34
Spain	7	5.34
Romania	6	4.58
Greece	5	3.82
France	4	5.03.2025
Czech Republic	3	2.29
Lithuania	3	2.29
Sweden	3	2.29
Denmark	2	1.53
Ireland	2	1.53

Country	Frequency	Percentage (%)
Latvia	2	1.53
Norway	2	1.53
Slovakia	2	1.53
United Kingdom	2	1.53
Bulgaria	1	0.76
Finland	1	0.76
Luxembourg	1	0.76
Portugal	1	0.76

Conclusion

This study comprehensively examined tourism-focused projects jointly carried out by Türkiye and Poland under the Erasmus+ Programme. It evaluated the transnational cooperation dynamics between the two countries from structural, thematic, and institutional perspectives. An analysis of 131 project records obtained from the European Commission's official Erasmus+ Project Results Platform indicates that both countries have established a strong and sustained partnership in the field of tourism.

The findings revealed that a significant portion of the projects fell within the categories of Learning Mobility of Individuals and Cooperation for Innovation and the Exchange of Good Practices. This demonstrates that Türkiye and Poland actively engage in mobility-based learning activities and collaborate to develop innovative practices. Furthermore, the budget distribution for these projects showed a concentration largely in low- and medium-scale budget categories, suggesting that tourism-related initiatives within the Erasmus+ framework are accessible, feasible, and inclusive of a broad participant base.

Analysis of the coordinating countries indicated that Türkiye and Poland lead a substantial share of the projects. Other European countries, such as Italy, Germany, Spain, and Romania, play important complementary roles within the cooperation network.

Additionally, a word cloud analysis of partner country distributions demonstrated that the geography of collaboration is diverse, with Mediterranean, Balkan, and Central European countries identified as primary partners in tourism-themed projects. These results confirm that the multi-stakeholder and multinational cooperation model of the Erasmus+ Programme provides a strong platform for interaction in interdisciplinary and practice-oriented areas like tourism.

The study's findings indicate that Erasmus+ projects in tourism not only enhance learning mobility but also strengthen intercultural interaction, contribute to the dissemination of sustainable tourism approaches, and support the social and economic development of local communities. The partnership between Türkiye and Poland aligns with the core priorities of the European Union's tourism policies and offers concrete contributions to objectives such as innovation, sustainability, inclusiveness, and the preservation of cultural heritage. From this perspective, the cooperation between the two countries within Erasmus+ is strategic and complementary in the tourism sector, significantly enhancing the programme's internationalisation capacity.

In summary, this study clearly illustrates the current landscape of tourism projects within the Erasmus+ Programme and reinforces the position of the Türkiye–Poland partnership within European education and cooperation policies. The findings establish a foundation for future comparative studies and provide guidance for institutions, policymakers, and practitioners involved in developing tourism projects. Future research that includes in-depth analyses of project outputs and impacts, as well as expanded comparative examinations of thematic subfields, will contribute to a more detailed assessment of the Erasmus+ Programme's influence on the tourism sector.

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The journal „Education" and the spread of Western educational ideas in Georgia

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Abstract

The history of the spread of advanced Western educational ideas in Georgia at the beginning of the 20th century is gaining particular relevance at the modern stage, and the issue is poorly studied and attracts attention due to the diversity and abundance of materials translated from European languages into Georgian. The translation and dissemination of Western educational ideas into Georgian is associated with the journal "Education" founded in 1908 in Tbilisi by the famous Georgian educator Luarsab Botsvadze, and with the name of Luarsab Botsvadze himself. Luarsab Botsvadze, his family members, colleagues and associates were actively involved in the translation of the educational ideas of European and American thinkers into Georgian.

The goal of Georgian educators was to acquaint education specialists, teachers and intellectuals working in the Georgian education system with advanced European and American pedagogical and philosophical views, new theories of school education, improvement of the educational process, training of professional teachers, their rights and duties and other educational ideas. As children of a colonial country, they were interested in freeing themselves from the reactionary educational system of the Russian Empire and tried to create a conceptually new education oriented on national ideas based on Western educational ideas. On the pages of the journal "Education", we find the views of the Frenchman Jean-Jacques Rousseau, the German Hermann Weimer, Friedrich Nietzsche and Otto Lippmann, the Englishman Herbert Spencer, the American William James, the Swiss Heinrich Pestalozzi, the Czech Jan Amos Comenius, Cornelius Gurlitt and others on progressive theories and methods of teaching.

This work studies and analyzes the historical process of the spread of Western educational ideas, which at the beginning of the 20th century had a significant impact on the development of the Georgian national school and, after the collapse of the Russian Empire, created a solid foundation for the national educational policy of the Democratic Republic of Georgia (1918-1921). At the beginning of the 20th century, this process was influenced by Georgian youth educated in Europe, who, after returning to Georgia, were involved in the renewal of Georgian education. In addition, the enlightened views spread from Europe in democratic circles in Russia also influenced Georgia.

Keywords: European and American educational ideas, Russian colonial educational policy, new Georgia, national educational system.

Introduction

The spread of Western educational ideas in Georgia began as early as the 19th century. "Georgian News", "Iveria", "Droeba" and other journals and newspapers popularized the views of European educators, but the nation, trapped in the colonial chains of the empire, showed much more interest in markers of national identity – the history of Georgia, ancient Georgian literature, cultural monuments and other antiquities.

In the field of education, one of the first professional journals of the country, which positioned itself by spreading European educational ideas, was the journal "Education", which was founded at the beginning of the 20th century, in 1908, and its publisher and editor was Luarsab Botsvadze[1], a student of Iakob Gogebashvili. As a result, a discourse on the end of school education flowed through the pages of this journal, in which prominent Georgian public figures participated. "Education" was surrounded by prominent Georgian writers and public figures: Akaki Tsereteli, Vazha Pshavela, Iakob Gogebashvili, Irodion Evdoshvili, Tedo Razikashvili, Bachana Razikashvili, Ekaterine Gabashvili, Niko Lomouri, Giorgi Kuchishvili, Shio Mgvimeli, Aleksandre Khakhanashvili, Ilia Nakashidze, Ippolite Vartagava, Giorgi Leonidze, Galaktion Tabidze and others (Chkuaseli, 1981), which indicates the authority and trustworthiness of the journal in society.

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[1] Luarsab Botsvadze was born in the village of Nogha, now Samtredia Municipality, on January 16, 1865 (January 4, according to the new style). Luarsab's parents first sent him to the Kutaisi Theological Seminary, then to the Khoni Theological Seminary, from which he graduated in 1888 and began working as a school teacher in the village of Tskaltubo. In 1891, Luarsab Botsvadze was transferred from Tskaltubo to the Tsinamdzgvrishvili Agricultural School as a teacher, where he spent one year, and from 1892 he was sent to the Georgian school opened by the Society for the Promotion of Literacy among Georgians in Kavkav (now Vladikavkaz, in the Soviet era, in 1954-1990 it was called Ordzhonikidze, and in 1944-1954 – Dzaujikav. G.L.). Luarsab taught Georgian and Russian languages, singing here. In 1897, Ilia Chavchavadze thanked Luarsab Botsvadze for his exemplary lessons. In 1906, Yakov At the instigation of Gogebashvili, Luarsab Botsvadze was transferred to the Tbilisi Georgian Gymnasium as a teacher and supervisor. In 1908-1919, Luarsab Botsvadze was the editor-in-chief of the jounral "Education" founded by him (information is based on the following sources: Botsvadze, 2023: 5-41; Chkuaseli, 1981). Luarsab Botsvadze died on June 24, 1919, and is buried in Tbilisi, in the Didube Pantheon.

In the history of "Education", we can conditionally distinguish two periods: the first, the period of Luarsab Botsvadze's editorship - 1908 - 1918. and the second, 1919 - 1920, when the journal was headed by Varlam Burjanadze on behalf of the editorial board. Under Luarsab Botsvadze's editorship, 95 issues of the journal were published. In each issue, the publisher, along with the history of national education and the problems of Georgian school life at that time, offered us the views of European, American and Russian educators on the issues of education and upbringing, the principles of organizing school life, school subjects, teachers' professional associations, textbooks and other important issues. Basically, these were various educational theories and problems of school life, which were published in the form of translations.

The very first issue of the journal declared its national beliefs and scientific pedagogical direction, which is reflected in Luarsab Botsvadze's letters "Education is Power" (Botsvadze, 1908_1: 1-15), "Mother Language as the Basis of Teaching" (Botsvadze, 1908_2: 57-80), as well as in Ivane Gomelauri's[2] article "Pedagogical Thoughts in the Works of Ilia Chavchavadze" (Gomelauri, 1908: 29-40). In the first two letters, the editor emphasized the journal's main goals and objectives, priorities, and concept, while in Ivane Gomelauri's letter, he unequivocally declared himself the ideological successor of Ilia Chavchavadze.

 Research method: The work analyzes the history of the spread of European educational thought in Georgia at the turn of the 19th and 20th centuries using the historical-comparative and historical-chronological methods. Based on the historical-comparative method, the problems of the Georgian educational system under the colonial policy of the Russian Empire and the reasons for the interest of famous Georgian educators of the era in European educational ideas are studied.

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[2]Ivane Gomelauri (1867 – 1951) Georgian writer, public figure, teacher and translator, member of the society promoting literacy among Georgians. He studied at the Sighnaghi City School, and in 1886-1890 at the Tbilisi Pedagogical Institute, after graduating from which he worked as a teacher at the Ozur-Geti Zugdidi, Senaki city schools, the Tbilisi Gymnasium, the Chiatura school, etc. Ivane Gomelauri is the author of the first methodological manual in Georgian literature "Georgian Poems to be Studied in Schools", "Georgian Language Self-Teaching" (in Russian), "Chrestomathy for Non-Georgians" and others. Translated translations of writers such as Gerhart Hauptmann, Anton Chekhov, Vladimir Korolenko, and others (Alania, 2012: 91).

Discussion. The journal's interest in the dissemination of European educational systems and theories appeared in the very first issue. The readers were introduced to the pedagogical views of the German teacher and psychologist Hermann Weimer[3], translated by Niko Lortkipanidze (Weimer, 1908: 81-95). Weimer's work is one of the examples of the dissemination of European pedagogical thought in Georgia and indicates the special attitude of Georgians towards German pedagogical thought. Hermann Weimer's book "History of Pedagogy" was published in Leipzig in 1902[4] and was already known in Georgia in 1908. It is noteworthy that Weimer's famous theory of "error psychology", which was later published, was founded on this work.

"History of Pedagogy" was published in three issues of the journal. The first issue was devoted to the introduction and the first chapter of the work. In the introduction, the author convinces the reader of the necessity of education and upbringing, that this process developed in all cultural nations depending on what kind of character (psyche – G.L.) this nation was, or in general, on what level of education it was. In the first chapter,

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[3] Hermann Weimer (1872–1942) was a German teacher and psychologist. He studied at the University of Marburg, where he received his doctorate. In 1902, he first published his work "History of Pedagogy", which was subsequently reprinted 19 times. Since 1954, it has been edited by his son, Heinz Weimer, and since 1991 by Juliane Jacob. In 1925, he introduced psychological research into the causes of student errors, thereby opening a new field of empirical psychology, the psychology of errors. He worked as a teacher and principal in southern Hesse. From 1912 to 1927, he headed the Gymnasium in Biebrich, and in 1927 he was appointed lecturer and professor of pedagogy and psychology at the newly founded Pedagogical Academy in Frankfurt. Unfortunately, this is where the modernization of his pedagogical views begins, which eventually led him to the Nazi Party and then to Nazi pedagogy. Weimer's more or less well-known works are "The Way to the Heart of the Student", published in 1907, "School Discipline, a Manual for Secondary Schools", published in 1919, the book "Psychology of Errors" mentioned above, published in 1925, which was followed by another interesting study "The Processing of Errors and the Conclusion of Errors: With an Appendix: The History and Foundations of the Study of Errors", also published in Leipzig. In 1939, Weimer's work "The Prevention of Errors and the Avoidance of Errors" was published in Düsseldorf. One of Weimer's closest disciples was Arthur Kiesling, also based in Frankfurt. Weimer was interested only in the errors made by people, not in those that, for example, are characteristic of their character. He also distinguished between deception, error, and guilt. The latter is "an action that deviates from the correctness against the will of the author" (Weimer), which is caused by a violation of psychological functions, attention, thinking, or memory. By recognizing this, it is possible to avoid errors, especially in school. For a long time, Weimer's research did not arouse widespread interest, but then the situation changed (information is found in the books: Hesse, 1995:421, 821; Weingardt, 2004: 42-44). The story of Hermann Weimer's life and scientific work is a clear example of how political ideology plays a negative role in a scientist's personal life and the recognition of scientific excellence.
[4]The last publication of this work by Weimer was in 1991.

Weimer vividly describes the historical development of education and upbringing in ancient Greece and Rome (classical countries) and analyzes in detail the different educational systems of Athens and Sparta. The Spartans prepared the younger generation for the state and through the state, while in Athens the family had more rights in raising a child than in Sparta. Here, the state instructed citizens to ensure the physical development of their children (gymnastic training) and to teach them music. Gymnastics and music were the main subjects of Greek education, although from the time of Pericles, the promotion of literature in the Enlightenment led to the flourishing of philosophy and rhetoric in the country.

Weimer introduces the reader to the Sophists, Socrates, Aristotle, Plato, the Alexandrian philosophers, and distinguishes the stages of the Greek educational system: grammar, rhetoric, and dialectic, which were considered the foundation of education (later the Trivium), while arithmetic, geometry, astronomy, and music constituted the foundation of higher education (later the Quadrivium) (Weimer, 1908:83-84). Knowledge of the ancient Greek and Roman educational systems was also possessed in ancient Georgia, but in Weimer's work this knowledge is presented and analyzed in a much broader, systematized form.

After a brief overview of Roman education, the author chronologically discusses the following era. The second chapter, "The Development of Education in the Middle Ages," presents two subchapters: from the time of the Crusades, from the time of the Crusades to the end of the Middle Ages; The third chapter, "Upbringing and Teaching in the Age of Humanism and the Reformation (until the End of the 16th Century), begins with the Reformation and continues with the educational revival of humanism in Germany, which resulted in the founding of universities in Vienna, Leipzig, Cologne, Wittenberg, Frankfurt am Main, and Erfurt (Weimer, 1908: 86 – 93).

The third and fourth issues of the journal were published in one volume, which included those chapters of Weimer's book that tell us about the educational views of the Reformers, how Martin Luther evaluated humanism and school education, etc. In the author's opinion, it was at this time that a strong aspiration began to separate science from church faith and the "scholastic system." The reader is introduced to the ideas of the founders of Italian humanism, Francesco Petrarca and Giovanni Boccaccio, as well as the ideas of Marcus Fabius Quintilian, a classic of Roman ancient pedagogy, who was more highly regarded by humanists than in Roman times.

Weimer discusses the legal foundations of the Protestant school in the sixteenth century, in particular, the Saxon Education Statute of 1528, the Württemberg "Syllabus" of 1559, which he considers to be the best-developed curriculum of the sixteenth century (Weimer, 1908: 99-196). With Weimer's work, the Georgian reader was first introduced to the various aspects of the rich history of medieval European education, the importance of the ideas of humanism and the Renaissance in the advancement of education, the formation and development of scientific thought, and the necessity of separating church and secular education in education. Naturally, these topics were unknown to the general public, and the translation of Weimer's works was of great importance not only to teachers and education specialists, but also to historians, philologists, and the general public interested in the past.

From the very first issues of the journal, it is clear that the editorial board and a large part of Georgian educators believed in the need to integrate European educational views into Georgian school education and to base school life on progressive ideas. "Education" devoted a lot of space to the professional unions of European teachers and the events taking place there, including a description of the activities of the democratic movement of teachers in different European countries. One of the authors tells the reader that in 1871, through the selfless efforts of German teachers, the "Teachers' Union"[5] was formed, which promoted their education, regulated the educational process, protected their rights, etc. The editorial board's goal was to familiarize Georgian teachers with a brief history and organization of this "union" in the hope that "we too might find some significant and guiding thoughts in the history of the establishment of this union of the Aegeans" (Kumistaveli, 1908: p. 88).

[5] This was the German Teachers' Association, founded on 28 December 1871 and existing until 1933 within the framework of the National Socialist Teachers' League of Teachers' Associations. It was one of the first professional unions for teachers. The predecessor of the German Teachers' Association was the German Teachers' Association, which was founded in Eisenach in 1848 and which sought to unite all types of school teachers under a National Democratic auspices. However, the German Teachers' Association (DLV) in 1871 was only able to attract primary school teachers as members. By the beginning of the 20th century, all German teachers' associations had been united. In 1914, at the outbreak of World War I, the DLV had 131,748 members, representing about three quarters of all male primary school teachers. The official organ of the association was the "Pädagogische Zeitung", which was founded in 1872. It had been the organ of the teachers' movement since 1848 and ceased publication in 1914, and in 1919 it took the name Allgemeine Deutsche Lehrerzeitung (for details, see the book: Rainer Bölling 1978).

In the same issue, the editorial board of the journal offers us information about the activities of the Bulgarian public teachers and their union, which is signed under the pseudonym Luarsab Botsvadze (Botsvadze, 1908₃: 96-108). In the letter, the reader is introduced to the political situation in Bulgaria after the Russo-Turkish War of 1877-1878, the number of schools and teachers in Bulgaria, the history of their unification, the importance of the Ka-Vshir, both in the development of education and in the political life of the country. Just as in the history of the German Teachers' Union, here too the authors have the same goal, to arouse a sense of solidarity and duty among Georgian teachers towards each other in order to protect common interests. The goal of such unions was to improve the professional, moral, and material condition of teachers; Protection of teachers' rights, both at school and in society; Support and assistance to unjustly persecuted teachers; Establishment of a union budget for mutual support, publication of new textbooks, and publication of newspapers, journals, and books supporting teachers; One of the goals of establishing teachers' unions was to conduct pedagogical and scientific lectures, maintain libraries, reading rooms, organize evening classes and Sunday schools, etc.; Discussion of laws and decrees issued by the government regarding school education, etc. (Botsvadze, 2008₃: 107).

The Bulgarian Teachers' Union recognized itself as a non-partisan, independent teachers' corporation, which, in order to achieve its goals, engaged in not only cultural but also political struggle and defended the constitutional order, condemning the arbitrariness of the Ministry. The Union demanded the complete expulsion of religion from schools and argued that moral education should not depend on religious teaching (Botsvadze, 2008₃: 105-107). Following the example of the Bulgarian Teachers' Union, Luarsab Botsvadze called on his contemporary teachers to form a national teachers' union, which would contribute to the unification of teachers for the good of the country. Sharing the practice of German and Bulgarian teachers was a telling experience for Georgian educators, who were troubled by the educational policies of the empire. It is noteworthy that at this time, the germ of teachers' unions already existed in Georgia, as can be seen from the press of that time.

The journal established an interesting practice when it began to publish the history of the teaching of individual subjects or their development on its pages. For example, in the 2nd and 3rd issues of "Education" Samuel Tsomaia's "Astronomy, or Star Counting - from Copernicus (1473-1543) to Newton (1642-1727)" was published in two parts (Tsomaia, 1908$_1$, No. 2: 46-59; 1908$_2$, No. 3-4: 22-40).

The article contributed not only to the acquaintance with the history and knowledge of European astronomical sciences, but also to the dissemination of knowledge in the history of physics in Georgia[6]. Nicolaus Copernicus finally shattered the old views on the universe and established the Earth's place in the universe. He proposed the heliocentric theory, which is the basis of modern astronomy, correctly determined the sequence of planetary orbits, and was the first in the history of astronomy to determine their relative positions. The "Copernican revolution" changed the ideas about the world, and Isaac Newton, with the discovery of the law of universal gravitation, formulated a whole set of natural laws about the forces governing the movement of the Earth and planets, proved that celestial bodies move in orbits, etc. In a word, he was the first to scientifically determine and substantiate the system of the existing world. He was a brilliant mathematician, physicist and philosopher, theologian, and alchemist. Naturally, the ideas of Copernicus and Newton have long been known in Georgia, but Samuel Tsomaia's letter does not only concern them, it reviews the views of famous thinkers, including Newton, from Copernicus's rejection of the Ptolemaic system to Giordano Bruno, Galileo Galilei, Johannes Kepler, Tycho Brahe, William and Caroline Herschel, Isaac Newton and others. The work is accompanied by a footnote that sequentially follows the text, where the author makes special explanations for the reader. Naturally, the article was to become one of the important factors contributing to the spread of Western education and scientific thought.

In the 3rd issue of the journal, the editorial staff offered the reader a brief review of the work of the then popular French philosopher, multi-talented thinker and composer Jean-Jacques Rousseau[7]

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[6] Naturally, this was not the first information about the Varsk-Vlavtsevli, astronomy, Copernicus and Newton for the Georgian public (it is known that stargazing and astronomy were also developed in ancient Georgia, and there were references to Copernicus and Newton from the first half of the 18th century), but the material translated by Samuel Tsomaia describes in detail the contributions of both scientists in the field of astronomy.

7]Jean-Jacques Rousseau's (1712-1772) treatise "The Social Contract, or Principles of Political Right" was published in 1762 (see Delaney, IEP for a brief biography of Rousseau and his works).

"The Social Contract" (Rousseau, 1908: 41–76). The letter was translated by A.M. (unfortunately, the pseudonym is not identified – G.L.). Its author is well acquainted with the history of the French Enlightenment, their views, especially Rousseau's revolutionary nature and attachment to the states of his era, which are described in eight chapters of the letter and tries to prove to the reader the progressiveness of Rousseau's ideas. It can be said that this is a brief analysis of Rousseau's views written in popular language, in which the main details of Rousseau's theory are conveyed. In the author's opinion, he was a precursor of the changes that took place during the first French Revolution in 1789. It is rightly said that Rousseau created the conditions that ensured the success of the theory of the social contract (Rousseau, 1908: 76).

In the same issue of the journal, Luarsab Botsvadze offers us the tragic history of the Polish school in Prussia, describing the difficult situation of Polish children, when education was conducted in a language completely foreign to the Poles. This story was especially painful for the Georgian community, because Georgian schools in the Russian Empire were also in the same situation. The letter belongs to Adam Heller from Stein and, apparently, was printed in the journal "Die Gegenwart", translated into Russian by M. Uspensky and printed in 1906 in the twelfth issue of "Русская школа", from which the journal "Гасыбеба" translated. Here, it is necessary to note the academic integrity and ethical attitude of the journal towards intellectual property. The journal always indicates exactly from which language, or by whom, the extracted and used material was translated. The authors provide explanations in the footnotes and try to substantiate their opinions. If necessary, the material is presented with appropriate pictures, drawings, and illustrations, which helps the reader better understand the text.[8]

In subsequent issues, the journal introduces the reader to theories popular in Western educational life at that time, such as the concept of the Italian teacher, scientist and humanist Maria Montessori, the practical experience of her system of kindergarten on the example of an Italian kindergarten.

The letter is accompanied by the pseudonym N. B.[9] (Botsvadze, 1912, N6:447-464).

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[8] Similar norms of academic integrity are found in 19th-century Georgian journals, but "Education" attempts to establish the standard adopted in progressive journals of that era.

[9]N. B., Botsvadze Nino (1883 – 1971), wife of Luarsab Botsvadze, teacher, writer and journalist. Her real name and surname are Nino Iosebi Ausuli Bakradze, in addition to the journal "Education", she collaborated with the editorial staff of the children's journal "Nakaduli" and the newspaper "Kvali" (Mikadze, 1984: 67;114).

The fourth, fifth, sixth issues of the journal "Education" in 1911 and the second, third, and fourth issues of 1912 published the work of the famous American psychologist William James[10], "Conversation on Psychology." The author of the translation is presented under the pseudonym D.O. Dzesa, which has been identified by researchers as belonging to the famous writer, public teacher, and pedagogue of that time, Domenti Okreshidze.[11]

William James, along with famous American philosophers John Dewey, Charles Peirce and others, was a member of the Metaphysical Club. Together with them, he is considered one of the founders of pragmatism and functionalism. His works are actively used in pedagogical sciences, therefore, the material presented in the journal briefly reviews such philosophical categories studied by James as interest, attention, memory, habit, instinct, emotions and others (James, 1911, 4,5,6; James 1912, 2,3,4;). In one of his main works, "Principles of Philosophy," William James, in addition to these categories, discusses the perception of time, the relationship of the mind to other objects, the flow of thought, self-consciousness, concept, discrimination and comparison, association, negation, necessary truth and the effects of experience, etc. (Horace M. Kallen, 1925: 371).[12]

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[10]William James (1842–1910), American philosopher and psychologist. The first educator to offer a psychology course in the United States educational system, he is considered one of the leading thinkers and most influential philosophers of the 19th and 20th centuries. He is often called the "father of American psychology." James's most famous books include "Principles of Psychology," "Essays on Radical Empiricism," and "The Variety of Religious Experience," in which he examined various forms of religious experience, etc. (Information based on Encyclopedia Britannica, William James), (for more details, see Horace M. Kallen, 1925).

[11]Domenti Okreshidze (1876 – 1952) – writer, teacher, public figure. Since 1898, he worked in the schools of the Society for the Promotion of Literacy among Georgians in Samegrelo and Lower Imereti, and since 1911, he was a teacher of language and literature at the Georgian Gymnasium in Kutaisi. He collaborated with the newspapers: "Iveria", "Akhali Droeba", "Sakhalkho Gazeti", "Isari", "Amirani", the journal "Gasmeba" and others. He was persecuted due to the educational policy of the Russian Empire, but despite this, the Georgian gymnasium teacher tirelessly worked to instill the advanced ideas of the era in young people. He published under the pseudonyms: "D. Tomashvili", "D. Mtagoreli", D. Choleveli" (information verified from the book Public Education..., 1955: 373), "D.O." (information verified by Mikadze, 1961. 112). That the pseudonym "D.O." really belongs to Doment Okreshidze is confirmed by another argument, on the pages of the journal "Education" we often find poems under the pseudonym "D. Tomashvili", which is one of Doment Okreshidze's pseudonyms. It seems that the author closely collaborated with the editorial staff of the journal.

[12] Presumably, the translator used William James's work "Principles of Philosophy", which was published in 1891 (Horace M. Kallen, 1925: 371), and the translation by D. Okreshidze is intended to be a brief overview of its content.

These philosophical categories began to be discussed even in antiquity, they are widely discussed and studied by such disciplines as philosophy, psychology, medicine, and, of course, pedagogical science.

The interest in the works of William James, one of the greatest American psychologists and philosophers, his translation and publication, indicate the high demands of Georgian society at the turn of the 20th century and the high standards of development of Georgian public opinion.

Conclusion

Thus, the journal "Education" published the views and ideas of famous thinkers, psychologists, sociologists and philosophers Voltaire and Jean-Baptiste Fourier, Alexander Herzen, Otto Lippmann, Friedrich Nietzsche, Herbert Spencer, Arthur Leist, Hermann Genkel. Naturally, we cannot discuss all of them in one article, but this material is enough to conclude that the interest of Georgian educators was caused by the interests of the colonial country, to free itself from the reactionary educational system of the empire and to create a conceptually new education oriented on national ideas based on Western educational ideas.

This brief review is based only on the case of the journal "Education", however, it shows the growing trend of the spread of Western educational ideas in Georgia during this period, the interest of the public and the diversity of materials, accordingly, the following conclusions and assessments can be made:

1. A large part of the publications were translated directly from the original by Luarsab Botsvadze and his associates, which, under the conditions of imperial policy, contributed to the revival of the old tradition of translating from the original in the cultural life of the Georgian nation and the publication of texts close to the original;

2. The translation of Western educational and scientific ideas was oriented towards the needs existing in the complex educational life of Georgia and the inevitability of sharing the experience of European school life with the natives;

3. The journal was intended for all strata of Georgian society, therefore, the dissemination of Western educational ideas and scientific thought was a social imperative, which was an indicator of the intellectual demands of society and high standards of public thinking;

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7

Cultural Identity in the Context of Written Heritage (The Example of Abkhazia)

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Abstract

National cultural identity develops and is formed over a long period of time, based on various factors. According to the discourse of identity theorists, it can be considered as a collective cultural identity, which combines various spectrums of collective cultural creativity of nations. Among them, the leading place is occupied by written cultural heritage, which, together with other markers of identity, has a fundamental influence on the formation of the worldview and values of nations and individuals.

The written cultural heritage of the past is a set of leading historical narratives that form the basic content of collective historical memory. Throughout the Middle Ages, the national and cultural identity of the Abkhazian population was associated with the Georgian historical narrative and collective historical unity, since the existing historical and source knowledge base about the history of Abkhazia is based entirely on historical narratives created in the Georgian language. These are historical works preserved in the collection of ancient Georgian historical works - "Life of Kartli" ("Kartvelt Tskkovreba"), in family chronicles ("Divan of the Kings", etc.), in the works of Vakhushti Bagrationi and other Georgian chroniclers, in small chronicles, historical poetry and travel literature. In addition, interesting historical content is contained in official historical documents, epigraphic monuments of Egri-Abkhazian (Abkhazian) kings, eristavi, and major feudal lords - inscriptions, epistolary heritage, numismatic items, etc., which are preserved in the Georgian language.

Medieval traditions continued into the 19th century. In this regard, the written cultural heritage of the Abkhazian princely family - the Sharvashidzes - is noteworthy - documents, epistolary material, grave epitaphs, etc. The work analyzes the problem of the cultural identity of the Sharvashidzes in the context of the written cultural heritage of the 19th century.

Keywords: Cultural Identity, Written Heritage, Historical Memory of Georgians and Abkhazians.

Introduction

The study of national and cultural identity, against the backdrop of the current difficult situation in the world and the aggravation of political and ethnic conflicts, has attracted increasing attention from scholars. Accordingly, the study of national and cultural identities and the development of conceptual theoretical approaches should be considered as a means of achieving national cultural unity, cultural self-confidence, national consensus within the country and national stability (Villarroya, 2012: 31-45), but, at the same time, the study of identities in their historical content should be based on the scientific analysis of numerous arguments and factual material.

The formation of national and cultural identity is based on a variety of factors, is based on traditional experiences formed over centuries, and develops and is formed on the basis of various factors. Analyzing the discourse of identity theorists, it can be considered as a collective cultural identity, which combines various spectrums of collective cultural creativity of nations. Among them, the leading place is occupied by written cultural heritage, which, together with other markers of identity (language, life and traditions, religion, folklore, etc.), has a fundamental influence on the formation of the worldview and values of nations and individuals.

In our opinion, the written cultural heritage of the past is a set of leading historical narratives that form the basic content of collective historical memory. Throughout the Middle Ages, the national and cultural identity of the Abkhazian population was connected with the Georgian historical narrative and collective historical unity and, apparently, was based on the principles of equality in Georgian-Abkhazian relations. Because the existing historical and source knowledge base about the history of Abkhazia is based entirely on historical narratives created in the Georgian language. These are the historical works preserved in the collection of ancient Georgian historical works – "Life of Kartli" ("Life of the Georgians"), family chronicles ("Council of Kings" etc.), historical narratives reflected in the works of Vakhushti Bagrationi and other Georgian chroniclers, small chronicles, historical poetry and travel literature.

In addition, interesting historical content is contained in official historical documents, epigraphic monuments of Egri-Abkhazian (Abkhazian) kings, eristavi and major feudal lords – inscriptions, epistolary heritage, numismatic units, etc., which are preserved in the Georgian language (Akhaladze, 2019: 294-337).

If we look at the written cultural heritage of the 19th-century Abkhazian princely family – the Sharvashidzes (documents, epistolary material, tombstone epitaphs, etc.), the traditional experience existing in the Middle Ages continued into the 19th century.

The methodology and theoretical framework of the work are based on the method of historical-source analysis and synthesis, the technique of cyclical study of sources and qualitative research methods. The research is based on the content analysis of various types of historical sources (historical documents, epistolary material, epigraphic monuments). In more detail, when working on the texts of historical documents, we used the content analysis method. At the first stage of the research, we found archival documents and materials necessary for the study. At the next stage, the found documents were divided according to certain criteria. At the third stage, their content analysis was carried out. The theoretical and Practical framework of the work is based on the works of researchers of identity and collective historical memory, as well as the written heritage of Abkhazia (Chkhetia, 1963; Bghazhba, 1967; Zerubavel, 2003; Smith, 2004; Smith, 2008; Villarroya, 2012; Silogava, 2004; Akhaladze, 2005; Khorava, 2011; Akhaladze, 2021).

Discussion

The study and actualization of the written heritage of the Abkhazian princely house of the 19th century is of particular importance in the Georgian-Abkhazian scientific historiographical discourse. The main language of Abkhazian culture and education of this era is Georgian, which is confirmed by historical documents and artifacts. First of all, we should name the official documents, epistolary heritage and epigraphic monuments of the representatives of the Abkhazian princely house - the Sharvashidze family. The historical source of all three groups: which, along with official documents, includes family correspondence, letters of a political nature and other types of written material, is written in Georgian, with a few exceptions.

Among the historical documents issued by the princes, two Georgian-language documents dated May 20, 1806, by Kelesh-Bey Sharvashidze (1880s - 1808), which provide us with several interesting pieces of information, are noteworthy. The first document is addressed to Nino Bagrationi-Dadiani, the widow of the Samegrelo ruler Grigol Dadiani: "I, Sharvashidze Kelesh Ahmad-Begman, have sent this firm hand-written letter to you, my lord, the daughter of the Georgian king, Queen Nino, and your son Dadiani Levan, so that there was a quarrel between us and you through the language of a bad man and we were quarreled and again we wanted to make a deal, through the mediation of Major General Rikkhoff and Lieutenant Colonel Tarasov, we made a deal, so that if you do not enter into our humiliating affairs, we will become your good and I will not enter into your harmful and humiliating affairs and I will not be able to; I will become your good and I will become the enemy of your enemy, I will become the lover of my lover. The witnesses of this are Major General Rickhoff, Lieutenant Colonel Tarasov, Prince Parutchik Stepane Melikis-dze, Prince Ensign Adil-Beg. If I die and am injured by this letter, Major General Rickhoff will read it as is the order and I will be the one to answer it. May 20, 1806[1] - Anaklia Fortress" (Berzhe 1869: 189).[2]

The second document of Kelesh Bey Sharvashidze settles the vassal relations with his nephew, who had been "in conflict" with his uncle and who appealed to the Queen of Samegrelo and General Rikkhoff for reconciliation.

The document reads: . "I give you this manuscript to my nephew, Bekir Beg's son, Sosran Beg, so that you and I may have a quarrel and have gone to Major General Rickhoff and the Queen; now, these illiterate people have agreed to our and your agreement, and the Queen has come with them, and instead of the General, a man, a lieutenant colonel, has come and divided us, so that since your father Bekir Beg had a place for his father's servants and servants, or whatever he had, all four of us have been given a place for our father's servants; and as is the order of serfdom, serve your servant and let him take you at your will, and do not think of me either with death, or with capture, or with the appearance of a man, if they do not show passion from you.

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[1]The document is dated according to the tradition presented in ancient Georgian historical documents -The day and year are indicated in the Georgian alphabet - მაისი კ დღესა, ჩყვ წელსა.

[2] Acts collected by the Caucasian Archaeographic Commission. Published under the editorship of the chairman of the commission, Adolf Berzhe.

This book is from me, you do not have time "Don't worry, Lieutenant Colonel Tarasov is the guarantor of this, and if I fail to do so, I will be the one to answer to General Reichshof. Witness to this are Prince Melikov, Parutchik Stepan. May 20, 1806[3]. In the fortress of Anaklia" (Berzhe, 1869. p.190).

Both documents attract attention in several directions from a historical-source-study point of view. 1. Attitude towards the de facto ruler of Samegrelo, Nino Dadiani-Bagrationi, and the Bagrationi family in general; 2. Mediation and involvement of Russian officials in resolving the principality's internal affairs; 3. Relations between vassal and suzerain – the problem of the relationship between "master" and "servant"; 4. The issue of inheritance of the estate in late 19th century Abkhazia; 5. The official working language of the principality, both in resolving foreign and domestic issues and the problem of cultural identity; 6. Diplomatic norms of the document issued by the principality, its name, and many others. At this stage, the last two issues are of interest to us.

Both documents clearly show that the official working language of the Abkhazian Principality is Georgian and the drafting of legal documents, both for the settlement of foreign affairs and for internal use – for subordinates and vassals, is carried out in Georgian. When drafting documents, the Sharvashidze princely house meticulously adheres to the centuries-old tradition of drafting Georgian historical documents – it knows and uses the recognized rules and norms of ancient Georgian diplomacy, distinguishes various Georgian diplomatic terms, gives them a formal form, etc. In terms of cultural identity, these documents are a part of Georgian historical documents.

When discussing the second document of Kelesh Bey Sharvashidze, Zurab Papaskiri rightly considered that it was drawn up according to diplomatic norms developed in medieval Georgia and represents a manuscript (Papaskiri., 2016: 413).
The document is indeed executed in compliance with a number of norms of medieval Georgian diplomacy, but it should not be just a "handwritten" document, because it reflects the legal act of transferring the estate and should be considered a document of the pillars/approval of the estate.

[3] Here, in this document, too, the year and day are indicated according to the dating tradition accepted in ancient Georgian – მაისი კ დღესა, ჩყვ წელსა.

As for the diplomatic term – "handwritten", its fixation in the document attracts attention. The words "hand" and "letter" are presented with a hyphen, separately, i.e. the document is not an ordinary "handwritten" document and is a term used in the meaning of "handwritten", "handwritten book". This opinion is substantiated by the words presented in the following lines of the text, when Kelesh-Bey writes – "This book from me you will not lose at any time", that is, in this case we are dealing with the use of the term "book" denoting a document in ancient Georgia, and the word "manuscript" appears as a diplomatic term that has succeeded "book". Obviously, it has a broader meaning than the usual modern understanding of "manuscript". In the form of the term "manuscript" presented in the document, we are dealing with the use of one of the diverse diplomatic terms developed in the Georgian kingdoms and principalities of the late Middle Ages. "Manuscript" as a book is also used in other historical documents (Akhaladze, 2021: 48).

The documents issued by Kelesh Bey contain invaluable information in terms of studying the seigniorial-vassal relations, estate poles and mercy, and property rights in Abkhazia. With the issued document, the author legally grants the estates to "Bekir-Beg's son Sosran-Beg", while at the same time confirming that the official language of the prince's communication with his subjects is Georgian.
The "Requests" of Giorgi (Safar-Bey) Sharvashidze (1808-1921) are of the same importance, written in Georgian and consisting of seven points. The purpose of Giorgi (Safar-Bey) Sharvashidze's "Requests" was the same as what the kings and princes of other Georgian principalities requested from the monotheistic emperor of Russia – "so that I may be the prince and governor of my country, and also my son and my son's sons may forever be free from the imperishable government and the inheritance of the dominions of the empire." The document is signed by Giorgi Sharvashidze and Tula Sharvashidze, and at the end "we, the princes of Abkhazia, sign and verify this letter." The document is dated August 12, 1808 and unambiguously indicates, through collective historical memory and cultural identity, to which world the "Abkhazian princes" belong. The famous words of the Abkhazian nobleman Alexander Sharvashidze openly confirm his belonging to this world: "I am not Abkhazian, but a Georgian prince" (Berdzenishvili, 1990: 611).

Unfortunately, history has shown us that the "request points" of Giorgi (Safarbei) Sharvashidze and the rulers of other Georgian kingdoms and principalities were temporary documents created to gain trust, and the Russian Empire had in mind a specific historical perspective, as a result of which all Georgian kingdoms were abolished by the Tsarist Empire in 1801–1867 (Akhaladze , 2021: 49).

Giorgi (Safar-Bey) Sharvashidze's "Points of Prayer" are more interesting in another way than in its content. The language, script, signatures, and fluent text of the document attract attention, which preserves the norms of the Georgian literary language of the early 19th century, specific addresses, traditional forms of prayer to the Lord, etc. This is not a document compiled by a person or group of people with an "other" identity; for its author, it is the language of the Georgian inner world, his own "I," which is felt in each sentence of the document: "With our faith, which was our ancestors", "May he look with mercy upon our goodness from his emperors and greatness", "I become obedient to the supreme ruler of Georgia, with my faithful and faithful slaves and serfs…". It seems that for the author of the text, Georgian is not only the language of culture, it is also the language of his inner world, with which he tries to convey his message so vividly. As in the documents mentioned above, here too, the author of the document unintentionally demonstrates his own identity (Akhaladze , 2021:50).

The opinion is expressed that this document was drawn up by Georgians and blindly signed by the Abkhazian prince and "Abkhazian nobles". This opinion, first of all, denies the historical realities of the beginning of the 19th century in Abkhazia, when such simple and blind signing of historical documents by "Abkhazian nobles" is completely excluded, and on the other hand, the vast majority of letters of Abkhazian princes and Abkhazian nobles are preserved in Georgian, and it is impossible for the princely house to compose official and personal letters in a "completely foreign language" to them.

In this regard, the epistolary heritage of Mikheil Sharvashidze deserves special attention. Despite the fact that he was fluent in Russian and French, he sent letters to the Caucasian government in Georgian, although there are also several Russian-language letters. The Georgian documents of Mikheil are preserved in the funds of the National Archive of Georgia, including the originals, and some of the letters are also published in the Archeographic Acts of the Caucasus.

The epistolary heritage preserved and published in the Mikheil Sharvashidze fund can be divided into three groups:

1. Georgian-language letters, the Russian translation of which was made by the official authorities;
2. Russian-language letters, which the author sent in Georgian and translated from Georgian into Russian, but the original has not survived (the translator is also included there).
3. Letters that the author originally composed in Russian and sent to the addressee (Akhaladze, 2021: 51).

We present several documents preserved in the Georgian original: 1. Letter of the Abkhazian prince Mikheil Sharvashidze dated May 18, 1855 to his wife Alexandra; 2. Letter of the Abkhazian prince Mikheil Sharvashidze dated June 16, 1855 to Gen. Vasil Bebutov about the thwarting of the Turkish command's plan; 3. Letter of the Abkhazian prince Mikheil Sharvashidze dated October 1, 1855 to Dimitri Kipiani; 4. Letter of the Abkhazian prince Mikheil Sharvashidze dated December 17, 1855 to Gen. Vasil Bebutov; 5. Letter of the Abkhazian prince Mikheil Sharvashidze dated December 17, 1855 to his father-in-law Giorgi Dadiani. 6. Information provided to the Russian command by the Abkhazian prince Mikheil Sharvashidze no later than January 1, 1856, about the number of Omer Pasha's troops camped in Abkhazia and Samegrelo; 7. Letter from the Abkhazian prince Mikheil Sharvashidze to Gen. Vasil Bebutov, dated January 22, 1856, about his actions and plans. These documents prove that Mikheil Sharvashidze wrote letters to both family members and state officials, mostly in Georgian using the Mkhedruli alphabet.

According to official Russian historical sources, the last chief of Abkhazia usually addressed the Caucasian government and its representatives in Georgian. We find a noteworthy reference in the report of Vasil Bebutov to Dolgorukov dated July 11, 1855, in which the author notes the receipt of a letter in Georgian from the Abkhazian chief on June 7. And there he conveys the content of the letter in Russian. This is also confirmed by Russian antiquarians who were in Abkhazia in the first half of the 19th century, according to the information reflected in their works, the language of culture and education in the region was Georgian, while the Abkhaz chiefs and the noble population of the principality spoke Georgian perfectly. For example, Russian military and antiquarian Mikhail Seleznev, who was in Abkhazia in 1841, describes how representatives of high circles knew Georgian well (Seleznev, 1847. No. 206).

In the works of the same Russian researchers and travelers, we often find information about artifacts decorated with Georgian Asomtavruli inscriptions in 19th-century Abkhazia. Georgian inscriptions accompany icons made by order of Mikheil Sharvashidze in 1829 and 1848, which he donated to the Lukhuni (Likhni) temple. The inscription carved on one of them states that the icon was made by "the chief of all Abkhazia, Mikheil Giorgi Sharvashidze", "In a toast to my beloved wife and heir to our Giorgi… " (Sakhokia. 1903).

Mikheil Sharvashidze's 1864 A letter dated July 21 that he sent to the Governor-General of Kutaisi, Svyatopolk-Mirsky, expressing his wish to be buried in the Mokvi Cathedral he had restored (CSHAG, F. 416. Vol. 3. S. 177; Khorava, 2011: 278). A letter written in Georgian and sent to the same addressee, dated November 6 (Jnashia, 1988: 33), is believed to be the last letter of Mikhail Sharvashidze, but in fact it is not the last, but the last letter sent from Abkhazia, because after his exile, he sent several more letters to imperial officials – on March 7, 1865, to the Commander-in-Chief of the Caucasian Army, Mikhail Romanov (CSHAG, 1964: pp. 118-119), a telegram of July 23, 1865 to the Minister of War, Adjutant General Dmitry Milyutin (CSHAG, f. 545, vol. 1. p. 75. pp. 67-69), a letter of December 23, 1865, again to the Commander-in-Chief of the Caucasian Army, Mikhail Romanov (CSHAG, f. 545, vol. 1. p. 75. p. 71-72), and a separate letter to his assistant, Alexander Kartsov (CSHAG, f. 545, vol. 1. p. 75. p. 73-74; Khorava, 2011: 283).

The correspondence of other members of the prince's family is also Georgian and is written in fluent Georgian. Simon Janashia, observing the norms of the literary Georgian language, forms of address, and fluent grammatical style preserved in Mikheil Sharvashidze's letters, concludes that "such a function of the Georgian language was the fruit of the centuries-old cultural-historical development of the Abkhazian state" (Janashia , 1988: 35).

In this context, individual episodes from the history of the cultural life of the Abkhazian princely house are noteworthy. For example, the prominent Abkhazian historian Giorgi Dzidzaria, speaking about the cultural life of the Abkhazian princely court, emphasizes the attitude of the last prince's family to the Russian language and Russian culture and verifies the notes of a tourist who arrived in the Caucasus in the summer of 1867, according to which in the prince's library you could see Lermontov's "A Hero of Our Time",

a dissertation in Latin, librettos of Italian operas, French medical books, scattered numerous Russian novels, magazines, newspapers and other publications... Here were the stories of Napoleon and Suvorov, the history of the campaign of 1812, etc. (Caucasus 1867, N45; Dzidzaria, 1979: 35). This fact indicates Mikheil Sharvashidze's knowledge of Russian and French languages, his versatile education, and his cultural interests.

Giorgi Dzidzaria, while discussing the cultural life and public activities of the Abkhazian princely house, speaks with restraint about Mikheil Sharvashidze's relations with Georgian public figures. However, his closeness to prominent representatives of Georgian culture is well known. The friendly relations between the prince and our Sasikadulo Mamulishvili Dimitri Kipiani are exemplary. Giorgi Dzidzaria cites a letter from Mikheil Sharvashidze to Dimitri Kipiani dated June 16, 1859, but the author dryly quotes only one sentence from the prince's epistle: "It is nice to see a friend like him"(Manuscripts Center, d. 1715). This is a letter of gratitude from Mikheil Sharvashidze to his friend, when the regent Nikolai Muravyov (1854-1856), after the Crimean War (1856), demanded that Mikheil Sharvashidze be dismissed as a "traitor" and sent to a distant Russian province (Acts XI, 1888:54). Dimitri Kipiani, who was entrusted by the state with the investigation of the "treason" case of Mikheil Sharvashidze, at great risk, documented the truth of the Abkhazian prince[4] and actually delayed his deportation from Abkhazia for several years (Esadze 1907; Janashia, 1988: 9).

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[4] According to Shalva Chkhetia, on September 11, 1855, Dimitri Kipiani, on the instructions of the Crown Prince Nikolai Muravyov and General Vasil Bebutov, traveled to Western Georgia ... He traveled and visited those places and people who had some connection with the issue to be resolved. He was in Imereti (Kutaisi, Orpiri, Gordi, Kulashi), Guria (Ozurgeti, Sazhevakho, Aketi) and Samegrelo (Zugdidi, Senaki, Chkaduashi, Kurzu, Salkhino), where he had meetings and conversations with a number of private and official persons: the military governor of Kutaisi, Col. Kolyubakin, the head of the Guria detachment, Gen. Iv. Mukhran-Baton, the queen of Samegrelo, Ek. Dadiani, the wife of the Abkhazian prince, Alexandra Sharvashidze, her father Giorgi Dadiani, the prince of Guria Mikheil Eristavi, M. Sharvashidze's wife Menik Dadiani and others, some of whom belonged to the camp of M. Sharvashidze's opponents, some to his supporters... They were especially eager to portray his personal enemies in a bad light, so it was necessary to collect additional objective information and materials in order to make it possible to draw the right conclusion. A conclusion that would be convincing to the government as well. Dimitri Kipiani managed to do this – he was able to obtain secret correspondence from M. Sharvashidze's wife Alexandra and her father Giorgi Dadiani with Mikheil Sharvashidze and some other persons, from which Mikheil Sharvashidze's innocence was clearly visible... On this basis, D. Kipiani compiled an extensive report in which D. described Every step of Kipiani and meetings with various individuals were given, an analysis of the information or materials obtained was given, and the opinion was held that M. Sharvashidze had not committed any reprehensible or treasonable act before the Russian government (Chkhetia,1963. pp. 132-133). **104**

It is precisely because of this friendship that Mikheil Sharvashidze writes a letter of gratitude, which cannot be considered only one of the best examples of centuries-old Georgian-Abkhazian relations. This is the struggle of people with common roots, similar mentality and identity for the survival of the whole of which they are a part.

And yet, the Abkhazian scholar silently ignores the numerous references to the chancellery of the last prince of Abkhazia, which confirm the Georgian language of the princely chancellery of Mikheil Sharvashidze (Janashia, 1988: 7-13). Zurab Papaskiri notes: As a clear confirmation that the representatives of the princely house of Sharvashidze single-handedly attributed themselves to the Georgian cultural, political and state world, we can consider the epistolary heritage of Kelesh Bey Sharvashidze and his successors: Giorgi (Safar-Bey), Sharvashidze and Mikheil Sharvashidze, and other official documents from their chancellery. It is known for certain that these princes conducted their official and unofficial correspondence only in the Georgian language Papaskiri, 2016: 412).

In addition to the above-mentioned historical documents and epistolary heritage of Kelesh Bey, Giorgi (Safar-Bey) and Mikheil Sharvashidzes, this fact is also confirmed by the Russian Major General Kotsebu, who was at the Sharvashidze court in Abkhazia, in his letter sent to the Crown Prince of the Caucasus, Nikita Muravyov. In the words of the author of the letter: "The written language adopted by the main Sharvashidze family is Georgian" (Chkhetia, 1963: 154).

A direct expression of the cultural identity of the Abkhazian princely house is the Georgian Asomtavruli epitaphs on the tombstones of the last prince, Mikheil Sharvashidze, and his wife Alexandra Dadiani, from 1862 and 1866, in the Mokvi Cathedral. It is known that Alexandra Dadiani died in 1862, before Mikheil's exile, and her tombstone and epitaph were also made in Georgian Asomtavruli by order of her husband: "Here rests/ the prince of Abkhazia/ Alexandra,/ daughter of Giorgi Dadiani,/ who died in 1862" (Bgazhba, 1967. pp. 32-33).

Mikhail Sharvashidze also rests next to Alexandra Dadiani, whose death is connected with the issue of the abolition of the principality.

On June 24, 1864, the Grand Prince of the Caucasus, Mikhail Nikolayevich Romanov (1862-1881), officially informed Mikhail Sharvashidze of the order of the Russian Emperor Alexander II (1855-1881), according to which Mikhail Sharvashidze was relieved of his duties as a prince, and Russian rule was introduced in Abkhazia (CSHAG Fund 416, file 3, file 177, page 48). Accused of collaborating with the Ottomans during the Russo-Turkish War of 1853-1856 and after the death of his beloved wife, Mikheil Sharvashidze, extremely depressed and ill, requested to stay in Kutaisi and Racha, or to go to Jerusalem to pray, but was exiled to Voronezh, where he died on April 16, 1866. At his own request (CSHAG, Fund 545, Vol. 1, Vol. 75, pp. 2-5), he was buried next to his wife, in the Mokvi Cathedral. The epitaph on Mikheil Sharvashidze's tombstone, made in the old Georgian script, sadly informs us about the identity and identity of the owner: "Here rests/ the chief of Abkhazia/ Mikheil Giorgisdze/ Sharvashidze,/ who died in 1866" (Bgazhba, 1967: 32,33) .

In the reality of the 19th century, this is not a unique case when in Abkhazia – an Abkhazian or Georgian representative of the secular and religious elite made epitaphs in the Georgian language. In the same temple, we have a military epitaph on the tombstone of the Colonel of the Russian Guard, Mikhail Marshania himself, which was made by order of his wife, Kneina Daria Manuchar Sharvashidze's daughter (Bgazhba, 1967: 31). Numerous tombstone epitaphs were found in Ochamchiri and Gali municipalities during the cleaning of village churches by local parishioners. For example, among the epitaphs found during the cleaning of a church built in the 19th century in the center of the village of Ghumurishi, attention is drawn to the tombstone epitaphs of Kneina Salome Anchabadze and her husband Kiazo Emkhvari (Akhaladze.2006: 208-212), etc.

The decoration of graves and the carving of epitaphs are part of the culture of many countries and are directly related to the traditional life of the society of this country, its attitude towards the deceased and death in general. But it, as an aesthetic of the philosophical understanding of death and life, has a much different value load; in traditional life, it is a naturally, unadorned artifact of the mentality and cultural identity of people who have passed away. The language, script, content of the text and the attitude towards death (death or death, deceased or dead) of tombstone epitaphs among peoples of different ethnopsychology are, of course, an indication of different cultures and identities.

The epitaphs of the last prince of Abkhazia and his wife, Abkhaz dignitaries, are like "grave seals that are unbreakable" and in our world full of symbols, they are the best guardians of the cultural identity of the deceased.

Conclusion

The social nature of culture is to reflect the treasure of collective knowledge received through social inheritance, which the individual receives from his group (Smith 2004; Smith (2008). Abkhazian epitaphs are a treasure of inherited collective knowledge, which has been preserved in the Georgian language, Georgian script, the methods of transmission – decoration of the text of the epitaph and its content, and represent the most solid and irreplaceable symbols of the ethnopsychological and cultural identity of their owners. These symbols of identity cannot be changed by artificially created and replaced new symbols, these symbols cannot be interfered with by history.

The written cultural heritage of the Abkhazian princely family is the most important marker of the cultural and national identity of the Sharvashidzes and indicates Georgian-Abkhazian consolidation and unity. Based on historical experience, Georgians, like in previous centuries, considered Abkhazians in the collective unity of "us" (and still do), for them the inseparability of Georgians and Abkhazians is a unity dictated by historical memory and reinforced by various laws. Even sensible Abkhazians know this – for centuries, their national and cultural identity was connected with the historical narrative of the Georgians, and therefore with their collective unity. This is confirmed by the written heritage of the Sharvashidzes of the 20th century. Unfortunately, as a result of the historical processes that began at the beginning of the 20th century, the Georgians were unable to save the historical identity of the Abkhazians and preserve their "we" in their collective unity. The change in the historical memory of the Abkhazians and the correlation of cultural identity is already a fact today.

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Toward an Ontological Model of Manipulative Influence: Vector Distortions in the Informational Field

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Abstract

Manipulative influence represents a significant challenge in the contemporary information landscape. In the 21st century, manipulation and fake content have become a persistent background to interactions, undermining public trust, confusing citizens, and creating asymmetric realities. Traditional approaches such as fact-checking, discourse analysis, and media literacy tend to be reactive and do not offer systemic, predictive solutions.

This study aims to introduce an ontologically based model of manipulative influence, defining it as a distortion of the informational vector. The methodological approach relies on topological analysis, modeling informational vectors, and reconstructing fake ecosystems. Three levels of manipulative action are identified—instinctive, affective, and cognitive—alongside five main vectors that rebalance worldviews: devaluation, amplification, injection, reduction, and association/disassociation.

The findings indicate that manipulation is not an exception but a universal structure within communication, becoming asymmetric through concealment, suppression of the recipient's subjectivity, and a focus on affective influences. The proposed model provides a systemic classification of manipulations, weaving together cognitive, emotional, and social dimensions, and lays the groundwork for interdisciplinary countermeasures.

The practical importance of this work lies in its potential for early identification of informational distortions and for developing educational, analytical, and policy strategies to counter manipulative influence.

Keywords: manipulation, influence, fake, information field, ontology, topology, vector models.

Manipulative influence has become a defining feature of modern information environments. Rather than being a sporadic disruption, it functions as a persistent background mechanism that erodes trust, captures attention, and reconfigures meaning. Examples range from deepfakes and algorithmically amplified falsehoods to emotional hijacking and agenda-setting through social media platforms. Manipulation now shapes how knowledge is produced, how decisions are made, and how social cohesion is maintained.

Conventional responses—fact-checking, media literacy, and critical thinking campaigns—remain important but are mostly reactive. These measures focus on surface content or individual events without addressing the deeper structures that allow manipulation to operate. Consequently, much analytical and policy discourse lacks predictive power and fails to intervene early in the formation of influence.

This article advocates for a more foundational approach, viewing manipulation not simply as misinformation or persuasion but as an ontological distortion within the informational field. The central hypothesis is that manipulation operates through vectorial deformations of meaning—directional shifts that alter the cognitive, affective, and perceptual landscapes of individuals and groups. These deformations are systematic and can be mapped topologically, analyzed narratively, and modeled computationally.

The study's relevance extends beyond identifying new types of influence. It provides a conceptual and methodological framework for diagnosing and classifying manipulative strategies across various media ecosystems. The goal is to offer a systemic alternative to fragmented countermeasures by establishing the epistemic and ontological underpinnings of manipulation itself.

This article contributes to ongoing debates in media studies, cognitive science, AI ethics, and epistemology. It bridges theoretical abstraction with practical urgency, laying the groundwork for interdisciplinary interventions such as early-warning systems, educational frameworks, and resilience strategies for democratic societies.

Literature Review and Current Approaches

Research into manipulative influence and fake content spans several disciplines, each presenting distinct limitations. The principal approaches are summarized below:

Behavioral Approaches
Behavioral approaches examine individual responses to triggers and informational stimuli. They excel in empirical validation and experimental rigor (Kahneman, 2011), yet they overlook broader environmental structures, media topologies, and complex informational interdependencies.

Fact–Checking and Media Literacy
These methods focus on identifying false information and enhancing audience awareness (Wardle & Derakhshan, 2017). Although valuable socially, they are largely reactive and do not address deeper mechanisms of influence.

Cybersecurity and Information Warfare
This research area prioritizes the detection of hostile sources, networks, and attacks, often using AI tools (Starbird et al., 2019). While effective on a large scale, this approach is reductionist and tends to frame threats as external and technical, ignoring socio-cognitive dimensions.

Semiotics and Discourse Analysis
Semiotic and discourse analyses focus on narratives, symbols, and frames (Berger & Luckmann, 1966). They provide rich cultural interpretation but are often fragmented and challenging to apply or scale practically.

Social Media Analytics and NLP
Digital methods analyze dissemination patterns, user reactions, and network dynamics (Guess & Nyhan, 2018). These approaches allow for automation and scalability but face limitations in semantics and the interpretability of complex content.

Emerging AI and Generative Models

Recent research highlights the impact of large language models and generative AI on disinformation dynamics, enabling more rapid and targeted manipulations (Goldstein et al., 2023; Weidinger et al., 2022). While promising for detection, these technologies also introduce new vulnerabilities.

Synthesis of Limitations

Despite advancements, three systemic weaknesses persist:

- Lack of predictive capability—most approaches are post hoc.
- Narrow scope—each field is limited to its own perspective.
- Absence of cross-systemic analysis—systemic effects of fakes are not studied across psychological, social, and technological levels.

These shortcomings underscore the need for an integrative model that conceptualizes manipulation as a structural distortion of the informational vector within a multilayered field.

Methodology

Conceptual Framework

This study conceptualizes manipulation as a distortion of the informational vector, reshaping perception and generating asymmetric realities. Unlike traditional approaches centered on observable techniques or reactions, manipulation is treated here as a structural deformation across multilayered interactions. Fake content is not simply a unit of disinformation but signals systemic distortions, allowing for the identification of hidden influence patterns.

The methodological framework follows a logical progression: hypothesis, method, research function, and expected result:

- If manipulation alters perception structures, topological analysis is used to detect resonances and gaps across psychological, social, and technological dimensions (Friston, 2005).
- If manipulation redirects informational flow, informational vector modeling traces semantic, affective, and narrative shifts (Metzinger, 2004).
- If manipulation suppresses subjectivity, subjectivity mapping observes actors' resistance, reproduction, or unawareness of distortions.

- If manipulation operates as a networked system, reconstructing fake ecologies analyzes clusters of disruption (Wardle & Derakhshan, 2017).
- The following analytical tools are deployed:
- Media corpus analysis (NLP) tests for repetitive and evolving manipulation patterns (Guess & Nyhan, 2018).
- Frame mapping identifies shifts in core semantic oppositions over time (Starbird et al., 2019).
- Affective vectorization employs emotion lexicons and machine learning to reveal emotional modulation (Russell, 2003; Russell & Barrett, 2021).
- Ethical mapping compares message structures to value axes, assessing the depth of moral manipulation (Floridi, 2013).

For example, case studies of political discourse during elections using frame mapping and affective vectorization revealed coordinated manipulative dynamics that standard NLP methods miss.

Case Selection and Analytical Procedure

The model was tested using 36 cases from public communication, digital activism, marketing, media discourse, and political statements. Selection criteria included:
- Impact potential—the message's ability to influence opinion, policy, or identity.
- Presence of manipulative patterns—semantic, emotional, or structural distortions.
- Narrative density—replication, cross-platform spread, and symbolic anchoring.

Each case underwent a layered protocol:
- Vector analysis to determine narrative directionality.
- Frame mapping to extract binary oppositions (e.g., security/freedom).
- Affective tagging using Russell's core affect model.
- Manipulation pattern coding for recurring distortions.
- Cluster mapping to group cases by dominant logic.

This two-tiered methodology enables both theoretical validation and empirical observation, allowing for identification of cross-domain manipulative logic and systemic typology construction.

Multilevel Vulnerability to Informational Manipulation: Instincts, Affects, Cognition

General Structure of Vulnerability

Vulnerability to informational manipulation is multidimensional, manifesting across three levels:

- Instinctive: Automated threat reactions, bodily avoidance, or impulsive engagement.
- Affective: Emotional engagement driving attachment, aggression, rejection, or fusion.
- Cognitive: Deliberate perception, critical thinking, modeling, and conclusions.

These levels interact dynamically. Lower levels can override higher ones during stress or social tension, creating a cascade from stimulus to instinctive reaction, affective alignment, and cognitive interpretation. This feedback loop can also be bidirectional, with cognitive interventions calming emotional and instinctive responses.

Instinctive Vulnerability as a Forgotten Vector

Instinctive vulnerability is marked by automatic, preconscious reactions—autonomic changes, bodily threat perception, and reflexive avoidance or attack. Neuroscientific evidence (LeDoux, 2020; Pessoa, 2021) shows that fear and threat signals use "fast pathways" in the brain, bypassing conscious thought, making individuals susceptible to "micro-threats" embedded in media. Instincts are triggered by sensory overload, images of harm, and dominance/submission cues. These reactions resist rational correction, emphasizing the need for embodied criticality training in media literacy.

Ethical counter-strategies must respect bodily autonomy and avoid manipulative priming.

Affective Infiltration: When Emotions Replace Logic

The affective level follows bodily reactions and precedes rational analysis. It works through emotional coloring, repetition of archetypal scenarios, and emotional contagion within groups. This level is potent in memetic and narrative forms, reshaping value priorities through felt experience.

Framing selectively highlights aspects of reality and emotionally steers interpretation, requiring not just identification of emotions but also decoding the framing mechanisms.

Cognitive Uptake: Critical Thinking Under Pressure

The cognitive level facilitates logical understanding and source verification. However, under emotional or instinctive triggers, cognition may rationalize bodily or emotional assessments rather than analyze them (Hauser et al., 2022). Effective interventions include developing a cognitive–affective pause, strengthening metacognition, and fostering value independence from framing pressure.

A Configurational Approach to Vulnerability

Vulnerability is best understood as a dynamic configuration among the three levels:

- In calm states, cognition dominates.
- In emotional turbulence, affect displaces logic.
- Under threat, instinct blocks other responses.

Interventions must target each level:

- Somatic techniques for instinctive signals.
- Emotional mapping for affective frames.
- Cognitive model reconstruction for thought processes.

This approach allows for personalized media resilience, blending pedagogy, embodied practice, and analytics. Cultural factors influence the model's expression: shame triggers may be stronger in collectivist cultures, while indignation dominates in individualist contexts (Hofstede, 2021).

Results and Case Analysis

Cross-Domain Applications of the Model

The model was validated using examples from neuroscience, psychotherapy, and collective behavior. In neuroscience, manipulation aligns with dopaminergic reward circuits, where predictive errors reinforce misleading interpretations. In psychotherapy, manipulation reveals itself through intersubjective asymmetry, echoing the five manipulative vectors in emotional gaslighting and dependency.

Collective behavior, especially in online mobilization, demonstrates vector compression, reducing complex fields to emotional slogans. Topological structures, such as polarities and echo loops, can forecast escalation patterns in crowd dynamics. This aligns with active inference theory, where manipulation skews predictive processing and action selection (Friston, 2022).

These validations show manipulation is not just rhetorical or moral, but represents an ontological distortion of relationships.

Full-Scale Case Analysis: Typology and Patterns
The analysis of 36 real-world manipulation cases across public health, geopolitics, ecology, youth campaigns, and societal polarization revealed five dominant clusters:
1. Legitimization through Affective Triggering: Emotional shock preempting critical evaluation, as seen in anti-vaccine narratives.
2. Inverted Frame Association: Reversing evaluative frames, e.g., greenwashing tactics using emotional keywords.
3. Displacement through Injected Narrative: Inserting unrelated, emotionally charged content, individualizing systemic challenges in youthwashing.
4. Reduction of Agency through Structural Vagueness: Suppressing clarity and accountability through jargon and ambiguous authority, typical in war propaganda.
5. Fragmentation through Semantic Overload: Saturating information, fragmenting meaning, and promoting reactive interpretation in identity conflicts.

Visualizing these clusters reveals a typology of manipulations mapped topologically, from centralized affective shock to decentralized semantic fragmentation.

Cross-Cutting Dynamics and Vulnerability Mapping
Key mechanisms identified across cases include:
- Polarization Loops — recursive oppositional structures.
- Vector Hijacking — redirecting messages into new value axes.
- Emotional Compression — reducing complexity to binary emotional states.
- Topological Closure — closed interpretive circuits resistant to outside input.

Vulnerability mapping revealed:
- Youth are sensitive to agency-reducing narratives and empowerment mimicry.
- Older populations react to security frames and nostalgia.
- All groups are susceptible to emotionally-loaded identity disruptions.

Implications for Modeling and Prevention

These findings confirm the proposed systemic architecture: manipulation distorts the information field structurally, each cluster producing asymmetry with specific affective and cognitive traits. The typology enables predictive monitoring and supports AI systems with ethical and vector-aware filters.

The model also guides resilience design, helping individuals and institutions recognize and resist manipulation configurationally.

To summarise, manipulations are not isolated falsehoods but systemic reconfigurations of meaning, optimized for affective impact and cognitive overload. Recognizing their topological signatures is essential for robust disinformation responses.

Strategies of Resilience: Integrating Somatic, Affective and Cognitive Levels

Structural Triad of Intervention

Three key vulnerability levels targeted by manipulative content are (see Table 1):
- Instinctive: Primal reactions to threats such as fear, disgust, aggression, isolation.
- Affective: Emotionally charged frames that create judgment or belonging.
- Cognitive: Rational constructions and fact-based justification.

Table 1
Vector Logic of Intervention

Level	Type of Intervention	Techniques
Instinctive	Somatic regulation	Breathing, movement, grounding exercises
Affective	Emotional Frame Analysis	Storytelling, emotional mapping
Cognitive	Fact-checking and critical thinking	Debriefing, frame mapping

Application in Training and Therapy Formats
The triadic model is applied in various settings:
- Therapeutic sessions begin with grounding before verbalizing reactions.
- Youth workshops use body activation prior to content analysis.
- Media literacy programs demonstrate how affect distorts reasoning.

A pilot program across three countries found that 78% of youth participants reported increased awareness of emotional triggers, and 62% improved their fact-checking abilities within four weeks.

Real-World Case: Manipulation Through Somatic and Affective Triggers

Case Study: Disinformation on "Organ Harvesting Under Cover of Refugee Aid" (2023–2024, Eastern Europe)
In several Central and Eastern European countries (Poland, Slovakia, Romania), disinformation spread via TikTok and Telegram depicted alleged "mobile organ labs" targeting wounded Ukrainian refugees. Shocking visuals triggered fear and disgust. This example is valuable for learning modules, illustrating the layered structure of manipulation and the triadic intervention strategy (see Table 2).

Table 2
The structure of manipulation

Level	Manipulation Mechanism	Suggested Response
Instinctive	Graphic bodily imagery provoking disgust and panic	Somatic grounding; safety restoration through body practices
Affective	Framing betrayal and deception by authorities	Frame deconstruction; counter-stories and emotional literacy
Cognitive	Pseudo-facts out of context	Fact-checking education; validation of sources

The layered intervention process can also be summarized in terms of components, example interventions, and intended outcomes, as shown in Table 3.

Table 3
Intervention Table

Component	Example Intervention	Intended Outcome
Somatic	Grounding and relaxation techniques	Regain body connection, reduce reactivity
Emotional	Emotional debriefing, storytelling	Awareness of emotional triggers
Cognitive	Cognitive bias recognition, logical mapping	Strengthened critical reasoning

The progression of this triadic intervention is illustrated in Figure 1, while the detailed component breakdown is summarized in Table 3.
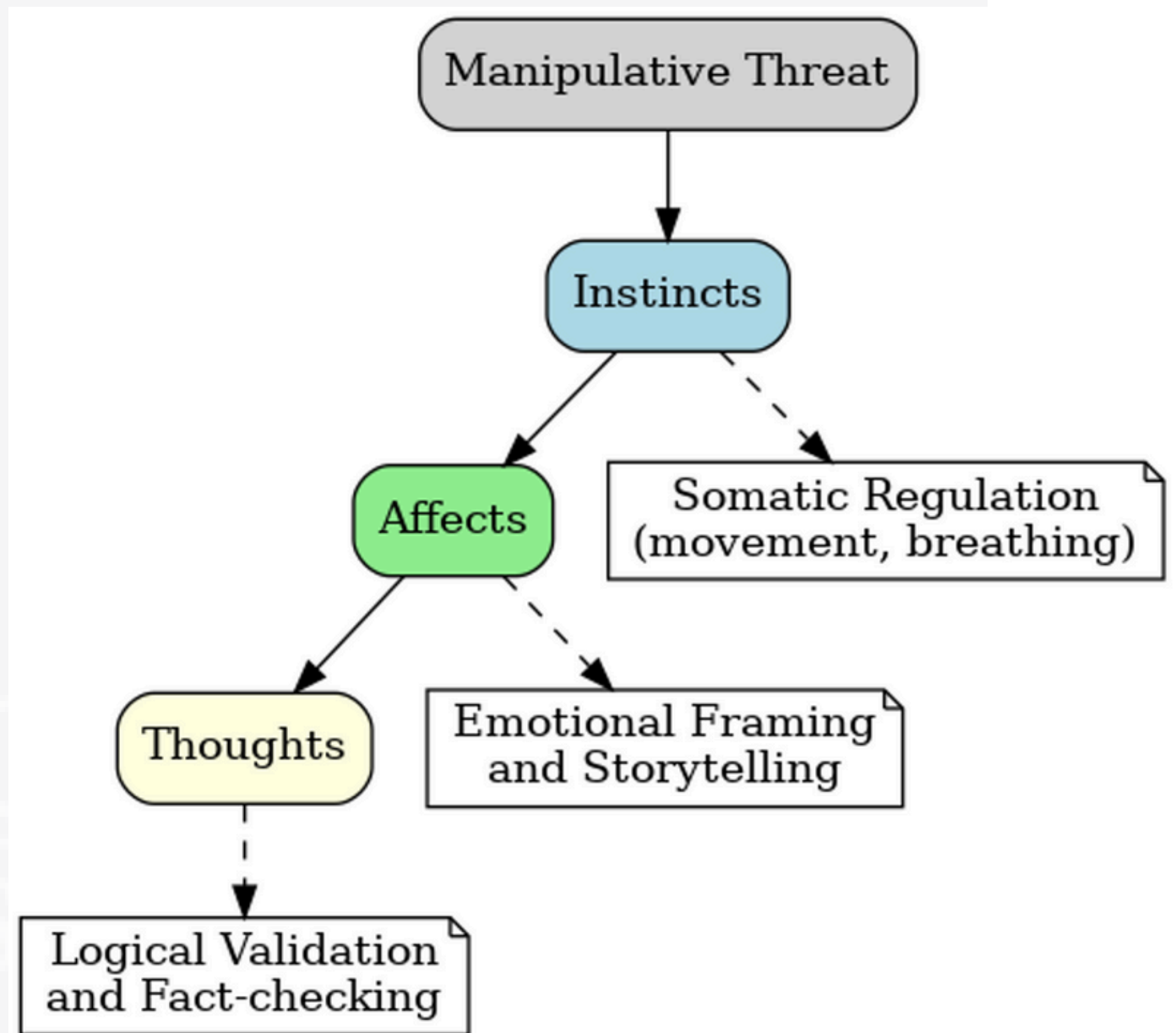

Figure 1

Triadic Intervention Flow Against Manipulative Influence

Note. The figure shows how manipulative threats trigger instinctive, affective, and cognitive responses, with corresponding somatic, emotional, and cognitive interventions.

Summary

This triadic strategy allows for multi-level, adaptive responses to disinformation, applicable across youth training, therapy, and public campaigns. It resolves internal discord between affect and logic, supporting sustainable, community-driven resilience. The approach establishes manipulation resilience as a holistic skill, integrating embodiment, emotion, and cognition into sense-making within complex media environments.

Synthesis and Conclusions

This study introduces an ontologically grounded model of manipulative influence as a structural distortion of the informational field. By framing manipulation as a vectorial deformation impacting instinctive, affective, and cognitive levels, the model advances the analysis of influence.

The methodology blends topological analysis, frame mapping, affective vectorization, and narrative reconstruction, enabling the classification of manipulations into five clusters. Results show that manipulative influence is systemic, operating through affective compression, narrative hijacking, semantic overload, and epistemic closure. These mechanisms not only mislead but actively restructure meaning and agency.

The model's interdisciplinary potential is substantial. It can inform educational programs, foster sense-making literacy, and support AI-based monitoring systems sensitive to affective and topological distortion. Communities in youth work, education, journalism, and culture can use the framework for certification, collaborative interpretation, and resilience-building protocols.

Further empirical validation is needed across diverse media ecosystems. Future research may incorporate the model into explainable AI and co-create toolkits with practitioners. Ultimately, this work maps manipulation as a systemic phenomenon and proposes a paradigm of informational resilience rooted in structural comprehension, interdisciplinary collaboration, and narrative agency restoration.

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