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In this issue of Cognition, Communication, Discourse, researchers from Ukraine, Hungary, and Spain address topics in political and cognitive linguistics, literary studies, and translation studies. In particular, they analyze metaphors of the Russia–Ukraine war in German and Spanish (M.J. López Sixto); political rhetoric of Viktor Orbán (L.P.Szabó and B. Horváth); Mykola Zerov’s translations (O. Bryska); the literary impressionism of Kotsiubynskyi and Conrad (O. Molchko); the interactive multimodal meme “One does not simply” (O. Nefedova); markers of humor in letters (V. Nikolaienko); a cognitive foundation for teaching political narrative using the CLIL methodology (S. Zhabotynska and A. Velikan).

For linguists, teachers, graduate students, and undergraduates.

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## PARATEXTS AS AN ACT FOR RESISTANCE: MYKOLA ZEROV AND RUSSIAN TRANSLATIONS OF THE UKRAINIAN CANONICAL POETRY

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### Abstract

Paratexts that accompany translations are of great importance from the historical perspective as they reveal certain factors that influenced the translation presentation and perception. Their importance is even more enhanced when the original texts are of national and cultural significance. The problem acquires a set of additional variables when texts are translated into the dominant culture. The paratexts analyzed in the research are exemplary in terms of their methodology developed with the decolonizing perspective in mind in the 30s of the 20th century in Ukraine and pertain the legacy of the national Ukrainian poet Taras Shevchenko and Ivan Franko being translated into Russian, the language of the long-term colonizer of the Ukrainian lands upon that time. The colonial status of the Ukrainian literature as translated into Russian enhances the importance of paratexts as it was a way of steering the perception of translation which was deprived of proper objective presentation or manipulation. Authored by the leading theoretician of translation and literary studies scholar in Ukraine of the time, Mykola Zerov, the paratexts trace which colonizer's goals prevailed at which period, how the practice was implemented, and if there was a place for genuine appreciation of the genius of a poet who is a representative of the subjugated nation. The research aims to trace the specific elements of such translation paratexts relying upon the elements of colonial translation theory and sociological approach to translation.

**Keywords:** *paratexts, canonical texts, worldview, translation strategy, translator, artistic values, social significance, patronage.*

### 1. Introduction

Translation of canonical works has always been a matter of heated discussions in terms of multiple asymmetries on a variety of levels and not limited to linguistic or literary perspectives. The tendency to account for the historical context and ideological influences in translation studies has been especially prevailing recently with resort to paratexts as an essential source for such data.

Translation from Ukrainian into Russian between the 50s of the XIX century and the 30s of the 20th century is a very peculiar phenomenon. The period is marked by the drastic change of power in the region with not so much difference in the status of Ukraine as a subjugated nation as the result. However, many things have undergone radical change during this time and so has the Ukrainian literature that experienced its essential upbeat after 1905 and before communism had been established. With the fall of empire Shevchenko's perception is changed from an opposition to tsar's regime to his approval as a proletarian poet but not more than that. So, the contribution of Mykola Zerov marks

an essential move forward in this respect as he was acutely aware and very well academically informed of the role the translation can play in self-identification of Ukrainian literature and culture.

Paratext as a term was first introduced by Gerard Genette in 1982 and was more prolifically presented in his monograph *Paratexts: Thresholds of interpretation* that became internationally available in 1997 (Genette, 1997). According to the scholar, paratexts make up an intermediary space shared by the book, author, publisher and reader (1997, p. 2). Genette differentiates between peritexts and epitexts among paratexts, where the first accompany the publication and the latter represent it as separate entities (1997, p. 4). Peritexts are represented by book titles, prefaces, afterword, notes to the texts etc., while epitexts are interviews with the author, marketing material, private letters and other pertinent elements but beyond the publication. Genette does not address the category of translation paratexts as such with some exceptions of prefaces to translations (1997, p. 264). Among the first to mention paratexts in the field of translation was Laurence Venuti, bringing to the focus the issue of translator invisibility and the problem of titles (Venuti, 1995). Among the first scholars to mention Genette's theory in regard to translation were Urpo Kovala and Theo Hermans in 1995 and 1996. Thus, paratexts in translation studies have only later been given attention regarding their decisive role in translation presentation and perception (Pleijel & Podlevskikh Carlström, 2022; Batchelor, 2018; Gil-Bardaji et al., 2012).

The paratexts analyzed in the research are selected as exemplary in terms of their methodology developed with the decolonizing perspective in mind in the 30s of the 20th century in Ukraine and pertain the legacy of the national Ukrainian poet Taras Shevchenko being translated into Russian, the language of the long-term colonizer of the Ukrainian lands upon that time. They were authored by Mykola Zerov, a renowned Ukrainian literary studies scholar, translator and translation theoretician of the 10s-30s of 20th century in Ukraine, who vastly contributed to the development of translation studies by his vision of translation as a shaping factor in culture identification (Shmiher, 2008; Cherednychenko, 2015; Bryska, 2019; Kolomiyets, 2023).

The studies of Ukrainian literature perception are usually founded on the translations of a set of timelessly canonical authors such as Taras Shevchenko and Ivan Franko among a few others. Perception of Shevchenko's works was the subject of analysis since the time first translations appear with a separate branch "shevchenkologia" (Shevchenko studies) started by Volodymyr Koriak in 20s 20th cen. in Ukraine and profusely supported by other Ukrainian literary studies scholars, headed further by Pavlo Phylypovych, a contemporary and colleague of Mykola Zerov in his literary stance (Phylypovych, 1925).

Paratexts dedicated to the Russian translations and retranslations of the Ukrainian canonical works (Taras Shevchenko and Ivan Franko), chosen for the analysis, shed light on a set of important intricacies that contributed to the overall development of Ukrainian literature perception at the period of harsh colonial regime in the Ukrainian history. They are also extensively revealing in terms of the colonizer's ideology and purposes pursued by the translators into Russian. Mykola Zerov's attempts to analyse the translations of Ukrainian canonical works trace which colonizer's goals prevailed at which period, how the practice was implemented, and if there was a place for genuine appreciation of the genius of a poet who is a representative of the subjugated nation. One may refer to the paratexts as anticolonial as they indicate the cases of direct censorship and illustrate other kinds of limitations imposed that had a direct impact on the national author and culture perception within the colonizing culture preventing an objective view of it. The colonial status of the Ukrainian literature as translated into Russian enhances the importance of paratexts as it was a way of steering the perception of translation which was deprived of proper objective presentation. Thus, the methodology chosen by the author of the paratexts is illustrative of the decolonization perspective and may also be characterized as an act of resistance in the decade of Stalin's calamities.

## 2. Method

This study employs a qualitative and historically grounded approach to the analysis of paratexts that accompanied Russian translations and retranslations of canonical Ukrainian works, primarily those

of Taras Shevchenko and Ivan Franko. The methodological basis of the research is shaped at the intersection of paratextual studies (Genette, 1997; Batchelor, 2018; Gil-Bardaji et al., 2012; Pleijel & Podlevskikh Carlström, 2022), critical translation studies, and postcolonial/decolonial frameworks (Venuti, 1995; Tymoczko, 2010; Spivak, 1993), supported by the elements of sociological approach to translation (Bourdieu, 2002) as well as the theory of manipulation (Lefevere, 1992).

The paratexts under analysis are treated as in a certain way ideological documents that aimed to mediate between the Ukrainian source text, the Russian translation, and the Russian-reading public diachronically. This analysis followed the following steps: 1) contextualization of the paratexts (it was important to situate each paratext in its historical and political context); 2) paratext genre and motifs: identifying recurring motifs such as (a) framing of Shevchenko and Franko as “regional” rather than “national” authors; (b) attempts to neutralize or appropriate their political radicalism; (c) emphasis on linguistic inferiority of Ukrainian to Russian; (d) selective admiration of “folkloric” or “aesthetic” aspects at the expense of ideological content. 3) interpretive reading through a decolonial lens: evaluating whether the paratexts served as instruments of colonial domination (erasure, appropriation, censorship) or, conversely, whether they contained moments of resistance, looking for its voice in the dominant discourse, or spaces where genuine appreciation for the subjugated nation’s literary genius emerged.

Mykola Zerov’s writings on translations of Ukrainian canonical works are read as an early form of anticolonial analysis, mapping how colonial translation practices operated and where they failed to suppress Ukrainian literary agency. His methodology—often philological, contextual, and comparative—forms a key interpretive axis of this article.

### **3. Findings**

The paratexts examined reveal a layered and often contradictory colonial strategy in shaping the perception of Ukrainian canonical literature when mediated through Russian translation. One may single out the following findings on the peculiarities of the anticolonial type of paratexts elaborated by Mykola Zerov as of 20s-30s of the XX century. Mykola Zerov’s anticolonial perspective in the analysed writings provides a counter-discourse to the then ongoing manipulative practices. By analyzing translation strategies in the paratexts, he identified where colonial ideology dictated interpretive frames and where translators betrayed either incompetence or unwillingness to fully engage with the original. His emphasis on fidelity to the genius of Shevchenko and Franko, prolifically supported by his awareness of imposed limitations, allows us to read his metaparatexts as acts of resistance during Stalin’s calamities. Mykola Zerov’s analyses anticipate later postcolonial critiques by showing how translation could serve both domination and resistance.

Thus, the peculiarities that were found in the paratexts were: colonial framing of the national canon, distortion of the original author’s worldview; appropriation and neutralization of the culturally unique imagery and the senses it carried; linguistic hierarchization; censorship and silencing; simplification versus genuine admiration strategies.

### **4. Discussion**

#### **4.1. Historical context in translation perception as presented in the paratexts with decolonizing perspective**

Mykola Zerov’s works on translations from Ukrainian reflect a peculiar selection of goals. He is interested in what preconditioned the choices made by the Russian translators both in terms of the selection of originals and translation strategies. Another criterion of translator’s activity characteristics is the resources they resort to, based on their understanding of the original author’s individual style and worldview presentation. If taken within the boundaries of colonial interpretation and manipulation theory, the translator’s activity is presented in view of the patronage and censorship policies.

The significance of Shevchenko’s and Franko’s canonical legacy to the understanding of Ukrainian culture and literature as independent unites was consistently opposed in line with the

policies of political dominance of the Russian culture over the Ukrainian. The censorship lens was of different character throughout the period characterized by Mykola Zerov – between 1870s and 1930s, hence the research was very apt and significant as it was revealing which translators and to which extent were dependent on the dominant poetics and what was the ideological grounding for it. Thus, the goal of the critic was to provide the characteristics of the poet's literary style and the level of its reproduction in translation and to comment on the extent of original's interpretation both in terms of the scope of ideas represented and the artistic value (translation strategies). Not less important is the perception by the Russian reader as the result of certain patronage policies.

Serving as a continuation of the profound historical and literary analysis of Taras Shevchenko's and Ivan Franko's creative legacy conducted and presented earlier in his works, a translation studies analysis of Shevchenko's poetry in the Russian language becomes a distinctive endeavor by Mykola Zerov, not to mention the historical period it appeared in – the beginning of the 1930s – period of worsening colonial terror and conversion of Shevchenko into a proletarian poet. Both Shevchenko-related paratexts utilize diachronic analysis to illustrate the achievements and shortcomings of the translations. In the case of the preface to F. Solohub's translation collection – it is an overview of all major endeavors in presenting Shevchenko's legacy to the Russian culture starting from 1870s until 1930s.

The most illustrative in terms of canonical works reproduction are Mykola Zerov's works on Russian translations of Taras Shevchenko's poetry and one of Ivan Franko's. Among them there is an article, published in the Ukrainian journal "Life and Revolution" ("Zhyttia i revoliutsiia") in 1930 in Kyiv as a tribute to one of the most prolific and dedicated Russian translators of Shevchenko's poetry into Russian Ivan Bielousov under the title "Ivan Bielousov - the Russian Translator of Kobzar" (Ivan Bielousov, rosiyskyi perekladach "Kobzaria") (Zerov, 1930/2003, pp. 773–783); a preface to the collection of selected poetry by Taras Shevchenko translated by Fiodor Solohub published in Saint-Petersburgh in 1934, with a thorough overview of all the previous translations into Russian and titled "Shevchenko's "Kobzar" in Russian Translations" ("Kobzar" Shevchenko v ruskih perevodah") (Zerov, 1934/2003, pp. 1000–1028). The preface was published under the name of M. Novytskyi, the author known in Russian publishing industry at the time. The authorship of Mykola Zerov was attributed by Viacheslav Briukhovetskyi only many years later (Briukhovetskyi, 1990). One more text scrutinized is a review of the Russian translation of Ivan Franko's "Moses" done by translator V. Diatlov that was published in a literary periodical "The Bookman" ("Knyhar") as a critical overview right after the translation publication within the first series of the library for those in the captivity in 1918.

The preface was published in 1934 – a time of severe terror in Russia-occupied lands, Holodomor, and persecution of all those involved in seeking Ukrainian identity recognition. On the other hand, the preface accompanied already a major accomplishment in the retranslation of Shevchenko's legacy publication into Russian. One might assume it was time to recognize the genius of his creativity, and it appeared to Mykola Zerov as one of the finer quality translations of Shevchenko's poetry into Russian so far. But it was one of the first publications during the communist regime, which was eagerly manipulating key Shevchenko's ideas about equality and an all-embracing Slavonic nation. These features are not traced by the author of the preface, however, he does provide the characteristics of the deviations that point to the fact of manipulation I will attend to further in this article. The very acceptance of Shevchenko's poetry new retranslation was another milestone and needed proper presentation.

The article dedicated to Ivan Bielousov is also a diachronic review, but of the life-long dedication of the poet to Shevchenko's genius and is written for the Ukrainian target audience. The article is an appreciation of the extended effort invested to Shevchenko's perception in Russia but is not limited to that. Despite a very thorough and exhaustive overview of the translator's activity and external characteristics of the contribution to Shevchenko's translated poetry the article in its second half is dedicated to the analysis of the translations artistic value. It follows similar theoretical grounds

as Mykola Zerov's other critical writings and offers tangible conclusions for translators of nationally significant poetry. Mykola Zerov lists the most essential difficulties that arise in the process. Among them he mentions 1) poetic syntax and phraseology enriched by the sources of folklore and biblical origin; 2) mastery of Shevchenko's versification technique that is characterized as strongly structured rhyme (14-syllabus or 11-syllabus verse, divided into two lines with a stressed but not fixed syllable each), aesthetically appealing euphony composed of subtle alliterations and assonances; 3) rhythmic specificity reflected in multiple enjambments; 4) lexical abundance of culture-specific stylistic devices. The translator is presented as the one who compiled at least five collections of Shevchenko's poems – in the years of 1900, 1906, 1911, 1918 and 1919, which means the contribution is unequivocal in terms of the selection of poetry and their number as well as due to the apt period of time, when the censorship restrictions were lifted almost entirely (Zerov, 1930/2003, pp.773–783).

The review to Ivan Franko's epic poem is presented with quite a similar scheme of analysis dedicated to the complexities posed by the original form and style, though it is much more limited in scale and does not attend to the diachronic overview of the author's translations or collections into Russian. However, this paratext is also revealing in terms of the level of a translator's mastery and original in-depth understanding.

There are two divergent cultural policies that the translators of Shevchenko as of 1934 worked under – the one that was implemented by tsarist ideology and the one by communist. Both utilized censorship as tool to control the cultural dissemination of Ukrainian literature to a large extent with the difference in the character of the action. The tsarist policy was rather overt, openly banning the use of the name of the nation and territory, publishing of anything related to or in Ukrainian overall. The communist policy was covert. It was proclaimed as the one advocating for equal rights of all the nationalities presented in the Soviet Union, though with open prohibition of anything that seems to be elite (so called "bourgeois" by character). So, anything that was classified as high culture or highly intellectual fell under latter category and was deemed unacceptable. Thus, the policy welcomed anything Ukrainian but that was to be dedicated to or about the poor, low profile, socially unprotected etc. Translators working in the years between the establishment of the two practices are marked by the feature of the most exhaustive range of the poetry by Shevchenko, though are still under the influence of Russian culture dominance.

Censorship during the tsarist rigid regime is presented in the paratext by the cases of Nikalai Herbel and Nikalai Chmyriov, whose collections of Shevchenko's poetry translations appeared in 60–70s of the 19th century (Zerov, 1934/2003, pp. 1003–1007). The constraints pertained to the selection of poems; thus, the genre of socio-political poems was banned from being translated, presenting Shevchenko mostly as a lyric poems author, far from being a voice of the nation. Chmyriov's translation contribution (of 1874) is considered to be more stylistically coherent with some poems evaluated as one of the most successful for that period. However, with the limitations still in force, the choice of poems for translation does not exceed further than the elegies, while the epic poems of substantial socio-political value are still left out. The appreciation of the translator's style amounts to the fact that the mastery of N. Chmyriov is higher than Herbel's and thus more representative of the original's literary value of poetics.

Later 70s and 80s 19th present a stagnation in Shevchenko's poetry translation, as in any other Ukrainian-related activity due to Emsk and Valuyev Ukases of 1876 and 1863 by which the Russian tsar Alexander II prohibited the printing in the Ukrainian language of any original works or translations. However, the following attempts, starting at the end of 1880s and during the following twenty-five years brought about a dedicated advocate appreciative of Shevchenko's poetic legacy I. Bielousov, whose first collection was twice as big in volume as the latter one (Zerov, 1934/2003, pp. 1007–1010). The article analyzed here presents him as one of the most prolific translators of Shevchenko's poetry in terms of the range and number of works presented. Though this was a transition period in the empire, the case is quite illustrative how the dominant poetics is not able to exert the influence on those able to identify and attempt to reproduce the originality of the source

texts, regardless of its author's origin. However, this is where Mykola Zerov signified the importance of poetic mastery in embracing the original's value and its decent reproduction, which was the case of Bielousov. Mykola Zerov underlines that his approach towards translation strategy of total loyalty to the original text may be not sufficient in reproducing the source text author's poetics, where the lack of mastery may take toll. On the other hand, the approach is presented positively in terms of consistent deviation from the dominant Russian poetics. The texts are devoid of the bookishness and unnecessary embellishments, which were quite frequently resorted to by other translators of Shevchenko's poetry.

The remaining part of transitioning period presents Maksim Slavinskii and Ivan Koltonovskii, who were working in a tandem and combined their effort in both providing even wider selection of poems. Their first collection of 1911 exceeded even the one by Bielousov in the same year. The attempt is mentioned to be positively accepted even by the Ukrainian critics. It is characterized by Mykola Zerov as being stylistically more diverse and avoids blind following of the dominant poetics, with colonizer's ideology still in force after the collapse of tsarist regime (Zerov, 1934/2003, pp. 1010–1014).

The collection of translations by Fiodor Solohub introduced by the preface under analysis presents an attempt by the translator made during the period of the deeply established communist regime, tightening its grip on the culture of subjugated nations. This fact predetermined a need to establish the new perception of Shevchenko's poetry – as an opponent of imperialism and an advocate of the masses. Mykola Zerov covertly explains the fact by indicating the translator's motivation for socio-political poem selection and clear avoidance of any biblical elements of the text. Thus, the historical context in this kind of paratexts is often fundamental in clarifying what the motivation of texts selection and strategies there was in this or that case.

#### **4.2. Canonical author worldview presentation**

The attempts of translation of Shevchenko's and Franko's poetry are generally characterized in terms of their ability to embrace the author's worldview and reproduce the key features of the original author's style. By undertaking the diachronic approach in his analysis of the translations the critic establishes that decisive for the worldview presentation is the selection of works in terms of the genres and their socio-political significance. This aspect is referred to by Mykola Zerov as an outer characteristic of the translator's activity, while an analysis of the approach undertaken is presented as the inner value and is accompanied with a set of text samples to illustrate it.

The worldview of the original author carrying a national significance demands profound research and interpretation from both literary and social perspectives. When the culture the works are translated to is dominant, this aspect is of even more grave importance since it carries the conduit of ideas a colonized nation relates to and identifies itself with. Mykola Zerov dedicates a substantial part of the preface to tell that during the first period of Shevchenko's legacy translation into Russian multifaceted selection of poetry and their distribution within the collection are often insufficient and poor to be able to illustrate the variety of ideas and resources that the original author utilized to communicate his worldview.

One of the brightest examples of Shevchenko's worldview distorted presentation in the preface is changing the versification forms he applied. Most of the translators at that period believed he utilized pure folklore versification techniques while in fact they are a mixture of folk songs and psalms as well as other genres deeply rooted into the lore and Christian literature. Shevchenko was motivated to cover the themes that were related to the people of his social layer, which made him a people's spokesman in front of the dominant powers. Thus, any attempts to translate his poetry by the Russian lore versification techniques or to use bookish solemn versification techniques that were popular in Russian literature at that time were characterized as doomed to failure in terms of the original reproduction and completely deprived the verses of their socially significant sounding. Such approaches as well as total lack of poems dedicated to socially and politically significant topics in the

first collections are openly presented by Mykola Zerov as the policy of censorship (Zerov, 1934/2003, pp. 1002–1003). Hence, the obvious underestimation of his genius and worldview during 1870s–1890s.

The dominant literary society representatives in Russian empire make up a bright example of the literary elite that ruled on which products were to be allowed into the culture and which not. As pinpointed by Zerov, during Shevchenko's life and for the following fifteen years after his death Russian elite was hardly acquainted with the whole range of the poetry due to fact of censored mentioning of Ukraine and anything related to it. They were convinced that Shevchenko was a mediocre poet, using folklore in his poetry, dedicated mainly to nature and life of the poor. To prove the fact, Mykola Zerov mentions that the first published translated poem was one by the representative of a smaller literary circle in Russia, N. Herbel, and was presented without mentioning an original author's name whatsoever. Herbel is also claimed to have authored three collections of poems by Shevchenko, but among the verses he presented were small-scale genres - songs and ballads only. According to Mykola Zerov, Herbel's habitus limited his interpretation of Shevchenko's worldview to the one similar of Mykola Hohol and Yevhen Hrebinka whose creativity was well known to him due to their tilting to the Russian literary tradition and romantic worldview. Meanwhile, such characteristics were scarcely present only in part of Shevchenko's poems written during the initial period in his creative life, hence the worldview presentation was distorted.

Thus, the selection of originals through the period of about eighty years of history of Shevchenko's poetry perception in Russian in the preface is claimed as decisive in terms of national author worldview presentation and is substantiated by Mykola Zerov in the following way: 1) for proper understanding of the socio-historical aspect of the significance of the creative work and its reproduction in the process of translation; 2) for well-rounded interpretation of the author's views by the target reader; 3) for the proper arrangement of the works in the translation collection, as the evolution of thought, imagery, or worldview takes place from poem to poem (Zerov, 1930/2003). The censorship practice resulted in poor choice of works during the first attempts at translation into Russian, namely narrowing down to the verses dedicated to nature and those closely related to folklore tradition, which gave a distorted understanding of his contribution and were far from revealing the canonicity of Shevchenko's legacy. This predetermined quite a belated acceptance of Shevchenko's genius by the Russian reader in the tsarist state.

As suggested by Mykola Zerov, censorship was not the only reason for poor selection and presentation of verses to Russians. It was also a superficial understanding of the original by the translators and their inability to identify the socially significant ideas or stylistics used to enhance them and what's more to reproduce them – the kind of poetry was simply not available in their literature at that time. Thus, it often manifested itself as an indeliberate smoothing over of the sharpness of the socio-political and prophetic content of Taras Shevchenko's poetry and not only distorted the worldview motives embedded by the original author but also diminished the artistic and ideological value of the text (Zerov, 1930/2003). The overall tendency to manipulate the translation for the benefit of the colonizer is quite clearly stated in the following statement by Mykola Zerov: "The translators (...) were not always inclined to highly evaluate the poetic value of Shevchenko: tended to see in his "imperfect" rhymes a sign of improper education, and in their schoolish sense of self-perfection, in their translations corrected him, left his delicate melody and play of intonations unnoticed (...)" (Zerov, 1934/2003, p. 1015).

#### **4.3. Translation strategy analysis as a decisive factor in proper presentation of an author and the literary genius**

The discussion of a translation strategy is key in defining the quality of translation. As mentioned before, Mykola Zerov is determined that the reproduction of the resources reflecting the author's worldview is decisive in ensuring a proper quality of such translation. The issue is chosen to be presented through the lens of strategies used to tackle the original artistic value and it remains in the focus in each case of retranslation characterized by Mykola Zerov.

The most prolific part is dedicated to versification as it is one of the most complicated stumbling blocks for the translators of Shevchenko's poetry. Mykola Zerov's major idea is that even those who can trace it are not able to translate it to the extent needed. Not to mention sustain the recognition of the genius representative of the country under colonization. Deliberate change of the versification techniques is claimed to have resulted in the texts of bookish and cliché type of literature, not of particular interest for the target audience.

Mykola Zerov also analyzes the reproduction of the stylistic register of the original text in direct correlation with its semantic content. Particular attention is paid to capturing the widest possible range of formal and poetic features of the original, asserting that success in translation can only be achieved when the versification principles of the poetic work are correctly identified and maximally preserved in the translation. Overall, Mykola Zerov devotes considerable attention to the interpretation of this issue concerning Shevchenko's poetry since the versification technique by Taras Shevchenko was often mistakenly considered technically imperfect and simplistic leading to a lack of adequate requirements for its reproduction. This aspect is of utmost importance due to its connection with the content, as the size of the poem and its variations within a single work often serve to emphasize changes in mood or tone and acquiring significant expressive meaning. Thus, Mykola Zerov places this criterion among the most significant in the process of analyzing translations of Taras Shevchenko's works and substantiates the high level of versification peculiarities in Shevchenko's poetic legacy. The translation of F. Solohub that the preface is written for is recognized by Mykola Zerov as the best one in terms of reproducing the expressiveness of Shevchenko's poetry as well as its more or less tangible coherence with the stylistic plane of the original but in the way that is relevant for the translator's mastery, thus compensating for the losses in one's idiolect (Zerov, 1934/2003).

A similar approach can be observed regarding the intonational contour of the text and euphony. These aspects directly influence the artistic and aesthetic impression of poetry, and therefore, its reception largely depends on how deeply the translator senses the intonational changes and reproduces them in the target text. Euphony, by its nature, is extremely language-dependent and complex to identify in the translation process, thus the appropriate level of its reproduction or compensation in a translation demonstrates the translator's high level of skill. According to Mykola Zerov, the translations by F. Solohub significantly surpass others in this aspect and therefore possess more adequate artistic and aesthetic value than the previous one concerning the original (Zerov, 1934/2003).

Other obvious obstacles the translators faced were Ukrainian realia, phraseology, syntax, folklore elements, euphony, and solemnity of his revolutionary poems, where he utilized the prophecy elements and biblical terms. Thus, Mykola Zerov delineates the inability of the translators to tackle the challenges on one hand, and their intentional removal of certain elements of Ukrainian origin and unnecessary embellishment of the verses by the Russian elements on the other.

Translator's idiosyncrasy is usually highlighted as defining in regard to the strategies the translators chose for rendering Shevchenko's poetry into Russian and are allocated to the influence of literary tendencies in the target culture. Not only was it limiting in presenting the worldview of Shevchenko as mentioned earlier but it also reflected on the resources utilized. According to Mykola Zerov, Herbel, working within the framework of this literary movement, often deviated from the original Shevchenko's text, transforming its stylistics, since only a portion of Taras Shevchenko's poetic works can be categorized within the framework of Romanticism style. Additionally, Mykola Zerov pinpoints the deliberate transcription of lexical elements from the original text. The consequence of such Ukrainization of the Russian text is a stylistic reduction of the work and an introduction of unnecessary pejorative connotations, thereby diminishing the artistic and aesthetic value of the text. Herbel also leaves untranslated the lexemes that have direct counterparts in the Russian language, such as "зhyтo/житo" (rye), "sviekrukha/свекруха" (mother-in-law), "zhinka/жінка" (woman), and "ochipok/очіпок" (headscarf), which further stipulated for the Ukrainian lexical items acquisition of some negative low-key connotations (Zerov, 1934/2003, p. 1005). As summarized by Mykola Zerov, the language of the translation resembles a certain massed-up mixture of Russian and Ukrainian, making it sound like a kind of dialect, obviously deprived of artistic value.

Despite the linguistic proximity between the original and translated languages, rendering a non-equivalent lexicon poses an almost insurmountable challenge for the translators of Taras Shevchenko's works. Particularly, the symbolism derived from the folklore layer of the text serves as a direct instrument for conveying its ideological and artistic content. Mykola Zerov examines specific techniques employed to address these elements, highlighting how each method affects the nature of the translated text, including its artistic and aesthetic value, as well as the reception of the cultural foundation of the work. Thus, Mykola Zerov elaborates on the importance of maintaining consistency in the chosen strategy, while allowing for a certain neutralization of the everyday component in favor of the emotional depth of poetry (Zerov, 1934/2003, p. 1019).

It is worth noting that during that period, Ukrainian translation studies embraced somewhat liberal views regarding the reproduction of specific elements found in Ukrainian texts. For instance, Ivan Franko, being a prominent writer, translator, and critic, authored a few research works on the German translation of Shevchenko's poems. He distinguishes between canonical and non-canonical works, attributing national significance to the former, which includes Taras Shevchenko's works. Franko identifies two approaches to their interpretation: 1) a free interpretation of the text while preserving formal characteristics to maintain simplicity and melodic expression, which undeniably influences the reader's impression of the work; 2) a meticulous reproduction of the text at the expense of disregarding the rhythm and rhyme of the original. Regarding translations of Taras Shevchenko's works into German, Ivan Franko leans towards a certain relaxation of the requirements for faithful rendering of the formal and stylistic peculiarities of the original in favor of the conceptual correspondence between the original and the translation of canonical works (Franko, 1983, pp. 520–530). However, one is to pinpoint it was not an approach that Mykola Zerov would support, laying a substantial emphasis on the stylistic side of the text reproduction being closely intertwined with the ideas expressed, underpinning their significance for the author and the nation he represents.

The reproduction of poetic syntax from the original is another task among the most challenging in the translation process of the works. Mykola Zerov acknowledges that losses are inevitable in poetic translation, and thus, successfully preserving the leading elements of this genre is a notable achievement (Zerov, 1918/2003). Interestingly, when comparing translators' achievements in reproducing this aspect, the critic asserts the decisive role of poetic syntax in classifying the text within the translation genre, whether it is a translation or an adaptation. Overall, revolutionary ideas, directed against the ruling regime, both in Shevchenko's and Franko's poetry, are often presented in epic poems that stylistically utilized biblical lexical and syntactic means as well as certain prophetic concepts, solemn figures, and images, even the plot as is the fact with "Moses". Resorting to biblical texts and tools is also a feature of canonicity and thus demands higher expertise to be reproduced.

The article under analysis presents a vivid example of the translator's inability to grasp and reproduce the artistic quality of the original. Though being quite complementary and positive in terms of the years dedicated to the legacy of the Ukrainian national poet, the paper provides quite a critical presentation of his achievements in rendering the poetry, admitting his limited artistic resources as a poet. Among the strategies he follows, the slavish following of the original is traced by Mykola Zerov most often, which, however, is not devoid of its flaws as a result (Zerov, 1930/ 2003, pp. 773–783). Meanwhile, Shevchenko's worldview and the selection of poetry for translation is by no means an effort in the direction of Shevchenko's appreciation and thus Mykola Zerov lays an essential emphasis on Bielousov's role in expanding and significantly enriching Russian readers' reception of Shevchenko's legacy and its quality.

Another sample of limited understanding of the original is presented in the review. As the poem is highly symbolic and representative of Franko's national and political views, summarizing his position, the preface could be key in establishing its role. The translation which is the subject of this paratext is indeed accompanied by two introductions – of the original author's (also translated into Russian) and the translator's one. However, Mykola Zerov points to the irrelevance of certain ideas mentioned in the translator's one. The critic is at times very much opposed to the way the nationally significant poem is presented, particularly the simplification of its ideological character. Thus,

Mykola Zerov's review of the translation touches upon the ideology behind the author's work as well as its artistic value (Zerov, 1918/2003, pp. 223–226).

### 5. Conclusions

According to Mykola Zerov, the aim of a translator of canonical works is to ensure a well-rounded original author worldview presentation, which largely depends on the translation strategy selected. Overall, it was a combined effort of censorship practices as well as poor level of mastery of the translators in their ability to identify the senses and worldview of a great Ukrainian that yielded the underestimation and belated acceptance of Shevchenko's genius by the Russian reader in the infancy period of Shevchenko's poetry reception. In this respect the paratexts signify the idea of a translator's idiosyncrasy playing an essential role in achieving the needed level of original's interpretation. The level of the translator's mastery is another essential component of the analysis as well as the scrutiny of compensation techniques on the relevant level. Those are mentioned as techniques to withstand the dominant poetics taking over the originality of the source text, which is often a case in such asymmetric interrelations. Censorship and colonial influences of the cultural practices were mostly manifested in the limited choice of originals for translation which was far from being representative of the key motifs of the originals for quite a while. Overall, the appropriate degree of reproduction of the historical and cultural context is stated as one of the most significant characteristics when presenting translated works of national significance, according to Mykola Zerov. Based on the analyzed examples one can assume that successful attempts of translation at the time were those that even under the censored conditions managed to reproduce a set of core idiolect features of the original author and/or of the source text, which in its turn was largely dependent on the literary mastery of a translator and their ability to grasp the scope.

The paratexts analyzed pinpoint the fact that translations or retranslations of texts canonical to some cultures are to be accompanied by the paratexts due to a variety of factors of linguistic and social character. Translating into the culture of a colonizer makes it even more acute necessity. The paratexts are fully capable of steering and shaping the presentation and perception of a certain literature and culture in another context, if allowed. The study revealed the following peculiarities of the paratexts of anticolonial type: colonial framing of the national canon, distortion of the original author's worldview; appropriation and neutralization of the culturally unique imagery and the senses it carried; linguistic hierarchization; censorship and silencing; simplification versus genuine admiration strategies.

The cases under analysis proved that the lack of paratexts prevented acceptance and appreciation of the authors at earlier periods and that it was largely deliberately done due to the cultural practices undertaken by the colonizer. In the cases of translations from the culture of the colonized, it is the context and the idiosyncrasy that are to be an essential component of the analysis paratext as they are revealing of the influences exerted and the extent of independence the translator could afford. Further studies of the paratexts that belong to the colonial period in Ukrainian literature might provide quite prolific evidence as to the efforts undertaken to steer the national literature presentation abroad.

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## ПАРАТЕКСТИ ЯК АКТ НЕПОКОРИ: МИКОЛА ЗЕРОВ І РОСІЙСЬКІ ПЕРЕКЛАДИ УКРАЇНСЬКОЇ КАНОНІЧНОЇ ПОЕЗІЇ

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### Анотація

Паратексти, що супроводжують переклади, мають неабияке значення в історичній перспективі, адже виявляють чинники впливу на презентацію та сприйняття перекладу. Їхня роль стає ще вагомішою, коли звертаємося до перекладів творів національно-культурної ваги. Проте переклади мовою культури колонізатора вимагають дещо іншої методології аналізу. У розвідці розглядаються паратексти авторства Миколи Зерова, провідного літератора, перекладача і перекладознавця, створені в 20-30-і роки 20 ст., які присвячені перекладам творів Тараса Шевченка та Івана Франка російською, мовою колонізатора українських земель та культурного надбання українського народу. Аналізовані праці вказують на колоніальний статус української літератури в російських перекладах різних періодів, що підкреслює значну роль паратекстів для цільового читача, адже стають орієнтирами у сприйнятті того, що було оригінально авторським і не зазнало об'єктивного відтворення чи стало об'єктом маніпуляції. Праці є показовими щодо їхнього деколонізаційного характеру і дають можливість простежити мету перекладів кожного аналізованого періоду, практики та стратегії, що застосовувалися в різні періоди, і чи справді було невідоме зацікавлення генієм поетів підневільної нації. Метою даної розвідки є з'ясувати провідні компоненти таких паратекстів у підході Миколи Зерова, виокремити особливості перекладних канонічних текстів, які він вважав найвагомішими для належного відтворення і сприйняття цільовим читачем, а також простежити методологію аналізу перекладацької стратегії із врахуванням соціальних та політичних чинників. Дослідження з'ясує особливості таких паратекстів з перспективи теорії колоніального перекладу, а також у руслі соціологічного підходу.

**Ключові слова:** паратекст, канонічний текст, світогляд, перекладацька стратегія, переклада, художня цінність, соціальне значення, патронаж.

### Декларація про конфлікт інтересів

Авторка не має конфлікту інтересів щодо цієї статті.



Sprachen auf? Und schließlich: Welche Unterschiede und Gemeinsamkeiten lassen sich zwischen den beiden Sprachen feststellen?

## 2. Untersuchungskorpora und Methodik

Die Metapher ist seit der Antike Gegenstand zahlreicher Forschungen – nicht nur in der Linguistik, sondern auch in der Philosophie, den Naturwissenschaften und anderen Disziplinen. Innerhalb der Linguistik wurde sie aus unterschiedlichen Perspektiven betrachtet. In jüngerer Zeit hat jedoch vor allem die kognitive Theorie von Lakoff und Johnson (1980) die Metaphernforschung maßgeblich geprägt. In ihrem Werk vertreten die Autoren zwei Hauptannahmen: erstens, dass die Alltagssprache von Metaphern durchdrungen ist, und zweitens, dass dieses metaphorische Netz das Weltbild der Sprecherinnen und Sprecher bestimmt. Sie gehen von einem dialektischen Modell aus, in dem sich Metaphern und Erfahrung gegenseitig beeinflussen. Metaphern werden nicht als sprachliches Phänomen verstanden, sondern als Mittel, unser Konzeptsystem und unsere alltäglichen Handlungsmustern zu strukturieren – denn Metaphern können Wirklichkeiten erzeugen.

Nach Lakoff und Johnson ist die Realität nicht völlig äußerlich und unabhängig, sondern hängt von der Art und Weise ab, wie Menschen die Welt konzeptualisieren. Um sie zu verstehen und uns in ihr zurechtzufinden, müssen wir sie kategorisieren – ein Prozess, der teilweise direkt aus der Interaktion unseres Körpers mit der Außenwelt und anderen Menschen hervorgeht. Hier liegt das Wesen der Metapher: Beim Sprechen über viele Phänomene unserer Umwelt verwenden wir Ausdrücke aus anderen Domänen. Nach Ansicht der Kognitivisten ist der größte Teil unseres alltäglichen Begriffssystems metaphorisch strukturiert, d.h. die meisten Begriffe werden teilweise über andere Begriffe verstanden.

So wird beispielsweise im metaphorischen Ausdruck *WEIL WIR KEIN PFLANZENFRESSER IN EINER WELT VON FLEISCHFRESSERN SEIN KÖNNEN* die Situation der Europäer gegenüber dem Rest der Welt durch ein Bild aus der Tierwelt veranschaulicht.

In Anlehnung an Skirl und Schwarz-Friesel teilen wir jedoch die Auffassung, dass die kognitive Theorie von Lakoff und Johnson nicht eindeutig zwischen Psychologie und Sprache unterscheidet. “Für Lakoff und Johnson sind Metaphern dementsprechend zuallererst ein Phänomen des konzeptuellen Systems des Menschen und erst in zweiter Linie eine Angelegenheit der Sprache. Deshalb verschieben sie den Metaphernbegriff auch von der sprachlichen auf die konzeptuelle Ebene.” (Skirl & Schwarz-Friesel, 2013, S. 10).

Aus diesem Grund werden die Metaphern des Korpus sowohl aus kognitiver als auch aus pragmatischer Perspektive untersucht. Zudem wird eine strukturell-semantische Analyse durchgeführt. Auf kognitiver Ebene dienen die Metaphern dazu, komplexe Sachverhalte und Prozesse verständlicher zu machen<sup>1</sup> – etwa, wenn die verheerende Lage der Ukraine als *VERGEWALTIGUNGSNOT* bezeichnet wird.

Im öffentlichen Kommunikationsraum haben Metaphern nach Schwarz-Friesel darüber hinaus persuasive und manipulative Funktionen, da sie Meinungen oder Bewertungen vermitteln können. In massenmedialen Diskursen beeinflussen sie Rezipientinnen und Rezipienten durch ihre “erkenntnisfördernde Funktion” einerseits und ihr “Emotionspotenzials” andererseits, was “sozial-kognitive sowie politische Konsequenzen haben” kann (Schwarz-Friesel, 2020, S. 143–144). Ein Beispiel für diese evozierende Kraft ist der metaphorische Ausdruck *VERGEWALTIGUNGSNOT*. Die Sprache bildet Realität nicht nur ab, sondern Massenmedien und Politik konstruieren sie zugleich “sie haben das Potenzial, gesellschaftliche Bewusstseinsprozesse zu steuern und zu prägen” (Schwarz-Friesel & Kromminga, 2013, S. 8). “Metaphern gehören somit zum politischen Kampf um die Sprache” (Skirl & Schwarz-Friesel, 2013, S. 76).

Wenn Olaf Scholz die finanziellen Hilfen seiner Regierung zur Bekämpfung der Energiekrise als *DOPPEL-WUMMS* verkündet, verfolgt er nicht nur das Ziel, komplexe finanzielle Maßnahmen der Bevölkerung anschaulich zu vermitteln, sondern auch sich selbst als kompetenten und verlässlichen Politiker zu profilieren und seine Regierung als handlungsfähig darzustellen: “Professionelle Politiker

sind sich des Vorteils prägnanter Metaphern bewusst” (Skirl & Schwarz-Friesel, 2013, S. 76). Wie etwas gesagt wird, reflektiert also nicht nur Denkprozesse, sondern auch kommunikative Intentionen.

Methodologisch wird hier davon ausgegangen, dass Metaphern auf sprachlicher Ebene Ausdrücke sind, die nicht wörtlich gebraucht werden. Sie erscheinen in einer Kommunikationssituation fremd und bedürfen einer Interpretation, die kontextabhängig ist. Bei diesem Verstehensprozess stellen Rezipientinnen und Rezipienten auf Grundlage des Kontexts Verbindungen zwischen unterschiedlichen Bereichen her. Wenn etwa am Unabhängigkeitstag DIE UKRAINE ALS DAS HERZ EUROPAS vom spanischen Ministerpräsidenten Pedro Sánchez auf Twitter/X bezeichnet wird “Die Ukraine ist heute das Herz Europas. Die Freiheit und die Demokratie werden immer über das Aufzwingen und die Gewalt siegen. Heute wie vor sechs Monaten steht Spanien – und wird es immer stehen – an der Seite des ukrainischen Volkes in seinem Kampf zur Verteidigung einer freien und friedlichen Zukunft”<sup>ii</sup>, muss eine spezifische Verbindung zwischen dem Bereich *Herz* und dem Bereich *Ukraine* hergestellt werden. Die metaphorische Bedeutung entsteht nicht durch einen simplen Vergleich, sondern durch eine komplexere konzeptuelle Konstruktion, in der Bedeutung und Weltwissen über Inferenzen involviert sind und ein “plausibles mentales Modell” oder Bild für den metaphorischen Ausdruck gebildet wird (Schwarz-Friesel, 2013, S. 207). Würde die Bedeutung der Metapher DIE UKRAINE ALS DAS HERZ EUROPAS auf einem Vergleich beruhen, so hieße das, die Ukraine sei das wichtigste Land in Europa – so wie das Herz das wichtigste Organ des Körpers ist. Unter Berücksichtigung des Kontextes zeigt sich jedoch eine komplexere Interpretation: Die Ukraine verkörpert hier die Ideale Europas – Freiheit und Demokratie – zentrale Werte der Europäischen Union. Zudem ist die Metapher emotional aufgeladen, was in einer rein vergleichenden Definition nicht erfasst würde.

In dieser Arbeit wurden nur “kreative” und “innovative Metaphern”<sup>iii</sup> ausgewählt; feste Wortgruppen, die im Lexikon der jeweiligen Sprache gespeichert sind, wurden nicht berücksichtigt (z. B. Kanonenfutter).

Das Korpus setzt sich aus zwei Teilen zusammen: Zum einen enthält es besonders ausdrucksstarken Metaphern, die von Politikern zu Beginn des Ukrainekrieges verwendet wurden und breite mediale Verbreitung fanden. Zum anderen stammen die meisten metaphorischen Ausdrücke aus den Überschriften täglicher Online-Medien zwischen August 2022 und Februar 2023. Nach fast einem Jahr Krieg ließ das mediale Interesse in Spanien allmählich nach.

Für das Deutsche wurden die meisten Ausdrücke in der Online-Zeitung *Zeit Online* gefunden, die für ihren ausgeprägten Metapherngebrauch bekannt ist. Für das Spanische war die wichtigste Quelle die Online-Zeitung *El PAÍS*. In den anderen Medien wurden zum Ukrainekrieg vergleichsweise wenige neue metaphorische Ausdrücke gefunden.

Das deutsche Korpus umfasst die Online-Zeitungen *Berliner Morgenpost*, *DIE ZEIT*, *FAZ*, *SPIEGEL* Ausland, *WELT*.

Das spanische Korpus entstammt den Online-Zeitungen *El Confidencial*, *EL PAÍS*, *HERALDO*, *La Vanguardia*, und der Webseite von RTVE Play.

Die Übersetzung spanischer Metaphern ins Deutsche dient allein der Verständlichkeit. Auf mögliche Äquivalenzen zwischen dem Deutschen und Spanischen wird in diesem Beitrag nicht eingegangen, da es sich um kreative und innovative Metaphern handelt und nicht um konventionalisierte metaphorische Ausdrücke der beiden Sprachen.

### 3. Kognitiv-pragmatische Analyse der Metaphern

Eines der Ziele dieser Studie besteht darin, die Metaphern des Korpus verschiedenen Domänen des Krieges zuzuordnen, die jeweils in beiden Sprachen erkennbar sind.

Unter Domänen werden hier kognitive Einheiten im Sinne konzeptueller Komplexe verstanden (Langacker, 1987, S. 147). Nach Kövecses (2017) sind sie “kognitive Strukturen, die Sprecherinnen und Sprecher nutzen, um Erfahrungen zu ordnen und zu strukturieren” (S. 326). Für Kövecses (2017)

umfasst jede Domäne bestimmte Frames, die einzelne Aspekte dieser Domäne konkretisieren (S. 328).

So wird beispielsweise beim metaphorischen Ausdruck MUNITION FÜR DEN FRIEDEN nicht an alle Arten von Patronen, Granaten, Bomben und Minen gedacht. Wie bereits erwähnt, spielt der Kontext bei der Interpretation metaphorischer Ausdrücke eine entscheidende Rolle.

Diese Domänen lassen sich in einen politischen Kontext einbetten. Denn Deutschland fühlt sich einerseits bedroht, andererseits aber auch verantwortlich für vergangene politische Entscheidungen. Hinzu kommt – aus historischen Gründen – eine moralische Debatte über die Waffenlieferungen in die Kriegsregion sowie die Energiekrise als Folge des Konflikts. Aufgrund seiner geopolitischen Lage hat der Krieg für Spanien hingegen vor allem wirtschaftliche Auswirkungen.

Innerhalb dieser Gruppen werden bei jeder Metapher die entsprechen den Funktionen ermittelt. Es sei darauf hingewiesen, dass es in der Literatur keine einheitliche Klassifikation metaphorischer Funktionen gibt. Stattdessen lassen sich bei den metaphorischen Ausdrücken mehrere Funktionen gleichzeitig erkennen, die sich gegenseitig überlagern (Meyer & Serbina, 2020, S. 612f.). Zunächst erfüllt die Überschrift – die meisten unserer Metaphern stammen aus Überschriften – mehrere Funktionen: Sie dient nicht nur als Ankündigung, sondern oft auch als Anreiz zur Lektüre des folgenden Textes (De Knop, 1987, S. 2).

In diesem Beitrag werden neben der Reizfunktion sieben weitere Funktionen unterschieden:<sup>iv</sup>

- Mithilfe der **Erkenntnisfunktion** werden komplexe Sachverhalte verständlicher dargestellt. “Die primäre Funktion der Metapher ist die, uns zu ermöglichen, dass wir eine Art der Erfahrung von einer anderen Art der Erfahrung her partiell verstehen können” (Lakoff & Johnson, 2021, S. 177).

- Diese verbindet sich mit ihrer **komprimierenden** (García, 2004, S. 62) **Funktion**.<sup>v</sup> Das Vermitteln von komplexen Informationen auf eine kompakte Weise erleichtert ihr Verständnis und ihre Verarbeitung. Dies ist einer der Hauptgründe, weshalb Politik und Massenmedien so häufig auf metaphorische Ausdrücke zurückgreifen.

- Metaphorische Ausdrücke erfüllen zudem eine **persuasive Funktion**, indem sie zum Überzeugen oder Überreden eingesetzt werden.

- Ebenso können sie eine **emotive Funktion** haben, da sie emotional ansprechen und nicht allein rational überzeugen. Sprachliche Strukturen vermitteln “bewertende und affektive Informationen als Meinungen, Einschätzungen, Wahrheitsansprüchen, Glaubensinhalte” (Schwarz-Friesel & Kromminga, 2013, S. 6).

- Eine weitere Funktion ist die **interaktionale Funktion**, durch die Metaphern Gemeinschaft erzeugen.

- Mit der **bewertenden Funktion** können Metapher eine positive oder negative Bewertung transportieren.

- Schließlich ist von einer **argumentativen Funktion** zu sprechen, wenn durch metaphorische Ausdrücke eine rationale Argumentation vorgetäuscht und eigentliche Absichten verschleiert werden.

### 3.1. Metaphern in den deutschen Medien zu Beginn des Ukraine-Krieges

#### DIE UKRAINE LEIDET

Auffallend in dieser Gruppe ist die vom früheren Vizekanzler Robert Habeck in einer Rede im Bundestag verwendete Metapher VERGEWALTIGUNGSNOT. Mit diesem stark emotionsgeladenen Ausdruck wollte Habeck davon überzeugen, dass sich die Ukraine in einer so schwierigen Lage befinde, dass es alternativlos sei, sie mit Waffen zu unterstützen.

Auch die schrecklichen Kriegszustände in der Ukraine werden mit anderen Metaphern beschrieben. Die zerstörte Infrastruktur im Winter führt zum HISTORISCHER FLUCHTWINTER. Damit soll die Öffentlichkeit zu europäischer Solidarität bewegt werden, da immer mehr Menschen Schutz in der EU suchen werden. Im Land selbst kommt es unter anderem zum Rubel-Zwang, der sich auf den erzwungenen Umtausch von *Hrywnja* in *Rubeln* durch die Besatzung in Cherson bezieht und eine negative Bewertung vermittelt.

Schließlich führt der Krieg zu dramatischen Konsequenzen wie der blockierten Ausfuhr von Weizen, die Hungersnöte in armen Ländern verursacht. Dies wird durch den Ausdruck DER WEIZENKORRIDOR WIRD ZUM STROHFEUER veranschaulicht.

#### WAFFEN SIND KONFLIKT

Der Überfall Russlands auf die Ukraine zwang Deutschland zu schweren Entscheidungen. Aus historischen Gründen waren die Waffenlieferungen an die Ukraine innenpolitisch und gesellschaftlich umstritten. In den Überschriften der Massenmedien erschienen hierzu kompakte metaphorische Ausdrücke wie PANZER HURRA, mit dem die kontroverse Freude über die Panzerlieferungen in die Ukraine thematisiert wird, oder PANZERWENDE, das eine entscheidende Veränderung, im Hinblick auf diese Panzerlieferungen bezeichnet, sowie die MARDER-ENTSCHEIDUNG, welche die schwer gefallende Entscheidung der Bundesregierung, Marder an die Ukraine zu liefern, ausdrückt. Zur selben Gruppe gehört auch der Ausdruck LEOPARD-KOALITION, da Deutschland bei der Lieferung von Waffen nicht allein agiert. Die Metapher KRIEGSGEIL wurde als Kritik an die Befürworter der Waffenlieferungen benutzt, was von der Presse kritisch hinterfragt wird, und eine bewertende Funktion hat.

Schließlich weißt MUNITION FÜR DEN FRIEDEN eine persuasive Funktion auf.

#### RUSSLAND IST EIN MONSTER

Ausdrücke wie FRANKENSTEIN-TRUPPEN oder PUTINS FRANKENSTEIN – russische Soldaten, russische Söldner –, oder DAS ENTFESSELTE MONSTER stellen Russland als Ungeheuer dar und lösen eine negative Haltung gegenüber diesem Land aus.

Auch Formulierungen wie KRIEGSWAHRHEIT – Ukrainer wollen Russen über die realen Geschehen informieren –, oder GETREIDEKRIEG – Russland verhindert den Export von Getreide und löst Hungersnöte aus – sprechen die Leserschaft emotional an. Bundespräsident Frank-Walter Steinmeier verwendet die persuasive Metapher BLASPHEMISCHER IRRWEG, um die russisch-orthodoxe Kirchenführung zu kritisieren.

Das Verhältnis Russlands zu den Nato-Partnern wird mit dem Fragesatz WER BLINZELT ZUERST? formuliert. Der heikle und komplexe Nervenkrieg zwischen der Nato und Russland wird hier bildlich dargestellt.

#### EIN LAND BEWEGT SICH (NICHT)

Die Metaphern KANZLER DES SCHWEIGENS – Olaf Scholz – und LAND DER ZAUDERER UND BREMSER – Deutschland zögert immer bei der Lieferung von Waffen – haben eine bewertende Funktion, da die Medien damit die Haltung des Ex-Kanzlers zur militärischen Unterstützung der Ukraine kritisieren. In diesem Zusammenhang besitzt die Metapher EIN LAND, DAS SICH UNTERHAKT, eine interaktionale Funktion.<sup>vi</sup> Scholz verwendet sie, um den Zusammenhalt und die Widerstandsfähigkeit Deutschlands zu betonen.

Der Krieg erschüttert jedoch auch Deutschland selbst. Die Inflation steigt und Olaf Scholz verkündet einen DOPPEL-WUMMS, eine Metapher mit persuasiver Funktion, die auf so einen großen Knall verweist, der Aufmerksamkeit erzeugen soll. Ein „*erster Wumms*“ hatte Scholz bereits als Finanzminister während der Pandemie geprägt, als er die finanziellen Hilfen zur Krisenbewältigung so bezeichnete. Mit DOPPEL-WUMMS will er die Schlagkraft der neuen finanziellen Maßnahmen sowie die Entschlossenheit der Regierung verdeutlichen, die Energiepreise schnell und wirksam zu senken.

### 3.2. Metaphern in den spanischen Medien zu Beginn des Ukraine-Krieges

Aufgrund ihrer auffälligen semantischen Inkongruenz zeigen viele der spanischen Metaphern – die größtenteils aus den Überschriften der Online-Zeitung El País stammen – vor allem eine klare Reizfunktion, die zum Weiterlesen anlockt. Wie bei den deutschen Metaphern sind auch hier stets eine Erkenntnis- und komprimierende Funktion vorhanden.

### DIE UKRAINE IST VERLETZT

Die spanische Presse bezieht sich auf die Ukraine mit emotionalen Metaphern wie *LAS CICATRICES DE JERSÓN* ‘Chersons Narben’ – Cherson nach der Besatzung/Befreiung –; *EL CAMPO UCRANIANO SIGUE HERIDO* ‘Die ukrainische Landwirtschaft ist noch verletzt’ oder *EJÉRCITO DE COCINEROS* – Eine Köche-Armee vom World Central Kitchen. Sie kochen für die Menschen in Charkiw – .

Besonders deutlich tritt die Reizfunktion bei Überschriften wie *RUSIA MUEVE SUS PIEZAS PARA RECUPERAR LA INICIATIVA: JAQUE A KIEV EN CUATRO JUGADAS* ‘Russland zieht seine Figuren: Schach auf Kiev in vier Zügen’ hervor. Hier wird eine neue Offensive gegen die Ukraine mithilfe des Bereichs Schachspiels veranschaulicht. Mit dem Satz *LA BENDITA PESADILLA LOGÍSTICA DEL NUEVO PODER BLINDADO UCRANIANO* ‘Der gesegnete Alptraum der neuen gepanzerten ukrainischen Macht’ wird das widersprüchliche Empfinden der ukrainischen Armee pointiert ausgedrückt, da ihr die Bedienung der Waffen aus verschiedenen Ländern und mit unterschiedlichen Designs Schwierigkeiten bereitet.

Dass immer mehr russische Waffen in ukrainische Hände gelangen und dies ein wachsendes Problem für Russland darstellte, wird als *LA GUERRA SILENCIOSA* ‘der stille Krieg’ bezeichnet. Mit den Metaphern *EL CORONEL OTOÑO Y EL GENERAL INVIERNO* ‘Der Oberst Herbst und der General Winter’ wird beschrieben, wie die Kälte sowohl die russische als auch die ukrainische Armee, vor allem aber die Zivilbevölkerung, beeinträchtigt. Auch hier ist eine semantische Inkongruenz sichtbar, die zum Weiterlesen anregt.

### PUTIN IST DAS BÖSE

Als mit dem Ukraine-Krieg die Preise stiegen, wiederholte der Ministerpräsident Spaniens Pedro Sánchez in all seinen Reden, dass der Grund für die Inflation ‘Putins Krieg’ *LA GUERRA DE PUTIN* sei. Sowohl hier wie auch bei den anderen metaphorischen Ausdrücken wie *PUTIN PIERDE SU HALO COMO DOMADOR de la élite rusa* ‘Putin verliert seinen Heiligenschein als Dompteur der russischen Elite’ – innerliche Kämpfe der politischen und militärischen Eliten, von denen Putin profitierte, treten zutage –; *DERROTAS DOMÉSTICAS DE PUTIN* ‘häusliche Niederlagen Putins’ – Widerstand der Bevölkerung gegen die Mobilmachung in Russland –; *EL WATERLOO DE PUTIN* ‘Putins Waterloo’; *EL ARMA SECRETA DE PUTIN ES EL HAMBRE* ‘Putins geheime Waffe ist der Hunger’ und *ACOSO INVERNAL DE PUTIN* ‘PUTINS winterliche Belästigung’ handelt es sich um Personifizierungen, vi die darauf abzielen, das Böse zu verkörpern und – nach Lakoff – ein greifbares Feindbild zu schaffen. Alle Missstände des Landes werden diesem “Bösewicht” zugeschrieben.

In der Literatur wird oft behauptet, dass im Interpretationsprozess einer Metapher ein Bild entsteht. Darunter werden neue Vorstellungen, eine affektive Einstellung, eine suggestive Wirkung, Visionen, Intuitionen verstanden. Nach Coseriu (1977) sucht die menschliche Vorstellungskraft stets nach neuen ausdruckskräftigen Bildern, um etwa Emotionen auszudrücken (S. 100). Einen solchen Effekt erzielen der metaphorische Satz *EL GENERAL INVIERNO DESPLIEGA SUS TROPAS* ‘Der General Winter setzt seine Truppen ein’ und der Ausdruck ante *EL NEGRO ESPEJO DE LA DERROTA* ‘Vor dem schwarzen Spiegel der Niederlage’ – Putin bleibt vielleicht nur die Wahl zwischen der Niederlage oder dem roten Knopf – .Im ersten Fall wird Putins Strategie, den Winter als Waffe einzusetzen, bildlich dargestellt; der zweite Ausdruck ist zudem stark emotional aufgeladen.

### EIN LAND IST AM BODEN

Spanien steckt erneut in einer Krise. Dieses Gefühl der Niedergeschlagenheit wird mit der emotionsgeladenen Metaphern *FELIZ DÉJÀ VU* ‘glückliches Déjà-vu’ – Das Neue Jahr reizt nicht mehr, sondern erschreckt wieder – zum Ausdruck gebracht. Hierbei handelt es sich zusätzlich um eine Ironie, bei der negative Umstände positiv bewertet werden (Skirl & Schwarz-Friesel, 2013, S. 17).

Die Opposition reagiert auf diese wirtschaftlichen Zustände mit der Metapher *PACTO FISCAL DE FRANKENSTEIN* ‘Frankensteins Finanzpakt’. Sie wirft der Regierung eine fehlende einheitliche

Steuerpolitik vor. Der Ausdruck erfüllt eine argumentative Funktion, da mit ihm eine rationale Argumentation ersetzt wird.

### EIN KONTINENT IST KEINE IDYLLE

Der frühere Hohe Vertreter der EU für Außen- und Sicherheitspolitik Josep Borrell versucht, die neue Aufrüstungspolitik der EU zu rechtfertigen und die spanische Gesellschaft von der Notwendigkeit höherer Militärausgaben zu überzeugen. Zu diesem Zweck benutzt er die Metapher PORQUE NO PODEMOS SER UN HERBÍVORO EN UN MUNDO DE CARNÍVOROS ‘weil wir kein Pflanzenfresser in einer Welt von Fleischfressern sein können’. Sie hat nicht nur eine persuasive Funktion, sondern zeigt auch die erkenntnisfördernde Funktion der Metapher: Ein komplexer Sachverhalt wird mithilfe eines Bildes aus der Tierwelt vereinfacht und für die Zuhörer verständlicher gemacht.

Metaphorische Ausdrücke wie EL LARGO DUELO ENTRE RUSIA Y OCCIDENTE ‘Das lange Duell zwischen Russland und dem Abendland’ – der unabsehbare Verlauf des Krieges –; LA FRONTERA ENTRE RUSIA Y ESTONIA ES LA DE LA CIVILIZACIÓN ‘Die Grenze zwischen Russland und Estland ist die der Zivilisation’ – Argument des estnischen Verteidigungsministers zur Unterstützung der Ukraine –; LA EUROPA DE LA RAMA DE OLIVO ‘Europa des Olivenzweigs’ – das europäische Erwachen vom Ende der Geschichte – und EUROPA, CAPITAL DE KYIV ‘Europa, die Hauptstadt Kyjiw’ – eine Delegation aus Brüssel zu Besuch in Kyjiw – spiegeln die Haltung Spaniens zu diesem Krieg wider. Spanien positioniert sich aufseiten der EU, gehört dem friedlichen, zivilisierten Europa und grenzt sich vom barbarischen Russland ab. In einer Bevölkerung mit solchen Einstellungen finden politische Entscheidungen wie Waffenlieferungen, humanitäre Hilfe und die Aufnahme von Flüchtlingen Zustimmung.

Schließlich wird auch Deutschlands Energiekrise in spanischen Medien thematisiert, etwa mit der Metapher ALEMANIA, EN GUARDIA ANTE EL TEMIDO INVIERNO DE LA IRA ‘Deutschland in Position vor dem befürchteten Wut-Winter’ – Deutschland fürchtet soziale Unruhen wegen der hohen Energiekosten.

**Tabelle 1.**

### Domänen und Quelldomänen der kognitiven Metaphern in beiden Sprachen.

DOMÄNEN		Nationale Auffassungen des Krieges		
Deutsch	Spanisch	Quelldomänen, die auf das Zielkonzept Krieg projiziert werden	Deutsch	Spanisch
DIE UKRAINE LEIDET	DIE UKRAINE IST VERLETZT	LEIDENDER/VERLETZTER	X	X
		MENSCH/KÖRPERLICHE SCHWÄCHE	X	X
		NATUR	X	X
		JAHRESZEIT	X	X
WAFFEN SIND KONFLIKT	PUTIN IST DAS BÖSE	FREUDE	X	
		MILITÄR	X	X
		MONSTER	X	X
RUSSLAND IST EIN MONSTER	EIN LAND IST AM BODEN	RELIGION	X	X
		KNALL	X	
		SPIEL		X
		BEWEGUNG/BEWEGUNGSMANGEL	X	
EIN LAND BEWEGT SICH (NICHT)	EIN KONTINENT IST KEINE IDYLLE	ZIRKUS		X
		HAUS		X
		EMOTIONEN		X
		KAMPF		X
		TIERWELT		X
		KULTUR		X
		FARBEN		X

## 4. Strukturell-semantische Analyse der deutschen und spanischen Metaphern

### 4.1. Die deutschen Metaphern

So wie die Metaphorik ein wichtiges Mittel zur Schaffung von neuem Wortschatz ist, da zwei Ausdrücke aus unterschiedlichen Bereichen in Verbindung gesetzt werden: z. B. Flucht + Winter, erweist sich im Deutschen auch die Wortbildung als einer der wichtigsten Prozesse zur Produktion neuer lexikalischer Einheiten. Wie bei der Metaphorik bestehen in der Regel die Zusammensetzungen ebenfalls aus zwei unmittelbaren Konstituenten.

Dass die Produktivität der Wortart **Substantiv** eine dominante Rolle in der Wortbildung spielt, (Fleischer & Barz, 2012, S. 117), belegt das Korpus: Die meisten Metaphern sind substantivische Komposita und Neubildungen. Auffällig ist, dass die Hälfte der substantivischen Zusammensetzungen des Korpus mit Bindestrich geschrieben wird. Der Grund dafür ist, dass es sich beim Erstglied um einen Eigennamen handelt (Fleischer & Barz, 2012, S. 331): RUBEL-ZWANG, MARDER-ENTSCHEIDUNG, LEOPARD-KOALITION, FRANKENSTEIN-TRUPPEN. Bei zwei weiteren Komposita DOPPEL-WUMMS und PANZER-HURRA könnte die Ursache für die Bindestrichschreibung die Hervorhebung des Erstgliedes sein (Fleischer & Barz, 2012, S. 193).

Das Erstglied der übrigen substantivischen Wortbildungskonstruktionen – VERGEWALTIGUNGSNOT, PANZERWENDE, KRIEGSWAHRHEIT, GETREIDEKRIEG, FLUCHTWINTER, WEIZENKORRIDOR – sind Substantive, was auch für das adjektivische Kompositum KRIEGSGEIL gilt.

Alle Zusammensetzungen des Korpus können der dritten Gruppe der von Fleischer und Barz erstellte Klassifikation von Komposita mit metaphorischen Erscheinungen (Fleischer & Barz, 2012, S. 142–143) zugeschrieben werden. Ihr Erstglied ist der Bildspender, ihr Zweitglied der Bildempfänger. Wie beim Determinativkompositum kann das Zweitglied für das Ganze stehen, was für das Erstglied nicht zutrifft.

So widerspricht das Korpus Skirls Behauptung, nach der metaphorische Determinativkomposita meistens die Form AB<sub>2</sub> besitzen, in denen B der Bildspender ist.<sup>viii</sup> Andererseits scheint uns fragwürdig, dass sich die oben angegebenen Metaphern – wie von Skirl angedeutet – mit der Vergleichspartikel *wie* oder *als* paraphrasieren lassen. Denn diese Kompositummetaphern unterliegen ebenfalls einer konkreten Interpretation innerhalb eines Kontextes, ähnlich wie solche mit der Form AB<sub>2</sub>: Marder *wie/als* eine Entscheidung\*. Auf jeden Fall wird hier Skirls These geteilt, dass Kompositummetaphern nur in einem Kontext interpretierbar sind und sie einer pragmatischen Perspektive unterliegen.

Die komprimierende Funktion der Metapher auf kognitiver Ebene wird auf morphologischer Ebene durch den Prozess der Wortbildung ergänzt und unterstützt. So lassen sich im politischen Diskurs ausdrucksstarke Konstruktionen mit großer Effektivität in der Kommunikation bilden. Hinzu kommt, dass "metaphorische Komposita sich ganz besonders gut eignen, um die Reizfunktion von Überschriften zu erfüllen" (De Knop, 1987, S. 3). Nach Fleischer und Barz (2012) besteht die Hauptintention einer Überschrift darin, Aufmerksamkeit und Interesse zu wecken (S. 39).

Neben metaphorischen substantivischen Zusammensetzungen enthält das Korpus auch einfache Substantivmetaphern. In der Äußerung MUNITION FÜR DEN FRIEDEN wird die Substantivmetapher Munition metaphorisch verwendet, denn nur die Abschreckung kann zu einem Ende des Krieges führen.

Zu den Substantivmetaphern gehören auch drei Genitivmetaphern des Korpus (Skirl & Schwarz-Friesel, 2013, S. 21). In den Ausdrücken KANZLER DES SCHWEIGENS und LAND DER ZAUDERER UND BREMSER haben die Genitivattribute metaphorischen Charakter. Umgekehrt wird in der Genitivkonstruktion PUTINS FRANKENSTEIN der Genitiv wörtlich verstanden, während der andere Eigenname metaphorisch verwendet wird, da damit die russischen Truppen gemeint sind.

Die Adjektivmetapher BLASPHEMISCHER IRRWEG charakterisiert das Substantiv mit einer Eigenschaft, die semantisch nicht zu ihm passt (Skirl & Schwarz-Friesel, 2013, S. 25-26).

Zum Schluss führen die zwei Verbmetaphern WER BLINZELT ZUERST? und EIN LAND, DAS SICH UNTERHAKT zu einem Widerspruch (Skirl & Schwarz-Friesel, 2013, S. 26). Beim Fragesatz ist

eigentlich der Nervenkrieg mit Putin gemeint. Im zweiten Fall drückt das Verb eine Personifikation aus, da nur Menschen – und nicht Länder – sich unterhaken und zusammenhalten können.

#### 4.2. Die spanischen Metaphern

Während die deutsche Sprache zur Bildung ausdrucksstarker Äußerungen die Mechanismen der Metaphorik und Wortbildung kombiniert, findet man im Spanischen viele metaphorische Äußerungen in Form von Sätzen. In diesen Sätzen treten Substantive und Adjektive als Metaphern auf. Denn nur die Wortarten Substantiv, Adjektiv und Verb können metaphorisch gebraucht werden, weil sie über eine Bedeutung verfügen (Skirl & Schwarz-Friesel, 2013, S. 20). Wie im Deutschen sind die meisten spanischen Metapher Substantive, da Überschriften in möglichst kurzer Form viel ausdrücken sollen und sich Nomina hierfür besonders eignen (De Knop, 1987, S. 75).

In Sätzen wie *RUSIA MUEVE SUS PIEZAS PARA RECUPERAR LA INICIATIVA: JAQUE A KIEV EN CUATRO JUGADAS* ist der Ursprungsbereich *das Schachspiel* und der Zielbereich *eine neue Offensive gegen die Ukraine*. Die Substantive ‘Figuren, Schach’ und die Präpositionalphrase ‘in vier Zügen’ werden metaphorisch verwendet, sodass der Angriff auf die Ukraine mithilfe des Schachspiels beschrieben wird. In einem anderen Satz wird Putin als ‘Dompteur’ dargestellt: *PUTIN PIERDE SU HALO COMO DOMADOR DE LA ÉLITE RUSA*. Die Substantive ‘Pflanzen- und Fleischfresser’ werden im Satz *PORQUE NO PODEMOS SER UN HERBÍVORO EN UN MUNDO DE CARNÍVOROS* ebenfalls metaphorisch verwendet und beziehen sich auf den Ursprungsbereich *Wildtiere*, mit dem die Menschen in zwei Gruppen eingeteilt werden. Das Substantiv ‘Macht’ wird im Satz *LA BENDITA PESADILLA LOGÍSTICA DEL NUEVO PODER BLINDADO UCRANIANO* für die große Bedeutung der neuen Waffen aus dem Ausland benutzt.

Weitere metaphorisch verwendete Substantive als Ursprungsbereiche sind *LAS CICATRICES DE JERSÓN*, wobei ‘Narben’ die Zerstörung der Stadt nach der Befreiung bezeichnen. Das Nomen *EJÉRCITO* ‘Armee’ steht für die Rolle von World Central Kitchen im Krieg. ‘Herbst’ und ‘Winter’ werden in der Formulierung *EL CORONEL OTOÑO Y EL GENERAL INVIERNO* als ‘Oberst’ und ‘General’ gleichgesetzt. Als ‘Duell’ wird die Beziehung zwischen Russland und den NATO-Partnern beschrieben. ‘Zivilisation’ wird als Grenze zwischen Russland und Estland im Ausdruck *LA FRONTERA ENTRE RUSIA Y ESTONIA ES LA DE LA CIVILIZACIÓN* verstanden. Schließlich wird nach dem Besuch einer Delegation aus Brüssel in Kyjiw *EUROPA* metaphorisch als die Hauptstadt der Ukraine gebraucht.

Zu den Substantivmetaphern gehören auch zwei Genitivmetaphern wie die metaphorische Nominalphrase *RAMA DE OLIVO* ‘Olivenzweig’ im Ausdruck *EUROPA DE LA RAMA DE OLIVO*, die das europäische Erwachen nach dem Angriff auf die Ukraine kennzeichnet. Mit *INVIERNO DE LA IRA* ‘Wutwinter’ wird eine möglicherweise schwierige Jahreszeit aufgrund der Energiekrise in Deutschland bildlich dargestellt.

Im Korpus finden sich jedoch auch drei Nominalphrasen, in denen sowohl das Adjektiv als auch das Substantiv metaphorischen Charakter haben. So wird unter *ARMA SECRETA* ‘geheime Waffe’ der Hunger im Krieg verstanden, *ESPEJO NEGRO* ‘schwarzer Spiegel’ beschreibt die Angst Putins vor der Niederlage und *FELIZ DÉJÀ VU* ‘glückliches Déjà-Vu’ steht für die fortdauernde Wirtschaftskrise.

Unter den substantivischen Metaphern sind auch Eigennamen, die für bestimmte Eigenschaften (Skirl & Schwarz-Friesel, 2013, S. 25) stehen. Im Ausdruck *el WATERLOO DE PUTIN* ‘Putins Waterloo’ wird die Metapher *WATERLOO* für Niederlage gebraucht. Dagegen wird im Ausdruck *el PACTO FISCAL DE FRANKENSTEIN* ‘Frankensteins Fiskalpakt’ der Fiskalpakt als Monster, als etwas Unübersichtliches, dargestellt.

Wie bei den deutschen Metaphern werden mit den fünf Adjektivmetaphern den Zielbereichen Eigenschaften zugeschrieben, die semantisch nicht zutreffen (Skirl & Schwarz-Friesel, 2013, S. 25). Dies ist der Fall bei *EL CAMPO UCRANIANO SIGUE HERIDO* ‘Die ukrainische Landwirtschaft ist noch verletzt’, *ACOSO INVERNAL* ‘winterliche Belästigung’ Putins, *BENDITA PESADILLA* ‘gesegneter Alptraum’ für die komplizierte Bedienung von Waffen aus dem Ausland und *LA GUERRA SILENCIOSA*

‘der stille Krieg’, womit das Gelangen russischer Waffen in ukrainischen Händen bezeichnet wird. Schließlich beschreibt DERROTAS DOMÉSTICAS ‘häusliche Niederlagen’ Putins.

### 5. Fazit

Bei der Betrachtung des Korpus kann zunächst festgestellt werden, dass sich Politik und Medien der persuasiven Funktion der Metapher bewusst sind. Denn sie besitzt nicht nur eine Erkenntnisfunktion, in dem sie komplexe Sachverhalte verständlicher darstellt, sondern versucht auch, den Textrezipienten auf emotionalem Wege zu beeinflussen.

Deutsche und spanische metaphorische Ausdrücke gehören unterschiedlichen Perspektiven des Krieges. Trotzdem zeigen die deutschen und spanischen Metaphern des Korpus, dass Russland für beide Länder eine ernsthafte Drohung darstellt, sodass ein negatives Bild von diesem Land und Putin vermittelt wird. Außerdem spielt die Debatte um die Waffenlieferungen in die Ukraine in der deutschen Öffentlichkeit eine große Rolle.

Die spanischen metaphorischen Ausdrücke signalisieren außerdem, dass der Krieg für Spanien hauptsächlich der Bruch der europäischen Friedensidylle bedeutet. Beide Länder wollen jedoch mit diesen Meinungsbildungsprozessen ihre Bevölkerung von der Unterstützung der Ukraine mit Waffen und der Annahme von Flüchtlingen überzeugen.

Die Energiekrise scheint in Spanien, einem von Krisen erschütterten Land, ein größeres Problem darzustellen als in Deutschland. Vor allem versucht die spanische Politik, Putin als greifbares Feindbild in der öffentlichen Meinung zu verbreiten und ihn als alleinigen Verantwortlichen für die wirtschaftliche Situation darzustellen.

Auf strukturell-semantischer Ebene erweisen sich im Deutschen und Spanischen die Substantive als das beste Mittel, um viel Information in kürzester Form zu kondensieren. Zu diesem Zweck verfügt die deutsche Sprache zusätzlich über die Wortbildung, von der die Medien besonders in den Überschriften viel Gebrauch machen.

Wenn noch darüber hinaus Komposita mit metaphorischer Bedeutung verwendet werden, entsteht auf pragmatischer Ebene eine Fülle kommunikativer Effekte mit großer persuasiver und emotiver Prägnanz, die sowohl für politische Zwecke als auch für die Konstruktion von Meinungsbildungen sehr effektiv sein können.

### Anmerkungen

- i “...how we comprehend and understand areas of experience that are not well-defined in their own terms and must be grasped in terms of other areas of experience.” (Lakoff & Johnson, 1980, S. 114).
- ii “Ucrania es hoy el corazón de Europa. La libertad y la democracia vencerán siempre a la imposición y la violencia. Hoy, como hace seis meses, España está y estará siempre junto al pueblo ucraniano en su lucha por defender un futuro libre y en paz.” (X, 24.08.2022).
- iii “[...] kreative Metaphern, die auf bekannte konzeptuelle Kombinationen [...] verweisen [...]. [...] innovative Metaphern, die sich [...] auf neue Konzeptkopplungen etablieren [...].” (Skirl & Schwarz-Friesel, 2013, S. 30f.).
- iv (García, 2004, S. 62f), (Kirchhoff, 2010, S. 130f), (Meyer & Serbina, 2020, S. 611f), (Skirl & Schwarz-Friesel, 2013, S. 60f).
- v “Podemos afirmar que la metáfora cognitiva permite condensar el sentido acerca de un sector de la realidad.” ‘Wir können versichern, dass die kognitive Metapher die Bedeutung einer Realitätssphäre kondensieren kann.’
- vi “Die Metaphern [...] werden auch dazu verwendet, um den Gruppenzusammenhalt der Mitglieder eines kollektiven Akteurs zu verstärken [...].” (García, 2004, S. 64).
- vii “Dann macht es keinen Unterschied, ob wir von Saddam Hussein oder dem Irak sprechen? Doch, macht es. Indem stellvertretend für den Irak von Saddam Hussein gesprochen wird, personifiziert man die Bösewichtnation. Mit einem Male hat man eine einzelne Person, die stellvertretend für

die irakische Nation die Rolle des Bösewichtes einnimmt. Eine viel bessere Besetzung, ein viel greifbareres Feindbild als die gestaltlose Person ‚Irak‘.” (Lakoff & Wehling, 2008, S.141).

viii “Kompositummetaphern sind Determinativkomposita der Form AB<sub>2</sub>, bei denen A oder B als metaphorisch gebraucht verstanden wird. In der Regel ist dies B [...]” (Skirl, 2010, S. 25f.).

### Interessenkonflikterklärung

Der Autor hat hinsichtlich dieses Artikels keinen Interessenkonflikt.

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## МЕТАФОРИ В НІМЕЦЬКИХ ТА ІСПАНСЬКИХ МЕДІА НА ПОЧАТКУ ВІЙНИ В УКРАЇНІ: КОНТРАСТИВНИЙ АНАЛІЗ

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### Анотація

У статті досліджується використання 21 німецької та 22 іспанських метафоричних конструкцій у медіадискурсі під час початкової фази війни в Україні. У роботі з'ясовується, які креативні та інноваційні метафори формували публічну комунікацію, які виміри конфлікту вони висвітлювали та як їхні прагматичні й семантичні функції реалізовувалися у двох мовно-культурних контекстах. Аналіз ґрунтується на корпусах медійних текстів і політичних заяв, зібраних у провідних німецьких та іспанських онлайн-виданнях. Методологічно дослідження спирається на когнітивний та прагматичний підходи, визнаючи, що метафори не лише відображають концептуальні структури, а й функціонують як переконливі та емоційні засоби у політичній комунікації. Спрощуючи складні реалії, метафори скеровують інтерпретацію, викликають емоції та впливають на колективні настрої щодо війни, відповідальності та солідарності.

Результати засвідчують, що німецький дискурс часто акцентує увагу на внутрішніх політичних дебатах щодо нерішучості, історичної відповідальності та економічного впливу конфлікту, тоді як іспанський дискурс значною мірою зосереджується на європейському вимірі та фреймуванні політичних акторів. Попри ці відмінності, обидва медійні контексти збігаються у зображенні Росії як фундаментальної загрози та у легітимації підтримки України через гуманітарну допомогу, військову підтримку та дискурси солідарності.

На структурному рівні дослідження підкреслює, що німецька мова часто спирається на складні іменники для ущільнення значення в компактні лексичні одиниці, тоді як іспанська надає перевагу розгорнутим метафоричним виразам на рівні фрази або речення. В обох випадках іменники відіграють провідну роль у стисненні інформації та досягненні комунікативної точності.

У статті робиться висновок, що метафори виконують не лише когнітивні, а й переконливі, емоційні та аргументативні функції, роблячи їх потужними інструментами формування громадської думки, конструювання політичних нарративів і скерування процесів соціального пізнання в умовах конфлікту.

**Ключові слова:** *метафора, медіадискурс, німецька мова, іспанська мова, війна в Україні, когнітивно-прагматичний аналіз, політична комунікація.*

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## KOTSIUBYNSKYI VS CONRAD: IMPRESSIONISTIC CROSSROADS

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### Abstract

This article presents a comparative study of Ukrainian and English literary Impressionism through the works of Mykhailo Kotsiubynskyi's *Fata Morgana* and Joseph Conrad's *Heart of Darkness*. Drawing on the literary theory of Impressionism and the principles of cross-cultural (comparative) literary studies, the research investigates how writers from distinct linguistic and cultural backgrounds employ impressionistic techniques to convey psychological depth, sensory perception, and moral complexity. The study explores how the key traits of literary Impressionism – subjectivity, fragmentation, and vivid sensory imagery – manifest within diverse historical, ideological, and aesthetic contexts shaped by empire, national identity, and modernist thought.

Particular attention is devoted to the role of translation as an intermediary between languages and artistic systems. Comparative analysis of Ukrainian-English and English-Ukrainian translations reveals how impressionistic nuances are maintained, altered, or reinterpreted, shedding light on the challenges of preserving mood, rhythm, and atmosphere across cultural borders. Through close textual and discourse analysis, the study identifies both convergences and divergences in the ways Kotsiubynskyi and Conrad construct imagery, interiority, and representations of colonial or peripheral experience.

Ultimately, the paper positions Impressionism as a transnational aesthetic mode that transcends national and linguistic frontiers, linking Ukrainian and English modernisms through shared concerns with perception, consciousness, and artistic form. This research contributes a new intercultural perspective on literary Impressionism and its capacity to articulate the complexity of human experience in a global context.

**Keywords:** *Impressionism, Mykhailo Kotsiubynskyi, Joseph Conrad, translation, comparative literature, cross-cultural interpretation.*

### 1. Introduction

This study aims to deepen the understanding of literary Impressionism by examining its formal and ideological expressions in Ukrainian and English works, particularly Kotsiubynskyi's *Fata Morgana* and Conrad's *Heart of Darkness*. Grounded in Literary Impressionism Theory and Translation Theory, it explores how impressionistic traits – subjectivity, sensory detail, and fragmented narrative – are preserved or altered in translation. Using a cross-cultural comparative approach, the research highlights both shared and divergent features of Ukrainian and English Impressionism within their cultural and linguistic contexts. Situated at the intersection of Postcolonial Studies, Comparative Literature, and Translation Studies, it applies comparative textual analysis, discourse analysis, and hermeneutic interpretation to uncover parallels, contrasts, and the colonial imaginaries embedded in both texts.



This research examines the origins and expression of Impressionism in the works of Mykhailo Kotsiubynskyi and Joseph Conrad, comparing their contributions and how scholars and translators interpret them. It analyzes the characteristics, influences, and variations of Impressionism in their texts, aiming to offer new insights into the movement through the lens of these two influential authors.

The object of analysis is the literary manifestation of Impressionism in two works: *Fata Morgana* by Mykhailo Kotsiubynskyi (Ukrainian literature) and *Heart of Darkness* by Joseph Conrad (English literature). The study focuses on how impressionistic techniques – subjectivity, sensory imagery, temporal fragmentation, and psychological introspection – are expressed and transformed across different cultural and linguistic traditions, with particular attention to translation as a medium of interpretation and transformation. The primary aim of this research is to examine the convergence and divergence of Ukrainian and English literary Impressionism through a comparative and cross-cultural lens. It seeks to identify how Kotsiubynskyi and Conrad employ impressionistic techniques to convey human perception and moral conflict within the frameworks of national identity, colonial experience, and aesthetic modernism. Additionally, the study aims to evaluate how translation mediates impressionistic expression, revealing the challenges of transferring aesthetic and cultural nuances across languages.

The study aims to solve a set of questions, namely:

- how the core features of literary Impressionism – such as fragmentation, sensory detail, and subjectivity are realized in the works of Kotsiubynskyi and Conrad;
- in what ways their cultural, historical, and ideological contexts shape their respective impressionistic styles;
- how translation processes (Ukrainian-English and English-Ukrainian) preserve, alter, or reinterpret the impressionistic essence of each text;
- what these comparative findings reveal about the transnational nature of Impressionism as both a literary and cultural phenomenon.

This study's novelty lies in its intersectional methodology, combining the literary theory of Impressionism with cross-cultural (comparative) literary studies and translation analysis. It presents a systematic comparative exploration of Ukrainian and English Impressionism through Kotsiubynskyi and Conrad – two authors rarely juxtaposed in this context. It introduces translation as a diagnostic tool for identifying how aesthetic meaning travels between linguistic systems. It situates both writers within a postcolonial and intercultural dialogue, revealing shared sensibilities shaped by imperial experience and peripheral identities. The approach highlights Impressionism as a transnational aesthetic, bridging the local and the universal through perception, atmosphere, and cultural memory.

## 2. Method and material

The methodological framework integrates two theoretical pillars: Literary Theory of Impressionism, emphasizing the representation of fleeting sensations, inner consciousness, and fragmented perception as key stylistic and structural devices, and Theory of Cross-Cultural (Comparative) Literary Studies, focusing on the interaction between distinct literary traditions, languages, and cultural contexts.

The material for the analysis is primary texts, *Fata Morgana* (Ukrainian original, 1910; English translation, 1980) and *Heart of Darkness* (English original, 1899; Ukrainian translation, 2021), where analytical methods are applied. They include close reading of impressionistic techniques (imagery, syntax, narrative perspective), comparative textual and discourse analysis to trace stylistic correspondences and divergences, translation analysis to assess semantic, stylistic, and cultural transformations across versions, and hermeneutic interpretation to contextualize these findings within broader historical and ideological frameworks (colonialism, national identity, modernism). Together, these methods ensure a comprehensive exploration of literary Impressionism as both a stylistic phenomenon and a cross-cultural dialogue between Ukrainian and English modernities.

'Impressionism' as a specifically aesthetic term was launched in 1874 by a journalist, Louis Leroy, to ridicule the affronting formlessness of the pictures exhibited at the Salon des Independents, and particularly of Claude Monet's painting entitled *Impression: Sunrise*. Impressionism, initially an artistic movement, was defined by its focus on light and color, with artists using primary colors applied in small, unblended strokes to create a sense of movement and change. The form of objects was often blurred, emphasizing the effect on the viewer's eye rather than precise detail. This approach extended beyond art into literature, evolving from the earlier Realist movement, which focused on objective depictions of everyday life. In literature, Impressionism shifted away from Realism's objective portrayal of reality, instead emphasizing subjective experiences and fleeting moments. Writers sought to capture the inner perceptions of characters, often prioritizing sensory details and psychological depth in the chapter "Impressionism and Post-Impressionism" in *The Oxford Handbook of Virginia Woolf* (2021), T. Katz argues that literary impressionism provides a key bridge into modernist experimentalism by privileging fleeting sensory impressions, interior states, and fragmented perceptions over coherent external narrative. She shows how this aesthetic allows modernist authors, even those like Virginia Woolf, to reconfigure subjectivity and time, turning momentary consciousness and material surfaces into the terrain of artistic innovation. Key characteristics of Impressionist literature include a focus on subjective perception, emphasizing characters' impressions, thoughts, and emotions, while exploring their psychological depth through techniques such as stream-of-consciousness (Katz, 2021). It employs vivid sensory detail, capturing light, color, and sound to immerse the reader's senses and create atmosphere. Narratives are often fragmented and non-linear, shifting between perspectives or periods to reflect the fluidity of human consciousness. A sense of transience pervades these works, highlighting the fleeting nature of experiences and impressions, while subtle symbolism (Howard, 1991) conveys deeper themes and adds layers of meaning. Through these elements, Impressionist literature prioritizes mood and emotional resonance over conventional plot structures, presenting a rich, immersive portrayal of human experience. Literary Impressionism, in J. Matz's formulation, is the technique by which fiction privileges fleeting "impressions" – experiences that are neither mere sensations nor fully formed ideas – that mediate between past and present, sense and thought, thereby promising a kind of perceptual totality (Matz, 2001). Its legacy in modernist literature lies in how this promise ultimately becomes precarious: writers such as Virginia Woolf, James Joyce, and Marcel Proust show that while the impression aims to unite temporal moments and interior/exterior life, its very instability becomes a hallmark of modernist self-reflexivity and fragmentation (Matz, 2001).

While these features are not exclusive to Impressionism, they are central to its literary style. Impressionism in literature shares roots with Realism, but it diverges by focusing on subjective experiences and the impermanence of human perception (Impressionism in literature, 2016).

Ukrainian literary Impressionism emerged in the late 19th and early 20th centuries under the influence of European trends and the socio-political context of Ukraine. It blended realism with subjective "end-of-the-age" sensibilities, aiming to capture both objective and subjective impressions: "Ukrainian Impressionism blends realism with subjective, 'end-of-the-age' sensibilities, capturing objective as well as subjective impressions" (Nalivaiko, 1985, p. 158). As Holod notes, Impressionism conveys "a subjective impression" through objectification, achieved by visualization that "strengthens emotional explosions with solid truth, even in drawing" (Holod, 2005, p. 221). Key figures include Ivan Franko, whose poetry fused Realism, Romanticism, Symbolism, and Impressionism, marked by vivid imagery and the influence of painting (Holod, 1998, p. 328), and Mykhailo Kotsiubynskyi, who added psychological depth and introspection. Other writers such as Lesya Ukrainka and V. Vynnychenko employed vivid imagery and symbolism to capture fleeting emotions. Rooted in national identity yet shaped by European aesthetics, Ukrainian Impressionism reflected rural life, landscapes, and cultural memory while adapting innovative literary forms to turbulent historical change.

In English literature, Impressionism emerged in the late 19th and early 20th centuries, influenced by a shift towards experimental aesthetics and sensory experience. This period saw British writers adopting techniques from French Impressionist artists, who were gaining prominence in Europe. Both Impressionism and Symbolism, as reactions against tradition, emphasized the individual's private vision and developed during the late 19<sup>th</sup>-century epistemological crisis, marked by the 'death of God' and the decline of the omniscient author (Peek & Hamblin, 2004, p. 103). English Impressionist literature is characterized by a deep focus on subjectivity and introspection, centering on characters' inner thoughts, emotions, and psychological states. Rather than following conventional linear plots, it emphasizes mood and atmosphere, using vivid sensory detail and impressionistic depictions of light, color, and sound to evoke emotion. Its structures are often fragmented and experimental, frequently employing non-linear narratives and stream-of-consciousness techniques to reflect the fluidity of human consciousness. Symbolism and metaphor play a key role, conveying deeper meanings and revealing characters' inner struggles. Ordinary experiences are elevated, depicted with emotional depth and aesthetic significance. By dissolving traditional storytelling boundaries, English Impressionist literature captures fleeting impressions, ambiguous moments, and the transient, shifting nature of lived experience (Impressionism in literature, 2016).

### 3. Mykhailo Kotsiubynskyi as the eminent Ukrainian Impressionist

The main representative of Ukrainian Impressionism, M. Kotsiubynskyi, is a significant contributor to the development of Ukrainian modernism. In 1884 and 1885, he began as a realist with *Andriy Solovejko* and *Dlja zahal'noho dobra* (*For the Common Good*). Gradually, however, he forsook the realistic story in favor of short impressionistic psychological sketches written in 1902, such as *Na kameni* (*On the Rock*), *Cvit jabluni* (*The Apple Blossom*), and *Intermezzo* (in 1908). He contributed to the development of Ukrainian modernity to a considerable extent. He introduced sensory perception without unnecessary descriptions. Impressionism in his presentation blurs the boundaries between art. The world of man is surrounded by nature, created with the help of colors, sounds, and tactile sensations and impressions (Genyk-Berezovska, 2000). The impressionistic qualities of Kotsiubynskyi's prose are evident in his rich *sensory detail*, as his works vividly portray Ukrainian landscapes, climate, and cultural settings, immersing readers in the lived reality of rural life. His writing is also *psychologically profound*, moving beyond mere description to explore the inner conflicts of his characters and the moral and emotional tensions arising from their aspirations for land ownership – and, symbolically, control over their own lives. In this way, Kotsiubynskyi's narratives transcend simple adventure tales, evolving into nuanced explorations of human consciousness. His works also carry a pointed *anti-colonial perspective*, revealing the brutal realities of imperial domination. In *Fata Morgana*, the recurring motif of *black* exposes the corrosive foundations of the Russian empire: it symbolizes despair, suffering, and death while stripping away the façade of progress and civilization. Through this chromatic symbolism, colonialism is revealed as a shadowed system rooted in exploitation and relentless oppression, with *black* serving as a marker of both moral decay and the oppressive structures at the heart of empire.

The short story *Fata Morgana* draws on Kotsiubynskyi's knowledge of rural life in Podolia, Volhynia, and Chernihiv during the 1902 peasant unrest, supported by villagers' correspondence and documentary accounts of the movement. Within that backdrop, each peasant hero played out the drama of his dream against the tragic panorama of public events. As B. Rubchak observes, the detailed historical setting functions less as social chronicle than as "a dynamic canvas that serves as a backdrop for Kotsiubynskyi's triangular structure of opposing forces – the poet's thirst for the ultimate horizons of existence... versus the cruelly inhibiting horizons of the world" (Rubchak, 1981, p. 81).

Kotsiubynskyi's *Fata Morgana* portrays life in a Ukrainian village before and during the 1905–1907 revolution. The work is notable for its pioneering ideas and its masterful narrative technique. Kotsiubynskyi successfully depicts the archetypal characters of the contemporary Ukrainian rural community with a particular emphasis on the psychological depth of individual personalities.

Additionally, the narrative explores the class struggle between peasants and landowners as well as the rise and development of the national revolution, which sought to challenge the oppression and unfreedom imposed by the ruling classes. His striking use of *sensory detail* enables readers to become fully immersed in the textures and rhythms of rural Ukrainian life (1):

(1) „Нема руїн. Скрізь нові будинки. Гук машин, сичання пари, тиск людей, ціле пекло роботи. Все рушається, живе, все таке принадне. І він чує силу у своїх руках, а в роті має смак холодного пива...” (Kotsiubynskyi, 2017, p.3) / “There were no more ruins: new work-shops everywhere, the sound of machines working and steam hissing, a crowd of people, and a hell of a lot of work to be done. All bustle, commotion, he liked it so much. And he felt the strength in his hands and the taste of cold beer in his mouth.” (Kotsiubynskyi, 1980, p. 14)

Passage (1) captures the vibrant atmosphere of the newly established workshops, emphasizing sensory details such as the sound of machinery, the hiss of steam, and the general hubbub. Phrases like *a hell of a lot of work to be done* and *he felt the strength in his hands* evoke a sense of immediacy and physical engagement, while the reference to the taste of cold beer introduces an additional sensory layer to the scene. The English translation effectively conveys the core imagery and atmosphere of the original Ukrainian text, illustrating a significant transformation from desolation to a lively, industrious environment. Both versions express the shift from ruin to productivity. The Ukrainian phrase *Скрізь нові будинки* translates as *new workshops everywhere*, with the latter term reflecting the industrial context while preserving the meaning. Similarly, *ціле пекло роботи* is rendered as *a hell of a lot of work to be done*, which effectively conveys the intensity and scale of the labor involved. The Ukrainian *Все рушається, живе, все таке принадне* carries a poetic tone, suggesting vitality and charm. The English version, *All bustle, commotion, he liked it so much*, maintains this liveliness and positive sentiment while adapting to the English language.

In addition to vivid description, Kotsiubynskyi delves into the inner struggles of his characters, highlighting the moral and emotional tensions born from their desire to claim ownership of both land and life. In doing so, his narratives transcend mere adventure stories, developing into sophisticated studies of *psychological complexity*. Passage (2) below contains several images highlighting a somber, gray, and melancholic depiction of nature, viewed through a ‘dark screen’ due to the dire circumstances:

(2) „Ідуть дощі. Холодні осінні тумани клубочать угорі і спускають на землю мокрі коси. Пливе у сірі безвісті нудьга, пливе безнадія і стиха хлипає сум. Плавають голі дерева, плавають солом’яні стріхи, вмивається сльозами убога земля і не знає, коли осміхнеться. Сірі дні змінюють темнії ночі. Де небо? Де сонце?” (Kotsiubynskyi, 2017, p. 26) / “It is raining. The cold autumn mists curl in the sky and come down to earth in thick wet braids. Anguish and despair drift along into the grey unknown, grief sobs quietly. The bare trees and thatched roofs cry, the wretched land bathes in tears and knows not when it will smile. Dark nights follow bleak days. Where, pray, is the sky? Where is the sun?” (Kotsiubynskyi, 1980, p. 39)

The atmosphere seems to reflect both the revolutionary sentiments of the villagers and the author’s feelings. The sense of despair and sorrow is conveyed with nature itself likened to weeping trees. In the original, *у сірі безвісті* describes the bleak surroundings, while the English translation opts for *cold autumn mists*. The Ukrainian version emphasizes the mysterious and the indefinite sadness, whereas the English version highlights the cold and the seasonal blues. Both the original and translation powerfully depict nature’s response to the late autumn rain. The Ukrainian *голі дерева, плавають солом’яні стріхи* and the English *bare trees and thatched roofs cry* evoke a poignant image

of nature mourning. Likewise, both texts use metaphoric tears to portray the rain's effect on the land. The Ukrainian *вмивається сльозами убога земля* and the English *the wretched land bathes in tears* emphasize the sorrowful state of the earth and the people alike.

*Fata Morgana* unveils the destructive and corrosive core of the Russian empire. The motif of *black* signifies not only anguish, loss, and mortality, but also symbolically dismantles the empire's self-fashioned image of progress and civilization. In its place, *colonialism* emerges as a system shrouded in darkness, defined by relentless exploitation and domination, with *black* serving as the emblem of oppression and moral corruption at the empire's center.

To more effectively depict Malanka's character, the author highlights key traits such as her hard work and pride in passage (3):

- (3) “Мала, суха, чорна, у чистій сорочці, в старенькій свитці. Андрій не бачить її обличчя, але знає, що в неї спущені додолу очі й затиснені губи. Ми хоч бідні, але чесні.” (Kotsiubynskyi, 2017, p. 3) / “*There was Malanka, small and thin, in a clean blouse and old coat. Andriy couldn't see her face, but he knew that her eyes were downcast and lips pursed. Though we're poor people, we're honest.*” (Kotsiubynskyi, 1980, p. 14)

In the Ukrainian original, *Мала, суха, чорна, у чистій сорочці, в старенькій свитці*, Malanka is introduced with brief but vivid descriptions. The English translation, *There was Malanka, small and thin, in a clean blouse and old coat*, successfully preserves the clarity and visual imagery of the original. The descriptive epithet *суха* is accurately rendered as *thin*, maintaining the intended depiction. Furthermore, the translation of *спущені додолу* as *downcast* in the phrase *her eyes were downcast and lips pursed* effectively conveys the somber tone and captures the mood of the original. However, the omission of the color term *чорна* (*black*) in translation significantly diminishes the passage's resonance. In Ukrainian, *чорна* not only evokes darkness and heaviness but also carries the connotation of exhausting, backbreaking labor. By leaving it out, the translation strips the text of its layered meaning, weakening both the sense of toil that defines peasant life and the symbolic association of black with suffering and exploitation. As a result, the richness of the original imagery is reduced, and the cultural weight embedded in the word is lost.

The passage below exemplifies key elements of Impressionism through its vivid depiction of the character's mental state (4):

- (4) “Дивно. Прожила життя, а воно раптом впало у прірву. Хоч би слід залишило, хоч би згадку яку. Все зап'яв морок. Все чорне. Навіть нинішній день одсунувсь далеко, так далеко забіг, що видається давнім, давно забутим сном.” (Kotsiubynskyi, 2017, p. 92) / “*It was strange. She had lived her whole life and suddenly she had fallen into a precipice. If only there were a trace left, some memory. Everything was engulfed by the darkness. Everything was black. Even today had receded far into the distance, so far that it seemed a forgotten dream.*” (Kotsiubynskyi, 1980, p. 118)

The use of metaphoric language, such as *fallen into a precipice* and *engulfed by darkness* (4), evokes a strong sensory impression of the character's disorientation and emotional turmoil. The repetition of *Everything was* further amplifies the overwhelming nature of the experience as if all aspects of the character's life have been consumed by the abyss. The phrase *Even today* receding into the distance introduces a temporal distortion, blurring the boundaries between past and present. This sense of temporal ambiguity aligns with the impressionistic focus on subjective experience and the fluidity of time. The notion that today *seemed a forgotten dream*, expressed through simile, deepens the character's struggle to maintain a grasp on reality. The Ukrainian *зап'яв морок* and the English *Everything was engulfed by the darkness*, where the English version employs direct wording to capture the immersion into darkness, closely adheres to the original meaning. The theme of time is

effectively maintained in both versions, highlighting the character's perception that even 'today' has receded far into the distance, reinforcing a sense of temporal dislocation. The past is depicted as a forgotten dream, underscoring the character's estrangement from reality. Both versions emphasize either the significance of memory or the absence thereof, suggesting a profound yearning to preserve a connection to the past.

The examples examined showcase the diverse range of impressionistic elements, detailed character development, and atmospheric scenarios that characterize impressionistic literature. Through skillful use of sensory details, time distortions, and a focus on personal experience, they provide a distinctive and emotionally impactful reading experience. Kotsiubynskyi's use of vivid imagery, metaphorical language, and sensory details draws readers into the impressionistic world he crafts. While the intensity and emotional depth of the descriptions can sometimes make events seem more dramatic, this likely reflects the author's goal of portraying life as vividly and expressively as possible. Based on his knowledge and impressions, Kotsiubynskyi's work epitomizes subjectivism and highlights the early signs of impressionism.

#### 4. Joseph Conrad as the eminent English Impressionist

Joseph Conrad is a pivotal figure in English literature, associated with the Impressionist movement. *Heart of Darkness* (1899) is widely recognized as a quintessential example of Impressionistic literature. It marks the beginning of his 'darker' works, which were not compiled into a collection until 1902 (York, 1982). His literary legacy is frequently interpreted at the intersection of impressionistic aesthetics and anti-colonial critique. Texts such as *Heart of Darkness* and *Lord Jim* illustrate his capacity to weave vivid sensory portrayals of colonial environments with a penetrating examination of the moral and political implications of empire. This synthesis allows Conrad to be read simultaneously as an impressionist writer and as a powerful critic of imperialism. The Impressionistic dimension in Conrad's prose involves *sensory evocativeness* as his fiction abounds in finely crafted depictions of colonial settings. *Psychological insight* is well-felt in his works since, alongside environmental detail, he delves into the inner struggles of his characters, highlighting the mental and ethical tensions produced by colonial encounters. His works are as much psychological explorations as they are descriptive narratives, providing keen insights into the multifaceted processes underlying human consciousness (Netragaonkar, 2016, p. 1647). Conrad's descriptions of the sea, landscapes, African jungles, and the unsanitary living conditions of the colonized natives present a realistic portrayal of these settings, allowing readers to immerse themselves in the characters and their environments (Netragaonkar, 2016, p. 1652). In doing so, his narratives transcend the adventure genre and assume the form of probing psychological studies. *Heart of Darkness* powerfully reveals the *exploitative core of empire*, depicting colonialism not as a lofty civilizing project but as a ruthless machinery of plunder and domination. The recurring imagery of *black* functions as a symbolic shorthand for this reality—evoking both the literal darkness of the colonized spaces and the moral corruption at the heart of imperial rule, where *black* becomes the chromatic emblem of oppression, brutality, and decay. Through vivid descriptive prose, Conrad captures the African landscape while delving into the complex issues surrounding colonialism and human morality. His writing is marked by an atmospheric quality that emphasizes the subjective experiences of the characters and their environments.

Conrad's use of metaphor in *Heart of Darkness*, particularly the comparison of the meaning of Marlow's experiences to an enveloping haze rather than the core of a nut, encapsulates the blend of symbolism and impressionistic *sensory qualities* in his work. This technique highlights the story's symbolic layers, while also reinforcing its impressionistic focus on sensory experience. The quote below illustrates key impressionistic elements through the phrase *evoke the great spirit of the past* and the focus on the personal subjective experience of someone who has *'followed the sea'* (5):

- (5) “*And indeed nothing is easier for a man who has, as the phrase goes, ‘followed the sea’ with reverence and affection, than to evoke the great spirit of the past upon the lower reaches of the Thames.*” (Conrad, 2018, p. 6) / “*І справді, людина, котра шанобливо і палко віддалася, як то кажуть, ‘поклику моря’, може заввиграшки оживити тут, у пониззі Темзи, величний дух минулого.*” (Conrad, 2021, p. 3)

The language highlights immediate sensory impressions and memories connected to the river (5), invoking a sense of nostalgia and a link to the past. This emphasis on personal experience and emotion reflects the core tenets of impressionistic literature. The passage describes a person who has ‘*followed the sea*’ with reverence and passion, suggesting a profound connection to maritime life. The Ukrainian translation faithfully conveys this sentiment, capturing the essence of devotion to the ‘*call of the sea*’ with reverence and ardor. One notable distinction lies in the translation of *than to evoke the great spirit of the past upon the lower reaches of the Thames* as *може заввиграшки оживити тут, у пониззі Темзи, величний дух минулого*. The lexeme *заввиграшки* introduces a more playful, informal tone as compared to the original, yet it effectively conveys the notion of bringing to life or animating the great spirit of the past on the lower reaches of the Thames.

*Psychological detail* is well-seen through metaphoric imagery, such as *empty stream*, *great silence*, and sensory descriptions of the air as being *warm, thick, heavy, sluggish* conveys a highly subjective and immediate impression of the environment. This language creates a momentary snapshot that emphasizes the emotional and sensory impact of the scene, aligning with the impressionistic tendencies in literature. The vivid imagery immerses the reader in the atmosphere of the journey, evoking a strong and immediate sense of the surroundings (6):

- (6) “*Going up that river was like traveling back to the earliest beginnings of the world, when vegetation rioted on the earth and the big trees were kings. An empty stream, a great silence, an impenetrable forest. The air was warm, thick, heavy, sluggish.*” (Conrad, 2018, p. 39) / “*Мандри горіріч нагадували повернення до перших днів сотворення світу, коли рослинність буяла на землі й великі дерева були її владиками. Безлюдна ріка, непорушна тиша, непрохідний ліс... Повітря було тепле, густе, важке, сонне.*” (Conrad, 2021, p. 34)

Passage (6) describes the experience of traveling up the river, likening it to a journey back to the primordial stages of the world. It paints an image of a lush, untamed environment where vegetation flourishes and large trees dominate the landscape. The depiction includes an empty river, profound silence, and an impenetrable forest, with the air characterized as warm, thick, heavy, and sluggish. The translation effectively captures the essence of the English original, yet some linguistic differences emerge: *рослинність буяла на землі* conveys the idea of flourishing vegetation but may lack the connotation of *riotous* or *uncontrolled growth* present in the English lexeme *rioted*. Additionally, the phrase *Безлюдна ріка*, which is rendered from *An empty stream*, captures the emptiness accurately but may introduce a slightly different nuance, as *безлюдна* typically refers to something deserted or uninhabited, while *empty* in English may emphasize the absence of activity or movement.

In the sentence below (7), with a clear-cut *anti-colonial tone*, the phrase *deathlike indifference of unhappy savages* employs vivid and emotionally charged verbal means to convey the immediate subjective impression of passivity and detachment:

- (7) “*They passed me within six inches, without a glance, with that complete, deathlike indifference of unhappy savages. Behind this raw matter, one of the reclaimed, the product of the new forces at work, strolled despondently, carrying a rifle by its middle.*” (Conrad, 2018, p.19) / “*Вони проминули мене дюймів за шість, навіть не глянувши, із кам’яною байдужістю, властивою цим нещасним дикунам. За ними, тримаючи на плечі гвинтівку, сумно сунув один із “неофітів” – цей виродок нового ладу.*” (Conrad, 2021, p.15)

The juxtaposition of the individual holding the rifle with this description intensifies the contrast between the oppressive environment and the individual ensnared by colonial forces. This imagery captures a momentary snapshot, emphasizing the emotional resonance of the scene, aligning with the

impressionistic tendencies in literature that focus on fleeting sensations and subjective experiences. In the English text, the phrase *complete, deathlike indifference of unhappy savages* is translated into Ukrainian as *із кам'яною байдужістю, властивою цим нещасним дикунам*, which successfully retains the original emotional impact. The use of *stone-like indifference* in the Ukrainian version adds a nuance of coldness and detachment, subtly modifying the noun *indifference* while preserving the meaning and emotional load. The Ukrainian term *неофіт*, which is suggested as a correspondence to *the reclaimed* in English, adds a deeper sense to the meaning: *неофіт* typically refers to someone newly converted to a religion, particularly Christianity, and in this context, it implies a transformation or reclamation, suggesting a departure from the individual's former state. This choice reinforces the idea of a change brought about by external forces, emphasizing the transformative impact of colonial power. It enriches the depiction of the characters, highlighting their altered status or condition within the narrative.

The use of adjectives *somber*, *stately*, and *sinister* generates a vivid and emotionally charged depiction of the painting (8):

- (8) “*The background was somber – almost black. The movement of the woman was stately, and the effect of the torchlight on the face was sinister.*” (Conrad, 2018, p. 29) / “*Тло було темне, майже чорне. Жінка рухалася статечно, і щось лиховісне було в її обличчі, освітленому тим смолоскипом.*” (Conrad, 2021, p. 25)

The focus on the interplay of light and shadow, along with the personification of the woman holding a lighted torch, creates a subjective and immediate impression of the scene. This language captures a transient moment, aligning with the impressionistic qualities prevalent in literature. The translation accurately conveys the sense of darkness and near-blackness in the background. However, the choice of *темне* instead of *somber* offers a more straightforward description, slightly diverging from the subtler tone of the original English word. Similarly, the English phrase *the effect of the torchlight on the face was sinister* translated as *і щось лиховісне було в її обличчі, освітленому тим смолоскипом* with the addition of *освітленому тим смолоскипом* introduces a more specific reference to the torch, thereby intensifying the imagery.

The Ukrainian translation effectively captures the essence of the original English passages, preserving their core meanings, atmospheres, and thematic intentions. It skillfully conveys the vivid imagery, emotional tones, and nuances of the text, allowing Ukrainian readers to experience the work in a way that resonates with their language and cultural context. While consistently faithful to the source text, the translation also introduces subtle variations in expression, vocabulary, and tone, enriching the Ukrainian text. This balance between fidelity to the original and adaptive changes results in a translation that not only conveys the intended meanings but also evokes similar emotional responses. The analyzed excerpts display impressionistic elements, characterized by rich sensory descriptions, atmospheric imagery, a focus on subjective perception, and, at times, playful language, further aligning the translations with the principles of Impressionism in literature.

### 5. Mykhailo Kotsiubynskyi and Joseph Conrad: similarities and differences

Both Conrad and Kotsiubynskyi employ highly visual, graphic representations of physical landscapes and the cultural ethos of colonized or peripheral regions. Their prose captures the complexity of natural and social environments, while also delving into the psychological depths of their characters. This dual focus enables the writers to reflect not only the external realities of colonial encounters but also the inner dilemmas of individuals shaped by them, combining impressionistic imagery with psychological insight.

Conrad, born on the territory of present-day Ukraine, in a space historically marked by imperial domination and cultural hybridity, approaches colonial themes with an awareness of displacement and marginality. His multi-cultural roots visibly shaped this style. Born in Berdychiv (today in

Ukraine) into a Polish noble family, Conrad was deeply influenced by the Romantic literary tradition of Mickiewicz and Słowacki read to him by his father and by the sensorial experiences of the Second Polish Republic Borderland (*Kresy Wschodnie*) environment. Polish critics, including Andrzej Busza (Busza, 2024) have emphasized how this 'Polish literary baggage' informed Conrad's narrative sensibility and thematic concerns. Furthermore, contemporary reflections highlight Conrad's acute awareness of his cultural in-betweenness and his capacity to observe and internalize the perspectives of multiple ethnic groups, a sensibility shaped by his upbringing in the multicultural borderlands.

Kotsiubynskyi, deeply engaged with Ukrainian folk culture and the realities of the empire, projects his own vision of colonial subjugation and resistance through symbolic landscapes and archetypal figures. His acute sensitivity to Ukrainian folk traditions and symbolic modes of rural life brings a complementary dimension to this comparative exploration. His evocative natural settings and psychological realism mirror Conrad's dual concern with landscape and mind, but are rooted in a Ukrainian cultural ethos of resistance and identity (Abubakar, 2016).

Both *Fata Morgana* and *Heart of Darkness* exhibit prominent impressionistic qualities, yet they diverge significantly in cultural context, thematic focus, and narrative form. Written at the height of European imperialism, Conrad's novella interrogates the exploitative foundations of *colonialism* in Africa, while Kotsiubynskyi's work emerges from the Ukrainian socio-political milieu of the Russian empire, exploring the struggles of rural people caught in cultural and economic upheaval. Despite these differences, the two texts converge in their *impressionistic style*, employing rich sensory descriptions, vivid imagery, and deeply subjective perspectives that foreground the inner lives and emotional states of their characters. Both writers cultivate atmosphere through evocative language, drawing readers into immersive moods and settings that heighten the psychological intensity of their narratives. They also share a preoccupation with dark themes, though approached from distinct vantage points: *Fata Morgana* examines the emotional toll of political turmoil and the yearning for autonomy, while *Heart of Darkness* exposes the moral corruption at the core of European imperialism and the unsettling depths of human nature. Yet their divergences are equally telling. Kotsiubynskyi grounds his work in the Ukrainian landscape, weaving a fluid, introspective narrative that reflects both the beauty and hardship of rural life, whereas Conrad situates his tale in the Congo and frames it through Marlow's retrospective account, creating a layered narrative that extends beyond individual experience. Ultimately, *Fata Morgana* critiques the oppressive conditions of the Russian empire, while *Heart of Darkness* confronts the brutal realities of colonialism in Africa. Together, these works illustrate how impressionistic techniques can illuminate vastly different cultural realities, each contributing uniquely to the development of modern literature.

## 6. Conclusions

This research examined the commonalities and distinctions between Ukrainian and English Impressionism, with a focus on the unique features of Mykhailo Kotsiubynskyi's *Fata Morgana* and Joseph Conrad's *Heart of Darkness*, as well as their corresponding translations. It established a framework for understanding how Impressionism, shaped by distinct cultural and historical contexts, manifests in both traditions while sharing stylistic and thematic affinities. The study highlighted the movement's evolution in Ukrainian and English literature, tracing its defining features – subjectivity, sensory detail, fragmented structure, and symbolic depth and examining how these are preserved or transformed in translation. By comparing cultural sensibilities, linguistic nuances, and literary techniques, the research underscored both the universal qualities of Impressionism and its localized expressions. Special attention is given to how the subtleties of Ukrainian Impressionism are conveyed across languages and how Conrad's work embodies impressionistic traits within the context of European Imperialism.

Special attention is given to how the subtleties of Ukrainian Impressionism – its rural imagery, psychological intimacy, and culturally rooted symbolism are negotiated in translation without losing their emotional resonance. At the same time, the analysis shows how Conrad's impressionistic

techniques, such as shifting focalization and atmospheric ambiguity, reinforce his critique of European Imperialism and expose the moral instability at its core. The study also examines how translators preserve the delicate emotional textures and culturally specific nuances of Ukrainian Impressionism, ensuring that its sensory richness remains accessible across linguistic boundaries. In contrast, Conrad's work demonstrates how impressionistic fragmentation and subjective perception can be harnessed to illuminate the distortions and ethical disorientation produced by imperial power. Particular focus is placed on the strategies used to convey the fine-grained moods, symbolic layers, and sensory immediacy of Ukrainian Impressionism in translation. Meanwhile, Conrad's narrative reveals how impressionistic methods, especially atmospheric shading and psychological immediacy, serve to confront readers with the contradictions and moral blindness inherent in European imperialism.

This comparative analysis not only revealed the challenges and opportunities of cross-cultural interpretation but also emphasized Impressionism as a transnational movement. In doing so, it offered fresh insights into the interplay between language, culture, and artistic expression, while paving the way for future studies that might expand to other impressionistic works, languages, and interdisciplinary approaches.

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## КОЦЮБІНСЬКИЙ VS КОНРАД: ПЕРЕХРЕСНІ СТЕЖКИ ІМПРЕСІОНІЗМУ

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### Анотація

У статті здійснено порівняльне дослідження українського та англійського літературного імпресіонізму на матеріалі творів Михайла Коцюбинського «*Fata Morgana*» та Джозефа Конрада «*Heart of Darkness*». Спираючись на теорію літературного імпресіонізму та засади порівняльного літературознавства, дослідження аналізує, як автори з різних культурних та мовних середовищ використовують імпресіоністичні прийоми для відтворення психологічної глибини, сенсорного сприйняття та моральної складності. Розглянуто основні ознаки імпресіонізму, суб'єктивність, фрагментарність і насичену чуттєву образність, у контексті історичних, ідеологічних та естетичних координат модернізму, національної ідентичності та імперського досвіду.

Окрему увагу приділено перекладові як медіатору між мовами та художніми системами. Порівняння українсько-англійських і англо-українських перекладів показує, як імпресіоністичні відтінки – ритм, настрої, образність – зберігаються, змінюються або інтерпретуються наново, виявляючи труднощі відтворення естетичної атмосфери у міжкультурному контексті. Текстуальний і дискурсивний аналіз дає змогу простежити як збіги, так і розбіжності у способах творення образів, внутрішнього світу персонажів і зображення колоніальної чи периферійної реальності.

У підсумку імпресіонізм постає як транснаціональний естетичний феномен, що виходить за межі національних і мовних кордонів, поєднуючи український та англійський модернізми спільними художніми інтенціями. Дослідження пропонує новий міжкультурний підхід до осмислення імпресіонізму та його ролі у відтворенні складності людського досвіду в глобальному контексті.

**Ключові слова:** імпресіонізм, Михайло Коцюбинський, Джозеф Конрад, переклад, порівняльне літературознавство, міжкультурна інтерпретація.

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## ІНТЕРТЕКСТУАЛЬНИЙ МЕМ “ONE DOES NOT SIMPLY”: СХЕМИ КОНЦЕПТУАЛЬНОЇ ІНТЕГРАЦІЇ

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### Анотація

Метою статті є розширення аналітичного та експланаторного потенціалу теорії інтертекстуальності за рахунок застосування принципів та методології когнітивно-дискурсивної лінгвістики для врахування когнітивних механізмів встановлення міжтекстових зв'язків при формуванні інтертекстуально активних мультимодальних текстів та їхнього життєвого циклу. У дослідженні зроблена спроба відмовитись від суто описового підходу до аналізу текстів і натомість на прикладі інтертекстуально активного мультимодального тексту мему-макрокартинки “One does not simply” розглянути, які механізми концептуальної інтеграції та в який спосіб визначають процеси формування, інтертекстуального побутування, нарощування, занепаду та розпаду мему, та які саме вербальні/невербальні структури маніфестують такий процес смислотворення. Для досягнення поставленої мети в роботі пропонується та тестується процедура комплексного аналізу мультимодального мему-макрокартинки на всіх етапах його життєвого циклу в мережах, яка передбачає 1) дослідження лінгвального та екстралінгвального контексту утворення мему; 2) виділення його типологічних структурно-семантичних, мультимедійних та інших ознак та їхнє прототипування; 3) аналіз когнітивних операцій та механізмів концептуальної інтеграції, які формують прототипові структурно-семантичні ознаки мему та процеси смислотворення і інтертекстуальні зв'язки; 4) розгляд трансформації виявлених прототипових ознак на всіх етапах. Застосування запропонованої методики для аналізу формування та побутування мему-макрокартинки “One does not simply” виявило багатоетапність процесу концептуальної інтеграції, внаслідок якого утворюється досліджуваний мем, феномен смислотворення завдяки прямому та зворотньому мапуванню інтегрованих ознак, нарощування отриманої інтегративної структури завдяки снігоклонуванню та іншим трансформаціям та втрата мемом своєї мультимодальності та прецедентності на кінцевому етапі життєвого циклу. Проведений аналіз продемонстрував, що вербальні та невербальні компоненти структури мему-макрокартинки не є випадковими та відбивають глибинні процеси концептуальної інтеграції і пристосовані до інтертекстуального побутування.

**Ключові слова:** інтертекстуальність, концептуальна інтеграція, макрокартинка, мем, мультимодальність, прецедентний текст.

### 1. Вступ

На сучасному етапі розвитку комунікації одним із найяскравіших повсюдних мультимодальних текстів є інтернет-мем. Попри активний дослідницький інтерес, який стосується, передусім, когнітивних аспектів формування мемів (див., наприклад, роботи Barczewska, 2020; Bondarenko, 2020, 2021; Majdzińska-Koczorowicz & Ostanina-Olszewska,

2024; Zenner & Geeraerts, 2018), інтертекстуальні та лінгвостилістичні фактори формування мемів та їхній життєвий цикл потребує більшої уваги з точки зору когнітивної лінгвістики та теорії інтертекстуальності / інтермедіальності / прецедентності (надалі – теорії інтертекстуальності).

Водночас, у більшості наявних дослідницьких робіт в галузі теорії інтертекстуальності як вітчизняних (див., зокрема, Bilovus, 2003; Merkotan, 2016; Petrenko, 2021; Solovyova, 2022; Velykoroda, 2012), так і зарубіжних авторів (див., зокрема, Barthes, 1975; Piégay-Gros, 2022; Riffaterre, 1984), загалом спостерігається сфокусованість на описовому підході до міжтекстових зв'язків та наслідків актуалізації прецедентних феноменів в досліджуваному тексті. Такий дослідницький ракурс знижує експланаторний потенціал теорії інтертекстуальності і обмежує можливості її застосування на теренах панівної в сучасній лінгвістиці когнітивно-дискурсивної парадигми. Описовий підхід, притаманний теорії інтертекстуальності, фокусує її ресурси передусім на дослідженні розмаїття окремих текстів, у той час, як її методологічні засади потребують узгодження в річищі сучасної когнітивно-дискурсивної парадигми.

Застосування описового підходу до дослідження інтертекстуальних зв'язків зумовлює розгляд тексту “*One does not simply*” як локусу актуалізації відбитків попередніх (прецедентних) текстів, які утворюють інтертекст, що набуває багатьох форм: цитати, алюзії, ремінісценції, прецедентні оніми тощо. Результатами описових досліджень переважно стають номенклатури та класифікації виявленого інтертексту та інтертекстуальних взаємодій: наприклад, п'ятичленна номенклатура типів міжтекстових відносин (за концепцією Genette, 1997) або концептуально аналогічна їй семичленна номенклатура (за концепцією Miola, 2014) та ін. У межах описової концепції інтертекстуальності основною властивістю інтертекстуальних відносин стає їхня суб'єктивність: залежність кількості та номенклатури виявленого в такому тексті інтертексту від натренованості сприйняття та ерудиції реципієнта тексту. Очевидно, що в річищі описової концепції інтертекстуальності неможливо виділити універсальну одиницю/і аналізу та дослідити глибинні механізми міжтекстових взаємодій, які зумовлюють все розмаїття проявів інтертекстуальності. Натомість у вітчизняних описових дослідженнях інтертекстуальності простежується тенденція ставити за мету здійснення атрибуції виявленого інтертексту та побудову його класифікації за жанровим, хронологічним, тематичним, функціональним критерієм тощо (див., наприклад, дослідження Koroļyova, 2012; Merkotan, 2016; Sakharuk, 2011; Solovyova, 2022 та ін.). У роботах зарубіжних авторів описовий підхід до дослідження інтертекстуальності набуває форм докладного лінгвостилістичного аналізу окремого твору (див., наприклад, Barthes, 1981; Riffaterre, 1981). Попри цінність описових досліджень для вивчення окремих текстових творів та творчого доробку їхніх авторів, такий ракурс аналізу інтертекстуальних відносин не враховує їхні загальні глибинні механізми, натомість фокусується на розмаїтті наслідків їхньої дії.

Відмінністю теоретичного підходу в цій роботі є розгляд інтертекстуальності не емблематично, а як когнітивно обумовленого комунікативно опосередкованого потенціалу, що уможливує утворення та актуалізацію прецедентних феноменів в процесі створення дискурсу (визначення останнього див. (Shevchenko, 2006)). Дослідити механізми встановлення міжтекстових зв'язків, та їхню реалізацію в комунікації можна на теренах когнітивно-дискурсивної парадигми в лінгвістиці, першими розробниками якої стали зокрема Дж. Лакофф (Lakoff, 1987), Р. Ленекер (Langacker, 1987), Ч. Філмор (Fillmore, 1982), Ж. Фокон'є та М. Тернер (Fauconnier & Turner, 2002). Когнітивна лінгвістика постулює, що в основі будь-яких мовленнєвих процесів, зокрема встановлення міжтекстових зв'язків, лежать цілісні концептуальні структури взаємопов'язаних елементів, що зберігають та впорядковують мовні та позамовні знання. Водночас, теорія дискурсу наголошує, що такі когнітивні структури втілюються в мовленні, зануреному в контекст, визначеному окремими фізичними, ментальними та соціально-культурними факторами (Langacker, 2001, p. 145). Таким чином,

когнітивно-дискурсивна парадигма у застосуванні до теорії інтертекстуальності надає їй можливість вийти за межі літературознавчого і лінгвостилістичного аналізу, сфокусованого виключно на передумовах та наслідках міжтекстових взаємодій вербальних текстів, та досягнути весь цикл утворення та функціонування окремих інтертекстуальних / інтермедіальних / прецедентних феноменів. Когнітивно-дискурсивний ракурс теорії інтертекстуальності дозволяє розглядати міжтекстові зв'язки як когнітивно-дискурсивний феномен, різновид комунікативних та пізнавальних процесів, опосередкованих мовою.

Такий методологічний поворот теорії інтертекстуальності означає, що у фокусі інтертекстуального аналізу знаходяться:

- 1) вербальний або мультимодальний фрагмент, представлений мовленнєвими одиницями та/або мультимодальними структурами, який актуалізує відповідні прецедентні феномени як концептуальні структури (лінгвостилістичний/мультимодальний аналіз);
- 2) концептуальні сутності (прецедентні феномени та ін.) і механізми їхньої взаємодії (аналіз на теренах теорії концептуальної інтеграції);
- 3) мінімальний потрібний вербальний та екстралінгвальний контекст ситуації актуалізації відповідного прецедентного феномену в комунікації (дискурсивний аналіз);
- 4) контекст відповідної лінгвокультури та художньої (літературної/кінематографічної/образотворчої тощо) традиції, в межах якої відбувається встановлення міжтекстових зв'язків, який формує їхню значущість (лінгвокультурологічний, літературознавчий тощо аналіз).

Таким чином, традиційна методика інтертекстуального аналізу має трансформуватись відповідно до нової когнітивно-дискурсивної методології теорії інтертекстуальності, яка все ще знаходиться в процесі формування.

У дослідженні перевіряється *гіпотеза*, що формування та інтертекстуальне побутування мультимодального тексту, зокрема мему, спирається на когнітивно-комунікативні механізми, які визначають доступні для безпосереднього спостереження лінгвостилістичні та мультимодальні структури такого тексту.

**Об'єктом** аналізу є мем-макрокартинка “*One does not simply*” як учасник та осередок реалізації інтертекстуальної взаємодії на різних етапах свого життєвого циклу, а **предметом** – схеми концептуальної інтеграції, які формують його прототип та варіанти, а також вербальні та невербальні складники таких мемів як актуалізатори дії означених механізмів.

**Метою** дослідження є встановлення схем концептуальної інтеграції інтертекстуального мультимодального мему “*One does not simply*” на базі теорії інтертекстуальності шляхом застосування принципів та методології когнітивно-дискурсивної лінгвістики для врахування когнітивних механізмів встановлення міжтекстових зв'язків при формуванні інтертекстуально активних мультимодальних текстів та їхнього життєвого циклу.

**Завдання** дослідження відповідають пунктам запропонованій в статті методики аналізу:

- 1) дослідити та узагальнити лінгвальний та позалінгвальний контекст формування відповідного мультимедійного текстового продукту;
- 2) виявити перший/і варіант/и мему і сформулювати корпус матеріалу дослідження;
- 3) виділити та систематизувати типологічні структурно-семантичні, мультимедійні та когнітивні ознаки досліджуваного мему і встановити їхній прототип;
- 4) шляхом аналізу когнітивних операцій та механізмів блендінгу, які утворили досліджуваний мем і його варіанти, побудувати схеми процесів концептуальної інтеграції;
- 5) відстежити трансформації прототипової структури мему протягом його інтертекстуального побутування на всіх етапах життєвого циклу, зокрема при зміні мемом середовища побутування;
- 6) узагальнити отримані дані, сформулювати висновки дослідження.

**Матеріал** дослідження представлений корпусом із 50 прикладів снігоклонів (від англ. “*snowclone*” – добре відомі фрази, наприклад, цитати або прислів'я, які змінюються багатьма мовцями в усній та/або письмовій комунікації (Oxford Learner's Dictionary)) та трансформацій

Інтернет-мему макрокартинки “*One does not simply*”, утворених на матеріалі мультимодального кіномонологу Боромира (*Boromir*), персонажа роману британського письменника Дж.Р.Р. Толкіна “*Lord of the Rings*” (Tolkien, n.d.) у виконанні актора Шона Біна (*Sean Bean*) з однойменної екранізації продюсера та режисера П. Джексона (Jackson, 2001), отриманих методом суцільної вибірки з веб-сайтів Meming Wiki, Medium та мережі Інтернет. Окремий корпус складається із прикладів назв наукових статей різної тематики, в яких актуалізується прецедентне висловлення “*One does not simply*”. Вибір матеріалу зумовлений високою прецедентністю обраного мема-макрокартинки для англомовної лінгвокультурної спільноти, що засвідчується великою кількістю її снігоклонів та їхньою активною циркуляцією в інтернет-комунікації приблизно з 2004 р. і дотепер, а також лаконічним мультимодальним форматом, зручним для проведення запланованого аналізу.

Запропонований дослідницький підхід, сформований на теренах когнітивно-дискурсивної теорії інтертекстуальності забезпечує перспективність подальшої розробки цієї тематики, адже дозволяє експлікувати процеси утворення та функціонування всіх складників та продуктів міжтекстових взаємодій: прецедентних феноменів, утворених мультимодальних текстів та інтертексту.

## 2. Теоретико-методологічне підґрунтя

У когнітивно-дискурсивній теорії інтертекстуальності міжтекстові взаємодії можна розглядати в термінах теорії концептуальної інтеграції, яка експлікує формування та мовленнєву актуалізацію концептуальних структур прецедентних текстів. Залежно від цілей аналізу, прецедентні феномени як концептуальні сутності моделюються як образ-схеми, ментальні простори, лінгвокультурні концепти та інші структури упорядкування та зберігання знань. Такі структури є результатом когнітивно-комунікативної діяльності, зокрема процесів концептуальної інтеграції (Fauconnier & Turner, 2002, р. 40-41, 47-50 та далі), в яких вони також беруть участь як вхідні простори (*input spaces*), а також результатом яких вони стають (*blends*). Для концептуальної інтеграції потрібно щонайменше два вхідні простори, між порівняними елементами яких утворюються зв'язки – процес, що позначається терміном “*cross-space mapping*” (міжпросторове мапування). Пов'язані співставні елементи вхідних просторів фіксуються в загальному/родовому просторі (*generic space*) і, своєю чергою, мапуються на відповідні елементи вхідних просторів. Відібрані маповані елементи утворюють інтегративний простір (*blend*). На відміну від загального/родового простору, на який мапуються відібрані з вхідних просторів окремі порівнянні елементи, в інтегративному просторі відбувається процес смислотворення – інноваційного емерджентного структурування відібраних та мапованих елементів, коли з мапованих елементів утворюється нова концептуальна структура, яка може знаходити своє втілення також у нових вербальних, невербальних та мультимодальних продуктах. Такі (мультимодальні) текстові продукти концептуальної інтеграції функціонують в стані (потенційно) нескінченного “прогривання” та нарощування (*elaboration*), що й зумовлює нескінчену інноваційну полірезультативність процесу концептуальної інтеграції – конструктивну творчість (*construal*) (пор. “прояв нашої здатності розуміти і відобразити одну і ту саму ситуацію в альтернативні способи”) (Langacker, 2008, р. 43).

Попри свої креативні витoki та можливість модифікацій, (мультимодальні) текстові продукти концептуальної інтеграції, особливо ті, що на початку свого виникнення вважаються “вірусними”, можуть засвоюватись, стабілізуватись та укорінюватись (*to be entrenched*, див. Fauconnier & Turner, 2002, р. 50) у відповідній лінгвокультурній спільноті, доєднуватись до її корпусу прецедентних феноменів, і, своєю чергою, ставати вхідними просторами для нових операцій концептуальної інтеграції. Такі процеси, що становлять етапи життєвого циклу прецедентно-активного (мультимодального) тексту, який завершується втратою прецедентності та клішованих способів мовленнєвої актуалізації.

Важливо, що для концептуальної інтеграції у вхідних просторах для мапування відбираються лише окремі елементи. Процес відбору здійснюється на підставі основних когнітивних операцій конструювання (*construal*), які можна узагальнити таким чином (Langacker, 2008, p. 55-73; Croft & Cruise, 2004; Krueger, 2018; Bondarenko, 2020):

- 1) увага/салієнтність та фокусування (“*specificity/salience*”, “*focusing*”; стосується рівня точності та деталізації характеристики конкретної ситуації і вибору концептуального змісту для лінгвальної презентації, а також його пріоритизації);
- 2) перспектива (“*perspective*”; передбачає реалізацію певної точки зору (“*vantage point*”);
- 3) оцінювання/порівняння (“*judgement/comparison*”, пов’язані із категоризацією, метафоризацією);
- 4) композиція/гештальт (“*composition/gestalt*” – структурна схематизація, масштаб, обмеженість).

Переважає більшість текстів будь-якої лінгвокультури є мультимодальними, тобто вони є результатом поєднання вербальних та невербальних складників (аудіодоріжки, статичного або динамічного візуального складнику). На сучасному етапі розвитку комунікації, зокрема мережевої, одним з центральних різновидів мультимодальних текстів є інтернет-меми. Спираючись на низку досліджень (Barczewska, 2020; Bondarenko, 2020; Bondarenko, 2021; Majdzińska-Koczorowicz & Ostanina-Olszewska, 2024; Shifman, 2013; Shifman, 2014; Wiggins, 2019), інтернет-мем розумімо як стислий за обсягом мультимедійний текст, який має високу прецедентність (лінгвокультурну значущість, смислову навантаженість, когнітивну та емоційну цінність та активну циркуляцію у спільноті користувачів-комунікантів – вірусність). Серед інтернет-мемів можна виділити окремі жанри, одним з яких є жанр макрокартинки.

Мультимодальні складники мемів можуть бути поєднані в тексті у різний спосіб, проте можна виділити два базові варіанти їхніх взаємодій:

- 1) ілюстровані тексти (термін Дж. Стівенса (Stephens, 1994)), в яких невербальний та вербальний компоненти семантично досить автономні, причому вербальна частина має більшу автономію, а невербальні (образотворчі) елементи тексту виявляються факультативними, відіграють другорядну роль, ілюструючи, дублюючи або несуттєво доповнюючи образи, створені вербально, тобто виконують суто ілюстративну функцію (Р. Барт пропонує для таких зображень термін “*anchorage*” – “якір”(Barthes, 1986));

- 2) суто мультимодальні тексти, в яких невербальний та вербальний компоненти утворюють єдине структурно-семантичне ціле та не сприймаються адекватно в ізоляції один від одного, тут невербальний компонент виконує смислотвірну або “конструктивну”(Martyniuk, 2025) функцію (в термінах Р. Барта: “*relay*” – “перемикач”(Barthes, 1986)).

Мультимодальні тексти мемів демонструють приклади взаємин як першого, так і другого різновидів (див., наприклад, (Barczewska, 2020)), які також можуть змінюватись протягом життєвого циклу мему.

Як суто вербальні, та і мультимодальні тексти, що утворюються внаслідок реалізації механізмів концептуальної інтеграції, мають різний ступінь фіксованості і стабільності, та, відповідно, особливості життєвого циклу і потенціал до еволюціонування. Прецедентний потенціал, особливості та тривалість життєвого циклу мему та напрямки його еволюції не піддаються точному прогнозуванню, проте аналіз фактичного матеріалу може сприяти виявленню основних тенденцій.

Зважаючи на зазначене вище, пропонуємо таку процедуру аналізу життєвого циклу мему як прецедентного мультимодального тексту, який утворюється внаслідок процесів концептуальної інтеграції та має інтертекстуальне, переважно мережеве, побутування:

- 1) дослідження та узагальнення лінгвокультурного / літературного / художнього / історичного / соціального підґрунтя для формування відповідного мультимедійного текстового продукту;

2) збір прикладів мережевого побутування мему з можливістю їхньої хронологічної та жанрово-стилістичної диференціації;

3) виявлення первинного варіанту мему; виділення типологічних структурно-семантичних, мультимедійних та ін. ознак досліджуваного мему (за потреби – з їхньою діахронічною диференціацією) для з'ясування їхнього внеску в конструювання загального смислу; прототипування;

4) аналіз когнітивних операцій та механізмів концептуальної інтеграції, внаслідок реалізації яких утворився відповідний мем та його варіанти, створення схеми відповідної структури концептуальної інтеграції (бленду);

5) відстеження трансформацій прототипової структури мему як на концептуальному рівні, так і на рівні лінгвостилістичної/мультимодальної організації, які відбуваються внаслідок його інтертекстуального побутування протягом всього його життєвого циклу, зокрема при зміні мемом середовища побутування (на матеріалі снігоклонів та істинних варіантів мему);

6) узагальнення отриманих даних, формулювання висновків та їхній порівняльний аналіз з наявними концепціями / висновками.

Результати застосування сформованої процедури аналізу, протестованої на матеріалі корпусу варіантів макрокартинки “*One does not simply*”, наведені нижче.

### 3. Результати дослідження інтернет-мему “*One does not simply*”

Інтернет-мем “*One does not simply*”, який належить до жанру макрокартинок, за відношенням його вербального та невербального складників є суто мультимодальним текстом. Кількість його варіантів, які циркулюють, та ріпостів, наявність снігоклонів та трансформів свідчить про його високий рівень прецедентності в англомовній мережевій спільноті. Результати лінгвокультурологічного аналізу ситуації формування та побутування мему-макрокартинки “*One does not simply*” доводять його атипово довгий та активний життєвий цикл – понад 21 рік. За даними словників мемів (Memes dictionary, n.d. та Meming Wiki), перший інтернет-мем “*One does not simply*” з'явився на форумах у 2004 р., за три роки після виходу у прокат першої частини кінотрилогії реж. Р. Jackson “*The Lord of the Rings*” – “*The Fellowship of the Ring*” (2001 р.), один з епізодів якої (промова Боромира (*Boromir*) на нараді в Елронда) надав матеріал для формування цієї макрокартинки. Словники мемів також засвідчують інші стимули подовження життєвого циклу макрокартинки “*One does not simply*”, адже піку популярності цей мем досяг лише в 2012 р., на що вплинув вихід в прокат ще однієї культової стрічки за участі Ш. Біна (*Sean Bean*) – “*Game of Thrones*”, в якій актор втілював образ візуально аналогічний образу Боромира (*Boromir*) з першої частини кінотрилогії П. Джексона. Подальшій активній циркуляції досліджуваної макрокартинки сприяв вихід на екрани нового фільму зі всесвіту Середзем'я Дж. Р. Р. Толкіна – “*The Hobbit: An Unexpected Journey*” у грудні 2012 р. Таким чином зміна факторів комунікативної ситуації впливає на інтертекстуальне побутування прецедентного феномену, стимулюючи його комунікативну активізацію або занепад. Саме суттєва прецедентність мультимодальної кінострічки “*The Lord of the Rings*” режисера П. Джексона забезпечила також прецедентність макрокартинці “*One does not simply*” і зумовила їхній зворотний вплив на вихідний твір Дж. Р. Р. Толкіна шляхом мапування окремих ознак на вихідний літературний образ Боромира, який в оригінальному тексті створюється суто вербально:

- (1) *There was a tall man with a fair and noble face, dark-haired and grey-eyed, proud and stern of glance. His garments were rich, and his cloak was lined with fur and he had a collar of silver in which a single white stone was set; his locks were shorn about his shoulders. On a baldric he wore a great horn tipped with silver that now was laid upon his knees.* (J.R.R. Tolkien, “The Council of Elrond” from “The Lord of the Rings”)

Наведений вище вербальний текст лише опосередковано став джерелом формування макрокартинки “*One does not simply*”. Варто зазначити ускладненість та багатоетапність процесу формування досліджуваного мему, який відбиває відповідний процес формування прецедентності: адже прецедентна ситуація кінопромови Боромира відсутня у першоджерелі – епосі Дж. Р. Р. Толкіна “*The Lord of the Rings*” – і є доповненням до цього прецедентного образу. Контекст утворення макрокартинки “*One does not simply*” можна унаочнити на схемі (див. Схему 1), яка демонструє відсутність безпосереднього генетичного зв’язку досліджуваного мему з вербальним першоджерелом.



Схема 1. Генетичний зв’язок джерел утворення макрокартинки “*One does not simply*”.

Макрокартинки можна виділити в окремий жанр мемів, типологічні риси композиційної, візуальної, лексичної та граматичної структури якого забезпечують його впізнаваність. На основі докладного аналізу фактичного матеріалу E. Zenner та D. Geeraerts сформували таку схему-прототип характеристик макрокартинки як типу мультимедійного тексту (сірим позначені безпосередньо видимі невербальні частини, чорним – заголовок, невидимий на мемі, проте який передбачається, а білим – аналітичні категорії) (Zenner & Geeraerts, 2018, p. 175):

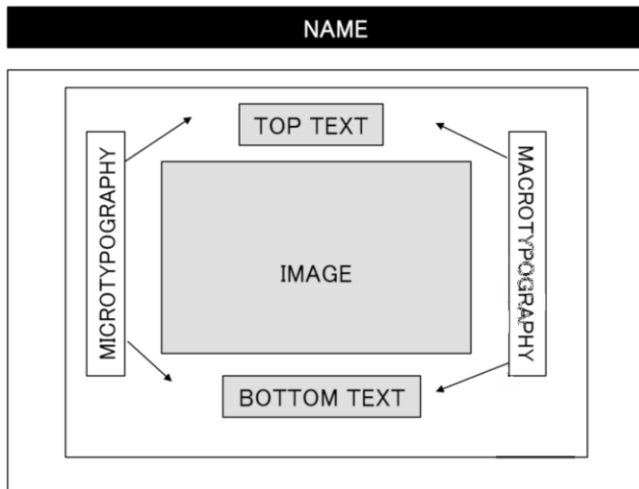


Схема 2. Прототип мему-макрокартинки як мультимодальний конструкт (Zenner & Geeraerts, 2018, p. 175).



Рис. 1. Прототиповий варіант реалізації мему-макрокартинки “One does not simply” (Meming Wiki).

Варіант реалізації мему-макрокартинки “One does not simply” (рис. 1) демонструє актуалізацію всіх базових складників прототипу: 1) відсутність експліцитної назви (*name*); 2) текст на горі (*top text*), надрукований шрифтом Impact великими літерами білого кольору (про прототиповість цього шрифту для мемів див. (Zenner & Geeraerts, 2018, p. 176; Brideau & Berret, 2014)); 3) центральне поле займає фото з фокусом на обличчі (*image*); 4) текст внизу (*bottom text*) оформлений аналогічно тексту на горі. Закономірно, що через незаповненість слота назви макрокартинки (*name*), функцію імені цього мему виконує текст нагорі (*top text*), який займає місце заголовка. Саме тому назва досліджуваного мему-макрокартинки утворена фрагментом безособового заперечного речення без смислового предиката, який перенесено до тексту внизу: “One does not simply” (див., наприклад, словники мемів “Memes Dictionary”, “Meming Wiki” та ін.). Вербальний текст макрокартинки нагорі та внизу займає сильні межові позиції, проте висуненість (*foregrounding*) цих двох частин різна. Сильна позиція нагорі переважає нижню позицію, текст нагорі надає тематичну інформацію і задає структурно-семантичну рамку мему, а текст внизу представляє змінну, рематичну, інформацію, яка забезпечує трансформаційний потенціал.

Як показав аналіз корпусу прикладів, утворення досліджуваного мему-макрокартинки не є процесом суто міметичним: це не просте відтворення кадру кінострічки П. Джексона 2001 р. На прототиповій макрокартинці пальці на правій руці Боромира складені в кільце і супроводжуються підписом “One does not simply // walk into Mordor”. Проте у кінострічці означений примітний жест Боромир використовує на позначення круглого ока Саурона (*Sauron*), головного антагоніста трилогії (пор. вербальний супровід на Рис. 2 (а, б), і цей кадр супроводжується іншим вербальним текстом:



а.



б.

Рис. 2 (а, б). Кадри промови Боромира, на базі яких сформувались (а) вербальний та (б) невербальний складники мему “*One does not simply*” (Jackson, 2001).

З прикладу 2 транскрибованої аудіодоріжки кінострічки також видно, що зображення та висловлення, на основі яких утворився мем-макрокартинка “*One does not simply*”, розсинхронізовані, прецедентне висловлення супроводжує непрецедентне зображення Боромира, а його прецедентний образ супроводжується непрецедентним висловленням:

(2) *One does not simply walk into Mordor. Its black gates are guarded by more than just Orcs. There is evil there that does not sleep. And the great Eye is ever watchful. It is a barren wasteland. Riddled with fire and ash and dust. The very air you breathe is a poisonous fume. Not with ten thousand men could you do this. It is folly!* (The Lord of the Rings: the Fellowship of the Ring)

Можна стверджувати, що вибір як зображення, так і вербального складника для утворення мему-макрокартинки “*One does not simply*” ґрунтується на когнітивній операції салієнтності (*salience*). Жест-кільце з п’яти пальців вмотивований, впізнаваний та привертає найбільшу увагу реципієнта у порівнянні з попередньо використаним жестом (піднятий напіврозкритий кулак). Своєю чергою, салієнтність вербального складника забезпечується авторським топонімом “*Mordor*”. Укорінений в індоєвропейській мовній традиції, цей топонім походить від давньоангл. лексеми “*mordor*”, яка означала “смертний гріх” (“*mortal sin*”) та пізніше “*murder*” (TolkienGateway, n.d.). Салієнтність забезпечується етимологією та фонетичною і графічною формою написання з великої літери, а також сильною кінцевою межевою позицією в реченні.

Попри поверхневу простоту прототипового мему, його утворення є результатом кількох етапів операцій концептуальної інтеграції, які можна представити низкою схем. Спочатку літературний образ Боромир, зовнішність якого актуалізується в романі Дж. Р. Р. Толкіном вербальним описом (див. приклад 1), перетворюється в екранізації П. Джексона на візуальний завдяки акторському перевтіленню Шона Біна (*Sean Bean*), виконавця ролі Боромира.

На схемі 3 узагальнено процес концептуальної інтеграції двох вхідних просторів (ВП 1 та ВП 2) у генеративному просторі (ГП), кінцевим результатом якого є утворення інтегративного простору (ІП), що формує параметри образу Боромира (і на подальшому етапі процесу концептуальної інтеграції слугує вхідним простором нового бленду).

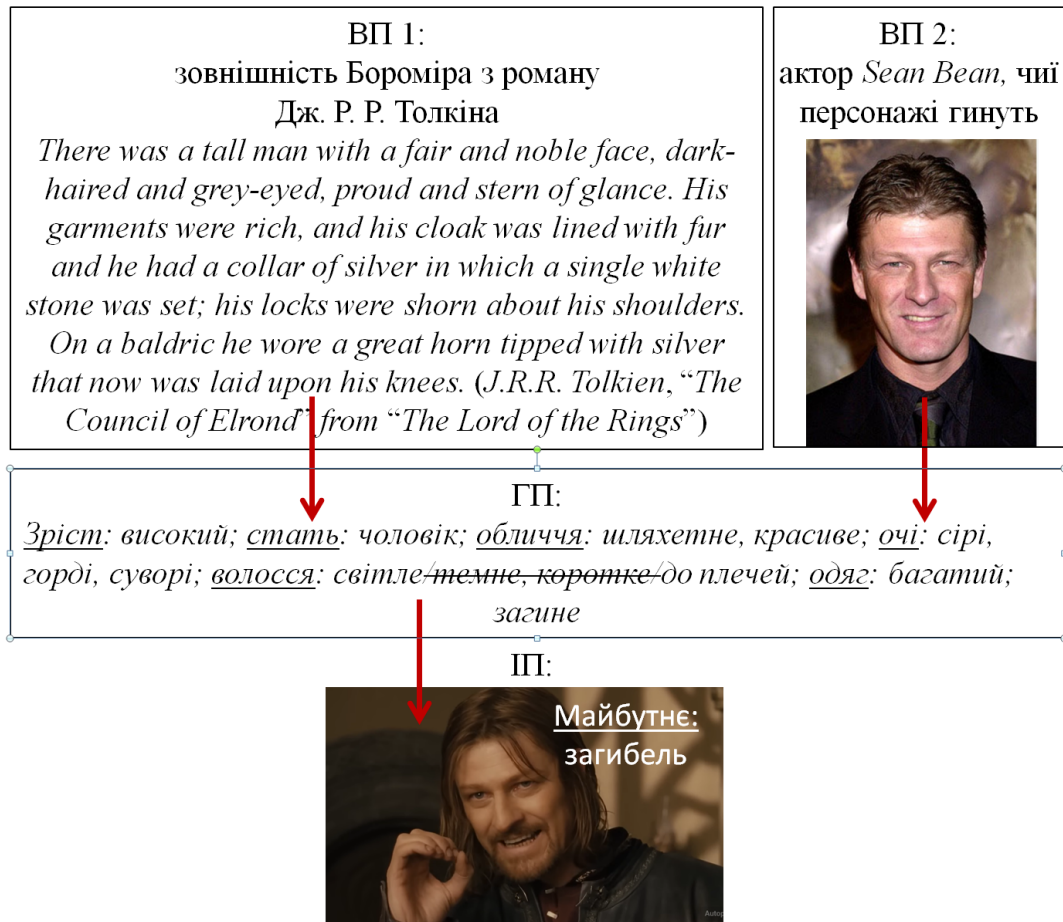


Схема 3. Схема формування прецедентного образу Боромира на матеріалі вербального тексту вихідного твору "The Lord of the Rings" Дж. Р. Р. Толкіна та однойменного мультимодального кінообразу у виконанні актора ІІІ. Біна.

Під час інтеграції ВП 1 та ВП 2 окремі їхні порівнянні елементи, що стосуються зовнішньої характеристики прецедентного образу *Boromir*, мапуються на генеративний простір ГП; при цьому категоріально споріднені, але непорівнянні характеристики (відмінний колір волосся) нейтралізуються: "dark-haired" у вербальному першоджерелі vs. світле волосся на фото актора (не вербалізується) викреслені на схемі ГП. Утворення концептуального бленду, який інтегрує одну з провідних характеристик ВП 2 – загибель практично всіх персонажів, яких грає ІІІ. Бін, – дозволяє також передбачити загибель Боромира. Цікаво, що процес мапування характеристик виявляється двоспрямованим, адже інтегративний простір формується на підставі ознак, мапованих від двох означених вхідних просторів, проте порівнянні ознаки, маповані на генеративний простір, мапуються в зворотній бік, на вхідні простори, недискриміновано. Це, зокрема, дозволяє ототожнювати актора ІІІ. Біна із його персонажем; уявити, що в Боромира з твору Дж.Р.Р. Толкіна світле волосся, а також вмотивовує такі питання, поширені в мережі Інтернет, як "Are Boromir and Ned Stark the same actor?"

Сформований внаслідок описаного процесу концептуальної інтеграції прецедентний образ Боромира стає вхідним простором на новому етапі формування передумов для виникнення досліджуваного мему-макрокартинки "One does not simply", як продемонстровано на схемі 4.



Схема 4. Схема другого етапу формування прецедентного образу Боромира.

На другому етапі концептуальної інтеграції (схема 4) прецедентний образ Боромира, який слугує одним із вхідних просторів (ВП 1), ускладнюється в процесі інтеграції мапованих характеристик іншого ВП, представленого образом Саурона (*Sauron*) як несплячого вогняного ока кулястої форми. Основними порівнянними ознаками, які мапуються до генеративного простору, є жест правиці Боромира, яким він ілюструє образ круглого вогняного ока ворога, і референт цього жесту – вогняна куля ока Саурона. Таке мапування уможливується завдяки вербальним структурам (безпосереднього вербального коментаря Боромира “*And the great Eye...*”, див. рис. 2б) та невербальним структурам (жест-коло Боромира на позначення відповідного референта). Інтегративний простір, що утворюється внаслідок другого етапу процесу концептуальної інтеграції, який створює підґрунтя для формування досліджуваного мему-макрокартинки, уможливує висновок про те, що частина тіла Боромира (правиця) йому не належить і репрезентує ворога, тож він частково поневолений Сауроном. Ця гіпотеза підтверджується сюжетною лінією як роману, так і його екранізації, коли Боромир правицею

тримає кільце ворога Саурона (ще один колоподібний елемент) на ланцюгу, який водночас символізує поневолення (бажанням мати кільце) та здатність опанувати свій недостойний імпульс.

Сформований внаслідок багаторівневого процесу концептуальної інтеграції прецедентний образ Боромира бере участь у формуванні макрокартинки “*One does not simply*” знову як вхідний простір (ВП 2). З ВП 1 на генеративний простір мапуються дві окремі ознаки: складність завдання, яка в мемі вербалізується усталеним словосполученням “*one does not simply*” (а) та номінацією дії (б).

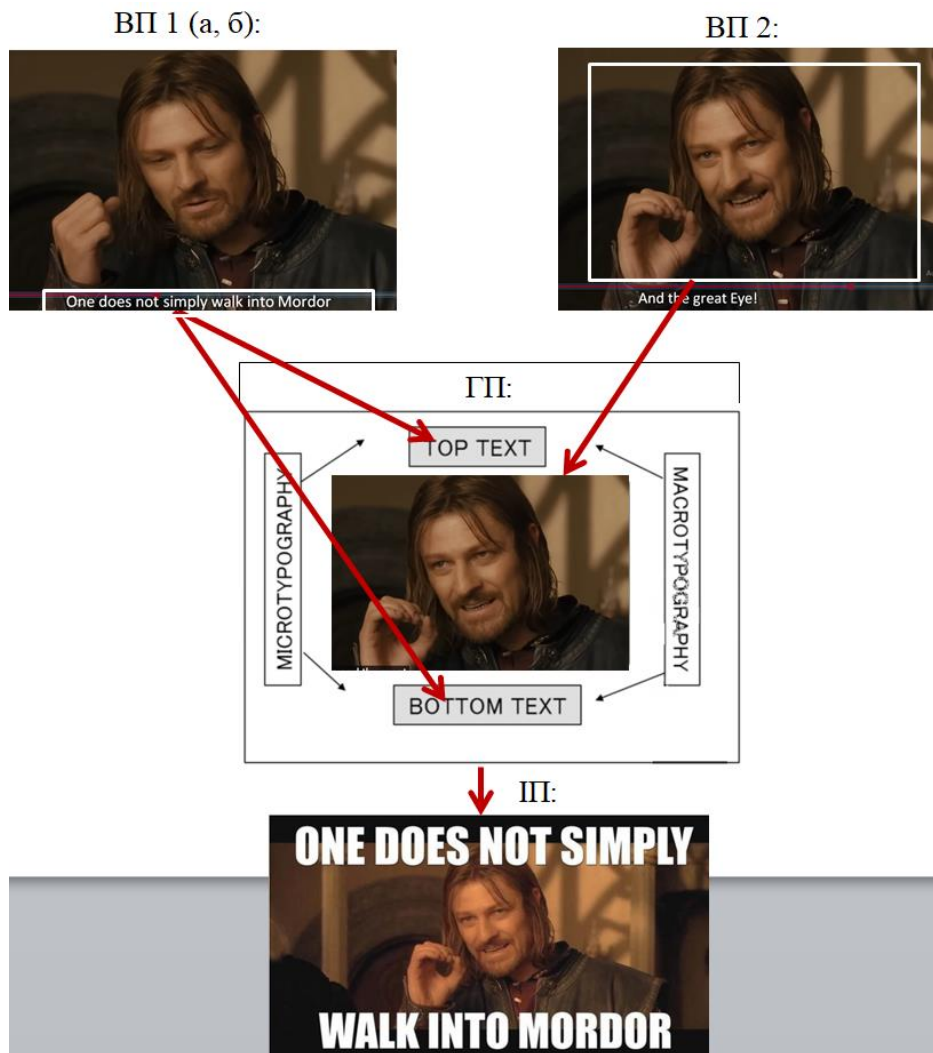


Схема 5. Утворення прототипового мему-макрокартинки “*One does not simply*” внаслідок процесу концептуальної інтеграції.

Проілюстрований схемою 5 процес концептуальної інтеграції застосовує продукти попередніх етапів блендінгу і є спробою синхронізувати відеоряд зі звукорядом і представити їх у прототиповому статично мультимедійному мемі-макрокартинці. У цьому сформованому мемі-прототипі візуальний складник є якорем, що посилює семантику вербального компонента, і водночас реле, яке конструює нове значення (жест-коло – небезпека, вказівка на референт-джерело небезпеки: “*the great Eye*”). Вербальний складник мему-макрокартинки утворюється простим реченням, в якому диференціація вербалізаторів елементів (а) та (б), посилюється композиційним розділенням на текст нагорі та текст внизу. Перша частина прецедентного висловлення, текст нагорі (а) “*One does not simply*” є тематичним, утворює

структурно-семантичну рамку та акцентує важкість завдання, висловленого текстом внизу (в прототиповому мемі – переміщення до смертельно небезпечної ворожої території (б) “*walk into Mordor*”).

Мережеве побутування мемів, зокрема досліджуваної макрокартинки, передбачає їхнє ‘нарощування’ (elaboration) та трансформування, мало обмежене часовими рамками. Переважний спосіб нарощування досліджуваного мему-макрокартинки – заміна одного вхідного простору, а саме трансформація його нижнього текстового поля (б). Зокрема, “*walk into Mordor*” утворює снігоклони, які я розумію як множинні неконгруентні трансформації одного компонента макрокартинки переважно змінної частини вербального компонента (рис. 3).



Рис. 3. Варіанти-снігоклони прототипового мему “*One does not simply*” із модифікованим нижнім текстовим блоком <https://www.fimfiction.net/blog/132852/one-does-not-simply-memes>

Комплекс процесів концептуальної інтеграції, який лежить в основі утворення досліджуваного мему-макрокартинки “*One does not simply*”, не передбачає конкретних семантичних обмежень щодо змінного елемента, що робить можливості нарощування цієї макрокартинки безмежними. Заміна тексту в нижньому полі макрокартинки “*One does not simply*” відбувається за принципом еквонімії: будь-яка предикативна конструкція, інтегрована до мему замість прототипової “*walk into Mordor*”, набуває контекстуальне семантичне значення “важке завдання” (див. Рис. 3). Процес нарощування автоматизований настільки, що дозволив створити онлайн генератор снігоклонів макрокартинки “*One does not simply*”:

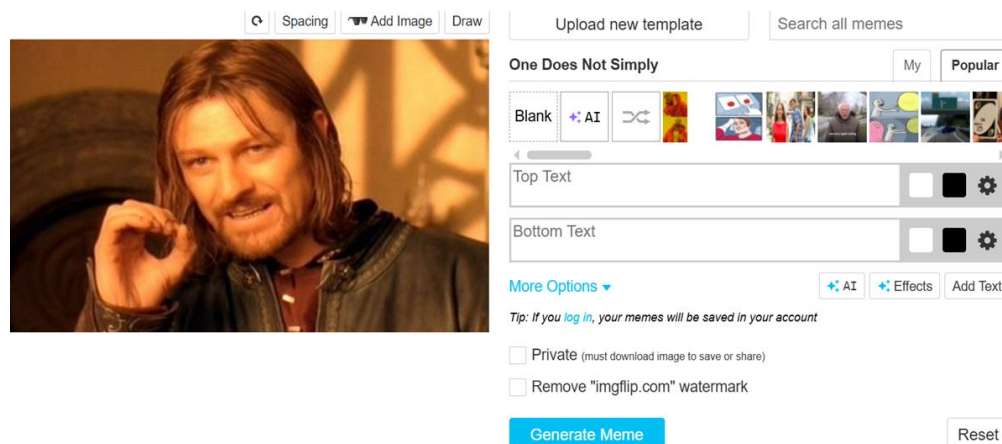


Рис. 4. Генератор варіантів-снігоклонів мему-макрокартинки “*One does not simply*” <https://imgflip.com/memegenerator/One-Does-Not-Simply>

Як підтверджують дані діахронічного аналізу, прототип окремого типу тексту складається поступово. Словниками мемів Memes Dictionary, Meming Wiki та ін. зафіксований один з перших варіантів макрокартинки “*One does not simply*” (Рис. 5) як трансформ прототипового варіанту (Рис. 1):

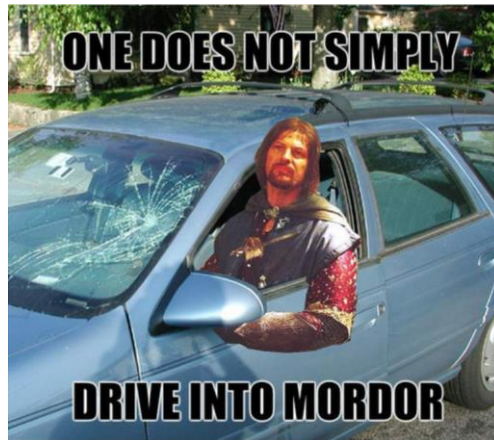


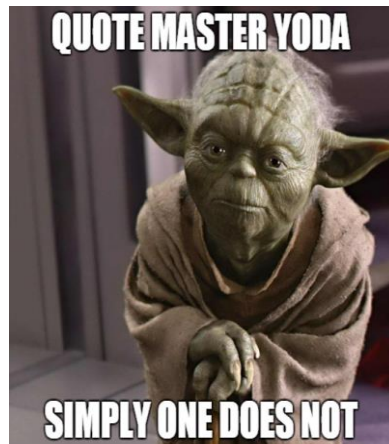
Рис. 5. Один з перших варіантів макрокартинки “*One does not simply*”, зафіксований близько 2004 р. (Meming Wiki).

Макрокартинка, представлена на Рис. 5, утворилась внаслідок інтеграції елементів ВП 1 та ВП 2, відмінних від тих, що маються при утворенні прототипового мему. Проте, попри заміну конкретних варіативних ознак, вхідні простори залишаються незмінними (ВП1 – “прецедентний образ Боромира”; ВП2 – “складне завдання”), що забезпечує впізнаваність мему та можливість категоризувати його як варіант макрокартинки “*One does not simply*”. Заміна мапованих ознак ВП2 відповідає за різьчу, в окремих аспектах полярну відмінність їхніх невербальних актуалізаторів: колірної гама (чорний колір шрифту на Рис. 5 у порівнянні з білим у прототиповому варіанті на Рис. 1; холодна синьо-зелена колірна палітра на Рис. 5 у протигагу теплим охристим відтінкам прототипового варіанту на Рис. 1) та пози персонажу (хоча на обох мемах персонаж повернувся вліво, персонаж із першого варіанту мему ще не демонструє критично важливий для прототипового мему жест, тож не актуалізує ознаку “частково опанований ворогом”). Хоча другорядні невербальні компоненти цього варіанту кардинально відмінні від прототипових, ідентифікацію цього варіанту макрокартинки забезпечує вербальний складник (її лексичний склад та композиційне розташування), а також фотозображення обличчя Боромира у виконанні Ш. Біна, нехай і модифіковане у порівнянні із прототиповим варіантом мему, наведеним на Рис. 1

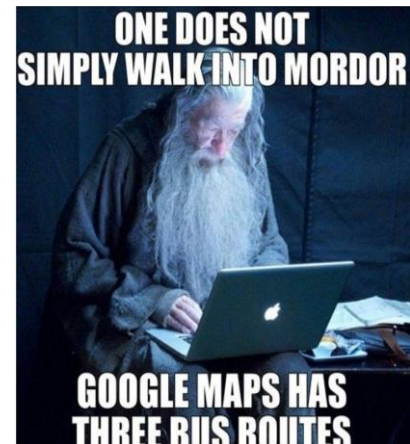
Непрототипові варіанти макрокартинки “*One does not simply*” утворюються при заміні ВП 2, представленого прецедентним образом Боромира, на інший прецедентний образ *Eddard (Ned) Stark*, персонажа серіалу НВО “*Game of Thrones*” у виконанні Ш. Біна (Рис. 5а); *Master Yoda*, персонажа багатосерійної кіноепопеї “*Star Wars*” (Рис. 5б); та *Gandalf the Gray*, ще одного центрального персонажа кіноекранізації епосу Дж. Р. Р. Толкіна “*Lord of the Rings*” реж. П. Джексона (Рис 5в) і відповідною зміною елементу (б) (складна дія) з ВП 1. Утворені меми-трансформи досліджуваного мему-макрокартинки “*One does not simply*” актуалізують іронію щодо зовнішньої і поведінкової схожості кінообразів Боромира та Старка, створених Ш. Біном; ідіосинкратичного оберненого синтаксису магістра Йоди, який є основною мовленнєвою характеристикою цього образу; та інтеграцією артефактних реалій сучасного світу (ноутбук Applebook, автобусний розклад) у чарівний принципово антитехнократичний світ, який представляє чарівник Гендальф.



<https://www.dictionary.com/e/memes/one-does-not-simply/>



<https://www.dictionary.com/e/memes/one-does-not-simply/>

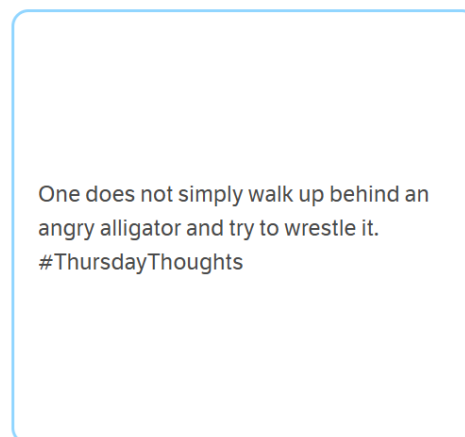


<https://boardgamegeek.com/thread/1141110/one-does-not-simply>

Рис. 5 а, б, в. Непрототипові варіанти макрокартинки “*One does not simply*”.

Класифікація макрокартинок, аналогічних наведеним на Рис 5, як варіантів мему “*One does not simply*” уможливується актуалізацією ключових вербальних елементів тексту нагорі, прототиповість якого перетворює його на назву-ідентифікатор цього мему: “*One does not simply*”, навіть попри зміну розташування (переміщення в центр мему на Рис. 5а, в нижнє текстове поле в мемі на Рис. 5б, розбивку на два рядки в мемі на Рис. 5в). Аналіз трансформованих варіантів досліджуваної макрокартинки дозволяє зробити висновок, що центральним прототиповим елементом мему є саме перша частина прецедентного висловлення-назви “*One does not simply*”, а не прецедентний образ Боромира.

Ще один трансформований варіант досліджуваного мему утворюється, коли він повністю втрачає невербальний складник і, відповідно, змінює свою типологічну приналежність: з макрокартинки він перетворюється на суто прецедентне висловлення (Рис.6):



@Gfycat, April, 2017

Рис. 6. Трансформація макрокартинки у прецедентне висловлення  
<https://www.dictionary.com/e/memes/one-does-not-simply/>

У прикладі на Рис. 6 спостерігається типологічна трансформація макрокартинки “*One does not simply*” внаслідок нейтралізації невербальних елементів (прототипової композиції, типу та кольору шрифту, макрозображення). Водночас ідентифікувати цей мем, який перетворюється на прецедентне висловлення, можна за вербальним складником – початковим

фрагментом безособового заперечного речення без смислового присудка. Аналіз трансформованих варіантів досліджуваної макрокартинки підтверджує висновок, що прототиповим елементом досліджуваного мему є саме його вербальна складова-назва, що зумовлює напрямок еволюції цього мему впродовж його життєвого циклу.

Слід підкреслити, що після типологічної трансформації на прецедентне висловлення мем “*One does not simply*” здатен змінювати також середовище побутування і тип користувачів. Необтяженість прецедентного висловлення “*One does not simply*” зображеннями дозволяє йому перейти з Інтернет-форумів та соціальних мереж в інші формати письмової комунікації та в усне мовлення. Особливо цікавим видається використання цього прецедентного висловлення в письмовому науковому дискурсі – в заголовках наукових статей різної тематики, зокрема присвячених творчості та мемам (див. приклади 3–5):

- (3) Wu, Z., Weber, T., & Mueller F. (2025). One does not simply meme alone: Evaluating co-creativity between LLMs and humans in the generation of humor. *Proceedings of the 30<sup>th</sup> International Conference on Intelligent User Interfaces*.
- (4) Gonçalo Oliveira, H., Costa, D., & Pinto, A. (2016). One does not simply produce funny memes! *Explorations on the Automatic Generation of Internet humor*.
- (5) Zenner, E., & Geeraerts, D. (2018). One does not simply process memes: Image macros as multimodal constructions. In E. Winter-Froemel & V. Thaler (Ed.), *Cultures and Traditions of Wordplay and Wordplay Research* (pp. 167-194). Berlin, Boston: De Gruyter.

Наведені приклади 3-5 демонструють, що підстановче прецедентне висловлення “*One does not simply*”, яке виникло внаслідок втрати однойменною макрокартинкою невербального складника, представленого макрокартинкою та відповідними текстовими ефектами, зберігає базовий прототиповий компонент, що утворює його назву, і інтегрується до сильної позиції заголовка тексту на його верхній межі, як і у вихідному мемі-макрокартинці. Проте радикальні трансформації та відхід від прототипу є не лише проявом суттєвої прецедентності та значущості даної структури для відповідної лінгвокультури. Такі трансформації зрештою стають руйнівними. Перетворення на прецедентне висловлення, яке зберігає прототипові компоненти вихідного мультимодального тексту, на основі якого воно сформувалося, стає кінцевим етапом життєвого циклу мему. Неминуча повна втрата зв'язку із першоджерелом (мемом-макрокартинкою “*One does not simply*”) позбавляє це висловлення прецедентності та перетворює його на вільне словосполучення, значення якого утворюється зі значення окремих його мовних елементів і не містить додаткових конотацій.

#### 4. Висновки

Інтеграція теоретико-методологічних можливостей когнітивної лінгвістики та теорії інтертекстуальності для розробки та застосування методики аналізу мультимодальних прецедентних текстів, яка враховує не лише лінгвостилістичний, а й екстралінгвальний контекст та глибинні когнітивні механізми породження, дозволила в цій статті виявити закономірності формування та інтертекстуального побутування прецедентних текстів – мультимодальних мемів протягом всього життєвого циклу, а також їхньої актуалізації вербальними та невербальними структурами.

Результати проведеного аналізу когнітивних та інтертекстуальних процесів, характерних для кожного з етапів життєвого циклу мему-макрокартинки “*One does not simply*”, та способів їхньої актуалізації вербальними та невербальними структурами дозволило зробити такі висновки:

1. Мем-макрокартинка формується внаслідок багатоетапної концептуальної інтеграції на матеріалі як вербальних, так і невербальних джерел. Аналіз механізму та результатів концептуальної інтеграції дозволяє виявити прототипові та непрототипові, базові та факультативні елементи мему як мультимодального тексту, а також спрогнозувати напрямки нарощування та трансформації досліджуваних інтегративних структур і зворотний вплив бленду на вхідні простори.

2. Життєвий цикл мему складається з низки етапів: 1) формування мему та його прототипових ознак; 2) інтертекстуальне мультимодальне побутування з утворенням снігоклонів та трансформів; 3) часткова нейтралізація, про яку сигналізує зміна модусу та контексту існування (як-от перетворення мультимодального мему на мономодальне прецедентне висловлення, яке використовується в нетипових для мемів комунікативних ситуаціях, наприклад, професійного спілкування), втрата окремих складників та редукція до найбільш прототипового елемента, зазвичай вербальної назви; 4) розпад прототипового вербального компонента – перетворення сталої синтаксичної структури на ряд вільно відтворюваних лексем.

3. Результати аналізу доводять, що в основі утворення мему-макрокартинки “*One does not simply*” лежат процеси концептуальної інтеграції (блендінгу). Під час такого мемомтворчого багатоетапного блендінгу відбувається мапування окремих ознак вхідних просторів як в прямому напрямку (на генеративний простір), так і в зворотній бік (назад, на вхідний простір), що ускладнює та збагачує процеси смислотворення в цьому мультимодальному мемі. Утворена концептуальна структура макрокартинки зазнає нарощування (*elaboration*), внаслідок якого з’являються її снігоклони та трансформи.

На всіх етапах свого життєвого циклу макрокартинка функціонує в інтертекстуальний спосіб і поступово втрачає окремі компоненти своєї структури за умови стабільності її основного прототипового елемента: вербального тексту, який утворює першу частину прецедентного висловлення “*One does not simply*” і розташовується в сильній позиції нагорі мему; натомість втрата цього тексту призводить до колапсу всього мему.

**Перспективи** дослідження полягають в поглибленні аналізу процесів та типів формування вітальних зв’язків в процесі концептуальної інтеграції, виділенні та аналізі частотності основних моделей концептуальної інтеграції при утворенні окремих типів мультимодальних текстів, а також у тестуванні запропонованої методики для проведення повноцінного лінгвостатистичного експерименту.

### Декларація про конфлікт інтересів

Авторка не має жодних конкуруючих інтересів або фінансової підтримки, про які вона могла б заявити.

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## INTERTEXTUAL MEME “*ONE DOES NOT SIMPLY*”: CONCEPTUAL BLENDING DIAGRAMS

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### Abstract

The article aims to expand the analytical and explanatory potential of the theory of intertextuality by applying the principles and methodology of cognitive-discursive linguistics to take into account the cognitive mechanisms of establishing intertextual relations in the formation of intertextually active multimodal texts and their life cycle. The study attempts to transcend the exclusively descriptive approach to text analysis and instead to explore the intertextually active multimodal meme-image macros “*One does not simply*”, to consider the mechanisms of conceptual integration and their effects in the processes of the meme’s emergence, intertextual instantiation, growth, decline and decay, and to elicit and analyse the verbal/nonverbal structures, manifesting such processes of meaning production. To achieve the set goal, the paper proposes and tests a procedure for comprehensive analysis of a multimodal meme-image macro at all the stages of its life cycle, which involves: 1) discovering the lingual and extralingual context of the meme formation; 2) identifying the meme’s typological structural-semantic, multimedia, and other features and prototyping them; 3) analyzing cognitive operations and conceptual integration mechanisms that form the prototypical structural-semantic parameters of the meme and the processes of meaning formation and intertextual bonding; 4) investigating the transformations of the identified prototypical parameters at all the life cycle stages. The application of the proposed methodology for analysing the life cycle of the meme-image macro “*One does not simply*” revealed the multi-stage nature of the conceptual integration process, leading to the emergence of the meme, the emergence of meaning from direct and reverse mapping of integrated features, the elaboration of the resulting integrative structure due to snowcloning and other transformations, and the meme’s loss of its multimodality and precedent potential at the final stage of its life cycle. The analysis demonstrated that the verbal and non-verbal components of the image macro’s structure are not arbitrary: they reflect the core processes of conceptual integration and they are adapted to intertextual existence.

**Keywords:** *conceptual integration, image macro, intertextuality, meme, multimodality, precedent text.*

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## 'THAT'S DEPRESSING, LOL': HUMOR MARKERS IN THE SELF-ADDRESSED DISCOURSE OF FUTUREME LETTERS

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### Abstract

This article examines humor as a cognitive and pragmatic resource in asynchronous self-addressed digital discourse, focusing on publicly available letters written on the FutureMe.org platform. A corpus of 3,426 English-language letters sent by users to their future selves was compiled and searched for four widely used humor markers, *lol*, *haha*, *hehe*, and *lmao* (along with their spelling variants). The resulting 652 concordances were manually annotated to determine whether these markers generally index humorous intent or specifically signal amusement at the communicative incongruence inherent in addressing a future self. Drawing on incongruity-based theories of humor, the study conceptualizes the FutureMe letter as a genre that simultaneously presupposes an addressee and challenges the epistemic conditions typical for epistolary communication. The results indicate that 11.7% of all humor-marker occurrences explicitly accompany reflections on the paradoxical status of the addressee (being both Self and Other), revealing humor's role in managing conceptual fuzziness. It has also been found that *lol*, *haha* and *lmao* signal humorous effect (laughter) more often than *hehe*. Qualitative analysis further discusses three primary functions of humor markers: (i) indexing amusement at the strange, playful incongruity of writing to oneself across time; (ii) signaling or reinforcing a joke; and (iii) mitigating excessively grave, emotional, or face-threatening content. The findings suggest that humor in these letters serves less as a reaction to situationally humorous content and more as a pragmatic device for stance adjustment under atypical communicative conditions. By foregrounding humor's role in resolving genre-based and epistemic incongruities, the article contributes to research on digital communication, humor pragmatics, and stance in self-addressed discourse.

**Key words:** *humor marker, self-addressed discourse, incongruity, computer-mediated discourse, stance.*

### 1. Introduction

While the functions of humor range from laughter and social bonding to relieving tension and managing ambiguity or uncertainty, the latter comes into focus in the case of self-addressed letters, highlighting how humor markers help discursive agents to manage the tone of written discourse and adjust their stance.

This study focuses on the letters that users posted on the FutureMe platform. A corpus of 3,426 publicly available self-addressed letters was collected from the FutureMe.org website in 2023. These are letters addressed by the users to themselves, which the program allows to write, store, and program to be sent to an indicated email at a certain moment in the future. After receiving one, many users

choose to publish these “letters from their past selves” online in public access. With the topics raised in these letters ranging from reassuring and supportive comments to pessimistic or sarcastic self-deprecation, the letters written to the future are humorous enough, the authors including jokes or written markers of laughter. Arguably, humor helps the writers to deal with the non-standard communicative situation of addressing the self asynchronously on the one hand, and on the other hand, humorous stance allows writers to both tone down the excessively serious discourse of talking about life milestones and mask their preoccupation with allegedly trivial matters.

An analysis of the humor markers in self-addressed digital letters to future allows one to develop insights into the cognitive and pragmatic dimensions of humor. This asynchronous written self-addressed discourse features a unique communicative situation, in that the intended recipient is the author’s self in the future. The implications of such communicative context on the construal consist in the author’s fairly precise understanding of the recipient’s knowledge, values, and experiences except for some upcoming ones that are yet unknown to the author. Arguably, this results in a fuzzy construal with an uncertain conceptualization of the recipient who is the Self and the Other at the same time. In turn, the genre restrictions of a letter force a scheme with an author and a recipient onto this discursive practice, prompting the authors to turn to the means of overcoming an uncomfortably ambiguous situation by the means of humor.

The *aim* of this study is therefore to analyze to what extent humor serves as a means of overcoming conceptual fuzziness and the dual construal of the addressee in letters addressed to oneself in the future.

To achieve this aim, the following *objectives* were established: i) to retrieve concordances with the markers signaling humor (teasing and irony inclusive)—*lol*, *haha*, *hehe*, and *lmao* and ii) manually annotate them to establish what fraction of these markers signal humorous or ironic response specifically to the uncomfortable construal of this communicative situation (addressing the imaginary self in the future).

## 2. Theoretical underpinnings of the approach

### 2.1. Humor theories underpinning the interpretation of results

For this study of written humor markers, following Attardo (2020, p. 3), I depart from a definition of humor as an umbrella-like term for the stimulus, an understanding of mirth/amusement as a characteristic of the emotional response, and laughter as a physical response to the stimulus.

The classical theory of incongruity postulates that humorous effect is based on the cognitive response resulting from betrayed semantic expectations (Attardo, 2020, p. 81-82). In relation to FutureMe letters, incongruity can be traced to the very communicative situation set-up, with writers’ finding it amusing to be addressing the “unknown self,” the self in the future, a stranger while also a perfectly known themselves. Arguably, this results in their expressing this amusement by including humor markers with the explicit comments on the paradoxical communicative situation.

The users of the FutureMe platform write letters, a form that by genre presupposes an addressee different than Self, with a different world knowledge. In turn, the fact they send it to themselves and that the letters will be received some time in the future creates a conflict between the classical epistolary genre and the real communicative situation. Incongruity can be conceptualized with different levels of specificity (Attardo et al., 2024), which allows to model a betrayed expectation of the whole communicative situation dictated by its genre conventions, as a source of incongruity. As a result, the genre conventions typical for letters such as asking questions, sharing news, and addressing the receiver, are challenged by the fact that the response will not be possible, on the one hand, and will yet be received by the author themselves when they read the letters. This way, the questions lose the pragmatic sense, and basically are written to be read in the future with a thought “what worried me X years/months ago.” Arguably, this flipped situation amuses the writers, prompting them to write those letters in the first place, the whole purpose being “asynchronous introspection” rather than communication.

As a cognitive development of the notion of incongruity, the General Theory of Verbal Humor (GTVH) (Attardo & Raskin, 1991) is based on the conflicting scripts as the engine of humor. The opposing REAL VS. UNREAL is the basic opposition, and the clashing scripts create a cognitive effect that requires resolution and stimulates laughter (Attardo & Raskin, 1991, p. 337). As for letters addressing oneself in the future, there is a major script conflict in being both the writer and the perceived addressee, which results in amusement at the mere set-up of the communicative situation, prompting the usage of laughter markers to accompany seemingly non-humorous passages.

Finally, humor transaction scheme involves perception or creation of an amusing stimulus that the person (author) then tries to communicate to the others (Davis & Hofmann, 2023), and humor may be perceived as a communicative event (Attardo, 2020, p. 95). In the case of letters addressed to the future self, two considerations emerge: firstly, the main addressee is the authors themselves in the future, which is not a standard communicative situation; at the same time, the authors may be aware that in the computer-mediated context of the FutureMe website, there is an option of publishing this letter for everyone online to see, so the humorous effect may be designed to amuse both the primary addressee and other people who can potentially see it. Therefore, there is an imaginary addressee in these letters, supported by the default of the epistolary genre, even though the identity of the addressee is fuzzy in writers' perception.

## 2.2. Classification and functions of the orthographic humor markers

Markers of humor, including both acoustic and orthographic ones in written texts, are categorized as a means of identifying humorous intent (Attardo, 2015, p. 182). Attardo (2000, p. 7) suggests a divide between markers (elements signaling humorous intent or effect), and factors (constitutive elements of humor). Essentially, markers accompany the means that bear humorous intent, but do not alter the stimulus. However, as observed in some studies as well as in my data, humor markers like *lol*, *haha* may not necessarily signal humorous intent and may have a wider range of discursive functions bordering humorous stance.

In computer-mediated English, punctuation and emoticons have substantial semantic weight (Lucey, 2013; Walther & D'addario, 2001). Exclamation marks and punctuation emojis bear the emotional and tone-related information and can alter the message profoundly. General "playfulness" of digital writing can be expressed in the following ways (Danet, 2010; Lockyer, 2018): reduplicated punctuation marks or phonemes, non-standard spelling, capitalization, acronyms, shortenings, and abbreviations, meta-discursive descriptions speaker's reactions, emoji, and onomatopoeias. A more concise classification of humor-signaling typographical markers in written computer-mediated discourse includes as punctuation, formatting, emoticons, laughter (textual and acronym, e.g. *lol*, *haha*, *hehe*), and explicit comments (e.g. "kidding!") (Adams, 2012). According to Burgers and Van Mulken (2017), by using these markers, speakers make up for the means that are lacking in digital communication compared to face to-face communication and verbalize their paralinguistic responses. These responses may include laughing, smiling, or demonstrating a not-so-serious stance by facial expression or body posture. Lucey (2013) points out that it is especially relevant for communication through messages as the facial expressions and body language are unavailable to convey these meanings, and the "enhanced potential for interpretative failure" (Gal et al., 2020) prompts the communicants to turn to markers that can signalize their stance.

*LOL* appeared in digital communication as an acronym for "laughing out loud," but it has become lexicalized (which is reflected in its spelling *lol* and its applicability in the contexts where "laughing out loud" is not allegedly presumed, but *lol* serves for tone adjustment, making it a discourse marker) (Markman, 2013). It is used as a standalone utterance as well as at the beginning or at the end of the utterance (Markman, 2013). It can also occasionally be heard in live conversations (Zabotnova & Bohdanova, 2018). In addition, *lol* and *haha* may serve to soften the discomfort from a perceived mistake (Lockyer, 2014); similarly, Baron (2004) found that *lol* can serve to soften face-threatening acts, as well as *heehee* (or *haha*), rendering the message of "it's okay, alright" rather than humorous intent or reaction, developing the characteristics of phatic fillers.

Some researchers also approach *lol* and *haha* as interjections (Lockyer, 2018). Indeed, interjections in English are considered as a vehicle of emotion (Lockyer, 2018), and similarly, *lol* and *haha* may adjust the emotional tone of an utterance. In a similar perspective, despite it being an acronym, “Lol” is held to be acontextual marker and not to have a stable semantic content (Schneebeli, 2020). According to a study on *lol* in YouTube comments (Schneebeli, 2020), clause-final *lol* most often performs an expressive function signaling amusement and a socio-pragmatic function conveying alignment.

Lockyer (2018) distinguishes between primary emotive interjections (e.g. *whoa!*), cognitive interjections (e.g. *aha!*), conative interjections (e.g. *(shh!; hop!)*), secondary emotive interjections (e.g. *LOL, hell!*), contact interjections (e.g. *hello! sorry!*), and descriptive and onomatopoeic interjections (e.g. *haha, thud!*). Secondary emotive interjections, to which *lol* can be classified, overlap extensively with exclamations and discourse markers (Lockyer, 2018).

I approach *lmao* from a similar perspective as *lol* is regarded: it is initially an abbreviation (“laughing my ass off”), that became lexicalized and lost capital letter spelling, and may also appear in cases where the full phrase would be semantically awkward. Therefore, it also performs the functions of a pragmatic marker adjusting stance to a less serious and/or a phatic filler.

Similarly to *lol*, the onomatopoeic *haha* (and its variants such as *hehe*) can serve as ways to check on the status of the interaction and prove to the interlocutor that the relationship is still positive (Lucey, 2013). *Haha* may hence perform a function similar to the role of *lol* in communication, demonstrating that the speaker is positively-minded and/or does not commit to the utterance too strongly in order not to infringe of the interlocutor’s discursive face.

So, I argue the functions *lol*, *lmao*, *haha* and *hehe* can be roughly divided into the cases where these markers signal humorous intent that is evident or not evident from the utterance itself, and the cases where these markers serve to soften the meaning of the utterance by setting a certain playful emotional tone without an intention to stimulate laughter.

### 3. Methods and corpus design

The corpus of 3,426 self-addressed letters was created in April 2023 by using letters from the FutureMe.org platform. Only the letters that the users decided to publish in open access on the website were available and used for the corpus.

The corpus was created semi-automatically. First, the sitemap generating software (Sitemap Creator 5.4 by Inspyder Software, trial version) was used to compile an XML list of all links from the website. Then, the links to pages with letters were manually filtered from this list. This new list of useful pages was uploaded to a parsing application (Octoparse 8, trial version) that automatically extracted the texts of the letters as well as the dates the letters were written and then received. No demographic information on the users was either available or registered. At the final stage, the resulting corpus in XML format was manually cleaned for blank cells, scrambled encoding, and other languages than English.

The whole corpus was then processed using AntConc software with the queries *lol*, *haha*, *hehe*, *lmao*. The extracted concordance lists with the context window of 25 items on the left and on the right were manually annotated in Excel to establish if the marker accompanies an explicit amusement at the incongruence of the communicative situation, where the addressee is the author themselves in the future.

File	Left Context	Hit	Right Context
letter_4.txt	are still together right? Have you gotten to hang out yet? has he kissed you yet?	lol.	I just realized hes pretty prude. Did you get that whole problem fixed or did you
letter_4.txt	id to use correct grammar and punctuation and spelling when I write to myself?	lol!	Did Alex ever talk to Jesse about the situation? So did you ever figure out how C
letter_4.txt	he asked you to do that. Jesse came up and said he got 4 detentions that day.	lol!	Someone isn't doing her job! You gotta whip him into shape. Chop chop!
letter_54.txt	in 15, 2021, Dear FutureMe, i just found this website so i hope you get this letter	lol	but anyways just keep your head up bc i think by now you graduated highscho
letter_72.txt	Jul 17, 2018, Jan 24, 2019, Dear FutureMe, happy birthday. We must eat all the ??	lol.	So how dose it feel. You know turning 13 and all. Did we getta better phone? Pre
letter_95.txt	back against it watching your little sister complain about the expire lemon juice,	lol.	Okay well I m gonna sent this to you, don t get murdered at work K!! U tried se
letter_122...	keep your parents trust through all the stuff you did that they don't know about	lol	I like that you're dad's favorite child I like how hard you fought to not type out t
letter_126...	it made you feel funny... like idk youll know what im talking about cuz your me!	lol.	i do not forget ty and i think hes visiting again duringsummer. which brings me
letter_126...	hour from Lyons. guess what?! I DID TOO! (well again i guess..) from Lyons too!	lol	that really makes me laugh . awh im kinda sad. as i type im kinda cheating and k
letter_126...	cheating and looking at the keys and my fingers ARE NOT resting on home row!	lol:	blech sal is still on my nerves and she likes wyatt and gets mad and comes over
letter_126...	hard. and colters a creeper. he makes me feel all yucky uncomfortable like.. eww.	lol.	but today i regestered for gilbert! im excited! and CJ got a pitiful truck! haha i ho
letter_200...	Oof idk what else to say uh.. ree? And go to futureme.org to write another one	lol	
letter_211...	ave you gotte a girlfriend yet? i know that would b hard but it could be a secret	lol.	i just dot wanna be lonely. have you kissed someone yet at least. if you havent y
letter_221...	es 2 (in the future of course) and btw i think im still gonna b liking the same ppl	lol	imma beeeeeee

Figure 1. A fragment of the concordance search for *lol* in AntConc

As observed by Attardo (2015, p. 183), corpus methods and quantitative techniques are promising in humor studies to allow for the extraction of certain statistical data on humor communicative behaviors, so this study departed from a corpus-based inquiry that was then interpreted in a qualitative description.

#### 4. Results

The results of the annotation for humor markers expressing amusement at the communicative situation where the addressee is the same as the author, but asynchronously, are presented in Table 1.

Table 1

#### Manual annotation results for humor markers *lol, haha, hehe, lmao*\*

	Total	Amusement at the communicative situation incongruence	%
<i>lol</i> ( <i>LOL, Lol, lolz, lolol, Lolooolol</i> )	325	40	12.3%
<i>haha</i> ( <i>hahaha, ha ha, bahahaha, ahahaha</i> , and various combinations of upper and lower case)	199	23	11.6%
<i>lmao</i> ( <i>LMAOAOAOAO, lmaoooo</i> , and other combinations of upper and lower case)	85	10	11.8%
<i>hehe</i> ( <i>ehehe, hehehe, heh</i> , and various combinations of upper and lower case)	43	3	7%
<b>All markers</b>	<b>652</b>	<b>76</b>	<b>11,7%</b>

\*A technical remark for Table 1: For *lol*, the initial search returned 359 hits, among which 34 were excluded because of a different language of repeating content, leaving 325 annotated cases in total. For *haha*, the initial search returned 262 hits, among which 63 were excluded because of a different language of repeating content, leaving 199 annotated cases in total. For *lmao*, the initial search returned 87 hits, among which 2 were excluded because of a different language of repeating content, leaving 85 annotated cases in total. For *hehe*, the initial search returned 53 hits, among which 10 were excluded because of a different language of repeating content, leaving 43 annotated cases in total.

As shown in Table 1, the highest percent of cases where the humor marker accompanies an expression of amusement or bewilderment at the situation where the addressee is the author themselves is found in *lol*. This percent is close for *haha* and *lmao*, but is lower for *hehe*.

## 5. Discussion

Following the quantitative results that indicate a large fraction of humor markers associated with the amusement at the communication situation of addressing a letter to self, three main functions of humor markers (*lol*, *haha*, *hehe*, *lmao*) in FutureMe letters were described: i) expressing amusement at the explicit incongruence of the communicative situation, where the addressee is the author themselves in the future; ii) signaling humor or joke, hence actually rendering *laughter*; iii) toning down the seriousness of the subject and reaffirming a positive/ironic stance.

### 5.1. Humor markers accompanying comments at the author-addressee confusion

The group of humor markers that stands out is the markers that accompany explicit comments on the incongruence of the communicative situation of sending a letter to the future self, where the sender is at the same time the receiver. Such cases account for 11,7% of all markers in total, with the fraction being comparably similar for *lol* (12.3%), *haha* (11.6%) and *lmao* (11.8%) and lower for *hehe* (7%), highlighting its more sarcastic than humorous usage. For example:

(1) *I'm so interested to see how you're doing. It's so weird writing to myself. lol*

(2) *Me..... hi there? how's the pandemic going? has it ended? Am I 10 years old? (probably lol) Anyways, how are my future friends... family... other. lol, - your past self*

In (1) and (2), the writers express amusement that they are writing to themselves and resort to an economical means of making their stance good-natured, the marker *lol*. It is not signaling or accompanying an explicit joke, but rather amusement without laughter.

Humor can reside in “cognitively refreshing, creative and thus amusing” content or linguistic expression as opposed to the conventional (Chłopicki, 2017, p.148). Indeed, the authors of letters published on the FutureMe platform demonstrate their interest and amusement at the whole idea of writing such a letter and sending it to the future. It might not be the funny elements that prompt their usage of the humor markers like *lol* or *haha*, but also their perception of this communicative event as a creative, cognitively challenging one.

The users also reflect on the genre of the letter and point out how it is not actually a letter in its typical genre understanding, but they treat it like one:

(3) *probably reading this in the future like 'why did i think it was a good idea to write so many questions like i could reply', lol.*

In (3), *lol* accompanies a comment on how questions are pointless in a letter to one's future self because no answer is possible, and yet the epistolary genre dictates asking them, and pragmatically-wise, the questions become an engine of reflection for the reader in the future, implying that it is what interested their past self.

The users also add the marker when reflecting on the genre of the letter that is closer to the diary (in (4) and when choosing the appropriate grammatical tense becomes confusing because the actions and events that are in future for them will be the past for the reader (in (5):

(4) *This is my only way to cope now. Its like my diary now lolol hope your okay now dude, I hate it here still. I wish things were back to what it used to be*

(5) *hope you continue to keep soccer in your life because you love that. also **im not sure what tense i should be writing in but lol its whatever.** remember to love yourself and be kind to others, and have fun when you can.*

Similarly to *lol*, *haha* and *lmao* are used to accompany comments on how the user is confused or perplexed by the dual nature of the addressee, who is the Other and the Self at the same time in this asynchronous communication setting:

(6) *depressed or tired or anything of that sort, please cheer up. I want you to, k? **So do it, just for me, just for yourself[haha, get it?] I'll always be here for you ;]** Much love, PastRachael*

(7) *Dear FutureMe, Hey gis it's me yourself **lmao.***

In (6) and (7), the pronouns are the source of humorous play for the users, as they are not sure if they should address the recipient as a different person or use “myself” or “yourself” when introducing themselves, and the humor markers serve to highlight the humorous intent.

Taken together, these examples show that humor markers do not just accompany joke that presuppose laughter or signal that the stance shifts to a more playful, but serve a broader construction of genre and identity. By marking the strangeness of addressing oneself across time, writers manage an inherently dissonant communicative event. The markers help to briefly flag the incongruence in discourse, this way re-establishing a cognitive control over the conceptualization and mediate the epistemic tension that is unique to asynchronous self-address.

## 5.2. Humor markers rendering laughter

In turn, the cases where the humor markers signal laughter can be generally divided into two groups: accompanying an explicit joke or showing the humorous intent of an utterance that is otherwise not explicitly humorous. For example:

(8) *remember, you are a freeking good looking guy, hell, i'm amazed tht guys dont start telling you how you caused them to become gay!! **lol***

In (8), the self-assurance is clearly humorous, with an exaggeration and a speculative scenario, as well as with the punctuation (the exclamation marks), and the marker *lol* serves to reinforce the humorous intent, especially given that the written form does not allow for face expression or tone, requiring compensation.

(9) *Is it better now? How do you see your future? Are you working hard or hardly working? **haha.***

In (9), there is wordplay – “working hard” and “hardly working” accompanied with a marker of laughter *haha*.

Similarly, the author give themselves funny recommendations and make the support they send to themselves into the future light-hearted, warming it with jokes:

(10) *be proud, sweetie. Look them in the eye and know you're beautiful and they're ugly. **And imagine them on the loo!! Haha!!** Now they're not so scary, are they?!*

Similarly to *haha* and *lol*, *lmao* may either accompany a joke (examples (11) and (12)) or signal that otherwise serious utterance has humorous effect (13)):

(11) *of the Mandir, and that too, every single time! So hopefully, you have a bomb fashion sense, fingers crossed that you're the next supermodel **lmao.***

In (11), the writer is apparently exaggerating for the humorous effect, and includes *lmao* to make the intention clearer.

(12) *i hope so how is school are there now zombies???* you know like from COVID19 or is there a different virus turning people into zombies ***lmao***

Similarly, there is an exaggeration in the writer's question about Covid, bringing it to the point where people are turned into zombies, and this imaginative comment is turned into humorous one by including the *lmao* marker.

(13) *end it all because daddy knows how much it means to you. Remember Dre? How you broke his heart? Yeah you belong to the streets ***lmao***. Being 16 was not easy so I hope as an 17 year old...some things have changed for the better.*

In (13), the writer accompanies the comment that they "belong to the streets" with *lmao*, signaling the illocutionary force of the utterance as not completely serious or at least too cliché to be serious.

(14) *go makeup to her rn omg she is your biggest supporter and she loves you so much. I hope u don't have wrinkles yet ***lmao***. Love u bae ;)*

In (14), the writer jokes about the wrinkles, again exaggerating the age difference between their sending the letter and them receiving it, and underlines the intent with *lmao*.

Finally, *hehe* is scarcer in the sample and shows some specific usage. It can accompany a joke, such as in (15), where it appears to signal the humorous intent of the question about the time machines not meant as a serious one. In the same passage, the author also jokes about "sending a letter back" into the past:

(15) *What awards have you won now? At this point I have only won 1 (the ACSC State Champion Medal). Have they invented time machines yet? (***hehehe***) You could send me a letter back! (***just kidding***) I am currently 13 and in year 8A. Got to go, sorry! See Me, Jonathan Sala*

There are also cases where "half-jokes" are accompanied by humorous markers and the utterance are not completely unserious but funny because something "silly" is said out loud:

(16) *take care live life and no matter what ur going through it's okay also this holloween be a slytherin a girl one for draco ***lol*** or Harley Quinn wtevr byeeee ***loser luv ya*** love y so much ??????????from Maria p.s eat the takis cream cheese and jalapeño ***lol****

Beyond the humor marker itself, the user in (16) additionally adjusts stance through lexical choices (*loser, luv ya*), exaggerated enthusiasm, rapid topic-shifts, and the succession of affectionate closings, performing informality. This pragmatically hybrid tone combining a supportive message with some teasing or ironic self-commentary is also characteristic of the self-addressed digital discourse. It is not quite possible to say if there is laughter in such cases signaled by *lol, lmao or haha/hehe*, and its functions develop a stance-marking turn rather than humor-signaling, bringing us to the next group of humor marker usage I discuss in the next section.

### 5.3. Softening the "excessively grave" stance

In many cases across the sample, humor markers accompany utterance that cannot be deemed funny and produce laughter even if the stance is good-natured/ironic. For instance:

(17) *Today we were supposed to see someone but he bailed on us and it ***kinda*** hurt. I realized that I still have feelings for him ***lol***.*

There is no laughter in this example, but the author uses the humor marker *lol* to soften the seriousness of this utterance, also using a hedge (*kinda*) in the phrase *it kinda hurt*.

Another example, (18), features the author complaining about school being stressful for them and concluding that they stopped aiming for the top, putting up with the bare minimum, and adding *lol* twice in the passage to correct the excessively serious (in their perception) stance:

(18) *I dont know now lol schools stressful and i used to Aim for the top and now i barely aim for the passing grade. Lolol*

From the point of view of the classical pragmatics, these examples are face-threatening acts (Brown & Levinson, 1987) that are politely masked as less serious (less threatening to the author's face, in this case) and hence less socially risky, with humor markers serving this purpose. Humor markers are effective as such "stance adjustments" (Yang et al., 2025), primarily because they are short and do not require much effort when expressing or processing, yet their use and positioning may change the perceived stance of the utterance quite significantly.

For example, in (19), the author writes in a warm, supportive tone, and then feels the need to shift the stance into a less serious one and add "lol" to signal that they realize that could sound "mushy", in their own terms:

(19) *please PLEASE don't mess up anything. Please don't give up on your goals! I know that sounded mushy so I'm sorry lol.*

In some topics, it appears that the authors feel that the words they use are too strong, and want to cool the dramatic effect down with humor markers:

(20) *I hope I get like a 4 or 5 on my AP exam for Euro. If not, then that's depressing lol.*

*Haha* appears in similar contexts as well, used to make the things said out loud sound less grave and serious, while they are not "laughter-funny":

(21) *work for living and my parents were the once who sustain our living. He is handsome as an angel and I don't look good HAHHAHA I do accept my physical appearance and I am contented of what I look like but I am still hoping for a glow up.*

The range of stance variations rendered by these markers is wide. When addressing the self in the future, authors may resort to playful teasing, like one could lightly tease a friend:

(22) *Did you make friends? Do you still talk to Justice, Alivia, Jasmyn, and Kyra?? You better lol. I hope you're happy and I hope you are living life in a way that makes you feel fulfilled and loved.*

Such teasing is often indexed with the humor markers that "tone down" a risky question and showing that it is exaggerated in the writer's perception:

(23) *film thing. Did you get it? If not, that's okay. There'll be more chances. How about your job? Did they fire you yet lol.*

In other cases, humor markers follow rather depressive comments, quite dark emotionally, and hence the humor markers show that the writer does not say it with sadness at the moment but rather with some perceived distancing from it through humor:

(24) *Even when you say "I hate myself" Just wait till you get this and cry your eyes out (lol) and get those tattoos to plz mami wont mind (she will kill u but go for it lollllll)*

(25) *ANYWAYS it's currently 4:45 am on June 26 and I feel like sobbing for now reason. It may just be hormones lmao.*

Grave, very serious utterances followed by humor markers can also be interpreted as life-and-death dichotomy-based jokes (Chłopicki, 2019):

(26) *Dear FutureMe, happy birthday lol ask clown if ur still friends with em who candice is :) also ru alive lol*

The perceived need to “soften” the risky turns in conversation (such as “*You suck at math lmao.*” in (27) is curious from the pragmatic point of view. An actual intersubjective communication requires that communicants save the social “face” (Brown & Levinson, 1987). When addressing the self, the writers reproduce the same norms as they are used to in intersubjective communication:

(27) *Dear [Name], please get better at math. You suck at math lmao. How much did you improve?*

(28) *Still miss your girlfriend? I definitely do now lmao.*

Similarly, from the point of view of “saving the face”, humor markers may accompany the utterances that authors deem too emotional and hence risking the imposition on the interlocutor:

(29) *how's jakarta. how's ur room, ur fa- agh sorry. we both hate the topic family. It's actually a sensitive topic for us hehe. your sis and bro? how are them?*

In these cases, their communicative behavior does not account for writing to self, but reproduces the norms of intersubjective communication. At the same time, such communication may not be absolutely intimate because the writers may not trust the technology enough or beware of the letters becoming public at some point.

Arguably, the habit of being rather dismissive towards own failures, anxieties, hopes and aspirations, is characteristic of the contemporary norms of social behavior and self-effacement in English-language discourses. People perceive being too serious (or *appearing* too serious) about their personal issues as an imposition on the audience or addressee, and this tendency is outstandingly visible in FutureMe letters.

Indeed, it is typical of the users to make fun of their own complaining, or just add humor markers alongside a serious negative claim to soften the stance. From the FTA theory point of view, this is a face-saving move to avoid imposition:

(30) *to love someone deeply, and i guess i almost did even tho i felt like thomas was more of an emotional dependance, not so healthy lol.*

(31) *Reality. Dreams are happy, theyre your fantasy. Or something like that. I wanna go back, go back home. Im scared of being attached now lol i hate everything.*

(32) *lol still single and depressed and currently jobless.*

In (30, 31, and 32) the users share personal emotionally-charged experience, opening up in the letters, and yet they apparently feel uncomfortable about doing it seriously and add humor markers with no joke to adjust the tone.

Similar stance-managing (or face-managing in pragmatic terms) strategy tends to accompany other strong feelings, not necessarily negative ones, so not only complaining but also emotional over-sharing is regarded as a “risky” discourse requiring softening with humorous markers:

(33) *how was sophie’s quinces? currently super excited for it lol :))*

(34) *Don’t forget to make time for yourself tho. Also don’t sell yourself sort. Love you lots. Never give up. Lol I just reread this and it sounds like I’m a basic white chick.*

In (34), the user sends advice and support to her future self, and then feels uncomfortable about it, adds *lol* and also reflects on this embarrassment by saying it sounded like she is “a basic white chick.” Another typical situation for letters to one’s future self will be the use of multiple available digital resources to adjust the stance and tone:

(35) *Heyy \*chuckle filled with pain bc i dont got no friends\* so.... how are you? I’m back again obviously. I write to u bc I ain’t got no friends. Anyways, so uhm where do u live rn? OH AND I FINALLY PAYED ATTENTION TO MY WHOLE MATHS LESSON THE WHOLE TIME. except for the fact I’m writing this at my math lesson right now =] kewl. Lil Levi supremacy is still alive =]]]]]]. Ioifhsohihwihw oh and i dont like school. It’s been decided long ago. Anyways you’ll be receiving a lot of this. Because I’m built different duh ?? and I’m lonely. Lol.*

In (35), the user resorts to meta-discursive comments (*\*chuckle filled with pain bc i dont got no friends\**), punctuation means, contractions and abbreviations (*where do u live rn*), capital letters to imitate intonation, emoji (=]), a playful non-standard spelling of cool (*kewl*), and the humor marker *lol*. The fragment showcases the vast array of digital communication resources that serve the users to render the nuances of stance, ranging from serious and neutral to humorous, ironic, slightly playful or sarcastic.

## 6. Conclusion

This study has demonstrated that humor markers in FutureMe letters function as a strategic resource for navigating the epistemic and genre-based incongruities characteristic of asynchronous self-addressing discourse of FutureMe letters. In this communicative situation, the author and the addressee are nominally the same person but cognitively distinct as the “future self” is constructed as an Other with different knowledge, emotions, and circumstances, creating a non-standard conceptualization of the addressee that the writers must linguistically manage.

The corpus analysis with manual annotation of the concordances shows that while humor markers frequently accompany (or signal) conventional joking and playful exaggeration, a substantial fraction of these markers follow authors’ explicit amusement at the unusual communicative configuration in which writer and addressee coincide yet remain temporally and epistemically distinct. The findings reconfirm previous research on humor as a response to violated expectations and script clashes, underscoring that the basic incongruity at the heart of this genre, the addressee being the Self in the future, elicits discursive behavior aimed at reducing uncertainty, embarrassment, or excessive seriousness.

Beyond “marking laughter,” items such as *lol*, *haha*, *hehe*, and *lmao* emerge as flexible stance-management devices. They soften face-threatening self-disclosures and frame potentially uncomfortable (or too sentimental and serious) reflections with a playful tone. In this respect, humor markers allow writers to uphold the interpersonal norms of epistolary communication even when the interlocutor is, paradoxically, themselves. The persistence of such norms in self-directed discourse highlights the extent to which communicative habits are socially and cognitively ingrained.

Overall, the study contributes to humor pragmatics and digital-communication research by illustrating how humor operates not only to amuse but also to stabilize interpersonal alignment in discourse, especially in face-threatening situations. Future research may extend this line of inquiry by comparing self-addressed digital writing with other forms of introspective discourse.

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The author has no conflict of interest to declare.

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**'THAT'S DEPRESSING, LOL': МАРКЕРИ ГУМОРУ  
В САМОАДРЕСОВАНОМУ ДИСКУРСІ ЛИСТІВ FUTUREME**

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**Анотація**

У статті розглядається гумор як когнітивний і прагматичний ресурс в асинхронному самоадресованому цифровому дискурсі на матеріалі листів, опублікованих на платформі FutureMe.org. Було зібрано корпус із 3426 листів англійською мовою, надісланих користувачами собі в майбутнє, та проведено пошук чотирьох широко вживаних орфографічних маркерів гумору: *lol*, *haha*, *hehe* та *lmao* (разом із їхніми варіантами написання). Отримані 652 конкордансів були вручну проанотовані, щоб визначити, чи вказують ці маркери на гумористичний намір загалом, чи конкретно сигналізують про гумор як реакцію на комунікативну інконгруентність, притаманну зверненню до майбутнього «я». Спираючись на теорії інконгруентності в гуморі, дослідження концептуалізує листи FutureMe як жанр, який одночасно і передбачає адресата, і ставить під сумнів епістемічні умови, типові для епістолярного спілкування. Результати показують, що 11,7% всіх випадків використання маркерів гумору явно супроводжують коментарі про парадоксальний статус адресата (який є одночасно і «Я», і «Іншим»), виявляючи роль гумору в управлінні концептуальним конфліктом. Також було виявлено, що *lol*, *haha* і

*lmao* частіше сигналізують про гумористичний ефект (сміх), ніж *hehe*. Якісний аналіз далі розглядає три основні функції маркерів гумору: (i) грайливе позначення інконгруентності адресатів у листі собі в майбутнє; (ii) сигналізування про гумористичний намір; та (iii) пом'якшення надмірно серйозного, емоційного або загрозливого для репутації змісту. Результати дослідження свідчать, що гумор у цих листах слугує не стільки реакцією на ситуативно гумористичний зміст, скільки прагматичним засобом для коригування постави в нетипових комунікативних умовах. Висуваючи на перший план роль гумору у вирішенні жанрової та епістемічної інконгруентності, стаття робить внесок у дослідження цифрового дискурсу, прагматики гумору та постави в автоадресованому дискурсі.

**Ключові слова:** *маркери гумору, самоадресований дискурс, інконгруентність, комп'ютерно-опосередкований дискурс, постава.*

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## ONE MAN'S WAR: PERSON-MARKING AND GEOPOLITICAL POSITIONING IN VIKTOR ORBÁN'S SPEECHES (2022–2025)

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### Abstract

Following Russia's full-scale war on Ukraine in 2022, the European Union and NATO largely reached a consensus on supporting Ukraine and imposing sanctions on Russia. However, Hungary's government opted for a different approach, consistently obstructing decision-making processes. This raises the question how Hungary's leaders positioned the country amid these disagreements during the Russo-Ukrainian conflict. This paper explores the rhetoric of Prime Minister Viktor Orbán, the primary spokesperson for the Hungarian government, to unravel how he portrays his leadership and the various group dynamics involving Hungary and its people. Utilizing the experiential view of person-marking and corpus linguistic methods, we analyzed four of his annual speeches from 2022 to 2025, focusing on first-person singular and plural, as well as third-person plural references. The use of the first person indicates whether the speaker emphasizes their own viewpoint in their rhetoric. First- and third-person plural references shed light on different in-group and out-group dynamics. Our research indicates that the Prime Minister increasingly expressed his personal views in his addresses, while distancing Hungary from its usual alliances and crafting a narrative centered on "foreign adversaries." These trends illustrate how political figures can manipulate alliance structures in their discourse and contribute to democratic backslide by normalizing narratives of external threats.

**Keywords:** *person-marking, personal pronouns, political personalization, political rhetoric, Russo-Ukrainian war.*

### 1. Introduction

In the aftermath of Russia's full-scale invasion of Ukraine on February 24, 2022, the member states of the European Union (EU) and the North Atlantic Treaty Organisation (NATO) condemned the invasion and almost unanimously imposed sanctions on Moscow, including restrictions on energy, transport, and services.<sup>1</sup> The Hungarian government, led by Prime Minister Viktor Orbán, broke the ranks. Hungarian politicians denounced Russian aggression (Dudlák, 2025) and expressed their support for peace and Ukraine's territorial integrity (Schmidt & Glied, 2024); however, the Orbán government gained notoriety for blocking sanctions on Russia and hindering assistance to Ukraine



(Berkes, 2022; Coakley, 2022; Gavin & Vincour, 2025; Karjalainen, 2025; Özoflu & Arató, 2023). This raises the question of how Hungary's political leadership positions itself in relation to its allies amid ongoing tensions over Russia's war in Ukraine.

To reflect on this question, this paper examines PM Viktor Orbán's political speeches between 2022 and 2025. In particular, four annual addresses delivered by the Hungarian prime minister are under scrutiny: the annual State of the Nation address, the March 15 national holiday speech, the Băile Tuşnad (Tusnádfürdő) summer camp speech, and the October 23 national commemoration speech. As the primary figure in Hungarian political discourse (Dudlák, 2025; Szilágyi & Bozóki, 2015), the prime minister has played a crucial role in articulating the government's position on the Russo-Ukrainian conflict, attributing the disruption of the political status quo to his allies, particularly the EU and NATO (Sata, 2023). Orbán, a right-wing populist leader (Agoston, 2024; Bozóki & Hegedűs, 2018; Csehi, 2019; Dudlák, 2025; Hronešová & Kreiss, 2024; Lamour, 2024; Özoflu & Arató, 2023; Sata, 2023; Suuronen, 2025; Sükösd, 2022; Szabó & Lipiński, 2024; Toomey, 2020) has been at the forefront of political communication since his electoral success in 2010. Consequently, his individual perspective on the war and his understanding of group dynamics may also shape public discourse in Hungary (Krekó, 2019).

A politicians' personal perspective can be grasped through the concept of political personalization. The personalization of politics attests that the individual political actor's persona is put in the forefront of political discourse over collective entities like political parties (Szabó, 2021, 2022, 2024, 2025b). Although politicians are mentioning their political affiliations less frequently, substantial research indicates that they are increasingly referring to the entire nation (Szabó, 2021, 2022, 2024, 2025b; Horváth, 2024a, 2024b). As a result, personalized politics can give the impression that the politician is representing the whole nation, fostering a sense of agreement among citizens on a range of political issues, including foreign policy. Orbán frequently employs first-person plural references to suggest that he transcends the role of a mere party politician, positioning himself as a representative of the entire Hungarian nation and even supranational entities, such as the EU; furthermore, he explicitly equates his supporters with Hungarians (Szilágyi & Bozóki, 2015).

Populism also exploits the sentiment of national unity: populist political rhetoric perpetuates a dichotomy between the country's "people" and the "antagonists," who are perceived as acting contrary to the interests of the people (Tóth, 2020). In Hungarian populist rhetoric, the adversaries include the European Union, the LGBTQ community, and Hungarian-American investor and philanthropist György Soros (Sükösd, 2022). Thus, to fully grasp how contemporary geopolitical dynamics are represented in Viktor Orbán's rhetoric, our research must consider not only the "in-group," which refers to the groups with which Hungary is associated according to Prime Minister Orbán, but also the "out-group," which encompasses those groups to which the country does not belong and may even perceive as hostile. Accordingly, this paper explores PM Orbán's personal perspective, as well as the construction of the in-groups and out-groups through his strategic use of person-marking. The following research questions guide our paper.

- RQ1. How did the relative frequency of first-person singular, first-person plural, and third-person plural markers evolve in PM Orbán's speeches between 2022 and 2025?
- RQ2. Which in-groups were constructed via first-person plural markers in PM Orbán's speeches between 2022 and 2025?
- RQ3. Which out-groups were constructed via third-person plural markers in PM Orbán's speeches between 2022 and 2025?
- RQ4. How were Hungary's key allies, the EU and NATO, represented via person-marking in PM Orbán's speeches between 2022 and 2025?

Person-marking is a particularly revealing feature of political communication. The first-person singular (1PS) facilitates the articulation of individual perspectives and the assertion of authority. In

contrast, the first-person plural (1PP) denotes affiliation, whereas third-person plural (3PP) references serve to distance the referents from each other. Building upon these insights, we analyze how Prime Minister Orbán utilizes pronouns and person-marking to position himself and to construct in-groups and out-groups during Russia's war on Ukraine. By examining the distribution and contextual use of the first-person singular (1PS), first-person plural (1PP), and third-person plural (3PP) referents across Orbán's speeches from 2022 to 2025, we explore how he defines his own position (1PS and 1PP) and frames the country's relationship with supranational entities, including the EU and NATO (3PP). This analysis enables us to discern whom the prime minister includes within the "we," as well as whom he regards as distant, obstructive, and hostile, thereby illuminating the personalized and populist foundations of Hungary's geopolitical communication.

The structure of the paper is organized as follows. Following the Introduction, Section 2 discusses the significance of person-marking in political communication. Section 3 offers a concise overview of the political context relevant to the research. Section 4 delineates the corpus and methodologies employed, while Section 5 presents the results alongside their discussion. The final section, Section 6, concludes.

## 2. Persons and politics

Personal pronoun choice is always political: pronouns point to particular people, designate various groups and they express power relations (Pennycook, 1994). Hungarian frequently omits subject pronouns in sentences, instead conveying number and person through verb conjugation and verbal inflections (Magyari et al., 2022). For example, in the case of *mi döntöttünk az adókról* ("we have decided on taxes") the first-person plural pronoun *mi* "we" can be omitted and shares the same propositional content with the clause *döntöttünk az adókról*. Consequently, we interpret person-marking as being conveyed by both pronouns and through conjugations and inflections. Thus, this section examines the politics of pronouns and person-marking: how politicians articulate their own identities and negotiate in-groups and out-groups via person-marking.

The 1PS is a double-edged sword in politics. On the one hand, it enables the politician to express their personal involvement; on the other hand, the 1PS assigns responsibility to the individual politician, thereby holding them accountable for their statements (Beard, 2000; Maitland & Wilson, 1987; Wilson, 1990). Consequently, it is unsurprising that the first-person singular (1PS) is predominantly employed when political actors discuss their achievements or plans (Wilson, 1990). Example 12 demonstrates the use of the 1PS.

- (1) "Ezért azt javaslom Önöknek, magunknak, hogy 2025 legyen az áttörés éve." (State of the Nation, 2025).

[That is why I propose to you, and to us, that 2025 should be the year of breakthrough.]

The 1PP can have multiple referents, a feature that is frequently utilized by practitioners in political communication (Jobst, 2007, 2010). The literature distinguishes two uses of the 1PP: the inclusive and the exclusive one (Tátrai, 2011, 2017). The inclusive 1PP encompasses the speaker, the addressee, and potentially additional individuals within its reference, as seen in Example 2 (Tátrai, 2011, 2017).

- (2) "Mi, magyarok persze azt is megtanultuk, hogy a biztonság nem barátság, hanem erő kérdése." (State of the Nation, 2022).

[We Hungarians have also learned that security is not a matter of friendship, but of strength.]

In Example 2, the first-person plural pronoun "we" encompasses the Hungarian speaker, the audience, specifically Hungarians viewing his address, as well as Hungarians in general. When employed in an exclusive manner, the referent of the 1PP encompasses the speaker and a third party, while excluding the addressee. This exclusivity is apparent in Example 3.

- (3) “Amikor 2010-ben a leggyengébb volt Magyarország, és ismét ránk maradt a kormányzás, megfogadtuk, hogy eltántoríthatatlanok leszünk, bízni fogunk a minden akadályon átrepítő közös akaratban, mindig kiállunk Magyarorszáért, és soha, de soha nem fogjuk feladni egyetlen percre sem.” (Speech, March 15, 2022).

[When Hungary was at its weakest in 2010 and we were once again left to govern, we vowed to be unwavering, to trust in our shared determination to overcome every obstacle, to always stand up for Hungary, and to never, ever give up, not even for a moment.]

In Example 3, the prime minister outlines the commitments he and his administration made when they took control of the country’s leadership in 2010. In this instance, the focus is on him and his government, rather than the audience or Hungarians as a whole.

Finally, 3PP references can be determined negatively as compared to first- and second-person person-marking as the referent of third-person pronouns does not include the speaker or the addressee (Laczkó & Tátrai, 2012; Tátrai, 2011, 2017). While the use of first-person pronouns in politics signals inclusivity, third-person pronouns express the “out-group” identity by excluding the referents from the “in-group” designated by first-person pronouns (Pennycook, 1994). This dichotomy is frequently emphasized in political discourse: first-person references are typically associated with positive connotations, whereas groups referred to in the third-person are often perceived negatively (Wales, 1996). Example 4 demonstrates the tension between the 1PP and 3PP referents.

- (4) “A Brüsszelből érkező zsoldosokat sem először vetik be ellenünk, és mi tudjuk, hogyan kell szétkergetni őket.” (State of the Nation, 2022).

[This is hardly the first time mercenaries from Brussels have been deployed against us, and we know how to chase them away.]

In Example 4, the 1PP alludes to the Fidesz government, against which the European Union, metonymically represented by “Brussels,” dispatched “mercenaries” that must be expelled from the country. It needs to be added that the use of the 3PP does not automatically signal negativity but can be used in a more general sense too (Wales, 1996; Wilson, 1990). For example, in Example 5, PM Orbán talks about “patriots,” which is also the name of the “Patriots for Europe,” a (far-)right sovereigntist political group Orbán and his allies formed in the European Parliament.

- (5) “A nyugati világ patriótái erőre kaptak.” (Speech, March 15, 2025).

[Patriots in the Western world have gained strength.]

In Example 5, the prime minister mentions politicians who hold a similar worldview to his own, which means the 3PP is unlikely to convey a negative tone.

As the examples above demonstrate, pronominal referents can encompass various groups including the administration (Example 3), the nation (Example 2), as well as people of a broader region, such as Central Europe (Example 7). How, then, can we ascertain the relationship between the speaker and the referents of various groups? Person-marking belongs to the study of deixis, the analysis of words and phrases that refer to a person (she), a place (here), or time (now) within a discourse context. To conceptualize the relationship between speaker and referents, we employ the experiential view of deixis, as articulated by Marmaridou (2000).

“Experiential realism” holds the stance that the way we experience the world around us bears consequences on language use (Marmaridou, 2000). In this vein, person deixis can be interpreted as an act of “pointing out,” namely, it “involves the linguistic act of pointing to an entity in space, performed by an authorized speaker and directed to an unfocused addressee” (Marmaridou, 2000, p. 100). This “linguistic act” of pointing out is based on the physical act of a human being pointing out to someone or something in the presence of another human being (Marmaridou, 2000). Deixis is

generally egocentric<sup>4</sup>: the speaker relates the entities of the outside world to themselves (Levinson, 1983). Thus, the speaker determines the world relative their “I.” This conceptualization of deixis is licensed by the center-periphery image schema (Marmaridou, 2000). (Image schemas are conventionally written in small capital letters.) Image schemas are abstract conceptual representations of our perceptual experiences of the physical world (Johnson, 1987). The center-periphery image schema shows that humans observe the world from their perceptual and experiential center (center), observing entities (for example other humans and objects) from various distances (periphery) with certain entities being closer to them (physically, emotionally, etc.) than others (Johnson, 1987; Lakoff, 1987).

According to Rees (Rees, 1983, as cited in Jobst, 2007), personal pronouns can also be placed at varying distances from the speaker, based on how “close” they are conceptually to the speaker.

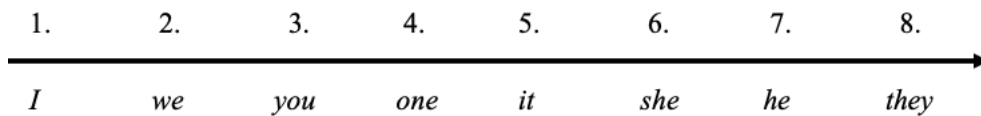


Figure 1. Distancing from the self („I”) via personal pronouns (Rees, 1983, cited by Jobst, 2007, p. 32).

The guiding principle of Figure 1 is that a speaker formulates their message from their subjective reference point (the “I”) and formulate their message relative to themselves (Wilson, 1990). However, the model requires certain modifications in the Hungarian language, as proposed by Horváth (2024b). In Hungarian, the pronouns marked with numbers 5, 6, and 7 can be combined because there is no distinction between grammatical genders, so the ranking in this case will be as follows: I, we, you, one (the general subject), it/she/he, they.

Szabó (2021, 2022, 2024, 2025b) introduced the radial model of deixis, as depicted in Figure 2 (adapted to Hungarian by Horváth, 2024b), building upon the framework established by Rees (1987) and the experiential, image-schematic perspective of deixis articulated by Marmaridou (2000).

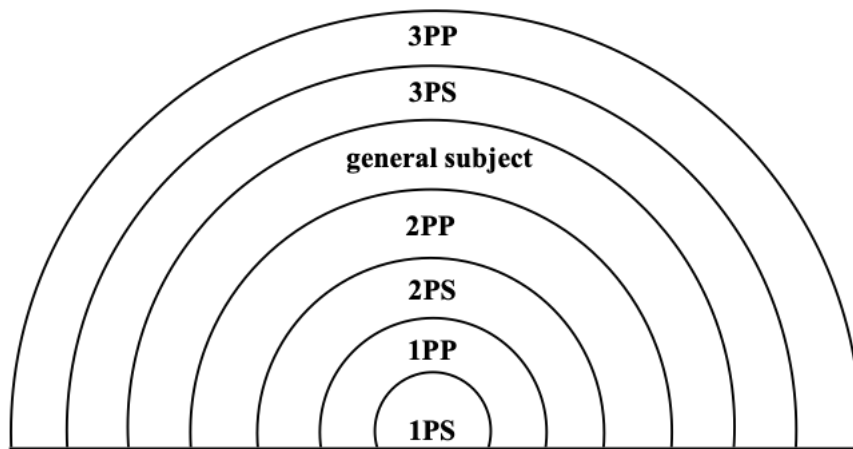


Figure 2. The relative distance from the speaker (based on Rees, 1983, cited by Jobst, 2007, p. 32, and Szabó, 2021, p. 65).

Figure 2 depicts the methodological framework of the study, illustrating how distance from the speaker is represented through concentric circles within the center-periphery image schema. The center-periphery schema consists of three structural components: entity, center, and periphery (Benczes & Kövecses, 2016). In this case, the entity is the individual identified by the pronominal references, the center indicates the first-person singular (1PS). The next pronoun, the 1PP represents

the group to which the speaker belongs and therefore, it is the closest to the speaker's experiential center. As we move towards more periphery, referents of personal pronouns are conceptually further from the center, with the 3PP representing the group farthest from the speaker. In Hungarian, unlike in Indo-European languages, the function of personal pronouns is often taken over by verbal affixes (suffixes/endings) or other grammatical devices (Magyari et al., 2022; Tolcsvai Nagy, 2017). Person-marking fulfills the same functions as personal pronouns, i.e., reference and antecedent identification (Heltai & Juhász, 2002), and thus achieves the same result as interpreting the radial model (for previous applications, see Horváth, 2024b, in press).

### 3. Viktor Orbán's (war) rhetoric

During the dissolution of the Soviet Union, Viktor Orbán, then a young political figure, delivered a significant address calling for democracy in 1989 in Hungary. This speech, that garnered him national popularity occurred at the reburial ceremony of Imre Nagy, the executed prime minister of the 1956 anti-Soviet Hungarian revolution; during this event, he called for the immediate withdrawal of Soviet troops and the announcement of free elections (Sükösd, 2022; Szilágyi & Bozóki, 2015). Since that time, delivering regular speeches has become a central communicative practice for PM Orbán to disseminate his perspectives on both domestic and international matters (Sükösd, 2022; Szilágyi & Bozóki, 2015). For example, he is a frequent participant at the Bálványos Free Summer University and Summer Camp in Băile Tușnad (Tusnádfürdő), an event that has been held regularly since the fall of the communist regime in Romania. At this venue, he has often articulated his ideas, including the advocacy for an "illiberal democracy" in 2014 (Karapetjana et al., 2023). In his speeches, Orbán has portrayed himself as the representative and protector of "true Hungarians," while characterizing his political adversaries as treacherous usurpers backed by foreign powers intent on undermining Hungary (Sata, 2023; Suuronen, 2025; Toomey, 2020; Visnovitz & Jenne, 2021). His addresses reinforce and reconstruct the dichotomy between the Hungarian people and various "enemies" of the people and incite crises and fears (Csehi, 2019; Sata, 2023).

While Orbán's speeches continue to be pivotal in establishing his political agenda, their content has altered considerably since 1989. Following his tenure in government from 1998 to 2002 and subsequent electoral defeat in the same year (Szilágyi & Bozóki, 2015), by 2010, his second administration demonstrated a significantly altered political strategy characterized by increasingly authoritarian tendencies and heightened nationalist beliefs (Bocskor, 2024; Özoflu & Arató, 2023; Toomey, 2020; Sata, 2023). As the nationalist-populist sentiment has grown, illiberal actions, such as violations of the rule of law and restrictions on freedoms, along with the erosion of checks and balances, and the control of the media have progressively increased in Hungary (Bocskor, 2024; Özoflu & Arató, 2023; Sata, 2023).

Similar tendencies characterize Hungarian international affairs, as the Orbán government has implemented a populist approach in its foreign policy, characterized by the politicization of decision-making processes, the expansion of international partnerships with authoritarian regimes (e.g., Russia), and a more confrontational approach towards traditional allies, such as the EU and NATO (Visnovitz & Jenne, 2021; see also Özoflu & Arató, 2023; Schmidt & Glied, 2024). Nonetheless, Orbán's sovereigntist agenda does not imply an intention for Hungary to withdraw from these alliances, resulting in a "role conflict" (Hettyey, 2022, p.260; Agoston, 2024; Lamour, 2024). This conflicting role is further evidenced by the Hungarian government's decision to strengthen its ties with Russia (citing energy security as the rationale), which has come at the expense of its relations with the European Union; this has led to Hungary being perceived as a "Trojan horse" within the EU (Özoflu & Arató, 2023, p.720; Bocskor, 2024; Fábrián, 2022)5.

Following Russia's full-scale invasion of Ukraine, the rift between the Hungarian government and its allies widened significantly, leading to concerns within the EU regarding Hungary's position on Ukraine (Özoflu & Arató, 2023). The origins of the strained relations between Hungary and Ukraine can be traced back to the mid-2010s, centered around the issue of Hungarian minority rights

(Schmidt & Glied, 2024, p.257; Toomey, 2020). Although the Hungarian government presented itself as an advocate for Ukraine's EU membership after Russia's annexation of Crimea (Bocskor, 2024), it obstructed NATO-Ukraine meetings and a joint EU resolution (Visnovitz & Jenne, 2021). Another oft-cited reason for the tension between Hungary and Ukraine is the Ukrainian comprehensive education reform of 2017 that restricted the use of minority languages in education (Özoflu & Arató, 2023; Szabó & Lipiński, 2024)<sup>6</sup>. After Russia's aggression in 2022, tensions remained high as Hungary declined to offer military assistance to Ukraine or allow its land to be used for transporting such aid directly to Ukraine (Lamour, 2024). As the conflict dragged on, Orbán held Ukraine responsible for its continuation and the resulting economic impact, asserting that neither party can achieve victory through military action (Schmidt & Glied, 2024).

The Hungarian government's attitude to Russia amidst the war in Ukraine has been neutral or even somewhat friendly, with no criticism towards President Putin (Dudlák, 2025). In February 2022, prior to the war, PM Orbán visited Russia on a so-called "peace mission,"<sup>7</sup> advocating for a peaceful resolution (Dudlák, 2025; Schmidt & Glied, 2024). Following the onset of the full-scale conflict, the Hungarian government adopted the terminology used by Russia, characterizing the invasion as a "special military operation" (Schmidt & Glied, 2024). Despite maintaining a cordial demeanor, all 19 sanctions imposed by the EU on Russia were adapted by Hungary until October 2025. However, the Prime Minister and Péter Szijjártó, the Minister of Foreign Affairs and Trade often delayed or moderated these measures, expressing criticism and asserting that the sanctions against Russia were ineffective<sup>8</sup> (Bocskor, 2024; Fábrián, 2022; Sata, 2023; Schmidt & Glied, 2024).

The discourse of government on international affairs plays a pivotal role in shaping public opinion, particularly since foreign policy does not typically occupy a central place in citizens' concerns (Krekó, 2019). Additionally, the Orbán administration maintains significant influence over Hungary's public media (Dudlák, 2025), which showed support for Russia at the onset of the war (Dudlák, 2025). It later adopted more pragmatic approaches by describing the situation as a "war in the neighborhood" to balance its narratives (Bocskor, 2024, p.144). Concerning PM Orbán's communication style regarding the Russo-Ukrainian war, Szabó and Lipiński (2024) observed that his online presence was characterized by a notable lack of empathy towards Ukraine. At the onset of the full-scale invasion, his Facebook posts indicated an awareness of the dire circumstances resulting from the conflict. (It needs to be added that at the beginning of the conflict, Orbán personally welcomed Ukrainian refugees at the border (Dudlák, 2025; Schmidt & Glied, 2024).) However, rather than expressing sympathy, he invoked emotions of sadness and pity. This governmental communication style may be attributed to the political leadership's pragmatic approach to foreign policy that is governed by national (economic) interest, leaving little space for moral considerations in decision-making (Dudlák, 2025; Fábrián, 2022; Krekó, 2019; Lamour, 2024; Schmidt & Glied, 2024).

The communication strategy of the Orbán government concerning the war is also evident in public opinion surveys. According to the spring 2025 Standard Eurobarometer survey (European Commission, 2025), the Hungarian respondents agree with providing financial and humanitarian support to Ukraine (63%), and imposing economic sanctions on the Russian government, companies, and individuals (51%). However, a much lower ratio agrees with granting Ukraine a candidate status as a potential EU Member (34%) and financing the purchase and supply of military equipment to Ukraine (40%). The results are corroborated by the survey of Policy Solutions, a Hungarian research institute reporting that solidarity towards Ukraine has decreased owing to the prolongation of the war as well as governmental war rhetoric (Kósa & Bíró-Nagy, 2025). As the Hungarian governmental communication has turned increasingly hostile about Ukraine, a visible decreasing trend of Hungarian humanitarian aid can be detected over the years, and the rejection of financial and military support is also broadly rejected (Kósa & Bíró-Nagy, 2025).

Notwithstanding governmental rhetoric, the attitude of the Hungarian populace towards Russia remained predominantly negative.<sup>10</sup> A nationally representative survey conducted in 2025 revealed

that the majority of Hungarians opposed closer ties with Russia (Bíró-Nagy & Molnár, 2025). Furthermore, in the same year, 60% of Hungarian respondents expressed the belief that Hungary aligns with the West, and a significant 79% continued to support the country's NATO membership (Bíró-Nagy & Molnár, 2025).

#### 4. Corpus and method

The corpus of this study comprises speeches delivered by Hungarian Prime Minister Viktor Orbán over a three-year period, from 2022, the year marking the commencement of the Russian military invasion of Ukraine, to the present, i.e., the end of 2025. Building on the know-how gained from his 1989 speech, Viktor Orbán has developed a series of four regular, seasonal speeches over the decades; each covers one season of the year: the State of the Nation addresses (winter), speeches on the March 15 and October 23 national holidays (spring and autumn), and speeches at the Kötöcske Civic Picnic (summer) (Sükösd, 2022). Accordingly, we examined these speeches with the exception of the Kötöcske Civic Picnic as this event is a closed strategic meeting from which information has long been leaked only (Sükösd, 2022). Moreover, from the period under review, only the most recent talk, from 2025, is available in its entirety. (Apart from the 2025 address, the most recent speech transcript from this event dates to 2015.) Thus, we have instead chosen to analyze the speeches of October 23 – a day of historical significance in Hungary, like March 15. The reasoning behind this is that these talks are of great interest to the Hungarian public, they are essentially addressed to the nation and occur annually. A total of 16 speeches were extracted from the Prime Minister's official website (<https://miniszterelnok.hu/>) and analyzed (N = 16), resulting in a combined transcript of 57,852 words.

The prominence of Viktor Orbán underscores the rationale for selecting this corpus as a key source of information pertaining to crisis communication within the Hungarian government (Bene et al., 2020). Orbán's speeches are disseminated through various channels, including audiovisual media and written formats, allowing them to reach a broad audience. Furthermore, news portals consistently cover his remarks, further amplifying the potential audience and ensuring that this content can be accessed by millions.

Our research investigates the degree of personalization from a linguistic perspective by analyzing personal pronouns across various cases, including subject, object, partitive, and possessive cases. In Hungarian, in addition to personal pronouns, number and person are more frequently indicated by verb person suffixes and possessive suffixes (Tolcsvai Nagy, 2017); therefore, the paper also deliberately examines these person markers. The first-person singular refers to the individual's more prominent role and personalization, while the first-person plural indicates group identity (Urban, 1986). Furthermore, in the context of political personalization, how politicians view not only the "in-group" but the "out-group" or, more specifically, the third-person is altered (Szabó, 2024). Wales (1996, p. 61) notes that while the 1PP is presented positively, the referents of the 3PP are framed negatively. The 3PP clearly indicate who the 'other' is, as it prototypically excludes both the speaker and the addressee(s).

The research employs corpus linguistic methods to investigate the phenomenon of political personalization within the Hungarian political discourse in the context of the Russian invasion of Ukraine. The paper employed a cross-sectional research design utilizing both quantitative and qualitative methodologies, and the analysis was carried out in the following steps. First, the speeches delivered by the Prime Minister during the specified time frame were collected, and then the texts were read (cf. Proctor & I-Wen Su, 2011). Subsequently, the authors manually built the corpus and analyzed the transcripts by searching for person markers corresponding to the first-person singular (1PS), first-person plural (1PP), and third-person plural (3PP) – these expressions are summarized in Table 1.

**Table 1.**

**The 1PS, 1PP, and 3PP forms of personal pronouns, verb person suffixes, and possessive suffixes in the Hungarian language.**

	<i>Personal pronouns</i>	<i>Verb person suffixes</i>	<i>Possessive suffixes</i>
1PS	én, engem, engemet, rajtam, bennem, nálam, rám, belém, hozzám, rólam, belőlem, tőlem, nekem, velem, értem, énengem, énengemet, énrajtam, énbennem, énnálam, énrám, énbelém, énhozzám, énrólam, énbelőlem, éntőlem, énnekem, énvelem, énértem	-k, -m	-m, -om, -am, -em, -öm, -im, -aim, -eim
1PP	mi, minket, rajtunk, bennünk, bennünket, nálunk, ránk, belénk, hozzánk, rólunk, belőlünk, tőlünk, nekünk, velünk, értünk, mirajtunk, mibennünk, mibennünket, minálunk, miránk, mibelénk, mihozzánk, mirólunk, mibelőlünk, mitőlünk, mivelünk, miértünk	-nk, -unk, -ünk -uk, -juk, -jük, -zük	-nk, -unk, -ünk, -ink, -aink, -eink
3PP	ők, őket, rajtuk, bennük, náluk, rájuk, beléjük, hozzájuk, róluk, belőlük, tőlük, nekik, velük, értük, őrajtuk, őbennük, őnáluk, őrájuk, őbeléjük, őhozzájuk, őróluk, őbelőlük, őtőlük, őnekik, ővelük, őértük	-nak, -nek -ik, -ják	-uk, -ük, -juk, -jük, -ik, -aik, -eik

The numerical values of 1PS, 1PP, and 3PP were summed. This study takes a qualitative approach to examining the use and meaning of first-person plural (1PP) references in political discourse. While also focusing on their quantitative distribution, the analysis explores how different forms of “we” express varying degrees of collective identity. In earlier research, first-person plural (1PP) references were typically classified into groups such as 1PP<sub>Family</sub>, 1PP<sub>Party</sub>, 1PP<sub>Nation</sub>, 1PP<sub>Nations</sub>, 1PP<sub>EU</sub>, and 1PP<sub>Humanity</sub> (Urban, 1986; Beard, 2000; Horváth, 2024a, 2024b; Szabó, 2021, 2025b; Proctor & I-Wen Su, 2011). It is possible to establish additional, war-related alliance system categories, such as 1PP<sub>NATO</sub>, to reflect the geopolitical context; the current study aims to develop further subcategories. For this purpose, a qualitative, bottom-up approach was employed to explore the meanings and contextual nuances of 1PP usage in political discourse; therefore, the categories were not predetermined but were developed during the manual analysis process. In addition, a qualitative method is employed to analyze third-person plural (3PP) references, focusing on determining the specific groups to whom the “they” referred. Although a qualitative, traditional pen-and-paper approach was employed in this part of the method for identifying categories in the speeches, the classifications have also been quantified. In further qualitative analyses, we focused specifically on those that addressed the topic of the Russo-Ukrainian war.

The following analytical steps were adopted. Sentences containing 1PS, 1PP, and 3PP person markers were manually collected from the transcripts of the speeches and analyzed on a sentence-by-sentence basis. The person markers within each sentence were placed separately in the appropriate category in the database. If there was an anaphoric or cataphoric reference within the sentence, the category was selected on that basis (Bazzanella, 2002; Jobst, 2007). In instances where it was unclear to whom the person marker referred, reliance was placed on the broader textual context for clarification (Bazzanella, 2002), as in Examples 6–7.

(6) “Ebből fakadóan az igazi feladat a számunkra, hogy a háború fényénél megpróbáljuk újra megérteni a Nyugatot.” (Băile Tuşnad speech, 2024).

[For this reason, our real task is to try to understand the West anew in the light of war.]

Based on Example 6 alone it is not evident which group is determined by the referent that would need to understand the “West,” which can also have multiple referents (see Szabó, 2025a). However, the broader contextual reading unlocks the group designated in Example 6, as evidenced by Example 7.

(7) “Ebből fakadóan az igazi feladat a számunkra, hogy a háború fényénél megpróbáljuk újra megérteni a Nyugatot. Ugyanis mi, közép-európaiak a Nyugatot irracionálisnak látjuk.” (Báile Tuşnad speech, 2024).

[For this reason, our real task is to try to understand the West anew in the light of war. For we Central Europeans see the West as irrational.]

While the first sentence in Example 7 allows for multiple interpretations of the marked person, the second sentence makes it clear that the first-person “we” refers to Central European people.

Furthermore, in Hungarian, a person can be marked multiple times in the same phrase, for example, *a mi háborúnk* [we + our war] contains both the personal pronoun *mi* [we] and the possessive suffix *-nk* [our]. In such cases, the sentences were recorded only once in the research database to avoid distorting the results; thus, personal pronouns were not considered as separate hits but were recorded together with verb conjugations and verbal inflections.

Finally, in accordance with corpus linguistic conventions, the number of occurrences was normalized to 1,000 words (Gries, 2010), and the results were recorded in a Microsoft Excel file.

Certain hits were excluded from the analysis, as outlined below. Three of the personal pronouns presented in Table 1 – *értem* “for me/I understand,” *értünk* “for us/we understand,” and *mi* “we/what” – may serve not only as personal pronouns but also as verbs or as pronouns that replace nouns (Horváth, 2024b). The first meaning indicated in English is that the terms function as personal pronouns, while the second meaning refers to the non-personal pronoun form. We filtered these from the corpus by examining the context to ensure the results would not be distorted. Quotations not originating from the Prime Minister were also excluded from the analysis.

## 5. Results and discussion

The results show that in the Hungarian PM’s communication between 2022 and 2025, first-person plural references were the most frequent, followed by third-person plural and first-person singular 1PP, followed by 3PP with 30%, while the 1PS accounts for 7%. The normalized frequency (per 1,000 words) of the analyzed person markers based on the annual totals is summarized in Figure 3.

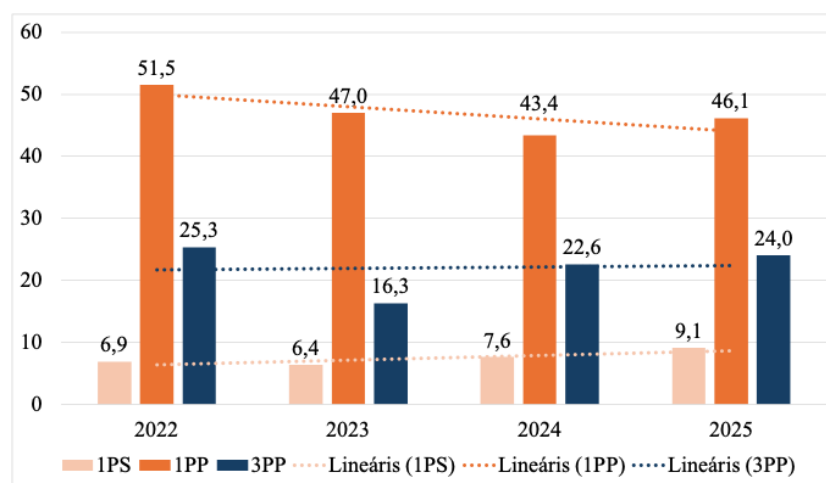


Figure 3. The normalized frequency (per 1,000 words) of 1PS, 1PP, and 3PP person markers in the analyzed speeches from 2022 to 2025, based on the annual totals.

Over time, there is an upward trend in the results for 1PS and 3PP, and a downward trend in the data for 1PP person markers, as shown in Figure 3. The extent of change is lower in the case of the previously mentioned markers (i.e., 1PS and 3PP); however, the results of this study indicate a more

significant decrease in the case of 1PP. The data reveal that, for Hungarian PM Viktor Orbán, communication in the first-person is increasingly shifting towards singular, rather than group dynamics, as time passes. Additionally, references to third persons are playing an increasingly important role in his communication. These findings are consistent with the notion that since 2010, Hungary has emerged as a stronghold of populist governance, marked by the characterization of the nation as a homogeneous internal group that must fight against some kind of “external enemy” (Juhász et al., 2015).

Standard deviation is high among 1PS ( $\sigma = 4.5605$ ) and 3PP ( $\sigma = 12.0888$ ) person markers because the data varies significantly relative to its average and mean. In contrast, 1PP ( $\sigma = 13.3459$ ) exhibits a moderate standard deviation, indicating noticeable variability, but not extreme. The frequency normalized to a thousand words ranged from 0 to 15.4 for 1PS statements, from 33.2 to 88.8 for 1PP references, and from 4.3 to 45.9 for 3PP statements. Their simple arithmetic means are, in the same order: 5.4, 5.1, and 24.6. The distribution of the person markers among the analyzed speeches is shown in Figure 4.

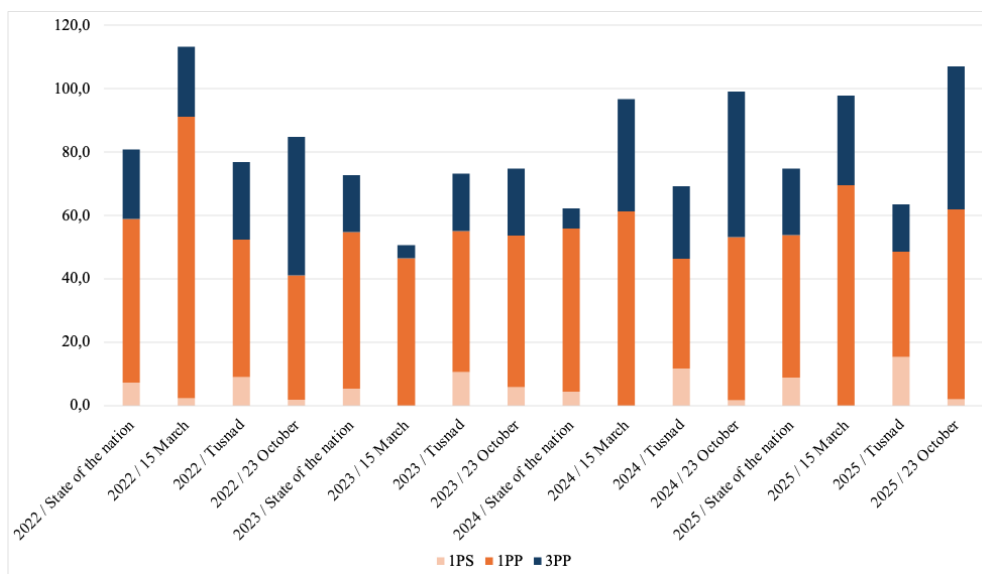


Figure 4. The normalized frequency (per 1,000 words) of 1PS, 1PP, and 3PP person markers in the analyzed speeches between 2022 and 2025.

As seen in Figure 4, the first-person singular occurs much more frequently in the Băile Tuşnad (Tusnádfürdő) speeches because they are more personal in nature than an average prime ministerial address, thus more personalized, while in other speeches, 1PS references occur less frequently – for example, in the speeches of March 15, there were zero hits in the last three of the four years, but even in 2022, the hits were only 2.3 normalized to 1,000 words. This trend can presumably be explained by the fact that the PM communicates less personally in a commemorative speech than, for example, in a lecture at a summer camp.

Furthermore, by calculating the proportional distribution ratios, we found that 1PP was the most common in almost all speeches, followed by 3PP and then 1PS. The order of frequency differed in only one case, namely in the speech of October 23, 2022, where 3PP was the most common, followed by 1PP, and finally 1PS.

The remainder of this paper presents the more specific meaning of person markers, specifically, who the Hungarian Prime Minister was referring to when he used them. Based on Szabó (2021, 2022, 2024, 2025b) and Horváth (2024b), several subcategories of 1PP have been identified in earlier research, typically classified as 1PP<sub>Family</sub>, 1PP<sub>Party</sub>, 1PP<sub>Nation</sub>, 1PP<sub>Nations</sub>, 1PP<sub>EU</sub>, and 1PP<sub>Humanity</sub>. In line with this approach, the categories shown in Figure 5 were created, and the following results are shown.

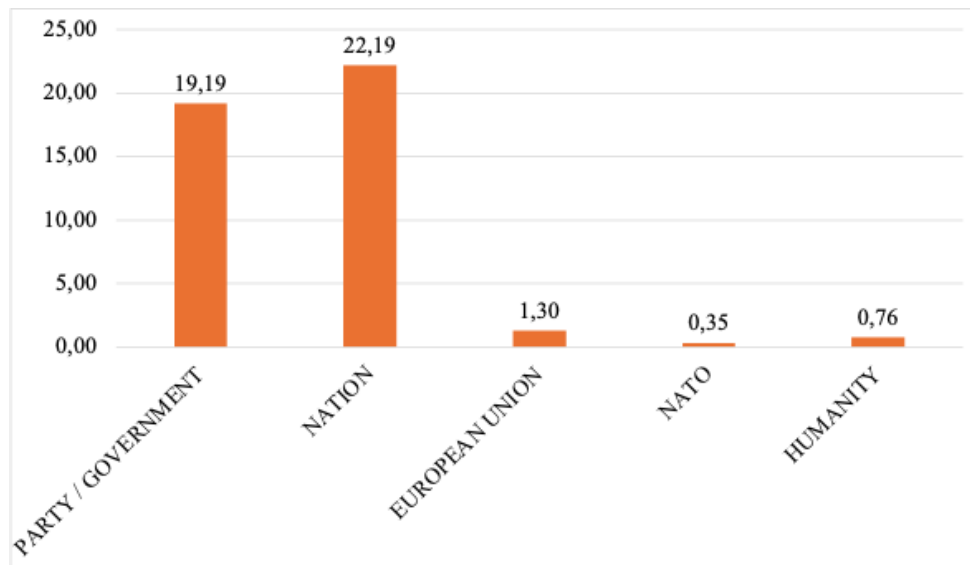


Figure 5. The normalized frequency of 1PP person markers (per 1,000 words) by categories, referring to party/government, nation, EU, NATO, and humanity.

As can be seen from the data, PM Orbán most often used first-person plural references when speaking on behalf of the nation (normalized hits = 22.19), which is in line with our expectations, given the fact that since 2010, the ruling party has referred to itself as “national,”<sup>11</sup> which necessarily involves the use of first-person plural person markers referring to the nation. Reference to the nation is seen in Example 8.

- (8) “*Mi, akik ma itt összejöttünk, különböző emberek vagyunk, de egy dolog közös bennünk: magyarok vagyunk, akiknek közös szenvedélye Magyarország.*” (State of the Nation, 2022).  
[Those of us gathered here today are all different people, but we have one thing in common: we are Hungarians who share a passion for Hungary.]

This is followed in order by references to the party and/or government (normalized hits = 19.19), demonstrated by Example (9).

- (9) “*Nehéz év ide vagy oda, tavaly is sikerült közelebb hoznunk magunkhoz a külhoni magyarokat, elvégre nemzeti kormány volnánk.*” (State of the Nation, 2024).  
[Despite the difficult year, last year we managed to bring Hungarians outside the homeland closer to us; after all, we are supposed to be a national government.]

In line with Horváth’s (2024b) research on Hungarian political communication during the coronavirus pandemic, the other subcategories lag far behind the nation, party, and government: the European Union (Example 10; normalized hits = 1.30), the NATO military alliance (Example 10; normalized hits = 0.35), and humanity (Example 11; normalized hits = 0.76), followed by other markers, for example joint statements on behalf of Hungary and other nations, Central Europe, Europe as a continent, or “the West” and “the East.”

- (10) “*NATO- és európai uniós tagok vagyunk, és közben kiegyensúlyozott politikai viszonyt és gazdasági kapcsolatokat ápolunk Oroszországgal.*” (State of the Nation, 2022).  
[We are members of NATO and the European Union, while maintaining balanced political relations and economic ties with Russia.]

(11) “Amiről beszélek, és amivel szemben állunk, az valójában egy világrendszer-váltás.” (Báile Tuşnad speech, 2024).

[What I am talking about, and what we are facing, is in fact a change in the world order.]

Figures 6 and 7 illustrate how the occurrences of first-person plural categories evolved over the examined period. The normalized frequencies across the years generally show comparable levels. However, a notable trend emerges: in line with the personalization of politics, 1PP person markers referring to the party/government (1PP<sub>Party/government</sub>) decrease. However, references to the the nation (1PP<sub>Nation</sub>) exhibit an unexpected decreasing trajectory. The decline in 1PP<sub>Nation</sub> is particularly surprising, as previous research (Horváth, 2024a, 2024b) characterized the Hungarian government’s communication, including that of the Prime Minister, as showing that the usage of these person markers is getting more frequent. In the present corpus, a contrary trend has emerged; the declining trend in references to the nation is also noteworthy and surprising, as the ruling party still refers to itself as “national.”

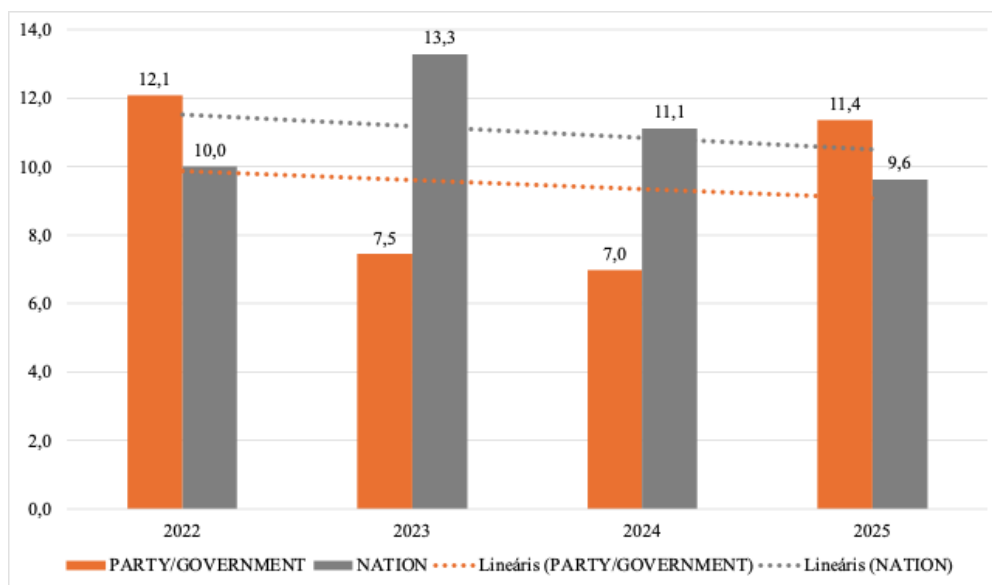


Figure 6. The normalized frequency of 1PP person markers (per 1,000 words) by categories, referring to party/government, and nation, aggregated by year.

References to the European Union (1PP<sub>EU</sub>) show a significant decline. The frequency dropped sharply from 1.3 per thousand words in 2022 to 0.4 in 2023 and 0.3 in 2024, with a slight recovery to 0.5 in 2025, suggesting that PM Orbán increasingly avoids speaking on behalf or as a member of the European Union (i.e., using 1PP forms to represent the EU). This decrease contrasts with the findings of Horváth (2024b), where an increase in these references occurred during the first three waves of the coronavirus pandemic, when Hungary sought financial and political support from the 27-member bloc. Rather, the Prime Minister currently tends to refer to the EU using the third-person plural (3PP) category (see Figure 9).

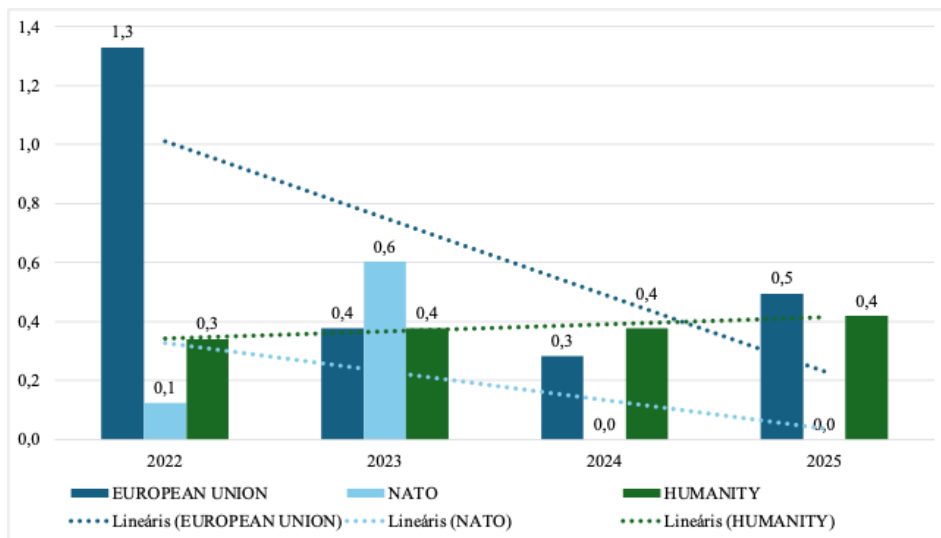


Figure 7. The normalized frequency of 1PP person markers (per 1,000 words) by categories, referring to EU, NATO, and humanity, aggregated by year.

The NATO military alliance, as a category (1PP<sub>NATO</sub>), appeared with initial enthusiasm in 2022 and 2023, likely attributable to the Russian invasion of Ukraine. However, this category did not appear even once in the speeches analyzed for 2024 and 2025, indicating a shift in the focus of Hungarian prime ministerial communication.

Conversely, 1PP nominations referring to humanity unexpectedly increased over the studied period. This upward trend is noteworthy because government communication did not frequently employ this meaning of 1PP even during the global coronavirus pandemic. This emerging pattern is in line with Viktor Orbán’s ambition to position himself globally among illiberal leaders, as evidenced by his English-language account on X that was registered in 2022 (Sonnevend et al., 2024).

Figure 8 presents the categories in a manner that distinguishes the results for each individual speech, rather than displaying them in an aggregated format. The relatively high fluctuation suggests that the overall intensity of in-group identification is highly context-dependent, potentially reflecting the political importance or external challenges faced at the time of the speech.

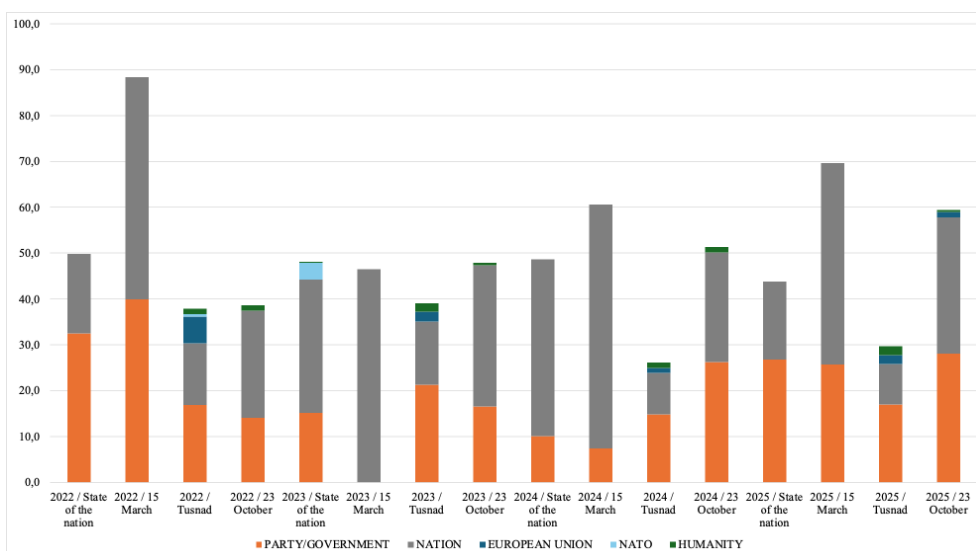


Figure 8. The normalized frequency of 1PP person marker categories (per 1,000 words) in the analyzed speeches.

A closer examination of the data reveals that rhetorical goals tailored to each occasion influence the preferred in-group identification. Speeches delivered on national holidays (March 15 and October 23) and the State of the Nation address tend to feature a high total volume of 1PP markers, with 1PP<sub>Nation</sub> often being highly prominent, particularly in the March 15 speeches; for example, in 2023, all the person markers were those related to the nation. While the Băile Tuşnad (Tusnádfürdő) summer camp speeches, traditionally political and strategic in nature, also maintain high total usage but exhibit greater internal variability. Conversely, 1PP<sub>Party/government</sub> consistently forms a robust base across all four types of speeches, often taking up a relatively larger proportion in some October 23 and State of the Nation speeches, suggesting a more direct focus on governmental action and party ideology in these settings.

Analyzing the data reveals a clear shift from referencing institutional alliances to a broader, global 1PP identification. References to key Western institutional structures – i.e., in this case 1PP<sub>EU</sub> and 1PP<sub>NATO</sub> – are characterized by their scarce, low-level appearance, followed by a near-total disappearance in subsequent years. NATO was strictly confined to the early 2022 and 2023 speeches, appearing in the 2022 Băile Tuşnad speech and the 2023 State of the Nation address, reflecting the immediate geopolitical concerns following the Russian invasion of Ukraine. Similarly, references to the European Union were scarce, appearing more visibly in every analyzed year’s Băile Tuşnad speeches, as well as last year’s October 23 speech.

Subsequently, the 1PP<sub>Humanity</sub> exhibits a distinct and growing trend; while remaining low in absolute frequency, this global identification appears consistently in the later speeches of 2024 and 2025. The emerging usage across high-profile platforms signals a deliberate, steady increase in its normalized frequency, irrespective of the specific speech type. PM Orbán’s communication is moving away from identifying with institutionalized European structures and is instead deploying a broader, transnational “we,” i.e., humanity. The data support the interpretation that the Hungarian Prime Minister’s communication is strategically moving away from identifying with institutionalized European structures and is instead deploying a broader, global “we,” i.e., humanity, to frame issues, possibly to contextualize domestic and regional challenges within a perceived worldwide threat matrix, thereby maintaining a focus on danger while circumventing traditional political alliances.

The results of the third-person plural person markers are presented in the continuation. Figure 9 illustrates the frequency of different external groups (out-groups) referred to using 3PP in PM Orbán’s speeches. When finalizing the 3PP referent groups, only categories that occurred at least 10 times ( $\geq 10$ ) in the corpus of the present study were considered; hence, those with fewer than 10 hits were excluded from further quantitative analysis and included in the “other” category.

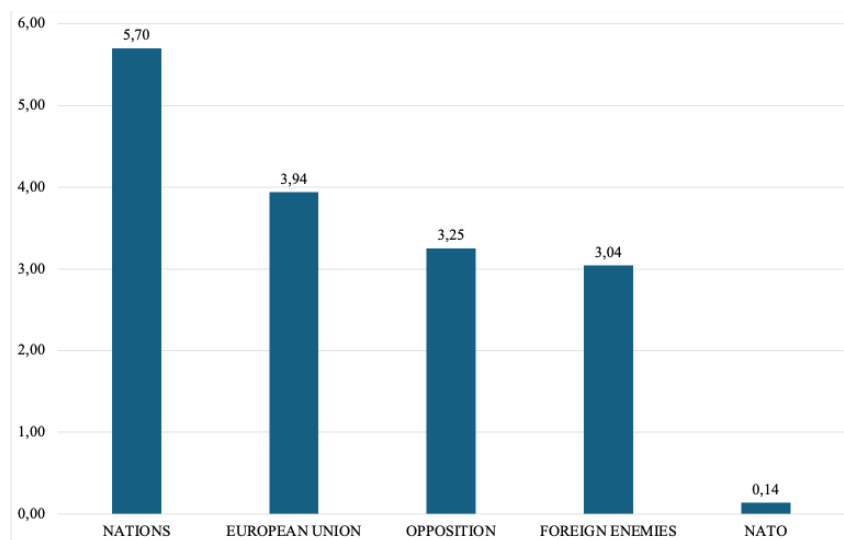


Figure 9. The normalized frequency of 3PP person markers (per 1,000 words) by referent.

The group referring to nations (3PP<sub>Nations</sub>) shows the highest overall frequency, registering 5.70 occurrences per thousand words, suggesting that other nations constitute the most frequent external referent when PM Orbán employs 3PP markers. This category does not necessarily encompass EU and NATO members, as seen in Example 12.

- (12) “*A szomszédaink biztosak lehetnek abban, ha bajba kerülnek, a magyarokra mindig számíthatnak.*” (State of the Nation, 2024).  
[Our neighbors can be sure that if they get into trouble, they can always count on the Hungarians.]

The European Union (3PP<sub>EU</sub>; Example 13) follows as the second most frequent category at 3.94. While the domestic opposition group (3PP<sub>Opposition</sub>; Example 14) is the third most frequent, with 3.25. Foreign enemies (3PP<sub>Foreign enemies</sub>; Example 15) are cited with a frequency of 3.04, placing them fourth. While the NATO alliance (3PP<sub>NATO</sub>; Example 13) exhibits a significantly lower frequency of only 0.14 per 1,000 words.

- (13) “*Na, most abban a veszélyes helyzetben vannak, vagyunk, hogy úgy kell valahogyan segíteniük de facto részes félként az ukránokat, hogy a moszkvai hatalom ezt ne érezze úgy, Moszkva szemében ez ne váljon egy olyan helyzetté, amikor mi, a NATO és az Európai Unió formális tanácsadó felekké válunk.*” (Băile Tușnad speech, 2022).  
[Well, now they are, we, are in a dangerous situation where they have to help the Ukrainians as a de facto party to the conflict in such a way that the authorities in Moscow do not feel that, in Moscow’s eyes, this is becoming a situation where we, NATO and the European Union, are becoming formal parties to the conflict.]
- (14) “*Sohase felejtjük el, hogy a mi igazi ellenfelünk nem a magyarországi ellenzék, hanem az ő gazdájuk.*” (State of the Nation, 2025).  
[Let us never forget that our real enemy is not the Hungarian opposition, but their master.]
- (15) “*Összefogás nélkül idegenek uralkodnának rajtunk, előbb-utóbb kiforgatnának mindenünkből, és adósrabszolga sorba juttatnának.*” (Speech, October 23, 2024).  
[Without unity, strangers would rule over us; sooner or later, they would take everything we have and turn us into bonded laborers.]

Figure 10 shows how the occurrences of third-person plural categories evolved between 2022 and 2025 by year. The frequency of 3PP<sub>Nations</sub> dips slightly from 2022 to 2023 by 0.1 occurrences per thousand words, but then sharply increases to its peak in 2024 (normalized hits = 8.1) before projecting a significant drop in 2025 (normalized hits = 3.0). Despite the prominent spike in 2024, the overall trendline shows a gradual decline in the normalized usage of 3PP for this group.

While 3PP person markers referring to the European Union (3PP<sub>EU</sub>), the linear trendline clearly indicates an increasing tendency, which is consistent with the fact that the number of statements made on behalf of the European Union decreased in the case of 1PP references in our research corpus (see Figure 7). All this may also point to a trend whereby Hungarian government communication tends to deflect responsibility, blaming external actors, such as “Brussels” (Horváth, in press).

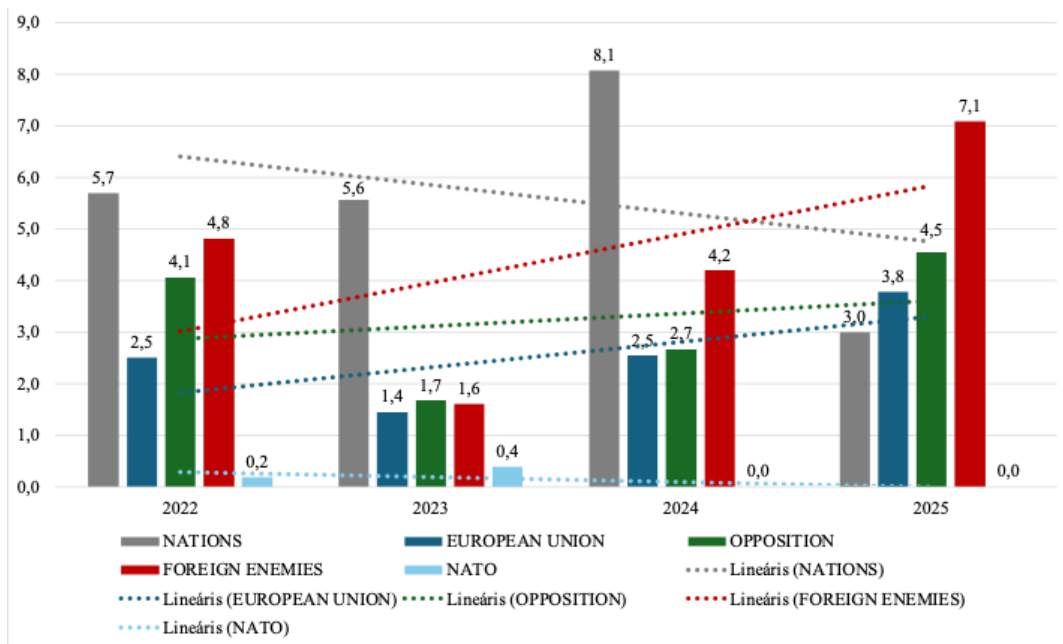


Figure 10. The normalized frequency of 3PP person markers (per 1,000 words) by categories, referring to nations, EU, opposition, foreign enemies, and NATO, aggregated by year.

The frequency for the opposition exhibits a relatively stable but slightly increasing pattern over the four-year period. In 2022 and 2025, the frequency of the  $3PP_{\text{Opposition}}$  category was higher, while in 2023 and 2024 it was lower, with normalized frequencies of 4.1, 1.7, 2.7, and 4.5, respectively. Based on this, we can assume that the PM is more inclined to refer to the opposition using the third-person during election years or in the campaign leading up to them.

Foreign enemies are also frequently mentioned in the Hungarian Prime Minister's communication, in line with populist rhetoric (Juhász et al., 2015). The  $3PP_{\text{Foreign enemies}}$  category shows the strongest upward trend. This includes statements in which, for example, liberals or "the West" are referred to as enemies in the third-person. Nevertheless, the exact referents of the  $3PP_{\text{Foreign enemies}}$  often remain vague, as seen in Example 15, allowing the PM to construct the omnipresent enemies of the nation.

Furthermore, the results of  $3PP_{\text{NATO}}$  align with those of  $1PP_{\text{NATO}}$ , as in both cases, it appears that although the occurrences are low, references to NATO in a linguistic sense were observed in 2022 and 2023, while in 2024 and 2025, the hits were solely zero.

Data-driven analyses can offer insights into the frequency and distribution of person-marking; however, to thoroughly investigate the subtleties of person references and their influence on political discourse, we must delve into their qualitative analysis (Szabó, 2022, 2025). While corpus-based data can reveal the patterns of references PM Orbán made to different groups and whether he perceived Hungary as part of these, qualitative interpretations can illuminate their discursive construction. In the context of Russia's war on Ukraine, understanding the Hungarian leadership's stance towards its allied partners is crucial, given the ongoing obstructions of measures against Russian aggression (see Section 3). Therefore, the following examines how Hungary's two key allies, the EU and NATO, were referenced in the corpus.

In his references to the European Union, PM Orbán regularly voices his criticism, as shown in Example 16.

- (16) "E remek stratégia következtében azonban úgy áll a helyzet, hogy ma egy olyan kocsiban ülünk, amelynek mind a négy kereke defektet kapott." (Báile Tuşnad speech, 2022).  
[However, as a result of this brilliant strategy, we now find ourselves sitting in a car with all four tires flat.]

Example (16) represents the European Union metaphorically, as a dysfunctional car with four flat tires. Although the European Union's intricate institutional framework might be challenging for the audience to understand, flat tires can effectively illustrate the PM's perspective on the EU. When referring to the NATO by means of 1PP person markers, the Hungarian Prime Minister also voiced his concerns. However, he employed a less demeaning language, citing what could have been done to prevent the war, as demonstrated by Example (17).

(17) *“Adhattunk volna garanciát, hogy Ukrajnát nem vesszük fel a NATO-ba, de az ellenkezőjét tettük, és megerősítettük a korábbi, 2008-as döntésünket, hogy fel fogjuk venni őket.”* (State of the Nation, 2023).

[We could have given a guarantee that we would not admit Ukraine to NATO, but we did the opposite and confirmed our earlier decision from 2008 that we would admit them.]

As seen in Example 17, the Prime Minister spoke on behalf of the whole alliance in elaborating on what the NATO could have done. This indicates that he sees Hungary as a member of this alliance. However, he also draws attention to the consequences of being part of this group in Example 18.

(18) *“Ugyanakkor, miután NATO-tagok vagyunk, és ki akarunk maradni ebből a háborúból, kényessé vált a helyzetünk, mert a NATO és az Európai Unió úgy döntött, hogy bár nem válnak harcoló félle, de fegyvert szállítanak, és súlyos gazdasági szankciókat vetnek ki, és [...] részesévé váltak ennek a konfliktusnak.”* (Báile Tuşnad speech, 2022).

[At the same time, as we are NATO members and want to stay out of this war, our position has become delicate because NATO and the European Union have decided that, although they will not become combatants, they will supply weapons and impose severe economic sanctions, and [...] they have become involved in this conflict.]

In the case of Example 18, it is noteworthy that the speech explicitly acknowledges Hungary's NATO membership. However, when he discusses Ukraine's military support and Russia's sanctioning, the Prime Minister switched to 3PP references, e.g., “they will supply weapons,” “they have become involved in this conflict”. Thus, it appears that the Hungarian government wishes not to take any part in the war, while the NATO and EU do contribute to it as external entities. This aligns with patterns of responsibility attribution in Hungary, which suggests that responsibility is primarily attributed to external actors, such as “Brussels,” Western Europe, and opposition parties by using 3PP person markers – especially in times of crisis, and when addressing issues that are uncomfortable for the government (Horváth, in press).

The government's distance from the policies implemented by its allies is also evident in Example 19, where the PM refers to the EU's support of Ukraine as “warmongering policy.”

(19) *“Brüsszel azt is sérelmezi, hogy háborúpárti politikának nevezzük azt, amit ők csinálnak.”* (Báile Tuşnad speech, 2024).

[Brussels also deplors the fact that we call what they are doing a warmongering policy.]

It is noteworthy that in Example (19), the European Union is referred to as “Brussels” via the CAPITAL FOR GOVERNMENT metonymy in the corpus. This strategy conceptualizes the EU as a person, rather than abstract entity, hence making it more accessible to the citizens (Benczes & Szabó, 2020). This way of understanding the EU allows politicians to stir strong emotions against it, similar to the feelings one might have towards an individual (Charteris-Black, 2011). However, it is not only people in the metaphorical sense that the PM made mention of in his speeches: he drew a contrast between the policymakers of the EU, labelled as “Brusselites” and ethnic Hungarians in Ukraine in Example 20.

- (20) “*Brüsszeliták még nem adták életüket ebben a háborúban, de magyarok már adták.*” (State of the Nation, 2023).  
[Brusselites have not yet lost their lives in this war, but Hungarians already have.]

Finally, not only international, but domestic politics also came to the forefront in the examined speeches. In Example 21, the PM also noted that the EU wishes to intervene in the 2026 Hungarian parliamentary election.

- (21) “*Ezért Brüsszelben bejelentették, hogy meg fognak szabadulni Magyarország nemzeti kormányától. Azt is bejelentették, hogy egy brüsszeli bábkormányt akarnak az ország nyakába ültetni.*” (Speech, October 23, 2024).  
[That is why Brussels announced that it would get rid of Hungary’s national government. It also announced that it wanted to impose a Brussels puppet government on the country.]

Example 21 illustrates that, according to the speech, the European Union oversteps its role by interfering in Hungary’s national elections. In response to the rising opposition against the Orbán government, particularly the Tisza Party, which gained popularity in 2024, the Prime Minister sought to depict his domestic adversary as an ally of the European Union.<sup>12</sup>

## 6. Conclusions

The rhetoric employed by the Hungarian government has been characterized by conflictual language (Benczes & Szabó, 2020). Viktor Orbán has declared a war on COVID-19 (Horváth, 2024b; Szabó & Béni, 2021; Szabó & Szabó, 2022), on LGBTQ and gender-rights (Gera, 2023), and recently issued a call to arms against the European Union (Szabó et al., 2025). However, on 24 February 2022, Russia initiated a genuine, full-scale war against Ukraine, necessitating unprecedented unity within the EU and NATO. Due to its amicable relations with the Russian leadership, the Hungarian government has persistently disrupted this unity, navigating a delicate balance between the EU, NATO, and its Eastern partners (Schmidt & Glied, 2024). The Fidesz-led government’s increasingly critical and confrontational stance towards its allies has primarily manifested in its communication strategies (Schmidt & Glied, 2024). Through the lens of governmental communication, shaped by senior officials, particularly PM Orbán, Russia’s war on Ukraine is primarily framed by citing Hungarian national security concerns and national economic interests, which are constructed upon Eurosceptic tones and nationalist beliefs (Dudlák, 2025; Özoflu & Arató, 2023).

Owing to his influence on Hungarian public discourse, this paper examined annual addresses delivered by Viktor Orbán, who can be considered as the key communicator of the Hungarian government. By examining the use of person-marking in the Prime Minister’s rhetoric, we identified how the tendencies in using first-person singular and first- and third-person plural forms reflect the PM’s perceived role and the group dynamics within his remarks. Over time, a noticeable increase in 1PS references highlights the personalization of politics, where the focus shifts to the individual personas of politicians. The predominant in-groups included references to the Fidesz party/government (1PP<sub>Party/government</sub>), the nation (1PP<sub>Nation</sub>), the European Union (1PP<sub>EU</sub>), NATO (1PP<sub>NATO</sub>), and the whole of humanity (1PP<sub>Humanity</sub>). In line with the Hungarian government’s self-definition as a “national government,” the 1PP<sub>Nation</sub> references outnumber other in-groups. Nevertheless, the 1PP<sub>Nation</sub> exhibits an unexpected decreasing trajectory, while more general references show an increasing trend (1PP<sub>Humanity</sub>). With regards to Hungary’s key strategic partners, first-person references to the European Union (1PP<sub>EU</sub>) and NATO (1PP<sub>NATO</sub>) exhibit a significant decline; at the same time, third-person references to the EU increased (3PP<sub>EU</sub>), marking Hungary’s drift away from allies in the wake of intensifying and prolonged conflicts between the Hungarian government and its partners. Furthermore, we delineated the 3PP<sub>Foreign enemies</sub> references, encompassing Hungary’s external “adversaries.” Nevertheless, the exact denotata of this category remains ambiguous.

Although data-driven results can highlight the various groups that the PM discursively constructed and their occurrence over the year, the discursive construction of these groups can be fully explored by a more nuanced qualitative examination. Given the Orbán governments dubious relationship with the NATO and EU in the context of the war, we focused on how the Prime Minister represented these two organizations in his speeches. While he openly acknowledged that Hungary is (still) a member of these alliances with 1PP references, he also voiced his criticism. In the case of policies the Hungarian government opposed, the addresses relied on 3PP, designating the NATO and the EU as the out-group. This rhetorical strategy implies the conceptual distance between Hungary and its closest allied partners.

This study acknowledges several limitations. Primarily, our examination of four annual speeches does not fully capture the comprehensive scope of Viktor Orbán's or the Hungarian government's communication strategies. For instance, an analysis of social media platforms could potentially uncover a broader range of political communicative strategies. Additionally, our analysis was solely focused on person-marking, which constitutes only one aspect of the diverse array of communicative strategies utilized in political rhetoric. Due to the size of the corpus and the specific features of the methodology, the present study could not quantitatively separate the statements in the speeches by topic. In the future, it would be worthwhile to analyze the sample with other corpus linguistic methods, for example by metaphoric and metonymic language usage, to gain a broader understanding not just on the explicit, but the implicit meaning of the Hungarian prime ministerial communication during a war-time period. Finally, it is important to note that political leadership positioning is not merely a linguistic issue; it can be examined from many other aspects, but this study sought to highlight the pragmatic side of the phenomenon under investigation.

In sum, our primary objective was to illustrate how references to individuals reflect political realities, including the use of personalized language and geopolitical strategies through the construction of in-groups and out-groups.

## Notes

- <sup>1</sup> EU sanctions against Russia <https://www.consilium.europa.eu/en/policies/sanctions-against-russia/>
- <sup>2</sup> Examples referenced in this article are derived from the speeches analyzed: the annual State of the Nation address, the March 15 national holiday speech, the Băile Tușnad (Tusnádfürdő) summer camp speech, and the October 23 national commemoration speech.
- <sup>3</sup> All translations from Hungarian are the authors' own. Initial drafts were prepared using DeepL and subsequently reviewed and corrected by the authors.
- <sup>4</sup> See Szabó (2025b) for a concise overview of non-egocentric perspectives.
- <sup>5</sup> Hungary's diversification of its relations towards the East is a part of its "Eastern Opening" strategy. For a more detailed discussion, see Grelinger (2023).
- <sup>6</sup> Note that in 2025, Ukraine submitted a draft education law to Hungary, which partially addresses Budapest's demands concerning language policy in schools (Bandouil, 2025).
- <sup>7</sup> In July 2024, Prime Minister Orbán undertook another unsuccessful "peace mission" to Ukraine and Russia, meeting with Ukrainian President Zelensky, followed by a visit to Russian President Putin three days later. For more details, see Rácz (2024b).
- <sup>8</sup> For a comprehensive analysis of the sanctions imposed on Russia, see Rácz et al. (2023).
- <sup>9</sup> However, Krekó (2019) noted that Hungary adopted a more favorable stance towards Russia compared to Western nations.
- <sup>10</sup> An explanation of the elevated ratio of first-person references is provided by Magyari et al. (2022). They suggest that the frequent use of first-person plural pronouns in everyday language serves as a linguistic indicator of hubristic personality traits. This is often observed in successful politicians, leading to an overconfidence that can result in poor judgment on certain matters or even unethical actions (Magyari et al., 2022).
- <sup>11</sup> Az Országgyűlés 1/2010. (VI. 16.) OGY politikai nyilatkozata a Nemzeti Együttműködésről.

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<sup>12</sup> For further information regarding the Tisza Party, refer to Rácz (2024a).

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## ОДНА ЛЮДИНА ТА ЇЇ ВІЙНА: МАРКУВАННЯ ОСОБИ І ГЕОПОЛІТИЧНЕ ПОЗИЦІОНУВАННЯ У ВИСТУПАХ ВІКТОРА ОРБАНА (2022–2025)

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### Анотація

Після повномасштабного вторгнення Росії в Україну у 2022 році Європейський Союз і НАТО загалом досягли консенсусу щодо підтримки України та запровадження санкцій проти Росії. Втім уряд Угорщини обрав інший підхід, послідовно перешкоджаючи процесам ухвалення рішень. Це порушує питання про те, як угорські лідери позиціонували країну на тлі цих розбіжностей під час російсько-українського конфлікту. У статті досліджено риторику прем'єр-міністра Віктора Орбана, основного речника уряду Угорщини, з метою з'ясувати, як він репрезентує власне лідерство та різні групові динаміки, пов'язані з Угорщиною та її народом. Використовуючи експерієнціальний підхід до маркування особи та методи корпусної лінгвістики, ми проаналізували чотири його щорічні виступи за 2022–2025 роки, зосереджуючись на словах першої особи однини й множини, а також на третій особі множини. Використання першої особи вказує на те, наскільки промовець акцентує власну точку зору в риториці. Посилання на першу й третю особу множини дозволяють виявити різні внутрішньогрупові й міжгрупові відмінності. Наше дослідження свідчить, що прем'єр-міністр дедалі частіше висловлював власні погляди у своїх зверненнях, водночас дистанціюючи Угорщину від її звичних союзників і формуючи наратив, зосереджений на «зовнішніх супротивниках». Ці тенденції демонструють, як політичні діячі можуть маніпулювати структурою альянсів у своєму дискурсі та сприяти відкату від демократії, нормалізуючи наративи про зовнішні загрози.

**Ключові слова:** *маркування особи, особові займенники, політична персоналізація, політична риторика, російсько-українська війна.*

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## NARRATIVE OF EU HERITAGE DIPLOMACY IN THE CLIL CLASSROOM: A COGNITIVE LINGUISTIC APPROACH

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### Abstract

Done from the standpoint of applied linguistics, this study demonstrates convergence of ideas and findings served by political narratology, cognitive linguistics, and CLIL methodology (Content and Language Integrated Learning), where the foreign language of instruction is English. The study shows how the topic “European Union (EU) heritage diplomacy”, important for today’s narrative space of European politics, can be taught in the CLIL classroom that uses cognitive ontologies as a scaffolding technique. The development of cognitive ontologies proposed in this enquiry grounds on the algorithmic ‘modelling grammar’ of basic propositional schemas (BPSs) defined in Semantics of Lingual Networks (Zhabotynska, 2019) – a cognitive linguistic conception focused on structuring information delivered with language. As a scaffolding device for arranging the topic “EU heritage diplomacy” taught to students of International Relations, a cognitive ontology provides this topic’s systematization and narrative cohesion, thus contributing to students’ understanding of WHAT to say. Besides, an ontological arrangement of the topic supplies rationale behind its division into educational modules and their constituents. A cognitive ontology also becomes the means for arranging phrasal sets of the authentic English expressions featuring the topic, thus facilitating acquisition of the language and enhancing students’ ‘HOW to say’ proficiency. The study argues that cognitive ontologies are not only an efficient tool of teaching, but also a useful instrument for developing students’ ability to adequately process professionally relevant content, and create coherent and cohesive narratives of this content – the skills that the modern society, immersed in information and communication flows, badly needs.

**Key words:** *EU heritage diplomacy, narrative, CLIL methodology, scaffolding, cognitive ontology.*

### 1. Introduction. Strategic narrative

In the nowadays political, diplomatic and public discourse one of the most frequently used terms is *narrative*. As Geoffray Roberts (2006) notes, talk about the value of narrative as a mode of explanation and understanding is ubiquitous, and it is possible to speak of a ‘narrative turn’ in human sciences, where we see a significant embrace of narrative as a fundamental research tool (p. 703). The ‘narrative turn’ in humanities and social sciences extends narratology beyond its traditional boundaries of literary studies and fiction, to become a broader science with universal laws (Gang, 2022, p. 258).



A host of competing definitions of narrative generated by the ‘narrative turn’ can be simply reduced to the practice of telling stories about connected events of human actions. “The aim of this storytelling activity is not only to explain the action in question but to enhance and extend understanding, comprehension and experience” (Roberts, 2006, pp. 703-704). In International Relations (IR) theory, narrative is understood as a structured story that conveys meaning, shapes perceptions, and influences behavior in international politics. Storytelling in diplomatic communication helps to frame issues, build alliances, and persuade audiences by creating relatable and compelling narratives (“Narratives and story-telling”, n.d.). Narratives are complex, sense-making constructs used to gain legitimacy and trigger action and participation in IR concerned with such important contemporary issues as security, war, justice, migration, inequality, race and gender, among others (Chaban et al., 2023, p. 1).

Endowed with a persuasive and mediational potential, political narratives are frequently used strategically. Strategic narratives are stories featuring an official political strategy via constructing “a shared meaning of the past, present and future of international politics to shape the behaviour of domestic and international actors” (Miskimmon et al., 2013, p. 7). Strategic narratives mold the identities, interests, and actions of states and non-state actors, guiding their responses to global events (“Narratives and story-telling”, n.d.). More specifically, political actors use strategic narratives for changing the discursive environment in which they operate, managing expectations, and extending their influence. These are narratives about states, political systems, and political issues, about ‘who we are’ and ‘what kind of order we want’ (Miskimmon et al., 2013). The study of strategic narratives “is not merely an exercise in heuristics, but a powerful tool for understanding broader geopolitical phenomena in a world in flux – where the multilateral IR are at risk of failing vis-a-vis the ‘great power’ politics” (Chaban et al., 2023, p. 1).

This article discusses the strategic narrative of “European Union (EU) heritage diplomacy” which is evolving at present in IR discourse and which has acquired particular relevance in times of today’s international conflicts and crises, including the war unleashed by Russia against Ukraine. The discussion evolves at the intersection of political narratology (providing understanding of the narrative’s content), foreign language teaching (showing how this content can be taught to university students), and cognitive linguistics (furnishing technologies for teaching and learning). The study aims to show how the findings of several seemingly distant theoretical disciplines can make their integral applied contribution to CLIL methodology (Content and Language Integrated Learning), with language being English taught primarily to students of IR and political science (C1-C2 levels). In the university context, CLIL is “a relatively new area where many important aspects of language acquisition and learning could be researched” (Fajardo-Dack et al., 2010, p. 49), among them the aspects interwoven into multidisciplinary contexts.

Further, we start with a brief outline of CLIL methodology, its objectives and the scaffolding means of their attainment. Then we proceed to one of such means – cognitive ontologies developed in cognitive linguistics for structuring information delivered with language. Next, we demonstrate how cognitive ontology applied to the information obtained from diverse resources (official documents, scholarly papers, and popular articles) structures the topic of “EU heritage diplomacy” thus providing its narrative coherence, or the “logical consistency and clarity of a narrative, which enhances its persuasiveness and acceptance by audiences” (“Narratives and story-telling”, n.d.). Finally, we show application of cognitive ontology to the arrangement of linguistic data that communicate the content and must be acquired by students together with it. The concluding remarks summarize the results of the study and sketch its further perspectives.

## **2. CLIL methodology in language teaching and learning**

The term CLIL (Content and Language Integrated Learning), first employed by David Marsh (1994), denotes a dual-purpose educational approach which involves learning to use language appropriately whilst using language to learn effectively (Coyle et al., 2010, p. 42). In CLIL, a foreign language is a

means to expand students' knowledge horizons and learn about the world around them. At the same time, the study of a new subject in a foreign language aims to improve students' knowledge of this language. Thus, CLIL methodology intends to build bridges: between language and content; between the learner and the new subject knowledge; between the language teacher and the subject teacher (Cinganotto et al., 2019, p. 4). CLIL grounds on the 4Cs Framework integrating four contextualized building blocks: content (subject matter), communication (language learning and using), cognition (learning and thinking processes) and culture (developing intercultural understanding and global citizenship). In the 4Cs Framework, the terms 'language' and 'communication' are used interchangeably (Coyle et al., 2010, p. 41-42).

While combining language practice and specific content delivery, CLIL classroom activities may encounter a gulf between theory and practice, where "so often 'communication' in formal language learning settings is reduced to language practice based on grammatical progression rather than meaning-making" (Coyle et al., 2010, p. 33). Practice, as an important part of language learning, involves understanding grammatical progression. However, unless learners are not also encouraged to use language for content learning, then CLIL cannot succeed. This brings to the fore the tensions in language learning between focus on meaning and focus on form (Coyle et al., 2010, p. 33).

Importantly, language teaching/learning in CLIL does not follow the traditional course from simple to complex; rather, language elements are introduced whenever they are related to the content (Cinganotto et al., 2019, p. 7). Besides, language is viewed from three interwoven perspectives: 'language of learning', 'language for learning', and 'language through learning' (Cinganotto et al., 2019, pp. 3–4):

- *language of learning* (focused on content) refers to the essential vocabulary and grammar associated with the communicative topic. Meanwhile, the language is used in authentic interactive contexts in order to develop communicative skills, rather than focusing exclusively on grammar;
- *language for learning* (focused on meta-cognition and grammar system) is needed to operate in a foreign language environment. Learners need skills for pair work, cooperative group work, asking questions, debating, enquiring, thinking, memorizing, etc.;
- *language through learning* (focused on cognition) means that new meanings would require new language which is to be acquired during the learning process, then recycled and developed later.

Integrated teaching / learning of content and language involves a number of technologies, many of which (using visual aids, providing language frames, encouraging peer collaboration among others) are subsumed by the term *scaffolding*. In CLIL it denotes the temporary support provided by teachers to help students learn new content and language simultaneously. Scaffolding makes difficult tasks accessible to students, so they can learn the content and language effectively, eventually becoming more autonomous learners (Mahan, 2022). Scaffolding is a temporary support system, like a physical scaffold, that is built to prop up a structure but is removed once it is stable. Similarly, CLIL teachers gradually remove this support as students become more proficient in the content and language.

This study argues that the role of scaffolding can be successfully played by cognitive ontologies that arrange the content and its linguistic representation.

### 3. Cognitive ontology as scaffolding in CLIL

Of late, the term *ontology* has acquired a new interpretation different from, although related to, its conventional philosophical sense of "the branch of philosophy which deals with the nature and structure of 'reality', ... and focuses on the nature and structure of things per se, independently of any further considerations, and even independently of their actual existence" (Guarino et al., 2009, p. 1). In experimental sciences concerned with information processing and modelling reality from a certain perspective, the term *ontology* (pl. *ontologies*) starts to mean (a) a special kind of *information object* or computational artifact – that which 'exists' is that which can be represented (Guarino et al., 2009,

p. 2); (b) a *means* to formally model the structure of a system, i.e., the relevant entities and relations which emerge from its observation, and which become useful to our purposes (Guarino et al., 2009, p. 2); (c) the *science* of “the kinds and structures of objects, properties, events, process, and relations in every area of reality” (Smith, 2003), or the study “of what might exist” (Banirostam et al., 2012, p. 3).

In information science, the term *ontology* is most often used in the meaning of an ‘information object’ defined as an “explicit specification of a conceptualization” (Gruber, 1993). An ontology is also a “formal specification of a shared conceptualization” (Borst, 1997), or group’s perception (Shanks et al., 2003, p. 85), which means that conceptualization should express a shared view between several parties, a consensus rather than an individual view. The merged definition states that: “An ontology is a formal, explicit specification of a shared conceptualization” (Stude et al., 1998, as cited in Guarino et al., 2009, p. 2). The ontology’s components are objects, qualities, relations, and processes, and the operations allied to them (Li et al., 2009). The backbone of the ontology is a generalization / specialization hierarchy of concepts, i.e., a taxonomy (Guarino et al., 2009, p. 2).

In the target information domain that has to be ontologically arranged, some types of phenomena classified as things, properties of things, states of things, laws, events in things, or couplings, are likely to be more common or more important than others. Therefore, the development of ontologies for target domains may require different conceptual modelling grammars that faithfully represent these key phenomena (Shanks et al., 2003, p. 87). In the definition of ontology, such grammars are mentioned as “a catalogue of the types of things that are assumed to exist in a domain of interest D from the perspective of a person who uses a language L for the purpose of talking about D” (Sowa, 2001). The choice of ‘modelling grammar’ implies that composites and aggregates should be modelled as entities, not as relationships; relationships should not be modelled with attributes; entities should not be modelled with optional attributes; conceptual models should clearly distinguish between classes and instances, things and their properties (Shanks et al., 2003, p. 88).

The above theses, formulated within information science, are also relevant for cognitive ontologies employed in language theory for structuring meanings and forms of linguistic expressions. Cognitive ontology associates with linguistically-accessed information (shared conceptualization) arranged according to a particular pattern (conceptual form, or model, represented in terms of some ‘grammar’ featuring the links between thematic ‘nodes’). Depending on the particulars of the target domain, and on the purpose of its structuring, cognitive ontologies branch into relational, entity-focused, and event-focused ones. (a) *Relational ontologies* demonstrate the types of node’s (things’ or actor’s) properties, and the types of relations in between nodes. (b) *Entity-focused ontologies* highlight a particular node (thing or actor) which becomes a target concept, with its relations viewed as subordinate to the target. (c) *Event-focused ontologies* feature a particular event bounded by time limits and populated by several actors / things whose properties are specified with regard to this event. The three types of ontologies interplay: a relational ontology may develop into an event-focused one, and both of them may develop into entity-focused ontologies (Zhabotynska, 2020, p. 21).

The building of the relational ontology, which underlies the other ontological types, employs the modelling language of basic propositional schemas (BPS) inferred from diverse linguistic data and described in Semantics of Lingual Networks (SLN) – one of cognitive linguistic conceptions that develops the principles of structuring information delivered with linguistic and other semiotic means (Zhabotynska, 2019). The BPS, which represent the most abstract conceptual categories and their relations, are thematically grouped into being schemas (*quantitative*: “X is THAT MANY-quantity”, *qualitative*: “X is SUCH-quality”, *locative*: “X exist THERE-place”, *temporative*: “X exists THEN-time”, and *mode of being*: “X exists SO-mode”), action schemas (*state/process*: “Agent acts”, *contact*: “Agent acts upon Patient [contact entity] / Affected [contact entity that changes due to the action]”, and *causation*: “Causer makes Factitive [entity created due to the action]”), possession schemas (*part-*

*whole*: “Whole has Part”, *inclusive*: “Container has Content” / “Content has Container”, and *ownership*: “Owner has Owned” / “Owned has Owner”), identification schemas (*classification*: “Identified-individual / kind is Classifier-kind / type [introduced with the indefinite article *a*]”, *characterization*: “Identified-individual is Characteriser [introduced with the definite article *the*]”, and *personification*: “Identified-individual is Personifier [a proper name]”), and comparison schemas (*identity / metamorphosis*: “Comparative is /as/ Correlate-MA [another category of the same entity]”, *similarity / analogy*: “Comparative is as Correlate-AN [an entity from the same category]”, and *likeness / metaphor*: “Comparative is as if Correlate-MT [an entity from a different category]”). The BPSs may be extended with additional argument roles: Circumstant (attendant, assistant, counter-agent, instrument, mediator, means, and mode), Stimulus (cause and goal), Prerequisite (condition and concession), Recipient (addressor, benefactor, and malefactor), Place, and Time. The number of BPSs is limited, but, arranged in various configurations, they structure an unlimited number of conceptual networks organizing an ontology of the target information space (Zhabotynska, 2018, pp. 111-112; Zhabotynska & Plakhotniuk, 2020, pp. 96-97).

On the one hand, BPSs structure a cognitive ontology of the linguistically represented content. The diversity of BPSs allows for the extension and particularization of “a generalization – specialization hierarchy of concepts, i.e., a taxonomy” considered to be the backbone of an ontology (see (Guarino et al., 2009, p. 2) above). In SLM, “generalization – specialization hierarchy” associates with the classification BPS. The other schemas specify conceptual hierarchies, and represent a rather wide range of relations between conceptual entities. On the other hand, BPSs furnish schematic, or generalized, meanings of linguistic forms, phrases in particular. Pairings of linguistic forms and their schematic meanings are known as constructions, which cognitive linguistics (Construction Grammar) considers to be the main system-forming factor of language. Several phrasal constructions, with BPSs as their schematic meanings, may be linked together to form a *phrasal set* (see for detail (Zhabotynska, 2019; Zhabotynska & Plakhotniuk, 2020) – Figure 1.

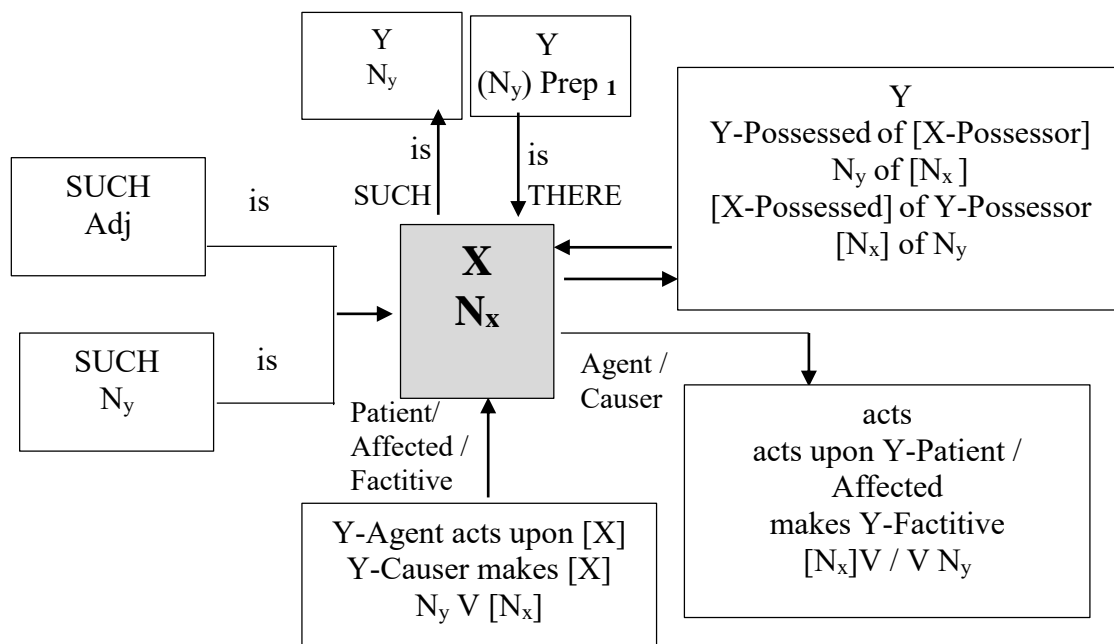


Figure 1. Typical arrangement of a phrasal set (an entity-focused ontology).

A phrasal set grounds on an entity-focused ontology featuring the target concept X named with a noun ( $N_x$ ), and the properties of X exposed in the phrasal satellites of  $N_x$ : Adj/ $N_y$   $N_x$  (SUCH X),  $N_x N_y$  (SUCH<sub>X</sub> Y), Prep  $N_x$  (Y is THERE<sub>X</sub>),  $N_y$  of  $N_x$  (Possessed<sub>y</sub> of Possessor<sub>x</sub>),  $N_x$  of  $N_y$  (Possessor<sub>y</sub> of Possessed<sub>x</sub>),  $N_x$  V /  $N_x$  V  $N_y$  (Agent<sub>x</sub> acts; Agent<sub>x</sub> acts upon Patient / Affected<sub>y</sub>; Causer<sub>x</sub> makes Factitive<sub>y</sub>), V  $N_x$  (Agent<sub>y</sub> acts upon Patient / Affected<sub>x</sub>; Causers<sub>y</sub> makes Factitive<sub>x</sub>) – where Y is any other ‘thing’ different from X.

In CLIL approach to teaching, a cognitive ontology becomes scaffolding for processing, understanding, and memorizing the studied content (WHAT to say), and phrasal sets with the key words describing this content become scaffolding for its discussion in a foreign language (HOW to say). Below, we show how cognitive ontologies that arrange content and language can be employed as scaffolding in teaching “EU heritage diplomacy” topic in the CLIL classroom.

#### 4. “EU heritage diplomacy” topic: cognitive ontology for the narrative content

To define the content of the topic “EU heritage diplomacy” to be taught in a CLIL classroom, we used various information sources – EU legal acts, scholarly papers, popular articles and videos available on the Internet platforms – where EU heritage diplomacy is featured against the background of EU cultural diplomacy. The obtained information has been represented as a relational ontology where, according to part-whole BPS, “Heritage diplomacy” is Part of “Cultural diplomacy”, and “EU heritage diplomacy” is Part of “EU cultural diplomacy”. Respectively, classification BPS represents “EU cultural diplomacy” as Kind of “Cultural diplomacy” (Type), and “EU heritage diplomacy” as Kind of “EU cultural diplomacy” (Type). “EU heritage diplomacy”, in its turn, becomes Type, whose Kind is “EU heritage diplomacy in conflicts and crises”, which, considered as Type, has its Kind “EU heritage diplomacy in Ukraine” (Figure 2).

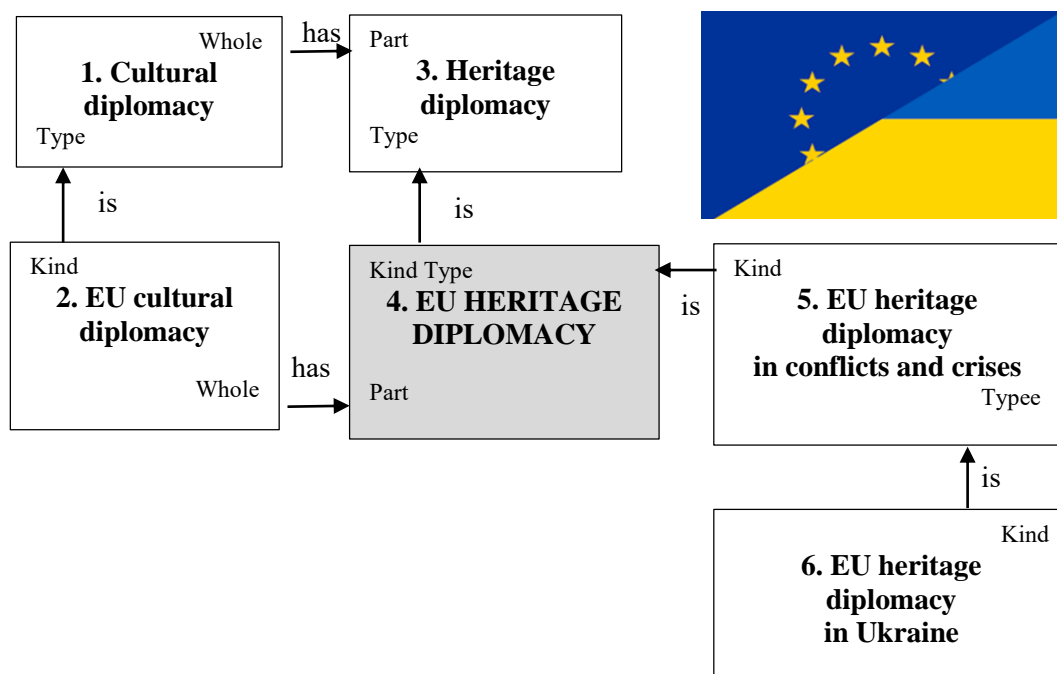


Figure 2. EU HERITAGE DIPLOMACY: thematic domains of the cognitive ontology

The constituents of the cognitive ontology are *thematic domains*, which in educational setting become teaching modules in the syllabus of the course “EU heritage diplomacy” taught to Intranational Relations students with an advanced level of proficiency in English (C1-C2). The teaching modules are studied in the sequence prompted by the cognitive ontology (Figure 2).

Within each domain, information has similar arrangement of thematic nodes. Since both cultural and heritage diplomacy is activity performed by the Actor (WHO: Agent – country, organization or political union, such as the EU) with regard to Patient / Affected (WHAT: culture / cultural and historical heritage), such arrangement is prompted by the Contact BPS with the extensions Time (WHEN), Place (WHERE), Cause (WHY), Goal (FOR WHAT), Circumstance (WITH WHOM: assistants and allies), Mode (HOW: means) – Figure 3. Cf. The principle of “the 5Ws and 1H” (Who, What, Where, When, Why, How) employed in journalism (Waisbord, 2019).

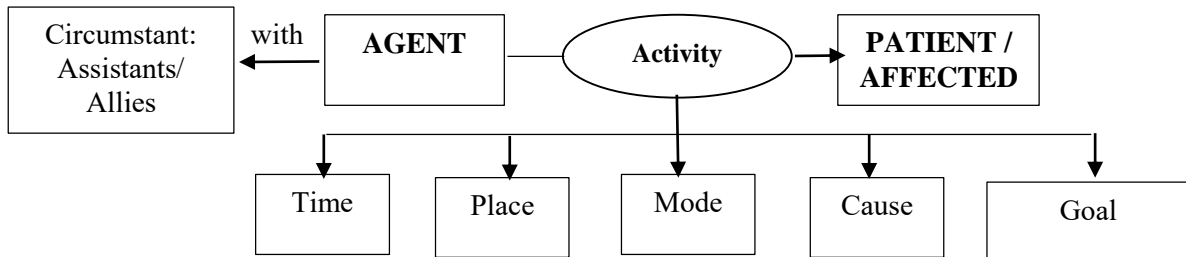


Figure 3. EU HERITAGE DIPLOMACY: arrangement of thematic nodes within domains.

The work with the content of each thematic domain splits into three consecutive stages – those of focalization, narrativization, and finalization.

- *Stage 1: Focalization* includes: (1) a brief description of the domain’s nodes, which is provided by the teacher; (2) contextualization and elaboration of this description via addressing the materials proposed by the teacher, and expanded by students (such materials may potentially be updated or substituted with the resources that suggest a better interpretation of an issue); (3) students’ extended description of the issues featured in the thematic nodes. Since the thematic domains overlap, the content of the nodes in a domain may be completely or partially imported from the previously studied domain. In this case, the same information, already familiar to students, is revisited and thus better assumed.
- *Stage 2: Narrativization* trains students to compile cohesive and coherent narratives of the domain’s theme via combining its nodes in different configurations with increasing complexity.
- *Stage 3: Finalization* intends to integrate the content of all relevant thematic nodes into practical communicative assignments (essays, classroom presentations, pair work, group debates, role play, etc.) requiring students’ in-depth exploration of the studied topic and application of their respective communicative skills.

Below, these stages are illustrated with teaching Module 4 “EU heritage diplomacy”. The contexts of the referenced information sources are exemplified with the thematic node “PATIENT / AFFECTED: Historical and cultural heritage”.

#### Module 4. “EU HERITAGE DIPLOMACY”

##### Stage 1. Focalization

**AGENT:** The European Union – *EU institutions (Council of the EU, European Commission, European External Action Service (EEAS), EU Member States, governmental and non-governmental organizations, policy makers, experts and expert committees, etc.).*

- Use the text (Jurkiewicz-Ecker, 2024, pp. 3, 6, 7, 9) to provide the contexts in which the ‘actors’ of EU heritage diplomacy are featured.
- Describe the role of each ‘actor’ in EU heritage diplomacy.

**PATIENT / AFFECTED:** Historical and cultural heritage – *Definition. Tangible, intangible, and digital cultural heritage. Heritage as representation of history and culture. Heritage as the grounds*

of national identity. *Heritage and today's life. Political sensitivity of cultural heritage* (materials imported from the domain "Heritage diplomacy").

- (a) In the texts (EEAS, 2021, p. 3; Clarke, 2018; European Commission, 2024; Jakovljević, 2025) find the contexts describing the aspects of historical and cultural heritage enumerated above.

Example of the contexts:

- ... *cultural heritage encompasses the resources inherited from the past in all forms and aspects – tangible, intangible and digital, including monuments, sites, landscapes, skills, practices, knowledge and expressions of human creativity, as well as collections conserved and managed by public and private bodies such as museums, galleries, libraries and archives. It originates from the interaction between people and places through time and it is constantly evolving* (EEAS, 2021, p. 3).
- *Tangible Cultural Heritage refers to physical artefacts produced, maintained and transmitted intergenerationally in a society. It includes artistic creations, built heritage such as buildings and monuments, and other physical or tangible products of human creativity that are invested with cultural significance in a society. Intangible Cultural Heritage indicates the practices, representations, expressions, knowledge, skills, as well as the instruments, objects, artefacts and cultural spaces associated therewith, that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. Examples of intangible heritage are oral traditions, performing arts, local knowledge, and traditional skills* (EEAS, 2021, p. 3).
- *Europe's cultural heritage is a shared source of remembrance, understanding, identity, dialogue, cohesion and creativity. It encompasses a broad spectrum of resources inherited from the past in all forms and aspects. Cultural heritage is tangible (castles, museums, works of art), intangible (songs, traditions, etc.), and digital (born-digital and digitised). It includes monuments, sites, landscapes, skills, practices, knowledge and expressions of human creativity. Collections conserved and managed by public and private bodies – such as museums, libraries and archives – and film heritage are also part of cultural heritage* (European Commission, 2024).
- *Cultural heritage enriches the lives of people. It is also a driving force for the cultural and creative sectors, and plays a role in creating and enhancing Europe's social capital/ ... Cultural heritage is an important resource for economic growth, employment and social cohesion. It helps revitalise urban and rural areas and promote sustainable tourism. In the European Union, over 300,000 people are employed in the cultural heritage sector and 7.8 million jobs are indirectly linked to heritage (e.g. hospitality, interpretation and security)* (European Commission, 2024).
- *Heritage is valued because it represents a peoples' history and culture, and because it speaks to a sense of identity or belonging upon which a community, nation or state is founded. This makes it a powerful bargaining chip in a diplomatic setting* (Clarke, 2018).
- *Heritage – and therefore history and cultural identity – is an undeniable facet of diplomatic relations that historians, heritage practitioners and policy-makers cannot ignore* (Clarke, 2018).

- *The dominant narrative of cultural heritage shapes personal and collective identity, deeply integrated values, and collective memory. It defines individuals, communities, and nations, i.e. they are using these manifestations to identify themselves and present themselves to the world in a certain (wanted) way. While these processes may have been unconscious in the past, they are now highly professional, with strategies created in advance, with specific target audience in mind (Jakovljević, 2025).*
  - *Cultural heritage is very much alive, constantly being recreated, and spread across the communities and people. ... it can also be commercialized, homogenized, and used for touristic purposes, as well as a tool for fulfilling political and diplomatic goals (Jakovljević, 2025).*
  - *Cultural heritage is by nature politically sensitive, highly complex with a high degree of symbolic significance, emotionally charged and with a risk of political manipulation concerning its history, ownership and use. Cultural heritage can be a driver of conflict but also a vector for peace, reconciliation and development. This heralds a new opportunity to develop a concept on cultural heritage as a powerful and complementary component for the revitalisation of the EU approach to peace, security and development (EEAS, 2021, p. 3).*
- (b) Use the above contexts to write a brief essay characterizing cultural and historical heritage as an object of diplomacy.

**ACTIVITY:** EU's heritage diplomacy: *A form of diplomacy that involves exchange, cooperation, and joint governing of mutual histories, cultures, and nature, shared by the people. Heritage in diplomacy and heritage as diplomacy. Three main lines in heritage diplomacy (research on cultural heritage, combat trafficking of heritage, and protection of heritage). Combating illegal excavation, looting and trafficking of cultural property. Protection, preservation and promotion of cultural heritage as a dimension of external relations activities. Preservation and reinterpretation of historical and cultural narratives. Reinforcing cooperation on cultural heritage, strengthening cooperation on the protection of cultural heritage, fostering the implementation of the legal framework. Integration of cultural heritage in EU's political and diplomatic engagement (materials partially imported from the domain "Heritage diplomacy").*

- (a) The above directions of cultural diplomacy are discussed in (Jakovljević, 2025; Winter 2015, p. 1007; Clopot, n.d.; EEAS, 2021, pp. 9-10; Jurkiewicz-Ecker, 2024, pp. 4, 8; Čeginskas and Lähdesmäki, 2022, p.1). Find the reference to these directions in the text and provide their extended explanation.

**CIRCUMSTANT:** Assistants and allies – *UNESCO and the Council of Europe, bilateral partners, the UK, international organisations and international foundations,*

- (a) In the texts (Jurkiewicz-Ecker, 2024, pp. 4, 5, 7; Jakovljević, 2025), find the mentions of the EU's assistants and allies.
- (b) Describe their role in EU heritage diplomacy.

**CAUSES:** Internal, external, and global factors – (i) *The acceleration of globalization, non-traditional security challenges (cyber warfare, climate change, radicalization, refugee and economic migration and energy insecurity).* (ii) *The EU's idea of a common Foreign Policy between the EU institutions and the individual member states. Necessity for the EU to "enhance unity in diversity".* (iii) *The need to strengthen the EU's position as a global actor.*

- (a) The further explanation of the three issues given above is available in the texts (McMillan, n.d.; Jurkiewicz-Ecker, 2024, p. 3). Use these texts to continue the story of the EU's challenges to which EU heritage diplomacy responds.
- (b) Divide the challenges into internal, external, and global. Explain your rationale.

**GOALS:** Within and outside the EU. *Within the EU – to create stronger bonds between its members, balance the powers, foster a sense of unity, and create a shared identity; to shape new cultural values through the interaction of various cultural traditions, nurturing common values among all members; to bring about community building, social participation, and dialogue; to promote job creation and competitiveness. In foreign affairs – to foster international relations and disseminate knowledge about European nations and cultures; to disseminate values and shape a certain picture on the global stage; to promote intercultural and international relations, to contribute to peacebuilding and security, reconciliation, mutual understanding, intercultural dialogue and sustainable development.*

- (a) The multiple goals pursued by EU heritage diplomacy are featured in (Jakovljević, 2025; “Building peace by cultural heritage”, 2021; “Cultural heritage at the heart of”, 2016; Čeginskas. and Lähdesmäki, 2022; Jurkiewicz-Ecker, 2024, p. 7). Refer to these works to learn more about this topic.
- (b) Divide the goals into several groups representing their major directions.

**MODE:** Projects, activities, platforms, delegations – *The EU-Western Balkans Cultural Heritage Route; the European Heritage Label (EHL), the European Capital of Culture, European Heritage Days, among others.*

- (a) The considered projects are described in (Jurkiewicz-Ecker, 2024, p. 4; Council of Europe, 2025; Jakovljević, 2025). Read the texts and explain what these projects mean.
- (b) In the Internet, find the information about other EU initiatives implementing its heritage diplomacy. Present them in the classroom.

**PLACE:** Location of diplomatic activities – *Activities organized on the soil of the European Union or outside its borders.*

- (a) Different places of the EU diplomatic activities are detailed in (Jakovljević, 2025). Use this text to describe these places.
- (b) In the Internet, find the information about the other such places.

**TIME:** Temporal milestones in the development of EU heritage diplomacy (materials partially imported from the domain “Heritage diplomacy”).

- (a) In the texts (Clarke, 2018; Clopot, n.d.; Jurkiewicz-Ecker, 2024, pp. 3-7) you will find the major milestones in the timeline of EU heritage diplomacy. Read these texts and fill out the table below:

Year (time)	Document / Event / Activity
Before the modern diplomatic system	
1980s, 1993, 2007	
Until 2016	
2016	
2018	
2021	

- (b) Use the materials, which are sequentially arranged in the table, as the framework for your classroom presentation “Timeline of EU Heritage Diplomacy”.

**Stage 2. Narrativization**

- (1) Make up stories arranged according to the following narrative lines: (a) Heritage + Heritage diplomacy + Actors and their allies; (b) Causes (today’s challenges) + Goals + Heritage diplomacy; (c) Heritage + Temporal milestones in the development of EU heritage diplomacy + Causes (today’s challenges).
- (2) Make up your own narrative line and use it in the story about EU heritage diplomacy.

**Stage 3. Finalization**

Write a paper featuring EU cultural and historical heritage diplomacy (about 4,000 words). Make references (APA6 style) to the information resources which are used in this module and which you have found on your own.

The illustrated pattern of content arrangement is shared by all six domains (educational modules) of the topic “EU heritage diplomacy”. In all domains, learning of the content integrates with acquisition of English as students’ professional language and the language of instruction.

**5. “EU heritage diplomacy” topic: cognitive ontology for linguistic data**

In this study, the scaffolding for language learning is a cognitive ontology that structures phrasal sets with the collocations describing the content (see Figure 1 “Typical arrangement of a phrasal set” in section 3 of this article). The illustrative phrasal set is the one with the nucleus word (*cultural and historical*) *heritage* relevant for all six thematic domains / teaching modules. The collocations of the phrasal set, which have been borrowed from the texts employed as teaching materials, and from the *Oxford Collocations Dictionary for Students of English* (2012), have the formal structures: Adj + *heritage*; *heritage* + N; Prep + *heritage*, *heritage* + V (+N); V + *heritage* (Figures 4a and 4b).

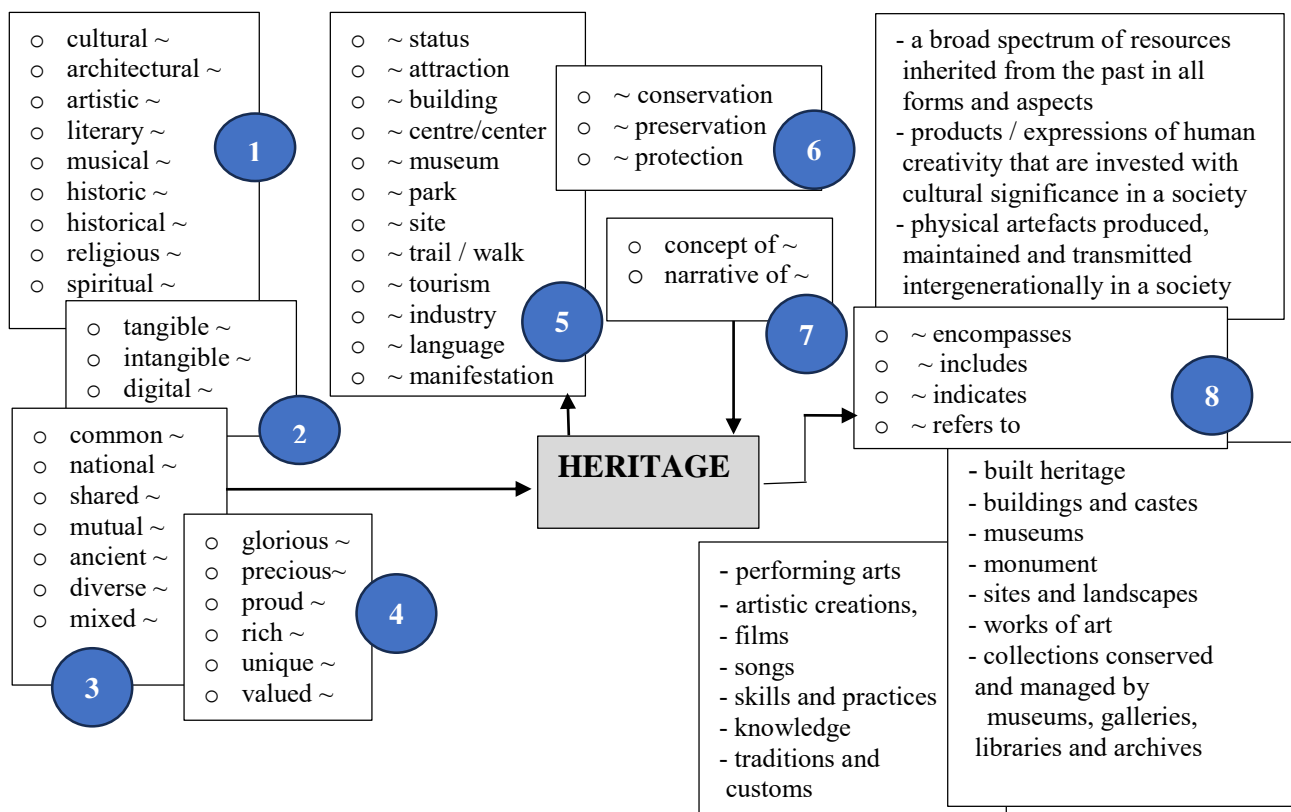


Figure 4a. HERITAGE: phrasal set (part 1).

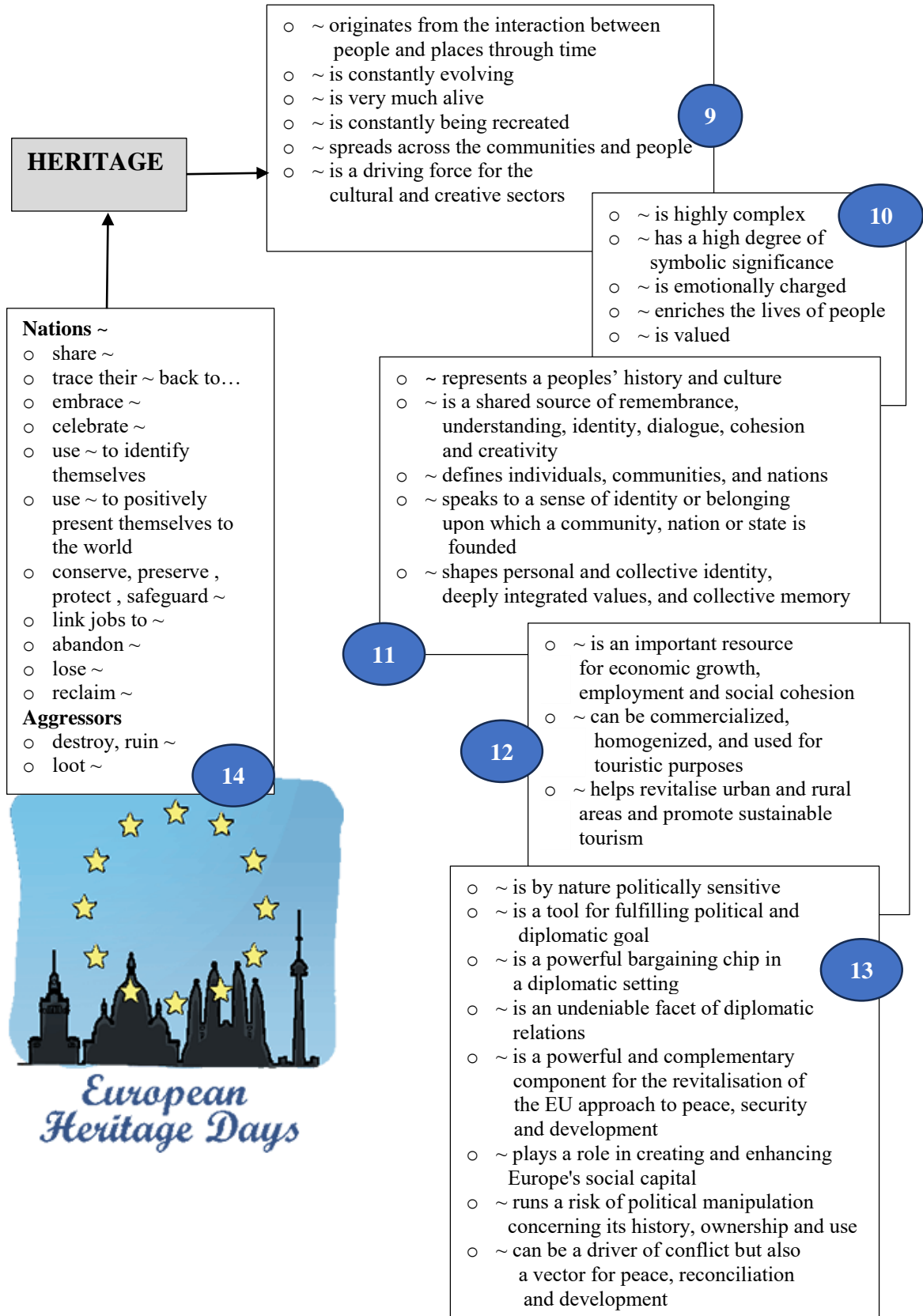


Figure 4b. HERITAGE: phrasal set (part 2).

In the phrasal set, according to “thematic tuning” (Zhabotynska & Plakhotniuk, 2020, p. 101), the collocations with one and the same formal structure are grouped into semantic blocks compatible with particular ‘content’ assignments. To fulfill them, students have to choose one or several blocks to describe the issues “*Definition of heritage*”, “*Tangible, intangible, and digital cultural heritage*”, “*Heritage as representation of history and culture*”, “*Heritage as the grounds of national identity*”. “*Heritage and today’s life*”. “*Political sensitivity of cultural heritage*”. A phrasal set links the vocabulary to a particular thematic issue and also serves as the resource of data for linguistic tasks proposed to students along with the content assignments. Such tasks integrate lexicon and grammar (see the types of tasks in (Zhabotynska, 2019)). For instance,

- To describe the issue “*Heritage as the grounds of national identity*”, compile 5 sentences with the expressions from blocks 10, 11, and 14. Use two, three or more phrases in a sentence. E.g. *Cultural heritage, with its high degree of symbolic significance, shapes personal and collective identity.*
- Paraphrase this sentence. E.g. *Cultural heritage shapes personal and collective identity, because it has a high degree of symbolic significance. Since cultural heritage has a high degree of symbolic significance, it can shape personal and collective identity.*
- Substitute one of the words by its synonyms. E.g. *Cultural heritage, with its high degree of symbolic significance, shapes (forms, builds, determines) personal and collective identity.*
- Change the initial sentence or / and its paraphrased versions into the Passive Voice. E.g. *Personal and collective identity is shaped / can be shaped (formed, built, determined) by cultural heritage which has a high degree of symbolic significance.*

Thematic stratification of linguistic expressions within a phrasal set facilitates their acquisition by students. The invariable graphics of the phrasal set (location of its blocks in the same particular places) prompts the sentence framework “Adj (SUCH) N (STH/SB) V (ACTS)”, which helps students combine phrases into sentences, and sentences – into texts. Thus, a phrasal set becomes a foundation for text production (vis-à-vis the conventional teaching technology of text reproduction). A phrasal set, with its structurally and semantically diverse units, allows for building sentences of various degrees of complexity. Once built, such sentences may be employed to work with the lexicon (synonyms, antonyms, word derivation, etc.), morphology (change of grammatical forms), and syntax (change of sentence structure). Meanwhile, the linguistic assignments remain content-focused and aimed at its efficient acquisition and communication.

## 6. Conclusions

It can be argued that application of cognitive ontologies to the arrangement of professionally relevant content and its linguistic manifestation demonstrates practical implementation of CLIL’s postulates about the bridges between language and content (phrasal sets feature the content issues), between content and communication (cognitive ontologies underpin the creation of coherent narratives), between content and cognition (students acquire skills in processing information and become more autonomous learners), between the learners and the new knowledge they acquire (the content, having been properly structured, can be easily specified and extended; students can track new content-focused phrases and add them to the respective phrasal sets). All these are bridges to students’ professional competence.

The professional topic discussed in this article was EU heritage diplomacy – a new evolving field requiring respective specialists in IR and European studies, who have a high level of professional expertise and communicative proficiency in English as the international language of diplomatic interaction. Training of such specialists in Ukraine (aspiring to join the EU) and in other European countries (current or potential members of the EU), could include a special “EU heritage diplomacy” CLIL course. This study broadly outlines its potential syllabus and lays the foundation for an interactive CLIL manual, where all educational modules employ cognitive ontologies as scaffolding

for content, cognition, and communication. Such manual is the focus of our future work, extending the ideas of this article.

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### Declaration of competing interests

The authors report there are no competing interests to declare.

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## НАРАТИВ «ДИПЛОМАТІЯ СПАДЩИНИ ЄС» У ПРЕДМЕТНО-МОВНОМУ НАВЧАННІ: ЛІНГВОКОГНІТИВНИЙ ПІДХІД

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### Анотація

Це дослідження, виконане з позицій прикладної лінгвістики, демонструє поєднання ідей і здобутків політичної наратології, когнітивної лінгвістики і предметно-мовного навчання (CLIL), в якому іноземною мовою, що опановується, є англійська. Дослідження демонструє, як тема «Дипломатія спадщини ЄС», важлива для сьогоденного наративного простору європейської політики, може викладатися у предметно-мовному контексті із застосуванням когнітивних онтологій як техніки навчальної «підтримки» (скаффолдінгу). Побудова когнітивних онтологій, запропонованих у цій роботі, відбувається із залученням «граматики моделювання» за участі базисних пропозиційних схем (БПС), схарактеризованих у семантиці лінгвальних мереж (Жаботинська 2019) – лінгвокогнітивній концепції, спрямований на структурування інформації, що передається мовними засобами. Як механізм підтримки для вивчення теми «Дипломатія спадщини ЄС», що викладається студентам-міжнародникам, когнітивна онтологія забезпечує систематизацію контенту теми і його наративну когерентність, завдяки чому формується розуміння студентами того, ЩО казати. Крім того, онтологічне аранжування теми обґрунтовує її поділ на навчальні модулі та їхні складники. Когнітивна онтологія стає також засобом для впорядкування фразових сетів автентичних англійських словосполучень, які описують тему, що сприяє засвоєнню мови та підвищує у студентів розуміння того, «ЯК сказати». У дослідженні стверджується, що когнітивні онтології є не лише ефективним інструментом навчання, але й корисним інструментом для розвитку здатності студентів адекватно обробляти професійно релевантний контент та створювати зв'язні та цілісні наративи цього контенту – навички, яких конче потребує сучасне суспільство, занурене в інформаційно-комунікаційні потоки.

**Ключові слова:** *дипломатія спадщини ЄС, наратив, предметно-мовне навчання (CLIL), підтримка (скаффолдінг), когнітивна онтологія.*

### Фінансова підтримка

Дослідження виконано в межах транснаціонального наукового проекту «Виклики та можливості для дипломатії спадщини ЄС в Україні» (2023–2026), що реалізується в рамках програми Jean Monnet Policy Network Європейської Комісії. Номер заявки: 101127459.

### Декларація про конфлікт інтересів

Автори заявляють, що не мають конфліктів інтересів, пов'язаних зі змістом цієї статті.

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**Abstract** (one in English and one in Ukrainian) (**Times New Roman, 11**)

An abstract is a brief, comprehensive summary of the contents of the article; it allows readers to survey the contents of an article quickly. The abstract should normally be a single paragraph *between 200 and 250 words* (minimum 1800 signs, key words included). A good abstract is accurate, coherent and readable, clear and concise. It uses verbs rather than their noun equivalents and the active rather than the passive voice; uses the present tense to describe conclusions drawn or results with continuing applicability; uses the past tense to describe specific variables manipulated or outcomes measured. An abstract for a *theory-oriented paper* should describe: how the theory or model works and/or the principles on which it is based; what phenomena the theory or model accounts for; and its linkages to empirical results. An abstract for a *methodological paper* should comprise the general class of methods being discussed; the essential features of the proposed method; and the range of application of the proposed method.

**Keywords:** *List five to ten pertinent keywords specific to the article with a full stop; use singular nouns (italics).*

### 1. Introduction

The body of a manuscript opens with an introduction that presents the specific problem under study and describes the research strategy. The structure of the introduction should necessarily comprise the author's *aims / tasks / objectives (bold, italics), the subject-matter* and the *material* of the study.

Exploring the importance of the problem the article should state how it is related to previous work in the area. If other aspects of this study have been reported previously, how does this report differ from, and build on, the earlier report?

Describe relevant literature. This section should review studies to establish the general area, and then move towards studies that more specifically define or are more specifically related to the research you are conducting. Your literature review must not be a series of quotations strung together; instead it needs to provide a critical analysis of previous work.

State hypotheses and objectives, their correspondence to research. The statement of the hypothesis should logically follow on from your literature review and you may want to make an explicit link between the variables you are manipulating or measuring in your study and previous research. The present tense is used to state your hypotheses and objectives.

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A good paragraph should contain at least the following four elements: transition, topic sentence, specific evidence and analysis, and a brief concluding sentence. A transition sentence acts as a transition from one idea to the next. A topic sentence tells the reader what you will be discussing in the paragraph. Specific evidence and analysis support your claims that provide a deeper level of detail than your topic sentence. A concluding sentence tells the reader how and why this information supports the paper's thesis.

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The Method section describes in detail how the study was conducted, including conceptual and operational definitions of the variables used in the study. It also permits experienced investigators to replicate the study. This section will often be broken down into subsections

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This section describes but does not explain your results; it provides the reader with a factual account of your findings. You can, however, draw attention to specific trends or data that you think are important. Your aim in your Results section is to make your results as comprehensible as possible for your readers.

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If necessary an article may have more sections and subsections.

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Sentence or textual examples, preferably numbered through the article, are given in separate paragraphs in italics (their source is given straight) with indentation 1,0 cm for the whole paragraph and separated from the previous / following text by one blank line. Example:

- (1) *“I’m Prendergast,” said the newcomer. “Have some port?”*  
*“Thank you, I’d love to.”* (Waugh, 1980, p. 46)

## 5. Conclusions

This section simply states what the researcher thinks the data mean, and, as such, should relate directly back to the problem/question stated in the introduction. By looking at only the Introduction and Conclusions sections, a reader should have a good idea of what the researcher has investigated and discovered even though the specific details of how the work was done would not be known. After moving from general to specific information in the introduction and body paragraphs, your conclusion should restate the main points of your argument.

Conclusions should finish up with an overview of future possible research.

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should be numbered consecutively in the text (super scripts<sup>1,2,3</sup>) and grouped together at the end of the paper.

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## 8. Declaration of competing interest

At the end of the article, the author includes the following statement:

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All materials should be Times New Roman, 12, font 1; indentation 1,0 cm, margins: left – 2 cm., right – 2 cm., top & bottom – 2.5 cm. The first lines in all sections and after Fig.s and tables are not indented.

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Contributions should be in English, may include multilanguage examples. Spelling should be either British or American English consistently throughout the paper. If not written by a native speaker of English it is advisable to have the paper checked by a native speaker.

**Footnotes** should be avoided.

**In-text citations.** The journal uses APA-6 format ([APA style](#)). If you are directly quoting from a work and the author is not named in a signal phrase, you will need to include the author, year of publication, and the page number for the reference: (Pocheptsov, 1976, p. 15; Leech, 1985, pp. 373-4).

If the quotation includes the author's last name, it is simply followed by the date of publication in parentheses; if no last name is mentioned in the text it is given in parentheses. For example: According to Jones (2005), "Students often had difficulty using Gerunds and Infinitives, especially when it was their first time" (p. 156). Or "Students often had difficulty..." (Jones, 2005, p. 156).

If you cite a work of two to five authors (use '&' within parentheses; use 'and' outside parentheses):

a) Becker and Seligman's (1996) findings contradicted this result. This result was later contradicted (Becker & Seligman, 1996). Mind no comma before & in citing two authors!

(b) Medvec, Madey, and Gilovich (1995) examined a group of Olympic medalists. Or medalists were examined in (Medvec, Madey, & Gilovich, 1995) (Mind a comma before & in citing three to five authors in parenthesis!) A subsequent citation would appear as (Medvec et al., 1995).

In case of six or more authors, cite only the last name of the first author, followed by "et al." and the year of publication: Barakat et al. (1995) attempted to ...

## APA-6

## In-Text and Parenthetical Citation Examples

Quote with author's name in text

Smith (2019) states that, "... " (p. 112).

Quote with author's name in reference

This is quoted as, "... " (Smith, 2019, pp. 112-4).

Paraphrasing with author's name in text

Smith (2019) stated these facts, too.

Paraphrasing author's name in reference

This fact has been stated (Smith, 2019).

No author – give title of work abbreviated to first major word

This book is true (*Long*, 2019).

*Italics for books & journals*, "quotation marks" for articles & web pages

This article is true ("Long," 2019).

Citing entire website – put URL

This has evidence ([www.pubmed.gov](http://www.pubmed.gov)).

Quote from website – use paragraph number

According to, "... " (Smith, 2019, para. 4).

More than one author with same last name

P. L. Smith (2018) and J. M. Smith (2019)

Source has more than one author in text

Smith and Lee agree that (2019)

Source has more than one author in reference

This is agreed upon (Smith & Long, 2019).

Citing more than one work

We all agree (Smith, 2019; Lee, 2018).

Citing more than one work by same author published in the same year

We all agree (Smith, 2019a, 2019b, 2019c)

Smith (2019a) believes .....

It has been reported ... (Smith, 2019c)

The quotations longer than three lines should constitute a separate block, indented 1.0 cm paragraph(s), single spaced, font 12 pts, italics, with no quotation marks, e.g., Kövecses (2018, p. 133) writes:

*In sum, the intratextual use of conceptual metaphor does not necessarily produce metaphorically homogenous discourse. In most cases, a variety of different conceptual metaphors is used in particular media and other texts.....*

For such quotations their author may be cited in a parenthesis below, not italicized, e.g.:

*In sum, the intratextual use of conceptual metaphor does not necessarily produce metaphorically homogenous discourse. In most cases, a variety of different conceptual metaphors is used in particular media and other texts. This is a natural phenomenon, given the nature of conceptual metaphors as based on the general structure of concepts (i.e., that the*

*concepts have various aspects and we use the conceptual metaphors to comprehend those aspects*). (Kövecses, 2018, p. 133).

**Quotation marks.** Single quotation marks should be used for the translation of non-English words, e.g., *cogito* ‘I think’.

Double quotation marks should be used in all other cases, i.e., direct quotations in running text. Please always use rounded quotation marks (“. . .”) not "straight" ones.

**Dashes.** Spaced EM dashes (long English dashes) are used as parenthetical dashes (“text — text”). Please do not use double hyphens (--).

Unspaced EN dashes (a short dash corresponding to the Ukrainian dash) should be used between inclusive numbers to show a range), e.g., 153-159, 1975-1979.

A long dash (EM dash, —) without spaces on the left or right in English texts might set off a phrase at the end of a sentence—like this one. Or, EM dashes may set off a phrase midsentence—a technique that really draws a reader’s attention—as they do in this sentence.

**Italics** should be used for:

- Words, phrases, and sentences treated as linguistic examples
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- Titles of books, published documents, newspapers, and journals
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- Emphasizing a word or phrase in a quotation indicating [*emphasis mine* – N.N.]

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Please keep the use of italics and boldface type to an absolute minimum. CAPITAL LETTERS and SMALL CAPS should not be used for emphasis.

**Punctuation.** Please use a serial comma (an Oxford comma or a Harvard comma) placed immediately before the coordinating conjunction (and or or) in a series of three or more terms as in “France, Italy, and Spain” (with the serial comma), but “France or Spain” (two terms only).

Put a comma before ‘which’ to introduce attributive clauses (“Tom’s book, which he spent ten years writing, is now a best seller.”). Do not use a comma to introduce questions and prepositional phrases (“in which”).

#### **Abbreviations.** List of Common Latin Abbreviations for APA Style

Abbreviation	Meaning	Used inside of parentheses only
cf.	“compare” or “consult” (to contrast information)	Never put a comma after “...in (cf. Zeller & Williams, 2007)”.
e.g.,	“for example,” ( <i>exempli gratia</i> )	Always put a comma after: “Some studies (e.g., Macmillan, 2009)...”
etc.	“and so on” / “and so forth”	Put a comma before if used to end a list of at least two other items: “(chemistry, math, etc.). In other cases do not use a comma “(biology etc.)”.
i.e.,	“that is,” ( <i>id est</i> ; specific clarification)	Always put a comma after: “(i.e., first, second, or third)”
vs.	“versus”	Put a full stop after: “(low vs. high)”, do not italicize.
ibid.	“ <i>ibidem</i> ” for citations	Not used in APA to refer again to the last source previously referenced. Instead give each citation using author names as usual.

#### **References (Times New Roman 12, bold, caps, not numbered)**

A reference list (usually about 30 authors, preferably of the last decade) must comprise all the references cited in the text of your paper, listed in alphabetical order at the end of the paper and not numbered. Each reference in the reference list needs to contain all of the bibliographic information

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Langacker, R.W. (2008). *Cognitive grammar: A basic introduction*. New York, NY: Oxford University Press.

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#### Book chapter:

Mind that editors' first names are cited before their family names, without a comma before "&" for two editors. In case of three or more editors, there is a comma before "&".

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#### Journal articles:

Peterson, T. (2017). Problematizing mirativity. *Review of Cognitive Linguistics*, 15(2), 312-342. <https://doi.org/10.1075/rcl.15.2.02pet>

#### On-line newspaper article:

Brody, J. F. (2007, December 11). Mental reserves keep brain agile. *The New York Times*. Retrieved from <http://www.nytimes.com>

#### Several volumes in a multivolume work:

Koch, S. (Ed.). (1959-1963). *Psychology: A study of science* (Vols. 1–6). New York, NY: McGraw-Hill.

#### Reference book:

VandenBos, G. H. (Ed.). (2007). *APA dictionary of psychology*. Washington, DC: American Psychological Association.

Print journal article. Article titles use sentence style capitalization, i.e., capitalize the first word of the title and subtitle (after a colon, if there is one), and any proper nouns (names). Journal/magazine and newspaper titles use headline style capitalization, i.e., capitalize each significant word but not articles and prepositions. In the year field for reference type Article in press enter the words: (in press). Mind a comma before "&" to cite more than one authors!

Wilson, S., Spies-Butcher, B., & Stebbing, A. (2009). Targets and taxes: Explaining the welfare orientations of the Australian public. *Social Policy & Administration*, 43, 508-525. <https://doi.org/10.1037/arc0000014>

Fennimore, D. L. (1981). American neoclassical furniture and its European antecedents. *American Art Journal*, 13(4), 49-65. Retrieved from <http://www.jstor.org>

#### Webpage, with author but no date:

Flesch, R. (n.d.). *How to write plain English*. Retrieved October 3, 2017, from [http://www.mang.canterbury.ac.nz/writing\\_guide/writing/flesch.shtml](http://www.mang.canterbury.ac.nz/writing_guide/writing/flesch.shtml)

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New Zealand Government. (2008). *Digital strategy*. Retrieved April 12, 2009, from <http://www.digitalstrategy.govt.nz/>

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Conference paper in regularly published proceedings, retrieved online:

Houzel, S., Collins, J. H., & Lent, R. (2008). The basic nonuniformity of the cerebral cortex. *Proceedings of the National Academy of Sciences*, 105, 12593-12598. <https://doi.org/10.1073/pnas.0805417105>

Film/movie

Scorsese, M. (Producer), & Lonergan, K. (Writer/Director). (2000). *You can count on me* [Motion picture]. United States: Paramount Pictures.

Blog post:

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Martynyuk, A. P. (2020). The problem of meaning-making in communication. *The Journal of V.N. Karazin Kharkiv National University. Series: Foreign Philology. Methods of Foreign Language Teaching*, 91, 27-41. <https://doi.org/10.26565/2227-8877-2020-91-04> (in Ukrainian).

Мартинюк, А. П. (2020). Проблема смислотворення в комунікації. *Вісник Харківського національного університету імені В.Н. Каразіна. Серія "Іноземна філологія. Методика викладання іноземних мов"*, 91, 27-41. <https://doi.org/10.26565/2227-8877-2020-91-04>

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