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**THE EFFECT OF THE TURKISH SERIES ON THE LATIN AMERICAN
SOCIETIES IN THE CONTEXT OF THE CULTURE INDUSTRY**

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ABSTRACT

Today, especially with the globalization process, Turkish TV series are becoming widespread on the international market as a product of the culture industry, and gradually increasing their impact. During this period, in which the 2000s constituted an important breaking point, Turkish TV series reached a wide audience in Latin American countries as well as in the Middle East, the Balkans, Eurasia and Southeast Asia. The fact that Turkish TV series are followed with interest and have a large audience in Latin American countries, as in many other countries of the world, shows that Turkish TV series have important effects on the social structures and audiences of Latin American countries. This study aims to examine the main factors and dynamics that make Turkish TV series effective in Latin American societies as a product of the culture industry. Within the scope of the study, the findings obtained as a result of in-depth interviews with 20 people using the qualitative research method were analyzed through descriptive analysis. The research findings revealed that Turkish TV series have positive impacts on the social structure of Latin American societies towards Türkiye, as well as stimulating the learning of eating and drinking habits, clothing preferences, and more importantly, learning Turkish language and culture, which will affect social change.

Keywords: Turkish TV series, Latin America, Culture industry, Globalization.

INTRODUCTION

Cultural interaction, which is one of the unchanging realities of the age we live in, represents a cycle that covers a wide area from daily life to management style, from eating and drinking habits to technology use, and that includes communities living around the world. This interaction process, also known as globalization (State Planning Organization, 2000: 3), has found new channels for itself, especially with the widespread use of mass media.

The transfer of knowledge and culture, which started with newspapers, radio and television, in which communication developed one-way, became faster and more widespread through digital platforms, with the effect of developments in the field of communication such as social media, since the 2000s. TV series and movies watched in different countries of the world have diversified with this process and increased the interest of different communities in TV series that have a global impact besides their local productions. The TV series industry, which offers new content against global demand in the TV series industry, has started to realize conscious productions to fill the concept of the culture industry.

In the same period, Turkish TV series, which were in high demand globally, were exported to more than 150 countries, reaching an audience of around 600 million and an economic value of 800 million dollars. After the close geographical regions, such as the Middle East, which is the first export direction of the Turkish TV series industry, overseas geographies such as Latin American countries with different cultural backgrounds have been the places where Turkish TV series are most popular. In a process where globalization gained diversity, the issue of the social impact of television series, which first came to the fore with American TV series, brought with it the thesis that it would create a similar mechanism of influence with the spread of Turkish TV series.

Although there are many studies in the literature on Turkish TV series, which will be examined in the context of the concept of the culture industry, which is also the focus of this study, however, a limited number of studies have been focused on Latin American countries. Examining the effects of Turkish TV series on Latin America within the framework of the concept of the culture industry reveals the difference and originality of the study from other studies and is expected to add a different dimension to academic and social studies in this field.

The purpose of this study is to examine the main factors and elements that make Turkish TV series successful in Latin American societies. In the first part of the study, a literature review will be conducted on the globalization and culture industry approach, which constitutes the conceptual and theoretical framework of the research, the global success of Turkish TV series and the process of being effective in Latin America. In the research part of the study, the findings of in-depth interviews with 20 people, which were held face-to-face and online, will be analyzed to understand the main factors that make Turkish TV series effective in Latin American societies. In the conclusion part, the findings obtained in the analysis part will be evaluated and the place of Turkish TV series in international media and their impact on Latin America will be discussed.

CONCEPTUAL AND THEORETICAL FRAMEWORK

According to Adorno and Horkheimer, in the periods when the effects of globalization began to be seen and the mass media began to become widespread, the whole world was filtered by the “culture industry” (Horkheimer et al., 2010: 169). In this process, the culture industry produces not a real culture, but a mold culture without spontaneity (Jay, 1989: 312). The culture industry is concerned with the commodification of life and refers to “the processes of standardization of cultural products and rationalization of distribution techniques” (Kejanlioglu, 2005: 184). Moreover, according to Adorno (Adorno, 2003), the culture industry combines the old with the familiar in a new way.

The products of the culture industry are thus produced in a planned manner, and they are similar to each other in terms of their structures or they are intertwined (Adorno, 2012: 109). What is portrayed as progress in the culture industry and glorified as new consists in the transmutation of the always the same; changes in this direction mask an unchanging skeleton like the snow motive that has not changed since the first day dominated the culture. Therefore, the concept of industry is used here to describe the standardization of cultural products and rationalization of distribution techniques (Adorno, 2003). Everything is alike in this industry. Small differences in cultural products also serve to classify consumers, who have become a statistical unit (Umit, 2018: 321).

The effects of the globalization process play an influential role in the global dissemination of media content produced as products of the culture industry. The concept of globalization, which was first used in the 1960s, has become widespread since the 1980s and has turned into a key concept frequently used in the social sciences literature today (Icli, 2001: 163). Giddens states that the concept of globalization is used extensively in discussions in the business world, politics, and the media (Giddens, 2012: 83). Bauman, on the other hand, states that the concept of globalization is essentially a concept that refers to global effects rather than global initiatives (Bauman, 2010: 65). In other words, globalization;

“...economic, political and cultural integration on a world scale, the use of ideas, views, practices and technologies at a global level, the universalization of capital circulation, the emergence of new forms of relationship and interaction that transcend the borders of the nation-state, the convergence of spaces, the shrinking of the world, unlimited competition, free movement means that the market grows on a world scale and goes beyond national borders, in short, the world becomes a single market” (Kacmazoglu, 2002, QDT., Balay, 2004: 62-63).

Therefore, the concept of globalization defined the spread of some common values in the political, economic, cultural, and social fields across the world by crossing national and local borders (State Planning Organization, 2000: 3). More generally, the concept of globalization is used both as the process of the emergence of a single “global culture” with the similarity of world societies and the process of expressing and defining the differences of societies. These two qualities express the process of globalization itself in terms of social life. Therefore, the interaction of “globalization” and “localization” processes with each other emerges in social life. For this reason, globalization characterizes the style of “a simultaneous and joint movement, not the opposition of universality and locality” (Icli, 2001: 163).

Due to the increasing influence of mass media and digital media platforms in today's world, Turkish TV series have started to be followed in many parts of the world as a product of the culture industry, along with the globalization process. In this process, Turkish TV series both increased their popularity in the global context and had significant effects on the countries that followed. The fact that Turkish TV series are followed with interest and have a large audience in Latin American countries, as in many countries of the world, contributed to the spread and popularity of Turkish TV series around the world.

GLOBAL SUCCESS OF TURKISH TV SERIES AND LATIN AMERICA

The series has open-ended narrations, which predict a climax finale that will keep the audience in front of the screen the next week (Kabadayi, 2009: 136), and connect each episode to the previous and subsequent episodes. Features such as the open-ended narration and the fact that the narrative is based on intense emotions, highlighting the plot caused by the conflicts, and emphasizing the attempts made to solve some of the problems are also effective in the formation of the sense of reality in the audience (Turkoglu, 2010: 270). In addition, the main characters and side characters are kept active in each episode divided into many segments. Although these segments seem to highlight different characters in the series, they are all structured around the main event story (Kabadayi, 2009: 136).

The first television broadcasting in Türkiye was carried out by İ.T.Ü in 1952. However, the first Turkish television, which became widespread throughout the country, started broadcasting on January 31, 1968, under TRT (Akbulut, 2005: 237). Since the first television broadcasts started in Türkiye, television series have become interesting productions (Hancigaz et al., 2021: 726). The audience's acquaintance with domestic Turkish serials coincided with 1974 when television broadcasts developed both in terms of quality and quantity. In this broadcast year, TRT's broadcast days and hours increased and broadcasts were made throughout the country. In the same year, the first Turkish TV series called "Kaynanalar" was produced by TRT (Tanriover, 2011: 44). In the following time, Turkish television series works continued with productions such as, "Aşk-ı Memnu", "Perihan Abla", "Diyet", "Ferman", "Şipsevdi", "Topuz", "Denizin Kanı", "Tatlı Çarşamba", "IV. Murat", "Üç İstanbul", "Çalığışu", "Küçük Ağa" (Cereci, 2014: 7). Thus, TV series studies, which started in the 1970s, showed themselves mainly in the form of novel adaptations at the beginning (Hancigaz et al., 2021: 726).

With the start of broadcasting of private television channels at the end of the 1980s, TV series studies increased and as a result of the development of production companies in time, TV series production turned into a private sector (Cereci, 2014: 7). Since these years, with the development of private television broadcasting, an increase has been observed in imported productions on the one hand, and a development has been recorded in domestic TV series productions on the other hand. In this process, the intense interest of the audience in TV series has also been effective in the shooting of many TV series in Türkiye (Bilis et al., 2018: 411). Thus, as a result of the privatization process that developed in the 1990s, diversity in TV series came to the fore. Thus, as a result of the

process of privatization that developed in the 1990s, diversity in TV series came to the fore. A diversification has emerged, ranging from novel adaptations and family-centered TV series to neighborhood TV series, from imported sitcoms to mafia and network TV series (Erguney, 2017: 53). In the 2000s, rapid developments were experienced in the serial production process and in terms of genre, Türkiye-specific, relatively fixed, format and content features were determined. In this direction, domestic serials, which have become almost the most popular and a real “sociological phenomenon” on commercial and public television channels broadcasting widely in Türkiye today, have become productions broadcast on prime time once a week. Local TV series are also produced every weekday, before the main news bulletin in the evening or in the daytime, but their number is not very high (Tanrıöver, 2011: 45-46).

The 2000s were also the years when Turkish TV series were opened to the international market, exported to many countries of the world, and watched with interest (Aslan, 2019: 32). Turkish TV series have reached wide audiences by focusing on situations and events that can be experienced by every person in the world, featuring characters that everyone can encounter in daily life, and adopting a universal approach besides local cultural features. The events that make up the series’ stories, the problems in human relations, family problems, jealousy, loyalty, revenge, ambition, and love are the subjects of emotions and situations that can be experienced by almost every person; While reflecting the characteristics of Turkish culture, stories are formed with the behaviors, places and rituals found in every culture, the audience can find their characteristics in the characters of the TV series, and therefore they can attract the attention of large masses (Cereci, 2014: 7-8).

Thus, since the 2000s, Turkish TV series have been followed with great interest in Middle Eastern countries, Balkan countries, Caucasian countries, and the Turkic Republics. The years between 2008 and 2009 represent an important turning point in the export of Turkish TV series. Turkish TV series are now exported to many countries such as India, Pakistan, China, South and Southeast Asia, North Africa, and South America, as well as the Middle East. In the 2010s, the Turkish TV series industry started to export TV series and movies to the world (Kuyucu, 2019: 569-570). There are political, economic, social, and technological reasons behind the cross-border success of Turkish TV series and the expanding market with this success. TV series, one of the most important cultural productions of Türkiye in recent years, first spread to the Middle Eastern countries and then to South America and other countries of the world in the 2000s and turned into a global cultural export (Pinto, 2018). Having a wide audience from the Middle East to the Balkans, Latin America and Central Asia, Turkish TV series have become one of Türkiye’s most effective soft power tools. Türkiye has become a country that ranks second in the world after the United States in the export of TV series and aims to generate 1 billion dollars in revenue from its TV series exports to 156 countries in 2023 (Ozdemir, 2021).

The positive reception of Turkish TV series, which has increased its influence in Latin American countries in recent years, in Middle Eastern societies for the first time has been tried to be explained by cultural affinity and similar sociocultural motivations (Ozalpman, 2017). Although there is a partial truth in these inferences, the positive reception of TV series in Latin American societies showed that the research should be examined in a different direction. Trying to explain

the success of Turkish TV series in Latin American countries with the “globalization” and “culture industry” studies appears to be a more rational approach than explaining it with the “soft power” applied in countries with which Türkiye has close geographical and cultural relations.

The Turkish TV series industry, which opened up to the world after the 2000s, started to search for a market at a time when the political and economic transformation in Türkiye was realized in the same years. The global economic crisis, which was also felt in Türkiye in 2001, and the subsequent elections, brought along a political change in which the coalition governments were replaced by a single party government. During the ruling period of the current government, which has been in power since 2002, bilateral relations with Middle Eastern countries such as the United Arab Emirates and Saudi Arabia, where TV series exports are made, have been carried out with fluctuations. The ongoing volatile economic relations with the Middle Eastern countries, which are a high-income market for the Turkish TV series industry, have led Turkish TV series exporters to seek new markets.

In the same years, Chile, which previously imported TV series from countries such as Brazil and Mexico, experienced a decrease in the general television audience since 2000, when the global crisis was experienced. The search for the Chilean television industry due to the reduction in the number of viewers has introduced Chile which is one of the important countries in South America with Turkish TV series in 2010 and later on. Turkish TV series, which entered the Latin American television market in 2013 with the TV series “1001 Nights Tales”, has had a wide audience since then. Especially TV series that appeal to “prime time” audiences have come to dominate the foreign TV series industry in these countries (Barrios et al., 2021).

Despite the lack of geographical and cultural proximity in Latin American countries, there are social reasons for the easy and long-term acceptance of Turkish TV series. Turkish TV series have a structure that presents different views to the audience due to the distant geography and cultural differences. According to Latin American viewers, TV series have an intriguing aspect, as they are based on real or probable life stories, rather than being fictional. Apart from this, serials have gained a faster and more continuous acceptance than expected for Latin American female audiences with their attractive aspects such as make-up, clothes, and houses (Pinto, 2018).

The media has an undeniable role in social changes and the individual socialization processes. Media, which is one of the most important agents of socialization, is a mechanism that affects the consumption, political and social behaviors of individuals and societies by using the newly developed technology aspect.

From this perspective, it is an expected result that Turkish TV series broadcast in Latin America will have an impact on the audience and the society in which they live. Since the years when Turkish TV series were broadcast, there have been processes in the target market that have had economic, political, and social consequences. TV series, as reflected in official reports, were influential in the choice of nearly 200 thousand Latin American tourists to Türkiye for their vacation a year before the COVID-19 pandemic, which affected the whole world. For instance, the vast majority of tourists who came to Türkiye from Colombia

between 2016-2018 stated that they preferred Türkiye because they were influenced by Turkish TV series (Ministry of Culture and Tourism, 2018). According to the report “Latin America Market Report, Activities, Targets and Strategies (Brazil- Argentina- Colombia)” published by the Ministry of Culture and Tourism in 2018, tourists from Latin America mainly visited the cities and places where TV series and movies were shot (Ministry of Culture and Tourism, 2018).

A similar economic impact occurred in the field of sectoral content. With the increase in the viewing rates of the TV series, other content broadcast on Turkish television also attracted the attention of the Latin American audience and led the industry to a search in this field. Reality shows and competition programs for families such as “Yaparsın Aşkım” broadcast on Turkish television were sold to countries such as Mexico and Bolivia with royalties (Pinto, 2018).

There have been processes in which TV series, one of the most important export items produced by the Turkish culture industry in recent years, were blocked or received a negative reaction in target countries due to political and cultural reasons. For example, in countries such as Iran and Pakistan, TV series have been shown as the reason for the increasing divorce rates and are partially banned. Likewise, it was brought to the agenda that TV series broadcast in some Middle Eastern countries were canceled because they were against Islamic values (Ozalpman, 2017). Apart from this, countries such as Iran and Saudi Arabia have periodically imposed restrictions on imported products, including Turkish TV series, according to the course of bilateral political relations with Türkiye. When the processes of Turkish serials on the Latin American market are evaluated in the context of the culture industry, a direct and targeted culture export motivation is not noticeable. Turkish TV series, which did not encounter any negative reactions in Latin American society, became the target of anti-Türkiye formations in the countries that were the target audience. The Armenian diaspora residing in South America has tried to attract the political field to cultural studies by organizing campaigns for the cancellation of Turkish TV series broadcast in the countries of the region (Gonzalez, 2015). However, these initiatives did not cause any change in the general attitude of the official authorities of the relevant countries and the audience.

Contrary to the reaction issue mentioned above, Turkish TV series have evolved in a direction that penetrates the socio-cultural areas where Latin American societies attach a high value. Turkish TV series have had a great impact on the audience since they were broadcast in Latin American countries. The most important of these is the issue of Turkish names given to newborns, which is also reflected in the official demographic statistics of the relevant countries. The demand for Turkish TV series in Latin American countries is evident in the names given to newborn children in these countries. The official population administration of Paraguay, a Latin American country (Registro Del Estado Civil), “Fatmagül’ün Suçu Ne”, “One Thousand and One Nights”, “The Magnificent Century”, “If-fet”, the names of the characters of the series such as Scheherazade, Kerim, Kemal, Devran and Mustafa are given to newborn children in the country often enough to enter the statistics (Oktay, 2020). Similarly, in countries such as Peru, Ecuador, Chile, and Argentina, the names “Onur” and “Scheherazade”, the protagonists of the “1001 Nights Tales” series, have been approved in the population units as the new names of thousands of Latin American children (Añez, 2015).

METHODOLOGY

Purpose of the Study

Nowadays, especially with globalization, Turkish TV series have become widespread on the international market as a product of the culture industry, increasing their influence. Particularly in Latin American countries, Turkish TV series have gained a wide audience, and determining their individual and societal impact in these countries is crucial for this research. The purpose of this study is to examine the key factors and elements that make Turkish TV series influential in Latin American communities.

The research questions which we aim to find an answer to within the scope of our study, which also determine the theoretical framework of our research, are as follows:

1. What are the key factors / elements that contribute to the influence of Turkish TV series on Latin American communities?
2. What are the elements of cultural transfer through Turkish TV series?
3. What kind of societal changes have been observed in Latin American communities through cultural transfer via Turkish TV series?
4. How have the social reflections of Turkish TV series been in Latin American countries?

Research Methodology

In this study, in-depth interview techniques are used, which is a qualitative research method suitable for the research topic. Qualitative research is a suitable approach to exploring a problem or phenomenon in-depth. It is necessary to rely more on qualitative methods to observe and explain the mechanisms of causality in quantitative research accurately. If the phenomenon under study is complex, distant, and difficult to measure, it is important for the study's reliability that the chosen method be the qualitative research method, which provides more detailed information (Creswell, 2021: 48-49). Therefore, qualitative research is defined as obtaining the desired information by evaluating social phenomena through observation, interviews, or information materials without external intervention, in their natural appearances and habitats (Islamoglu, 2009: 180). In-depth interviews, on the other hand, involve asking detailed questions to the interviewee about a specific topic to understand the essence of the phenomenon. In such interviews, the researcher tries to make informed inferences by asking additional questions to obtain detailed information or a more comprehensive response (Aziz, 2008: 85). In this research, we use qualitative research methods and in-depth interview techniques to analyze in detail the key factors and elements that make Turkish TV series influential in Latin American communities.

Design of the Research

This research, aiming to deeply examine and understand the key factors and elements that make Turkish TV series influential on Latin American viewers, was conducted in accordance with the phenomenological design, which is one

of the qualitative research designs. Through this design, the study sought to conduct an in-depth investigation based on the perspectives of individuals who play a role in the emergence and impact of the phenomenon of watching Turkish TV series in Latin American communities.

Population and Sample of the Study

The population of this research consists of Latin American individuals who watch Turkish TV series. The sampling method used to determine the participants was maximum variation sampling, aiming to include participants from various countries in Latin America. As many participants as possible were selected from diverse countries in Latin America. The main criteria for selecting participants for the study was that they had watched Turkish TV series at least once. Therefore, it was confirmed that the participants had previously watched Turkish TV series. Through purposeful sampling, in-depth face-to-face and online interviews were conducted with 20 Latin American Turkish TV series viewers selected from the population.

Data Collection Process

In this research, data were collected from participants through in-depth face-to-face and online interviews using an interview guide consisting of unstructured open-ended questions. The interview guide was developed based on the conceptual framework provided in the literature.

To ensure the suitability of the interview guide for the qualitative research paradigm, it was presented to an expert for review. After receiving the expert's feedback, a pilot application was conducted with a Latin American Turkish TV series viewer who was not part of the study group and resided in Türkiye to assess the suitability of the questions for the scope of the study. The pilot application confirmed the suitability of the questions.

The data collection process of the research was carried out through face-to-face and online interviews from 20.06.2022, to 30.06.2022. Before the interviews, voluntary participation forms were obtained from the participants, and a post-research information form was provided for disclosure purposes after the interviews.

Data Analysis

In this study, the analysis of participants' socio-demographic data was handled manually. The data obtained from the research were analyzed using the descriptive analysis method to describe and explain participants' experiences and identify emerging themes, without using any software program.

Various strategies are recommended for the validity and reliability of qualitative research data analysis, in line with the nature of qualitative research. These strategies include credibility, transferability, dependability, and confirmability (Yildirim et al., 2021). The research findings were examined within the framework of these four strategies. In terms of credibility, the study included the diverse opinions, perspectives, and experiences of the participants on the subject. Participants with different characteristics were also included in the research. Regarding transferability, the purposive sampling method was used to determine the participants relevant to the research topic, and the findings section directly

presents the participants' statements. To ensure dependability and prevent research bias, the researchers independently reviewed the recordings of the data obtained from the participants. For descriptive analysis, participants' statements were recorded by the researchers in both audio and written text formats, and for confirmability, all data documents of the study were stored.

FINDINGS

In our study, a purposive sampling method was used, and in-depth face-to-face and online interviews were conducted with a total of 20 participants, consisting of 4 males and 16 females, selected from our population. Of the participants, 9 indicated having a master's degree, 8 had a bachelor's degree, and 2 had an associate degree. Only one participant did not provide information about his/her educational background. Furthermore, 3 participants were not employed, while 17 participants were employed. The age range of the participants varied between 23 and 70. In terms of research ethics, the names of the participants were coded with different aliases such as "A1, A2, A3, etc." during the in-depth face-to-face and online interviews.

Based on the conducted in-depth face-to-face and online interviews, three interconnected themes emerged: 1) participants' practices for watching Turkish series, 2) participants' motivations for watching Turkish series, and 3) the impact of Turkish series on Latin American viewers.

Participants' Turkish Series Viewing Practices

In today's world, with globalization and advancements in communication technologies, Turkish TV series are watched in different countries as a product of the culture industry. However, behind each viewer's viewing practice, there are different elements at play. When we examine the viewing practices of Latin American individuals who watch Turkish TV series within the scope of this study, we can see that there are various elements underlying their viewing practices.

All the participants interviewed in the study expressed that they watch Turkish TV series. However, only two participants stated that they watch Turkish series every day. One participant mentioned, "*I used to watch soap operas every day, now I watch series whenever I have free time*" (A9, Colombia), indicating a shift from daily viewing to a more casual viewing pattern associated with free time. Two participants stated that they often and frequently watch Turkish TV series.

Among the interviewees, a participant with code name A1 (Colombia) stated that they watch Turkish TV series "*maybe 3-4 times a week*" on average, while participant A15 (Ecuador) mentioned that they watch "*one Turkish series every week*".

When it comes to the monthly frequency of watching Turkish TV series, one participant stated that they watch Turkish series 2 or 3 times a month, another participant mentioned watching one series per month, and one participant stated that they watch Turkish series once every 3 months.

A participant with code name A2 (Venezuela) stated, "*In the past 2 years, I watched a few Turkish series and movies,*" indicating their viewing frequency

every year. One participant mentioned watching Turkish series “*sometimes*,” another participant stated “*rarely*,” and two participants mentioned having watched Turkish series only once in their lives. Additionally, five participants did not provide any information about their Turkish TV series viewing practices. Overall, it can be observed that each participant has a different viewing pattern for Turkish TV series.

The TV series “Magnificent Century” which aired between 2011 and 2014 emerged as the most-watched series among the interviewed participants. However, when mentioning the series, participants used the name “*Sultan Süleyman and Sultan*” instead of “*Magnificent Century*.” Participant A1 (Colombia) stated, “*Of course, for me, the series of Sultan Süleyman comes first*,” reflecting the different naming of the series. Furthermore, five participants mentioned watching the series “Magnificent Century”.

After Magnificent Century, the two most watched series among the participants are “Medcezir” and “Mucize Doktor”. Four participants have mentioned watching these two series. The other participants have mentioned watching different series such as “Seksenler”, “Kösem Sultan”, “Masumlar Apartmanı”, “Her Şey Kızım İçin”, “Kurt Seyit ve Şura”, “Pera”, and “Yeni Hayat”. When looking at the series they watch, it can be observed that they watch both series that have ended their broadcast and current ongoing ones.

Half of the participants mentioned that other members of their families also watch Turkish TV series. The statement of participant A2-Venezuela, “*My family is currently watching a Turkish series*,” indicates that the whole family watches Turkish series together, while the statement of participant A3-Ecuador, “*My mother in my family watches Turkish series*,” specifically refers to the viewing practice of a family member. Four participants mentioned that their relatives also watch Turkish series, in addition to their families.

“For example, my aunts, my maternal aunt, and my father watch Turkish series a lot” (A16-Dominican Republic).

“My mother-in-law also watches the series Masumlar Apartmanı, which is broadcast on TRT” (A4-Mexico).

Four participants have mentioned watching Turkish series with their families, while only one participant has stated that they watch Turkish series with their partner. Additionally, one participant mentioned that they watch Turkish series in the original language (Turkish), while their family and people around them watch with subtitles or dubbed versions.

“Yes, I have acquaintances who watch Turkish series both in Colombia and Spain. But they mostly watch with dubbing or subtitles” (A1-Colombia).

National Television Channel, Netflix, YouTube, and Facebook emerged as the media platforms through which participants watched and obtained information about Turkish series. Particularly participants from Colombia, Ecuador, and the Dominican Republic have mentioned that in their countries, a single channel within the national television broadcasts Turkish series exclusively.

“We watch Turkish series on national television. A few years ago, Brazil-

ian or Colombian series were popular in Ecuador. Now, there are many Turkish series in Ecuador. Turkish series have become very popular in my country” (A3-Ecuador).

“There is one channel, I don’t watch much television, so I don’t know which channel, but they always have Turkish series. Always. They broadcast every day, every day” (A16-Dominican Republic).

“Soap opera series are on Colombian television because they are only broadcast there” (A6-Colombia).

The online streaming platform Netflix emerged as the most preferred media platform among the interviewed participants. Six participants mentioned that they preferred this platform due to its diverse content, while one participant stated that they preferred it because of both the variety of content and its accessibility to everyone.

“Netflix. Because it has everything I need so far” (A5-Paraguay and Brazil).

“Netflix. It is the most diverse platform in Latin America and the most accessible to everyone” (A2-Venezuela).

Five participants mentioned that they use both the national television channel and Netflix to watch Turkish series. However, two participants stated that they only watch Turkish series on the national television channel.

“I saw that there are Turkish series on national television and Netflix, and I watched them on these platforms” (A8-Colombia).

After Netflix and national television channels, the most preferred media platform by the participants is YouTube. The participants mention using YouTube due to its user-friendly interface, free access, availability of subtitled and dubbed content, and a rich variety of content, on-demand access to followed content, and user control over the content. Six participants stated that they use YouTube to watch Turkish series. However, three of these participants mention using the platform solely for watching Turkish series, while two participants mention using YouTube along with Netflix and national television channels. One participant states that they use YouTube and national television channels together, excluding Netflix.

“I watch on YouTube because it’s free and I can pause it whenever I want” (A4, Mexico).

“In my country, we have national television, YouTube, and Netflix. I can find various series and movies with Spanish subtitles or full translations on YouTube and Netflix” (A9, Colombia).

Only one participant mentioned preferring the world’s most-used social media platform, Facebook while following the Turkish series due to its ease of use and manageability.

“I prefer Facebook because I find it easier to manage this social network” (A15, Ecuador).

Participants' Motivations for Watching Turkish Series

People watch series to fulfill various needs, and the same applies to the participants in this study who watch Turkish series. Half of the participants expressed that they watch Turkish series for socio-cultural reasons. In this context, participants mentioned watching Turkish series to learn the language (Turkish), understand cultural and historical dynamics, gain knowledge about the structure and daily life of Turkish families, learn accepted behaviors in Türkiye's daily life, and observe social issues that can be encountered in almost any society.

"I enjoy watching Turkish films and series that portray everyday problems in people's lives, just like in any production, where realities such as poverty, psychological issues that people may experience, or even single mothers are depicted" (A12, Ecuador).

"I watched them before to improve my Turkish" (A17, Bolivia).

"For family reasons. Within the family structure, members support each other, stay close, and show respect. I watch [Turkish series] because of strong family ties and respect" (A16, Dominican Republic).

"Due to significant cultural differences according to our traditions and to generally learn about the daily life of a Turkish family" (A2, Venezuela).

"To learn about Turkish culture and history" (A7, Colombia).

One participant who expressed watching Turkish series for sociocultural reasons specifically highlighted the religious differences, saying,

"Religion is very different. For example, religious behaviors are very different. When I became Muslim, I understood certain things; there are different and hidden aspects. If you don't know Islam, you won't understand. But when I watch with my mother, I explain. She finds certain things different and asks, 'What's happening there?' And I say, 'Oh, they do it this way because of this situation.' Then she finds it reasonable" (A1-Colombia).

This statement emphasizes the difference in religious structure between Latin America and Türkiye. Another participant who mentioned sociocultural reasons for watching Turkish series said, "*The historical subjects of Turkish series are very different from what is usually seen in series*" (A10-Colombia), drawing attention to the disparity between historical events depicted in the series and actual situations.

Six participants identified the content and actors of the series as the main reasons for watching. They mentioned the respectful portrayal of love stories and romantic scenes, the presentation of interesting and beautiful narratives, and the scarcity of explicit scenes, the attractiveness of the actors and actresses, and the overall quality of the cast and production team as factors that contribute to their interest in the series.

"They talk about interesting stories, the actors are very good, and the production is top-notch" (A4-Mexico).

"They mention love and beautiful stories" (A3-Ecuador).

“They are more serious rather than, and they don’t show explicit scenes” (A11-Ecuador).

“The development of relationships between characters in the series is slow, which makes the viewer addicted. Also, the beauty of Turkish women” (A18-Bolivia).

Additionally, two participants mentioned watching Turkish series for entertainment and pleasure. One participant said, “Because I like being able to see the places I’ve visited again” (A6-Colombia), while another mentioned, “to see Turkish cuisine, such views, and to see Istanbul” (A19-Dominican Republic). Therefore, we can see that Turkish cuisine and cities also influence the viewership of Turkish series.

The Impact of Turkish TV Shows on Latin American Audiences

Half of the participants mentioned being influenced by the socio-cultural values, beliefs, locations, clothing, and names depicted in Turkish series, and some even form para-social interactions with the characters. Therefore, it is stated that the series has many effects on the viewers.

Half of the participants expressed being influenced by the most prominently featured locations and cities in the Turkish series. Istanbul, in particular, stood out. Additionally, a desire to live in Türkiye was emphasized. Two participants mentioned being influenced by both the locations/cities and the Turkish language.

“I would like to live in Istanbul and the beautiful lands of Türkiye” (A2-Venezuela).

“I wish I could speak that language and live there” (A6-Colombia).

Three participants expressed being influenced by both the locations/cities and the beauty of the costumes and accessories used in the series. Only one participant specifically mentioned that the costumes and accessories used in the series were the main factors creating the impact. Therefore, after locations/cities, the most influential factor on the participants is the “costumes and accessories” used in the series.

“I want to know those beautiful places seen in the series. Their costumes are like art, and I’m a fan of them” (A14-Ecuador).

“I remember something. When we were watching the series, there were earrings, very interesting earrings, and I’ve been looking for that type of earrings for years but couldn’t find them anywhere. A girl in Medcezir was wearing them. The earrings were very good, very beautiful. Generally, the costumes are more advanced; the fashion is more advanced in the series. They are very beautiful” (A16-Dominican Republic).

Four participants expressed that the Turkish series influenced cultural values, traditions, and culinary culture. However, two of these participants mentioned being influenced by the locations and cities in Türkiye as well as the cultural values.

“I love Turkish cuisine. Additionally, the tradition of taking off shoes before entering a home influenced me” (A10-Colombia).

“The culture of drinking tea in small cups is impressive” (A17-Bolivia).

“The places in Türkiye are beautiful, and their traditions such as dances, proposals, and marriages are remarkable” (A13-Ecuador).

Three participants mentioned being influenced by the main actors and female characters in the series, both in terms of their physical appearances and behaviors. One participant specifically emphasized the captivating nature of Istanbul’s landscapes. Two participants mentioned being impressed by the names used in the Turkish series, while two others stated that the Turkish series did not have a significant impact on them.

“Despite the series depicting Istanbul as a paradise, many people have a desire to visit the city. Additionally, the characters have incredible physical beauty” (A9-Colombia).

“Yes, I love the female characters; they are a bit assertive but not excessive” (A5-Paraguay and Brazil).

“The meaningful Turkish names are remarkable and impressive” (A18-Bolivia).

In terms of cultural values, when examining the impressions of the participants, some of them mentioned that the Turkish series influenced their understanding of Turkish culture. Two participants expressed their desire to learn more about Türkiye and visit the country because they find Turkish culture interesting. One participant noted that Turkish culture is conservative and that historical events hold significance within the cultural framework. Another participant emphasized the importance of historical values within Turkish culture. One participant stated that learning about cultural values through series helps in better understanding Turkish society.

“For people in Ecuador, Turkish culture is very interesting, and after watching the Turkish series, they want to travel or get to know Türkiye” (A3-Ecuador).

“Based on the movies I’ve watched, my perception of Turkish culture is that it consists of conservative people, and the country’s history is significant for its residents” (A6-Colombia).

Eight participants emphasized the significant impact of the Turkish series on their perspectives on Turkish culture. They found Turkish culture to be interesting and different, with unique traditional values. They expressed a desire to get to know Türkiye, highlighted the importance of historical elements within the cultural structure, considered the Turkish language intriguing, and noted that Turkish culture is emotional and respectful towards animals and nature. Only one participant expressed the view that women are undervalued in Turkish culture, describing it as a macho culture.

“Traditional cultural practices stand out, such as someone pouring water behind a person leaving or the blue bead, the evil eye bead” (A19-Dominican Republic).

“Turkish culture emphasizes the importance of the country’s history for

its residents and the series showcases the old structures preserved in many cities and landscapes” (A20-Mexico).

“It is an emotional culture, and there is joy in their lives” (A5-Paraguay and Brazil).

“It is a very macho culture where women do not value themselves and engage in actions against their interests to be a man’s first choice” (A15-Ecuador).

Some participants expressed the need to research Turkish culture, language, and religion after watching Turkish series. They mentioned that the content, stories, and scripts of the series motivated them to explore Turkish culture, language, and religion. Two participants specifically emphasized the importance of the series “Magnificent Century” and “Diriliş Ertuğrul” in this regard. Only one participant mentioned the need for research because they couldn’t understand certain topics and word meanings in Turkish culture and language.

“Turkish dramas motivate us to research more about the culture and religion of Turkish citizens because every story told presents something unknown and different to us, showing different scenarios that capture our interest” (A12-Ecuador).

“Sultan motivates you to learn more about what that great empire was, the people, and their way of life at that time” (A9-Colombia).

“Because there are some topics I don’t understand. I ask myself, why did it happen this way? Or, for example, in terms of language, I hear something, and I understand all the words, but I don’t understand the meaning, so I have to ask. And sometimes I think, oh, maybe it means this, and then something completely different comes up” (A1-Colombia).

After sociocultural and historical elements, language, and religious structures, Turkish family structure and Turkish cuisine stand out as two aspects that capture participants’ attention. Regarding Turkish family structure, participants mentioned that Turkish families have different characteristics compared to families in Latin American countries, emphasizing the importance of parent-child relationships, family unity, and emphasis on family. As for Turkish cuisine, participants noted that some dishes shown in the series are similar to dishes in their own countries, certain Turkish dishes are frequently depicted in every series, Turkish tea catches their attention, and watching the food in the series arouses their desire to eat it. Only one participant highlighted the connection between locations and Turkish cuisine, mentioning that different cities showcase different dishes.

“For example, börek is present in every series, and it attracts me. Sometimes I think people in Colombia don’t know what börek is. But there are similar things. Menemen, for example. Menemen is called Periko in our country. Menemen and Periko are actually the same thing” (A7-Colombia).

“I admit that Turkish gastronomy is something I have missed since I left the country, and sometimes when I watch a series or movie, I feel like eating it” (A2-Venezuela).

“For example, wherever the series takes place, whether it’s Istanbul, Izmir, or Bursa, there are significant differences. The clothing and the food are also different for this reason” (A16-Dominican Republic).

CONCLUSION

The concept of globalization, which has been used in the literature since the 1960s, essentially refers to the interaction of human communities through various means throughout history. Migrations, wars, trade relations, and travels have served as instrumental functions for the interaction of communities, while developments in the field of communication that have marked the last century have provided a different momentum to globalization.

The communication tools that have fueled globalization have not only brought ideas and commercial goods to a global arena but have also globalized cultures, which are the ancient accumulations of societies, even turning them into commercial products. This process, expressed by the concept of the culture industry, can also be defined as the conscious production and exportation of previously unique social accumulations by adapting to evolving needs.

With the proliferation of mass media and the discovery of a mechanism of influence that transcends borders through tools such as radio and television, Turkish TV series have found new markets in the last 20 years, not only dominating the export of drama films but also gaining popularity in countries such as Middle Eastern and Balkan countries, as well as in the Far East and Latin America. Turkish TV series sector, which produces cultural content in the synthesis of East and West, has emerged as a pioneer in this industry, gaining acceptance in both neighboring and overseas countries, influenced by the socio-political changes that Türkiye has undergone in the past century.

Communication tools with a rapid mechanism of influence and the TV series broadcast through these tools have been highly appreciated by Latin American society, turning into a potential that has influenced to the extent of giving Turkish names to children in countries such as Chile, Mexico, Dominican Republic, Venezuela, Colombia, and Peru since the 2000s.

The field research conducted within the scope of this study has revealed that a significant portion of participants with different television viewing practices themselves or in their close circles watch Turkish TV series. Participants stated that they watched these series with different motivations, such as learning about a different culture and observing the sociocultural environment produced by a society with a different language and religious structure. They also expressed that these series had subsequent effects, such as visiting the geographical region where the culture originated or learning the language that conveys that culture. However, apart from the effects on tourism and language learning, this influence has also resulted in changes in eating habits, family lifestyle, clothing style, and daily life, which can lead to societal changes.

Mass media and the transmission of different cultural productions through these media outlets present a different development that surpasses the notion of a uniform global cultural transmission. Especially in the last fifty years, the studies

conducted in this field should be seen as an effective mechanism in eliminating the perception of the spread of a uniform popular culture worldwide and addressing societal concerns on this matter. While the hegemony of American TV series and films, which has been discussed for years in the TV and film industry, was broken in one period with Brazilian series and in another period with Indian Bollywood films, it has diversified in recent years with Korean dramas and Turkish TV series.

In conclusion, Turkish TV series, which are recognized as an industry and followed with such an understanding, should be perceived as a cultural reflection of globalization and evaluated as a diverse coloration within global interactions rather than to change the society it influences. In today's world, where transportation and communication barriers are non-existent, and geographical and cultural boundaries can be easily overcome through mass media and transportation, similar interactions will inevitably continue to have an impact.

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Research Article

THE INDISSOLUBILITY OF PHILOLOGY AND POETICS
IN THE CREATION OF THE MEDIAEVAL EURASIAN KOINÉ

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ABSTRACT

Philological methods of analysis are not only perfectly congruous with reflections of a poetic order, but especially in the comprehension of a mediaeval epic tale, western or eastern. Philology practised as the art of unveiling images behind sounds and forms, figures and structures, communicates poetically, thus significantly the polyphonic import of the mediaeval epic tale. To defend this philological-poetics experience this paper compares the Turkic *Dede Korkut Kitabı* with the Armenian *David of Sassoun*, the poetic structures of the Tamil *Periya Puranam*, the iconic singularity of the Chinese *Ji Bu Ma Zhen* (Ji Bu Insulting the Enemy) and the Byzantine *Digenis Akritas* set within an Anatolian sub-koiné landscape with the *Book of Dede Korkut* and *David of Sassoun*. Homage has been rendered to three philologists whose philological training and academic works led them to the most extraordinary poetic works of art: F. Nietzsche, P.P. Pasolini and J.R.R. Tolkien.

Keywords: Alterity, Creative imagination, Epic tales, Mediaeval Eurasian Koiné, Philology of the future, Poetics.

CREATIVE IMAGINATION

For over the past thirty-five years of voyaging and research, I have endeavored to reactualize the medieval epic tales of Eurasia: *La Chanson de Roland*, *Beowulf*, *El Cid*, *Scandinavian Sagas*, *Dede Korkut Kitabı*, *David of Sassoun*, *Periyapuranam*, *Ji Bu Ma Zhen*, *Tain Bo Cuailngy*, *Digenis Akritas* and *The Song of Igor*. Having extracted certain imagery-laden theories and figures from the aforementioned medieval epic tales, I hope to evoke both researchers' and laypeople's interest and curiosity in understanding and appreciating them. To comprehend a text and take pleasure in it means to be "moved or aroused by it" (Coomaraswamy, 1977: 13-70). It entails exposing oneself to delve into the Other's Otherness that shapes the text or the collection of discourses constituting a text, thereby infusing life into it. To penetrate this Otherness of the Other requires a rhythmic respiratory exercise, an inhalation and exhalation in sync with the Other. This exercise engages the researcher outwardly while simultaneously drawing the Other inward. This shared endeavor finds its vehicle in the inseparability of Philology and Poetics; its intuition and reasoning are rooted in *Creative Imagination*.

Certainly, there is no doubt that Philology corresponds to Poetics just as Poetics corresponds to Philology, with Friedrich Nietzsche, Pier Paolo Pasolini, and J.R.R. Tolkien as 'companion travelers' on this journey. The intellectual and spiritual evolution of these companions attests to this inseparable unity. It is not solely due to astute or keen awareness, but more significantly, it results from a complete subjective immersion into the Otherness of the Other, into the Text. This is not conceived as some *Ur-Text* or mere literature, but rather as the soil from which life originates. F. Nietzsche, P.P. Pasolini, and J.R.R. Tolkien transcended the confines of language to delve into the Discourses of the Voices emerging from that soil. They penetrated and temporarily took refuge there, until the Philologist's Love of Language, Discourse, the signifier, and, consequently, Humanity, blossomed into a philosophy of Life. This transformation extended to philosophy, poetry, cinema, or narrative imagery. Nietzsche 'became' the Philosopher-Poet, Pasolini 'became' the Poet-Cinematographer, and Tolkien 'became' the Storyteller-Poet. They truly embodied their roles, turning raw Matter into Images, into Figures. This is not just a matter of style, unless one defines style as the creation of a distinctive lifestyle. It's a lifestyle that situates the subject-speaker as both an actor and a spectator of life. Didn't F. Nietzsche write:

"Philologie nämlich ist jene ehrwürdige kunst, welche von ihrem Verehrer vor allem eins heischt, beiseite gehn, sich zeit lassen, still werden, langsam werden-, als eine Goldschmiedekunst und-kennerschaft des Wortes, die lauter feine vorsichtige Arbeit abzutun hat und nicht erreicht, wenn sie es nicht lento erreicht".

"For philology is a venerable art which demands of its votaries one thing above all: to go aside, to take time, to become still, to become slow- it is a goldsmith's art and connoisseurship of the word which has nothing but delicate, cautious work to do and achieves nothing if it does not achieve it lento".

In lieu of lifestyle perhaps Road or Way may be preferable; that is, a method in its Hellenic import: 'μέθοδος'. A method, therefore, of direct or spontaneous *experientia interna* (inner experience) – not a vicarious one – enabled Nietzsche, Pasolini, and Tolkien to harvest the fruits cultivated by a

particular soil. Whether they were narrative, poetic, or pictorial in nature, these fruits were understood and cherished by them due to being genuinely moved or aroused. This genuine response allowed them to reactualize these fruits through the lenses of philosophy, poetry, storytelling, and cinema, all with a philological approach.

To comprehend, derive pleasure from, and be emotionally stirred by words – in essence, to employ the signifier through Discourse – because of its fragmentary emergence, achieved through effort, from the depths of human intellectual and spiritual substance. The gradual weaving together of these fragments into images, and their eventual coalescence into a harmonized, coherent narrative or figure, exemplifies how this Discourse captures the instinctive and intuitive *Creative Imagination* of the explorer. As they work diligently to reunite the myriad pans d'images surging forth from the depths of the Unknown, from the Other's Otherness. This act of reuniting is creation itself – the labor and the pains of trial and error that empower the explorer to once again consolidate into that primordial Whole using their *Creative Imagination*. In the face of insurmountable obstacles, philology causes this latent Whole to resurface, while poetics endeavors to re-present it as faithfully as it was initially manifested.

To implement this re-creation as a practical, everyday approach to life necessitates coming into contact with the soil from which a particular Text originated. This requires immersing oneself in the visions, emotions, sounds, and fragrances of its embryonic beginnings and its unfolding growth. It also requires, and possibly most importantly, a presence of the Philologist-Poet's mind, heart, and spirit. This presence doesn't blur the lines between the Past and the Present; instead, it contracts them into a dual composition, echoing Saint Augustine's "... *praesens de praeteritis* ..." – the notion that "the past is always present". Here, "present" doesn't signify a time category but a spatial "Presence". Indeed, it is within this contraction and its cultural landscape – the Soil and its Memory – that the Philologist-Poet must dwell, akin to an archaeologist who persists in excavating until those *pans d'images* are unearthed. Then, similar to the Bard-Poet of the Middle Ages, they embark on the task of collecting and reassembling these fractured images until they once again coalesce into that unified whole.

The *Creative Imagination* of the Philologist-Poet aligns with the Text in a manner akin to being the wellspring or source of creation, as *Creative Imagination* flows from our *Fons Vitae*. An etymological journey traces the evolution of words. A translation (*translatio*) gives rise to that *mise en miroir*, that alterity which exposes the Otherness of the Other just as it reveals the explorer's own gaze¹. An *Imitatio*² begets a tone, a variation, a modulation, an inflection of the Text, not solely mirroring it like a reflection but also generating (in the sense of Humboldt's *erzeugen*, meaning "to engender") its various angles as if these angles were numerous rays of refracted and deflected light, thus producing a multitude of polymorphic forms: pictorial, theatrical, cinematographic, novelistic, poetic, and musical. Creative Imagination renders feasible the *Unitas Multiplex*, casting light on Heraclitus' "πάντα τὰ ὄντα" – the "Flux of Time" (Fragment 47)³.

¹ See Plato's, *The First Alcibiade*. "So if an eye is going to see itself, musn't it not look into an eye, and in particular into that region of the visual apparatus which happens to contain the virtue of an eye, namely, sight?" Translation by Nicholas Denyer (132 C-133 C).

² From Aristotle's *Physics* 'μίμησις' (mimisis). 'Μίμησις' is not a perfect, true copy of an original, such as Plato characterized and postulated it, but reveals the analogical qualities of the original, analogies which permit variations, interpretations, and stimulation of the intelligence and the emotions, be they of the artist's or the spectator's.

³ *Héraclite*, translation Jean Brun, Paris, Seghers, 1965, 139.

However, *Creative Imagination* doesn't evoke perception or reception in isolation; rather, it hinges on the Philologist-Poet's encounter with Otherness. This entails immersing oneself in the ontic landscape of the Other, delving deep into the realms of Otherness as projected from the Text. A complete exposure. A comprehensive immersion. The subject-speaker lays bare the voice and form of the Other.

Indeed, deeply immersed in the whirlpool of language, Discourse, and the intermingling cultural forces that gave rise to the epic tales of my *Medieval Eurasian Koiné*, the explorer rekindles those binding energies once more, in the present moment. Consequently, the reformation of a *Medieval Eurasian Koiné* between 1986 and 2020 occurs—one that had, in fact, thrived since the Middle Ages.

THE DAWN OF THE EURASIAN KOINÉ

Twelve years of teaching, studying, and traveling in Türkiye and Armenia have brought me into contact with the Turkish and Armenian languages, as well as with the Turkic *Dede Korkut Kitabı* (The Book of Dede Korkut) and the Armenian *David of Sassoun* (*Sasownci Dawit Uuunılgħ Ğaułıhə*) – two medieval gems of the utmost quality. The *Dede Korkut Kitabı* exists in two versions: the Dresden version, containing all twelve legends, and the Vatican version, comprising six. Formerly housed in the Vatican Library, the latter version was handed over to the Azerbaijani government, along with sixty other Turkic medieval manuscripts from the Vatican Secret Archives, in 2011. Concerning *David of Sassoun*, there are over fifty versions (totaling 2500 pages!), with the oldest being the 1886 Anatolian version. Both works were nurtured on the Anatolian soil, thereby sharing similar discursive features. However, the challenge arose as to how to resound this distant yet ever-present voice or voices.

The texts had to be approached in both their medieval and modern forms. For this nuanced and demanding yet immensely rewarding endeavor, Turkish and Armenian had to be acquired. However, beyond this evident apprenticeship, their medieval Discourse needed to be navigated, achieved through metaphrasis or the method of *Translatio*. This method allows texts to converge, engaging in a dialogue with one another through an alternating interplay of intertextual alterity. It's a versatile medieval technique practiced by translators who converted Hebrew into Ladino in medieval Spain, as well as by Christian monks in scriptoriums across Germanic countries. In these regions, they translated biblical Latin into Northern-Germanic vernaculars. This method was rekindled by various German philologists, intellectuals, and poets from Romantic Germany during their pursuit of a *Grundton* (fundamental tone) in their translations, including figures like Goethe, Hölderlin, Rudolf Pannwitz, and others. Their practice and expertise formed the bedrock of *Bildung*, signifying a movement of forms, a journey towards the Other, an encounter with alterity within the uncharted realms of Otherness.

The outcomes of comparing the Turkic and Armenian medieval epic tales were astonishing, not only due to analogies but also due to stark contrasts. The *Book of Dede Korkut*, which contains twelve stories, spans geographically and sociologically from eighth-century Mongolia to fourteenth-century Anatolia. As you move from one legend to the next, if they are read in sequence, the Turkic nomadic Shamanist culture gradually transforms into a sedentarized or urbanized Islamic civilization. Conversely, *David of Sassoun* presents a four-generation genealogical portrayal of

the adventures and misadventures, both exogamic and endogamic, of a royal family. These events are primarily situated in and around a delimited region between Lake Sevan and Lake Van. Both epics were recited before the aristocracy and within the peasant villages of Eastern Anatolia before their various written versions were uncovered in libraries or in private hands.

Several of the legends in the *Book of Dede Korkut* also feature exogamic themes, wherein the heroes marry or defend Christian princesses. In the third legend, Bamsı Beyrek, the mightiest of the Oghuz warriors, marries a Christian girl who aided him in escaping from his prison tower, forsaking his Oghuz fiancée. Kan Turalı, in the sixth legend, weds a Christian princess. In the *Book of David of Sassoun*, Meherr the Great, the son of the eldest of the four royal brothers, Sanasar, is raised by his uncle Vargo and Vargo's spouse, Ismil Khatun, of Arabic origin. David, the third son, though married to an Armenian princess, falls in love with the Arab princess Tchemechkik. Both epic tales poeticize the joys and challenges of these exogamic relationships.

Tepegöz, the cyclops (legend eight), was born from the tumultuous union of a woodlands fairy and an Oghuz shepherd. His sorrowful life was divided between an Oghuz upbringing and a rugged, remote existence in the mountains. It's worth noting that Tepegöz's exceptional childhood strength while growing up in the Oghuz camp remarkably parallels the youthful David's experiences in Egypt. Furthermore, the "Oghuz Tepegöz" can be compared with the Armenian white-haired Tapagöz. Zoological references in both texts are imbued with symbolic and traditional significance. Horses, whether the knight's faithful companion Poulain Djali, the magical horse with quasi-human attributes belonging to the Sassoun royal family, or in the *Book of Dede Korkut*, Bamsı Beyrek's quasi-magical horse, hold particular importance. Wolves play intriguing historical and legendary roles within our tales. Böri, the grey wolf, guides the Oghuz people out of the treacherous Mongolian mountains, pursued by their adversaries as they journey westward into nationhood. This is expressed as "men senge başlap yolnu körgürgür men, tep tedı" (Ergin, 1936: verses 217-222) – "I shall show the path to your army," it (the wolf) says. In *David of Sassoun*, Gregory the Illuminator, the founder of the Armenian religion, cures the pagan king Trdat the Third of his lycanthropy, thus dispelling the king's "werewolfism" and subsequently paving the way for his conversion to Christianity. In the Armenian text, we also find negative connotations associated with the wolf. The Arab armies are likened to wolves that will devour the lamb of God (Armenia). On the other hand, on the battlefield, David howls like a wolf where refers to /gil/, meaning wolf. Dogs, ravens, and fierce lions all play significant thematic and structural roles, while fantastic creatures are also interwoven within the thematic and symbolic fabric of the plots. This is because White Demons, genies, fairies, cyclopes, and dragons emerge and blend in a peculiar world suspended between Reality and the Fantastic. These compositional techniques and Figures suggest a shared storytelling reservoir within a confined geographical area, rather than parallel developments. The jinnīs or demons featured in our poems certainly originate from the realm of Oriental literature in Asia Minor, especially *afrits*, as found in the *Tales of a Thousand and One Nights*. Heroes are often equated with dragons: "Ādemiler evreni Delü Dumrul ..." (legend five). In legend two, Kan Turalı and Karaçak the Shepherd are likened to dragon-killers: "Yidi başlu ejderhaya yetüp vardum," meaning "Kan caught the seven-headed dragon." Sanasar, the first of the royal line of kings in David of Sassoun, is a dragon-slayer. Two words for "dragon" are encountered in the *Book of Dede Korkut*: "evren," of Turkic origin, and "ejderha," of Persian origin. The latter is also the etymon found in *David of Sassoun* as /ažgaha'.

The execution of medieval epic poetry indeed serves as a key unifying element among all Anatolian peoples. Investigating word borrowing through linguistic interactions underscores semantic polysemy and inter-community exchanges. The *Legends of Dede Korkut* encompass etyma from Mongolian, Persian, Arab, and Old Turkic roots, while the word reservoirs of *David of Sassoun* are also composed of Persian and Arabic words. Words of Turkic origin are also present in *David of Sassoun*. The shared etyma of Persian origin bind both tales etymologically, given that both cultures were significantly impacted by the Persian language.

Over time, the Turkic nomads (Seljuks) gradually settled in Anatolia, adopting a more sedentarized lifestyle as a result of contact with the Armenian population. Their interactions in the public sphere undeniably form the foundation of Turkic and Armenian medieval social relations, which can be assessed through the study and comparison of the *Book of Dede Korkut* and *David of Sassoun*.

With that being said, the aforementioned literary themes and linguistic exchanges not only yielded intriguing findings upon reviewing the Texts but also led to analogies found in their medieval stone-cutting cultures. Indeed, the art of constructing medieval places of worship followed similar patterns by borrowing from sources like the Persians or the Armenians. For instance, the alternating prose and poetic elements in both tales *spatially* correspond to the crenulated ramparts of medieval castles or fortresses, or to the two-toned stone patterns on the walls of churches or mosques. Simultaneously, they offer an alternative perspective of both the exterior and interior, preventing the homogenization of material and the monochromatic amalgamation of stones. Within this alternation of space lies the psyche of the medieval mindset: a dynamic interaction involving the Other between the spaces of spoken words and silence, whether in a recited epic tale or in the emergence of a place of worship. Bas-reliefs do not only *ornate* or *adorn* a church or a mosque, but *narrate* and *recite* stories of that church or mosque in a form both pedagogical and pleasurable to the eye. Likewise, figures of speech do not only *ornate* or *adorn* a narration but *emit* and *assert* the wisdom that created or made emerge the narration as a companion to enlighten and delight.

Thus, *Dede Korkut Kitabı* and *David of Sassoun*, through their cognate literary themes, historical convergences, and analogous medieval Discourse, blend seamlessly within the framework of the *European Medieval Koiné*. This is the case despite the fact that the Turkish language doesn't belong to the Indo-European family. This circumstance adds weight to the conviction that gradually gained importance: Must a koiné necessarily pertain to a “common tongue,” or could it be perceived as a “common discourse”? This very notion, later substantiated during my years of work and study in India and China, illuminated the third composition (*Dede Korkut and David of Sassoun*) of the *Mediaeval Eurasian Koiné* (1993).

ARCHITECTURE AND RESONANCE

As I journeyed eastward, the practice of alterity as a means of connecting with the Other emerged, perhaps not as a definitive guide in shaping the *Mediaeval Eurasian Koiné*, but rather as a companion on the road. However, this underlying force or *élan* hadn't yet fully entered my consciousness. It was during my five-year stay in Tamil Nadu, India, that the inseparability of Philology and Poetics became evident. The underlying *élan* revealed itself to be none other than the manifestation of the Art of *Creative Imagination*, whose projected imagery and forms began to

harmonize perfectly with the paths and roads I traversed throughout the subcontinent. Simultaneously, these resonated with the journeys undertaken across the numerous pages of the *Periya Puranam* - பெ ா ி ய பு ர ண ண ம் -, where “*Periya*” (பெ ா ி ய) signifies “great,” and “*Puranam*” (பு ர ண ண ம்) means “legend.” This text is among the most treasured medieval gems, distinguished by its exquisite crafting and luminous brilliance.

This monument can be compared to the தீபம் மரம்/ti:pammaram/, that tree (மரம்) whose phosphorescent (தீபம்) leaves illuminate the darkened groves and forests of Southern India. It is what the Hindus of North India call the *Jyoti Vriksha* ज्योति वृक्ष, the “Tree of Light”. The *Periya Puranam* illuminated the path toward understanding the indissolubility of Philology and Poetics, and it convinced me of the unquestionable existence of a Eurasian koiné.

The philologist cannot help but be overwhelmed by the history, culture, and lore of Tamil Nadu, by the Tamil scriptures, and by the archaeological and theological forms that envelop him. The polysemy of Tamil words as presented in the *Periya Puranam* revealed an entirely new range of thoughts, visions, and figures that inhabited my inner world. This spectrum astonishingly resonated with the Indian reality I experienced while living in India and embarking on numerous journeys across South India and the Himalayas, both in major cities and villages. This marvelous array of forms evoked the emotions that I poured into my research and writings.

Now, if the archaeological parallelism continued to generate astonishing analogies with the writing of the *Periya Puranam*, consider the proliferation of images and their arrangement along the outer friezes of Sivaite temples, known as “*koyil*” (கோய்), or clustered atop the towering “entrance-gates” of those colossal temples, the “*gopurams*” (கோபுரம்). This proliferation and clustering strangely mirror the plethoric clusters of images found in the Tamil tradition of adjective/noun coupling, in the association of theological and worldly concepts through metaphor and simile, and in the extensive collection of etyma whose polysemic value reaches dizzying heights.

Indeed, the Otherness of India unfurled with astonishing amplitude, and the *Periya Puranam* served as its guiding force. The risk resided within the unfathomable depths of this intricate connection, in the boundless expansion of spiraling subterranean root-networks, in rhizomes bulging up from dark, swelling soils, in the dull blue-green ponds and tanks, and in the fantastic chromatic ranges of fragrant shrubs and flowers bursting into vibrant bloom. The most surreal and intricate configurations of Indian flora, fauna, and human figures seemed to mirror the similar intricacies and complexities of the Tamil system of ligature, syntax, and polysemy—its morph-clustering and paronomasia—that constituted the very linguistic and narrative texture of the *Periya Puranam*. Emerging from the nominal forms that swarm within the sixty-three legends are adjectives with the most diverse ramifications: epithets, participles, noun/adjective complements, and reduplications. A noun without an accompanying adjective is akin to a person without clothing:

“Hence in poetry every noun is furnished with an adjective, and if the adjective happens to be a phrase, the noun within that phrase is provided with an epithet, till the whole poem looks like the entrance-tower (gopuram) of our temples, studded with decorations.”

The agglutinative nature of the Tamil language cultivates the intensity of image-clustering through

the pairing of noun/adjective binary groups. These clusters of images burst forth for the public (or the reader) and spread across the strophes vertically and transversally, much like climbing ivy or hanging wisteria with shades of purple and blue, intertwining in and out of groves and arbors. The delirium of such intensive vegetal, animal, and scriptural growth appears boundless. Yet, this boundlessness illuminates the merging of Philology and Poetics. Indeed, the architecture and resonance of the *Periya Puranam* readily compare to this intense, rhizomatic Movement of India's frenzied biological production, whose multiplication seems endless and whose circular nature, like the ever-spinning Wheel of Life, is immeasurable. Is it a coincidence that the opening word of the epic tale, “உலகம்” /ulakam/ meaning “world,” also concludes the sixty-third legend? How many voices recited that ever-spinning Wheel? How many styluses engraved those recited words upon its vegetal texture—the *olia* leaves—(ஒலிய) before its academic publication in 1943, even though the first complete annotated edition appeared in Madras in 1870, prepared by Mahalinga Iyer?

In the rubric “Harmony of Antithetical Values” of my work *Periya Puranam ou l'Éternel Moyen Age* (1995), I analyze the intricate and interwoven architectural cadence of the Tamil *viruttam* (விருத்தம்) – the strophe or quatrain – and the *cīr* (சீர்) – the hemistich. This analysis delves into interpreting the poetic tension created by the alliteration and assonance within their anaphoric rhyming schemes. These schemes form the syntagms and paradigms of both aural and visual direct meanings. *Viruttams* and *cīrs* are literary figures molded by sound, which convey the imagery of the recited words to the audience. Reception is immediate.

It is the harmonious accord of alliteration and assonance – that poetic tension – that eradicates the mirage of duality and creates a eurhythmic architecture, as alliteration and assonance possess opposing aural values. Similarly, the reconciliation of hypotaxis and parataxis is achieved because they represent opposing syntagmatic structures. As is well-known, if there is no tension between contraries, energy will not be generated.

The Tamil *viruttam* is a compound of *cīrs*, with units of self-contained images composing a theme. For example, in the first *viruttam* of the legend of Sambanda Moorti (Book VI, legend I), it can be noted that the initial *cīrs* of each verse of the stanza audibly create a paradigmatic image of something “unchanging” or of what “remains”:

சிர்மன்னு /cīrmanṇu/
கார்மன்னு /kārmanṇu/
நார்மன்னு /nārmanṇu/
பார்மன்னு /pāmanṇu/

The word மன்னு/manṇu/ is repeated four times in the second lexeme of the *cīr*, forming a paradigm, theme, or leitmotif of “unchanging”. But what is unchanging? It is the four incipit words to which “unchanging” has been yoked that bring forth the repetition of the leitmotif: சிர் “beauty, greatness”, hence “unchanging greatness”, கார் “hues, tones”, “unchanging hues/tones”, நார் “love”, “unchanging love”, and பார் “earth/soil” “unchanging earth/soil”. The paradigm cast in its

syntagmatic verse-form communicates this devotional wisdom:

First Verse

சிரம்ன்னு செ ல்வக குடிமல்கு சிற்ப்வி னே ந்குங்

“Unchanging greatness of those eminent subjects of wealthy Pantiya”.

Second Verse

காரம்ன்று செ ன்னிக் கதிர் மாமணி மாட வை ப்பு

“Unchanging hues of glimmering great gems atop palaces great”.

Third Verse

நாரம்ன்று சிந்தை ப் பலநற்றுறை மாந்தர் பே ாற்றும்

“Unchanging love of the people of good domains and thoughts who praise it.”

Fourth Verse

பார்மன்று தெ ான்மை ப் புகழ்பூண்டது பாண்டி நாடு

“Unchanging earth from which its ancient town in the land of Pantiya rises gloriously”.

The leitmotif “unchanging” or “immutable” forms a theological thread that qualifies the values of the land of Pantiya: its *greatness*, *hues* (of gems and palaces), love, and of course, the *soil* of this grand town. The repeated lexeme ritualizes these values because they cannot be separated from God-Siva's creation of them for the good people of Pantiya. The “vertical” weaving of unchanging or immutability links man to his Creator, while the “transversal” extension of it in verse-form depicts man's existence issued from this divine verticality. Over 75% of the viruttams of the *Periya Puranam* follow this “theological thread,” whose plenary inspiration is drawn from God-Siva and the gleemen of Tamil Nadu, those recitors of poetry. Here is another example taken from the legend of Saint Tirunavukkarasar (Book V, legend I, viruttam 141), wherein the bard-poet builds his paradigmatic leitmotif, his vertical communion with God-Siva through the repetition of the lexeme *வண்ணம்/vaṇṇam*/, the second lexeme of each *cīr*, and which means in all its polysemic *élan*: “melody, harmony, colour, form, figure, beauty” The viruttam shall be reproduced in its entirety:

“இவ்வண்ணம் பே ால வெ வை னப்பல மாக்க ள ியம்பி டே யத்த
மெ ய்வண்ண நீற்றெ ளி மே வுங் குழாங்கள் விரவிச்செ ல்ல
வவ்வண்ண நண்ணிய வன்பரும் வந்தெ ய்தி யம்பவளச்
செ வ்வண்ணர் க ளோயிற் றிருவரீட் டரனத்தைச் சே ர்ந் தனரே”

The paradigm of the lexeme “வண்ண(ம்)” projects the leitmotif of “sacredness”; that is, it represents the nature or color of Siva, which by polysemic extension represents the temple and the Holy Ash of His devotees. Thus, the paradigm figure could be interpreted as:

“This colour ...

Colour of the Sacred Ash ...

This colour ...

Red-coloured temple ...”

The rest of the *viruttam* could read:

- ... praised (Siva's colour) like so many people
- ... of the company of devotees (those of the Sacred Ash) with whom He advances
- ... whose Siva-blaze is like coral (again Siva's colour)
- ... at Tiruveeratar in which all gather (in the Red-coloured temple)⁴.

The colour-scheme forms a circular pattern by which the colour source -Siva- not only *inspires* colour but *expires* it to all His devotees, *expires* it within His sacred abode (the temple). Siva's *inspiration* prompts praise, the effects of which -ashes and temples- are due to His *expiration*.

One last example will suffice. In Saint Kannappa's legend, *viruttam* 124, the bard-poet has forged his paradigm on the word மிசை /micai/, which means "on, upon, on top of" in the incipit *cīr* of each verse. So we read: தை ல மிசை... on top of His head (Siva's) மல மிசை... on top of the mountain (Siva's abode) சிலை மிசை... atop the bow (Thinnan-Kannappa's) இல மிசை... atop the leaf (Thinnan-Kannappa's from which has been placed ambrosian food for God-Siva).⁵

The paradigmatic interpretation could then be: Siva's head, His mountain, Thinnan's bow and his leaf-dish for Siva are all of equal height, understood as value. If the poetic reconciled tension of alliteration and assonance spontaneously forms aural comprehension, so too does asyndeton (hypotaxis) and parataxis on syntagmatic or transversal levels. The transversality of mediaeval Tamil verse unfolds by alternating *cīrs* and caesuras, constructing small *isles of meaning* separated by *seas of silence*. It is within these *seas of silence* that bardic and public communion is achieved, that bardic and Divine Communion, too, is accomplished. The pattern is extremely complex: All *cīrs* appear to be hypotaxed either audibly or significantly, and thus no "real" space, silence, or sea actually exists. This "illusion" arises due to the absence of relative pronouns, coordinating, or subordinating conjunctions in the Tamil language, thus signifying that fundamentally, the *cīrs* are linked by parataxic devices; that the silence is "filled in" either with a linking letter (acoustic level) or a lexeme that has been cleaved and separated (significant level). In other words, one may say that each *cīr* stands solitary, unmixed with the others as distinct units of sound and imagery, juxtaposed to one another like so many tiny isles of an archipelago.

⁴ The parentheses are put by the Author.

⁵ The parentheses are put by the Author.

And so it must be because without silence or caesura, the verse would become a mass of noisy nonsense. It is the seas that link the isles of an archipelago. Similarly, the silences within a verse, for hypotaxis and parataxis are not antagonistic but rather complementary in the playful alternation between “*cīr*” and “silence,” since their binding force is both of divine and worldly inspiration. A verse from the legend of Saint Manalicancharar (Book III, legend V) will illustrate the syntagmatic or transversal complementariness:

“பிறந்தபெருமகிழ்ச்சியினைற்பெருபூதூர் களிசிறப்பச்”

The first *cīr* ends in a consonant-vowel “ரு” /ru/ and the second begins with the consonant-vowel “ம” /ma/. The caesuras that breathe life into the verse, and hence signification, are, however, grammatically linked: the noun மகி “joy” (second *cīr*) is qualified by the epithet பெரு “joy” (first *cīr*). There is no rhythmical justification to separate an adjective from the noun it qualifies.

The mute “ற்” /r/ ends the second *cīr* whilst the allograph “ெ” of the consonant-vowel “ப” /pa/ begins the third. The *pulli* (dot over the consonants indicating consonantal value) does rhythmically open a silence that can be qualified as a caesura.

The third *cīr* terminates with the consonant “ ” /r/, last letter of the word ஊ /ūr/ “town”, and the fourth *cīr* begins with the consonant-vowel “க” /ka/ of the word களி /kali/ “joy”. The *pulli* over the “ர்” /r/ indicates muteness, thus an acoustic and grammatical pause. However, the two lexemes of this last *cīr* கள and சிறப்பு “generated”, join the third *cīr*, for this “joy” and “generated” qualify, in a possessive complement locution, the “great ancient town” பெருபூதூர். The joy generated “of the great ancient town” could be an interpretation, my “of” filling in the silence-space. In conclusion, the four *cīr*-verse forms two grammatically hypotaxical couplets divided into two hemstitches, the caesura falling after the second *cīr*. Another example of parataxical and hypotaxical alternation is read in this verse from Saint Ammaiyar of Karaikal (Book V, legend IV). The verse has been taken at random:

“டங்களுடிக் கரும்புதல்வி யரதவிற்றனத்தன்” (*viruttam* 12).

As in the majority of the verses of the sixty-three legends, the rhythm contains four *cīrs*. The first and second *cīrs* are acoustically linked by the “*consonant of liaison*” “க்” /k/, which serves as an aural technique to avoid a hiatus. This technique may be called *geminated hypotaxis*. Moreover, these two *cīrs* are significantly bound: “The sole கரும் female child புதல்வி of their தங்கள் household குடி”. Between the second and third *cīrs*, there is a caesura, and the last two *cīrs* are acoustically linked by the bi-graphism of the mute consonant “ற்” /r/ and the consonant-vowel “ற” /ra/, creating another *geminated hypotaxis*, all the more so since the combination of two “ற்ற” transforms the liquid phoneme into a trill /tr/. And like the first *cīr* couplet, this couplet, too, forms its own self-contained meaning: “due to this (for this reason) ஆதவினை ல் Thanattan

தனத்தன்”. The two hemistiches juxtaposed may be interpreted as “since the female child was the only one of the family, Thanattan ...” One final example of the parataxic/hypotaxic rhythmical scheme will suffice. The verse is from Saint Yenati's legend (Book III, legend II):

“வெ ஞ்சினவாட் டயுமிழ் விரக் கழல்கவிப்ப” (viruttam 26).

The first two *cīrs*, வாள் /va/ “sword,” have had their final lateral retroflex “ள” /l/ transformed into the cacuminal “ட்” due to the collision with the initial lexeme of the second *cīr*, “த” /ti/ “fire.” The combination of these forms the consonant “த்” /ta/ and the long closed vowel “ஈ” /ī/. This collision has caused the emergence of the same consonant “ட்,” even though neither the final nor the initial letters of these consonants are lexemes. The transformation is a pure acoustic one that facilitates the linking of two *cīrs* whose meanings are self-contained but should also be coupled to form a hemistich: “The boiling (சின) cruel (வெ ஞ்) sword (வாள்) spat (உமிழ்) fire (த)”. The relative pronoun “that fills in” the silence-space combines two separate objects that share the same metaphorical image: “a hot, boiling sword// spitting fire”. Both images symbolically represent the dragon.

Between the second and third *cīrs*, a caesura falls: there is neither acoustic linkage between the consonant-vowel “ழ,” the past marker of the verb “to spit” உமிழ், and the consonant-vowel “&” /i/ of the lexeme வீரவான் “hero”. Nor is there a grammatical linkage; the second hemistich lauds the “hero-anklets” (வீரக் கழல்) that resound (கலிப்ப). Finally, between the third and fourth *cīrs*, the acoustic linkage is effected by *geminated hypotaxis*, with the stop “க்” /k/ acting as a linking letter of the consonant-vowel “க” /ka/, the initial sound of the word “anklet”. As can be seen, the verse is a composition of two *cīr*-couplets, bound at both acoustic and significant levels, cleaved by a caesura after the second *cīr*. The two *cīr*-couplets are paratactic, and the *cīr*-couplets themselves are hypotactic. The Tamil bard-poets of the Periya Puranam recited their verses according to this eurhythmic architecture because parataxis and hypotaxis are of opposing rhythmic cadences, and because alliteration and assonance are of opposing aural pitches. Both compose the melodic curve of the *cīrs* that aurally organize each verse of the Tamil *viruttam* to transmit meaning spontaneously to the public.

THE ICONIC LANDSCAPE

The perfect amalgamation of Philology and Poetics, which is so conspicuous to me now, found its permanent perspective in the iconic landscape of the Chinese language, its art, and architecture; in the Chinese wont of punctiliousness and flexibility, of blitheness and demureness. Eight years of working at universities, studying Chinese and the Chinese mediaeval epic tale Ji Bu Ma Zhen “季布罵陣” Ji Bu Insulting the Enemy (camp), and voyaging throughout the extraordinary landscapes of the Republic of China brought me ever closer to the realization of the Mediaeval Eurasian Koinê. If China opens one's eyes to an iconic world, and Ji Bu Ma Zhen ensures the firm, objective reality of a Eurasian Koinê, the Chinese epic poem also opens them to the iconogram, or to the more traditionally known sinogram, which shall be described shortly.

Who is Ji Bu (季布)? He was a historical figure of the Han Dynasty, a gallant knight devoted to his Emperor-Lord, Xiang Yu. However, due to his insulting 罵 (mà) words towards the rival and future Emperor, Liu Bang, and after Xiang Yu's assassination, Ji Bu became a knight-errant tracked like an animal by Liu Bang's henchmen until he surrendered himself and was royally pardoned by the Emperor. Therefore, Ji Bu would serve devotedly under his rule.

These events were recorded by Sima Qian in his “*Biography of Historical Persons and Ancient Dynasties*.” However, during the Tang period (VIIth-Xth), the historical events metamorphosed into the most poetic of forms through ceaseless recitation, which extended the twenty prosaic lines of Sima Qian's account to 320 verses. These verses were divided into two hemistiches, each with seven iconograms, totaling 4,475. A dry historical account of a doughty Chinese knight transformed into a marvelous epic tale. How did this transformation come to be?

If the contents of *Ji Bu Ma Zhen* are of Han origin, the execution of its recitation is of a Buddhist Indian stamp. The Buddhist monks who had been evangelizing Western China, crossing over the Himalayas into the Taklamakan Desert and the passes of Pakistan from Afghanistan, developed story-telling techniques to narrate the events of the Buddha's life as they occurred in Northern India (the Jātakas). These hearty monks thus introduced an Art of story-telling of Northern Indian tradition into Confucian and Taoist China. The Buddhist Art of story-telling is called *biānwén* “变文” or “ambulant, itinerant literature,” and it prevailed not only because its cogent doxology converted the masses of Chinese but also because it appealed to the Chinese eye. Truly, the techniques of the *bianwen* made the gallant world of Ji Bu, his deeds and misdeeds, his friends and foes, visual through a deft, artful melding of the aural and the visual. While the bard-poets recited their tales, other artists held up panels of wood upon which the strands of the threaded words of the heroes appeared in painted gestures, bright and bold before the astonished eyes of the public, which concurrently illuminated the oral word. The recited word metamorphosed into an animated weft of phantasmagoric miniatures. The *bianwen* avers to be a most singular method of Chinese (Oriental) medieval story-telling.

The oral/aural-iconic narration by Chinese Buddhist story-tellers certainly sustains that Philology is like Poetics, as Poetics is like Philology, and that their indissolubility had always been a feature of ancient lore. But with the modern obsession of segregating the parts from the Whole to analyze them more meticulously, more “vertically,” of rending matter from its primal holism to organize alveolate cells which not only divorce the constituents from the Whole but from one another, Philology (the love of words) and Poetics (the expression of this love) little by little, like a watershed, separated.

The awareness of this happy fusion, thanks to the oral/aural-iconic traditional execution of mediaeval tales in China, then led me to comprehend the sinogram itself. It is neither a pictogram nor an image. It is an impression. Not a scriptural representation of the object itself represented, but the impression of that object that our senses have integrated and/or assimilated. And indeed, the process of memorisation of so many iconograms depends on this mental and corporal impression. The object no longer stands “outside” our vision, but “inside” our conscious or mental vista. This impression can be compared to the veneration of an icon which impresses the image of Christ, the Saints, or the Virgin Mary in our minds and bodies, incorporating them within from without. It is

not the material image itself that is venerated (wood, paint, veneer) but what the image symbolically presents to the devotee, then impresses upon his or her spirit, body, and soul. Hence, in imagining the iconogram, it depicts both an aural and iconic nature, forging a meaning that is aurally and visually transmitted spontaneously to the public. The iconogram is that very vehicle of direct comprehension because it is neither a sign nor a symbol; it is the indissolubility of sound and sight, the ear and the eye when enunciated in narrative form, be it aural or scriptural. It may just be the most dynamic aural/iconic *signifier*! The Philologist-Poet may even venture to say that the assiduous reading of the mediaeval Chinese epic tale, *Ji Bu Ma Zhen*, transcends the historical events themselves and anagogically elevates them into a higher realm. This may appear fortuitous to some readers; however, the indivisibility of the iconogram, that is, its quiddity, relates to the indivisibility of our world, of the Act of creation. For this reason, the iconogram composes a Whole with its minute components, with each and every stroke of an ink brush or pen, each producing an image that transcends itself because it composes the Whole. Here are a few examples to illustrate the argument.

The iconogram encloses within its designated perimeter one or several of the eight fundamental strokes of Chinese scriptural graphism, a graphism admittedly simplified since Mao Zetung opted for a more democratic pedagogy, but nevertheless image-filled enough to convey the demonstration. The strokes are: the horizontal and vertical, the curve to the left and to the right, those that begin at the top and descend downwards, those strokes that are written from left to right, the inner strokes written before the outer ones, the tripods in the order of the middle, left, and right, the enclosures filled in before being closed, and finally the dot or single stroke. The hierarchy is essential because it draws scriptural inspiration from what is essential in Chinese thinking and expression of that thinking – stability, equilibrium, and continuity. The eight fundamental strokes create the harmony of the iconogram, as this harmony conforms to the harmony of the Universe.

The writing of an iconogram fits into this cosmic-worldly harmony and thus becomes an icon of this harmonious union by presenting it acoustically and scripturally. For example, the iconogram for a garden is “园” “yuán”. Each stroke builds an image composed of an ensemble of images which, when fully realized, depicts the iconogram in its Wholeness. We begin by tracing the enclosure of the garden because all gardens in China contain the elements they enclose, and thus we must not enclose the garden grounds before each element has been properly set within them. The doors are delineated first as “门” “mén”, which allow us to step into the garden and place a “man's head” “元” within them, representing what is fundamental to the domestication of the wildness of Nature through the use of man's intelligence and labor, with man being the supreme architect of the mundane world.

Likewise the iconogram for “country” “国” “guó” that can be interpreted in the same material-iconic light. The doors are erected “门”⁶ delimiting territory that belongs to the royalty, for indeed within those doors sits the “emperor” “王” “wáng”, and whose ancient depiction also meant an axe since the bronze axe was the symbol of royal power. We also see within those swinging doors the iconogram for “earth” or “soil” “土” “tǔ”, over which the iconogram for a “palace” is “宫” “gōng”, and this rather simple construction contains some interesting components to interpret.

⁶ Traditionally the “doors” “門” were depicted as a much more visually constructed realization of the “swinging doors” of Chinese architecture.

We must begin our reconstruction of the palace with the roof-component “亠” upon which the stroke of its “gable” or “eave” is observed, as it is the gable or eave that gives a palace or house its prestige. Then the two stories are added “呂”, the lower serving as the Hall of Reception, it being the larger. Now if we were to envision the iconogram laid out lengthwise, the image of a temple would lie before us, such as the model of the Big Bell Temple displayed in the entrance hall of that temple in Beijing.

A last illustration will suffice: “画” “huà” “picture, painting, to draw a picture”. We have a coordinated series of images of a finely tilled “field” “田” “tián” drawn inside a “frame” “口”. One may even come to say that the “framed field” represents a “still-life” painting.

Aside from this “iconic vision,” at a morphological level, the doubling of an iconogram intensifies the image: “大大” “dà dà” “enormously, plenty of,” as if the reduplication augmented the quantity. For indeed, “man” “人” “rén,” when tripled, increases to “zhōng” “众,” “crowd, mass.” One “mouth” “口” “kǒu,” when tripled, broadens into “品” “pǐn,” “products, consumer articles.” A tree “木” “mù” becomes “woods” when doubled “林” “lín,” and when tripled “森” “sēn,” thickens into “forest, myriads of, multitudinous.”

It must be mentioned that these examples have not taken into account the iconic “keys” or “部首” “bùshǒu”, the iconic headers atop, to the left or under the main element of the iconogram, and whose iconicity presents objects such as “drops of water” “冫” (to the left) or “fire” “灬” (at the bottom), “herbs or grass” “艹” (atop the main element), a “walking man” “辵”, the “horns of an animal” “丩”, a “mutton” or a “sheep” “羊”. Now, if we combine two icon-keys, for example, two “water” icon-keys “冫” and “长” “shuǎng”, the union produces solidification: “冰” “bīng” “ice”. Such linguistic iconicity has far-reaching expressive narrative horizons, of which *Ji Bu Ma Zhen* and its bard-poet transmitters (詞人 “cì rén”) play such illuminating roles.

Furthermore, this rare image-manufacturing and clustering also functions at a paradigmatic level. Paradigm is understood in Hjelmslev's interpretation, which opposes syntagma, qualifying analogous or synonymous elements at a point of a chain or syntagm. In other words, one iconic element is placed upon the other in a paradigmatic configuration: “山” “shān” when placed upon a “rock” “石” “shí” portrays a “crag, cliff” “岩” “yán”. The perpendicular accretion of the “mouth” icon “口”, the “horse” “马” “mǎ”, and “force” “力” “lì” composes this remarkable iconogram “驾” “jià”, which signifies “to harness (a horse), to plow (with a horse), to draw a cart (with a horse)”.

Iconograms or morphemic image-clusterings, whether they are single paradigmatic compositions or strings of them syntagmatically strung, constitute a veritable summit in my Philological-Poetics method of interpreting and reactualizing a Text. Envisaging the aura of a Text as if the iconogram were the epiphany of five thousand years of Chinese thought.

Regarding my translation of the Chinese poem into French and English, metaphrasis, the Art of *Translatio*, proved to be the soundest method for exploiting the iconic world of *Ji Bu Ma Zhen*. To capture this plethora of iconicity, I resorted to phonesthemes, repetition of hemistiches and

reduplication, cognate forms, assonance and alliteration, suffix massing, extended metaphors and similes, archaisms, and polysemic wordplay or paronomasia. This recreative experimentation certainly imposed itself on the English and French languages, but is there any other means of expression when in communion with the Other in the Lands of Otherness?

In conclusion, the myriad explorations of China in the company of *Ji Bu Ma Zhen* (Ji Bu Insulting the Enemy) drew me ever closer to the Otherness of the Other, a Movement that expanded and highlighted ever more transversally the *Mediaeval Eurasian Koinĕ*.

ALTERITY AND MARGINALITY

After this Chinese adventure, I returned to teach and study in Istanbul, where I began to explore the analogous historical, linguistic, and compositional features of *Dede Korkut*, *David of Sassoun*, and *Digenis Akritas*, the twin-blooded Byzantine warrior whose father was a Muslim Arab and mother was a Greek princess. It was these three pillars of medieval lore in Anatolia that highlighted my research in Türkiye and inspired the third volume of the Anatolian triad: *Digenis Akritas: l'épopée anatolienne sous les signes de la Marginalité et de l'Altérité* (2009), thus establishing an Anatolian sub-koinĕ. This volume pays homage to the bards and warriors of such distinctive cultural backgrounds.

Digenis, as his name infers, is of “two races” “Δίγενοϋς”, literally “born of two races”, Arab by father and Greek by mother. This dual ontological and existential legacy raised an interesting question:

Unlike all the other doughtiest of the *Eurasian Koinĕ*, Digenis never fought for the Byzantine Emperor or for his own nation. Digenis battled against Greeks, Arabs, lions, and an Amazon to assert his independence and to craft his own code of chivalry. Whether saving women in distress or battling those who crossed his path in search of iniquity, these “personal” values were forged by an independent will of iron. Such values are uncommon among jingoistic warriors like Roland, Ji Bu, Cu Chulainn, and Siegfried. They can only be understood if the philologist focuses on Digenis' ontic makeup and concentrates on his existence lived out on Christian and Islamic territory. He claimed both as his own, not out of religious or political allegiance, but based on an inheritable claim that ontologically offered him a connection to both “sides” of his Self. Digenis practiced what is now called Alterity.

This conscious and willful practice became possible only when the Greek/Arab-blooded warrior ignored the gold and glitter of Constantinople to err freely among the weird lithic configurations of Cappadocia, in the guise of the self-exiled. His “μίξις,” the “union of heterogeneous elements” or “mixity,” bestowed upon him an irreplaceable legacy in fulfilling his epic destiny. Digenis willingly marginalized himself from the Seat of Power, and through those strange arid lands vibrating with a myriad of nations and tribes, led a life of wayfaring, combat, *Wanderlust*, and song. Eight *écits* or chants laud his wanderings, two of which he chants for us himself. Eight chants also form the substance of my work on *Digenis Akritas*. Eight experiences in the Art of Philology-Poetics, including two long poems and a short play. The first chant opens with a poem, cast in a cadence of the ABAB rhyme scheme, at the Sumela Monastery near Trabzon (Trebizond), where the discovery

of the manuscript of *Digenis Akritas* sets the stage for the intertwining of History and legend. A dramatic weaving that foretells the crepuscular events to come.

The rhythmic discovery of Digenis' heralded deeds and misdeeds, engraved on parchment and in the hearts of the black-cowled monks of Sumela, lays open the path for the *salto vitale* into the Cappadocia of Byzantium, into the fantastic world of the Knight-Errant, Turkic-Armenian Encounters, bardic storytelling techniques, voyages upon the waters of the Upper Euphrates, and through the rupestral monastic-filled Valley of Ihlara.

Chant VII, entitled *A Conversation Amongst Effendi*, dramatizes the contents of the poem while theatricalizing a sixteenth or seventeenth-century Ottoman *manière d'être*, staged in a garden of perfume-scented arbors, set to the delightful notes of fountains. There, five gentlemen of very different backgrounds and of the most refined tastes and intellectual acumen—an Armenian, Arab, Ottoman, Roman Catholic, and Orthodox Greek—ardently discuss the grand attributes of the *Digenis Akritas* manuscript, haggle over the purchase of the inestimable tome, cradled in the overly protective hands of the Armenian collector of manuscripts. The arch, even mischievous exchanges amongst the *effendi* (gentlemen), their spirited banter, sprightly wit, and repartee, represent the complicated relationships between the five nations of the Ottoman Empire as they sit in stately poise in those deliciously refreshing rose and tulip gardens. The drama is not exactly a paradox of this complexity but a humorous regal bound into Ottoman and Byzantine propinquity. The contents of *Digenis Akritas* are discussed at length, each garden denizen opining through the prism of his national culture, which betokens, and this goes without saying, his prejudicial upbringing.

The eighth and last chant, titled *La Grande Idée*, ostentatiously mocks the Greek dream of reconquering Türkiye, with Digenis as its galloping, dreamlike champion. Strophic in structure and Persian in scheme (AABA), the Byzantine hero battles doggedly through a concatenation of “personal” exploits before seeking sanctuary in his palatial abode within the snug bosom of Eudokia, his beloved. However, he is beset by remorse and compunction for not succoring his comrades in arms, who were butchered by the Turkish soldiers on the blood-soaked plains of Anatolia.

Indeed, “καταστροφή” (catastrophe), the last word of the poem, summarizes the smashing of a Byzantine-Greek dream that began with the tragic Battle of Manzikert (Malazgirt) against the Seljuks in 1071 and ended pathetically at Sakarya against the future Republican Turks in 1921. To express it in musical terms, the *Grande Idée* is rhythmically accompanied by a cadence of *scherzos*, facetiousness, whimsical wit, and a soupçon of biting sarcasm.

Besides the narrative derision and poetic shades of the *Grande Idée*, an alchemical experiment in amalgamating the Persian *rubaiyat* pattern with a Greek-Turkish event was undertaken with the intention of exercising poetic alterity, analogous to Digenis'. This alterity strikes so cogently because it remains unblighted by authority, convention, or formality.

The world, or the lands of Otherness, presumes a frontier at whose brink the Encounter is effected. The brink of this frontier can be of two sorts: ontological, as in Digenis' case, and existential, as in his case, too. Is he not Digenis “of the border,” galloping upon the frontier between Arab Muslim and Byzantine Christian, on the border of Christian and Muslim territory? To dwell on the borders of sundry cultures draws an ontological frontier, fundamental for the warrior to reconcile the

irreconcilable, articulate the inarticulate. An oscillating frontier over whose edge danger lurks: integration or assimilation of the Other? Rejection or extermination? Renegade or apostate? Is an existential harmony at all possible if the ontic frontier posits insoluble problems? What identity to adapt? What stand to take? What conviction to espouse when an existential choice must be made? Or must a choice be made at all? In Digenis' mind, his choice was his own because he respected both distinct origins, because he kept aloof from proscriptive, bigoted authority, from ethnic vanity, from the snares of tribal honor. The free spirit is the one who roams freely, ontologically and existentially, not "free to choose," but free to accept his Alterity as the very roots of human existence, an Alterity bestowed upon all living beings. It is this Alterity that had fashioned medieval Eurasia, as it is fashioning anew today's Eurasia.

CONCLUSION: THE ART OF ALTERITY

To sum up, my *Mediaeval Eurasian Koinê* is an existential experience lived out within a geographically multicultural unified landscape whose underlying fundamental values since the Middle Ages have been a polyphonic, multiform transversal fresco of both diverging and converging linguistic and iconographic forms, narrative or poetic structures, religious or cultural beliefs and aspirations—those which Eurasia still retains today but must be defended against the prescriptive monolithic globalizing forces of economic, political, and cultural uniformity. A uniformity that lauds relativism, syncretism, and master-race superiority in the name of so-called political, economic, social, and cultural well-being.

It behooves the Philologist-Poet to defend this extraordinary ontological and existential polyphony. Alterity should become second nature to him or her, which, by doing so, decenters him or herself temporarily, allowing the Other transitory passage, existential penetration, prompting or arousing an exchange of co-opted values—however ephemeral, however risky the penetration, the "breach of the ego," the disruption of the commodious groove.

The alloy of Philology-Poetics has carved out the Mediaeval Eurasian Koinê amongst the Eurasian nations, which I have allowed passage or 'a breach of the ego' in various degrees of intensity. This Method has not been practiced capriciously. The shaping of the Koinê - and concomitantly of my Self - has borne me along a flux that has fashioned a *modus vivendi*. A *modus vivendi* whose geographical and spiritual adventure has forged the *Mediaeval Eurasian Koinê*. An adventure accompanied by the three philologists of the future: F. Nietzsche, P.P. Pasolini and J.R.R. Tolkien, who certainly practised the Art of Alterity.

For they reached out to recapture the heroic spirit housed within their hearts and minds. Heroic in the sense of creative transformation, whose voices, divine or demonic, goaded them to contract their egos so as to coalesce their Selves with the Other's. Voices, too, which concurrently shielded them from the total effacement of their egos. That voice or voices are trustees, guardians, friends, and road companions beckoning to accomplish the Road's behest by the Other.

The Friulano that Pasolini so cherished and narrated as a form of Otherness acted as a vehicle that reached out to that Other, longing to be touched and recognized in a post-war Italy under construction, fragmented by a convulsion of reactionary conservatism, lingering nostalgic Fascist

factions, rampant consumerism, and shameful compromise. He founded the “Academiuta di Lengua furlana” in 1945 and proclaimed about the Friulano language: *in cui il Potere, fascista e democristiano, non comunica, (a language) with which fascist and Christian-democratic Power does not communicate* (author’s translation). He composed about fifteen poems in Friulano and translated Garcia Lorca and Juan Ramón Jimenez into Friulano. Pitting himself within these conflictual vectors, laying himself bare through his uncompromising writings and cinema, Pasolini philologically reached deep into the rich Tradition of Italy’s past and poetically expressed it through words and images, as he defended the diminishing “minorities” under the crushing and brutal wheel of the “majority”. His philological precision retraced the degeneration of polyphonic and morphic values with lyrical, poetic verve: *una poesia impegnata e civile, a poetry engaged and civilized*. He rekindled Gramsci’s minatory ashes with ardent verses, ashes that once had been the flames of “know thyself” as a product of a historical process. And there, within the still smoldering ashen matter, Italy would be able to retrace that historical process and, by doing so, reverse the degenerate ordination, unbeknownst to the common man:

“Me ne vado, ti lascio nelle sera che, benchè triste, così dolce scende per noi viventi, con la luce cerea”.

“I am departing, I shall leave you in the evening, that albeit sad, descends so softly upon us the living, with ashen light” (author’s translation).

Pasolini gave a narrative voice to the Roman proletarian argot and dialect in his novels: nouns designated pitiful but proud figures, adjectives chiseled out tormented and twisted faces, verbs agitated neurotic movements, and generated contorted, desperate acts. Giotto’s imagery burst onto Pasolini’s screen (*Decameron*) like so many smothered cries in the desert of consumerism, mocked Alterity, ugly social uniformity, cultural mediocrity, and banality. Did not dialects, jargon, and argot forge national languages (Martineau, 1979: 99-126)? Did and do they not nourish the national spirit and thus the language of a whole people? Why then have they been shamelessly proscribed, ostracized, and censured in the name of national or global interests?

Philology enabled Pasolini to assemble and reconstruct disparate political, cultural and poetic elements into a sound and coherent poetic and political discourse. As Pasolini never separated poetics from politics, neither did he ever separate Philology from Poetics. Massimo Sannelli puts it nicely when evoking Pasolini’s philological method:

“... ; che coordina fatti anche lontani, che mette insieme i pezzi disorganizzati e frammenti di un intero coerente quadro politico, che ristabilisce la logica là dove sembrano regnare l'arbitrarietà, la follia e il mister”. For “... la filologia è la capacità di collegare li frammenti” (Philologia Pauli).

Pasolini’s Philological-Poetics’ *modus vivendi* narrated another story of Italy, pieced together (*collegare*) with the shards (*frammenti*) or disorganized fragments (*pezzi disorganizzati*) of splintered lives, willfully broken asunder by the concentration of capital and its inevitable results: the concentration of politics, culture and art. Pasolini defied national priorities, leapt into the Other both in body and spirit, erred from one zone of Otherness to another, linguistic zones and mythological lands from which he never returned. The triumph of the universal over the particular,

the sign over Discourse, of concept over reality gave proof to the terrible truth that a person's existential value has no bearing in a world where the “noxious” parts, the “unwholesome” singularities are excised from the Whole, the Whole (the dominant ideology) being superior to its parts:

“*Bisogna bruciare per arrivare Consumati all'ultimo fuoco.* (Poesia con Letterature: 1951-52).
“One needs to burn so as to arrive consumed at the ultimate fire” (author’s translation).

Friedrich Nietzsche, too, practised a Philological-Poetics *modus vivendi*, never abandoning it as Stefan Zweig had so erroneously assumed. His transformation of Greek, Latin and German texts at university into a Philosophy of Life, exposed as such in his early works, then the release from university and the joyful errance in the lands of the Other: the Other-Troubadour, the Other-Dancer, the Other-Shadow, the Other-Psychologist, the Other-Nomad, the Other-Socrates and the Other-Zarathustra gave birth to his later poetic and philosophical creations. There is no rupture in these works, only a strong flowing creative and transformative continuum that a Philological-Poetics *modus vivendi* could have impressed upon his readers that could only have drawn its inspiration from the lands of Otherness. Unknown and dangerous lands indeed that Nietzsche traversed with such impassioned outbursts that the Other, gripping the ever-questing Nietzsche so tightly within, no other outlet seemed possible, his Self totally absorbed in the eternal blissful oblivion in those lands of the Other, out of which the Wanderer and his Shadow never returned. Perhaps like Socrates, he revelled in the drinking of hemlock because his will to transform pettiness into nobleness, niggardliness into magnanimity, parochialism into generosity was tastier than the bitter liquors of ideology (anti-semitism) that he substituted for his *Fröhliche Wissenschaft*:

“*Seit ich des Suchens müde ward, Erlernte ich das Finden.*
Seit mir ein Wind hielt Widerpart.

Segl' ich mit allen Winden” (Mein Glück: *The Gay Science*).

(My Happiness) “Since I grew tired of the chase/ And search, I learned to find/ And since the wind blows in my face,/I sail with every wind” (Translation).

As to J.R.R. Tolkien, his love of Anglo-Saxon, and more precisely, of *Beowulf*, his passion for the scriptural forms of Nordic alphabets (runes, oghams) led him to recreate the “lost worlds” of doughty dragons, marshy monsters, entombed treasures and human fellowship, where logos and reason have small roles to play. His world is one of images and vast vistas, of the signifier. Tolkien's philological passion for *Beowulf* engendered his recreation of a supposed earlier version of the Anglo-Saxon poem: *Sellic Spell*, a title which has been taken from verse 2,109 in *Beowulf*: “*sō □ ond sārlic/hwīlum syllic spell*”, “*true and sorrowful/a wonderful tale*”, which generously demonstrated the power of his *creative imagination*, one that navigated throughout the interstices of Oxford academia, Beowulfian readings, flights of fancies upon the golden wings of hoary tongues, dark legends, meady ballads. Like Pasolini, Tolkien sought out the particularities of dwindling, forlorn or extant dialects so as to breathe life into their archaic forms, to resonate their ancient accents. Tolkien's philological pursuits drew him ever closer, ever deeper to and into the twilight zones of Legend and History, of the living voice and the scriptural, of the Sense of the Past. As his son, Christopher has written:

“the philological detail exists to clarify the meaning and intention of that poet”
(Tolkien, 2014).

Namely, the poet of *Beowulf*! For Tolkien, *Beowulf* is the vision that ushers one into a History interlude with the marvellous, the wondrous, and the vast horizons of Imagination:

“The whole thing (Beowulf) is sombre, tragic, sinister, and curiously real. The “treasure” is not just some lucky wealth that will enable the finder to have a good time or marry the princess. It is laden with history, leading back into the dark heathen ages beyond the memory of song, but not beyond the reach of imagination” (Tolkien, 2014).

Indeed, these three adventurers of languages are a cheerful trio, whose laughter rings forth because behind each word lies a love of Humanity, of Life: *Hwæt!* “Listen” to the first word of the Beowulfian poem.

*“Grendel came forth in the dead of night; the moon in his eyes shone glassy bright, as over the moors he strode in might, until he came to Heorot.
Dark lay the dale, the windows shone, by the wall he lurked and listened long,
and he cursed their laughter and cursed their song and the twanging harps of Heorot”*
(*The Lay of Beowulf*, J.R.R. Tolkien: stanza 1, page 417).

The cheerful, dancing Nietzsche, the flamboyant, impetuous Pasolini, the joyous, out-going Tolkien experimented an Art of living by their questing, by their melding Philology and Poetics. There is no doubt that they achieved their Quests so splendidly...

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Research Article

**THE ROLE OF CENTRAL BANK INDEPENDENCE
IN PRICE STABILITY**

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ABSTRACT

This study aims to determine the relationship between inflation and the independence of central banks in post-Soviet, developed, and developing countries. The hypothesis of a negative statistical relationship between the inflation rate and the values of the CWN and GMT central bank independence indices and their constituent subindices for post-Soviet, developed, and developing countries for 2001–2020 was tested. Based on the results of the econometric assessment, the paper finds that high values of the central bank independence indices and their sub-indices help to keep inflation in a certain corridor: if inflation is high, central bank independence reduces it, and if inflation is low, it helps to keep inflation at a low level. The impact of central bank independence on inflation weakens as inflation decreases.

Keywords: Central Bank Independence, Inflation, CWN and GMT Indices, Post-Soviet Countries, Monetary Policy, Central Asia.

INTRODUCTION

Central bank independence (CBI) is the central bank's ability to control monetary instruments. CBI is a set of restrictions on the influence of the government on the management of the central bank's monetary policy. CBI can be limited or strengthened by personnel, financial and political independence. The first dimension, personnel, refers to how a bank governor is appointed and dismissed. As the government's influence on the governor's term of office increases, the central bank's degree of independence decreases. The government can also influence the personnel of the central bank by controlling the membership of the central bank's board. Financial independence refers to the ability of the government to fund its spending. If the government has direct access to central bank credit, it is more likely that monetary policy will be subordinated to fiscal policy. The limitation on the government's ability to finance itself with monetary instruments reflects the higher degree of CBI. Finally, political independence reflects the powers of the central bank to formulate and implement monetary policy.

The concept of central bank independence is not strictly formulated. Various indices reflect, to some extent, the central bank's independence in developing and implementing monetary policy. The most widely used indices are GMT-index (Grilli et al., 1991) and CWN-index (Cukierman, et al., 1992), named after the authors' last names in capital letters.

CWN-index is a method for assessing the degree of independence of a central bank, developed based on a weighted average of sixteen criteria that are responsible for certain criteria for independence, grouped into four groups: personnel autonomy, development of monetary policy, priorities and objectives of the central bank, restrictions on state budget financing.

In the GMT index, the central bank's independence is considered in the context of its political and economic independence. Political independence refers primarily to the procedure for appointing the leadership of the central bank, independent of the government, as well as its autonomous functioning. In turn, economic independence is determined by the possibility of lending by the central bank to the government and the involvement of monetary authorities in supervising commercial banks.

This paper aims to analyze and assess the role of CBI in price stability. In particular, the study aims to determine the relationship between inflation and the independence of central banks in developed, post-Soviet, and developing countries. Higher levels of inflation in all country groups, especially developing economies, make the study relevant. To achieve the study's goal, the authors put forward hypothesis H0: A negative statistical relationship exists between the inflation rate and the values of the CWN and GMT central bank independence indices and their constituent sub-indices. Based on econometric assessments, the paper finds that higher levels of the CBI contribute to a reduction of prices and high values of the CBI indices and their sub-indices help to keep inflation in a certain corridor.

LITERATURE REVIEW

Systematic literature review

There is still no precise definition of the CBI concept. Most authors understand the CBI as the economic and political independence of the bank in implementing monetary policy. The GMT and CWN indices are used to evaluate the CBI, which occupy a central place in most studies and include economic and political criteria.

Most studies on CBI analyze and evaluate the impact of the degree of independence on achieving inflation targets. Doyle and Weale (1994) show that there is fairly strong evidence that high central bank independence is associated with lower inflation. Of course, this does not mean that central banks should be free to pursue targets of their choice, but rather that they should use monetary policy to achieve a target set by parliament.

Mas (1995) notes that creating an independent central bank may not bring the claimed benefits in developing countries with underdeveloped financial markets, where the scope for a truly independent monetary policy is limited. The benefits of an independent central bank may be eroded by conflicts between fiscal and monetary policy and internal problems of the central bank's institutional structure so that the problems of dynamic inconsistency associated with monetary policy are not resolved, but simply transformed. Less developed countries wishing to move to a low-inflation path should focus on fiscal policy reforms that strengthen inflation resistance and on institutional arrangements that directly impose discipline on fiscal policy rather than indirectly through monetary policy.

Piga (2000) shows that central bank independence arises from the need for politicians to maximize rent extraction from private counterparties who engage in political transactions to obtain subsidies. The author also notes that Milton Friedman opposed an independent central bank. His argument was eminently libertarian, fighting against the concentration of power and warning against the possibility of central bank corporatism.

Moiseev (2018) provides many criteria for CBI in his review study. These criteria include the ability of the central bank to independently apply monetary policy instruments, the characteristics of the rules, the limited influence of the government on monetary policy, and the independence of purpose and instruments. The author reviews many studies showing that a high degree of CBI can keep inflation low. Moreover, additional advantages of CBI are cited, such as the ability of CBI to strengthen fiscal sustainability. It should be noted that the CBI minimizes the impact of the political cycle on inflation. Thus, the CBI is recognized as one of the key principles of monetary policy. However, strengthening the CBI was a global trend during the global financial crisis of 2007-2009. The balance between fiscal and monetary authorities has changed.

Crowe and Meade (2007) note that the measurement of central bank independence tends to focus on legal characteristics derived from the institution's charter. These legal characteristics refer to four aspects of the central bank's independence from the government. First, independence is greater when bank management is protected from political pressure by sufficient tenure and independent

appointment. Second, the central bank enjoys more freedom when the government cannot participate in or override its decisions. Third, CBI is higher when the central bank's legal mandate clearly states the objective of monetary policy. Finally, the central bank's financial independence depends on government lending restrictions. The authors also confirm the general conclusions of most economists that CBI leads to low inflation. However, additional arguments are given that this phenomenon is not always observed in developing countries. The authors conclude that independent central banks with clear mandates, a good communication strategy, and experienced, technocratic management teams can calm the markets and reduce the economic costs of political crises or mistakes.

According to Reis (2013), even though many experts advocate CBI, consideration of more specific issues leads to ambiguous conclusions. The author argues that sticking to a stable long-term nominal anchor can reduce the cost of price uncertainty, and this policy is completely different from maintaining a certain level of inflation. Research shows that a flexible price target can reduce the dispersion of inflation and real activity. Moreover, the release of the central bank from the obligation to increase seigniorage to transfer funds to the fiscal authorities does not mean that the central bank can take on greater risks through uncontrolled lending policy.

Levenkov (2018) shows that CBI can help countries achieve lower inflation rates, mitigate the impact of political cycles on business cycles, enhance financial system stability, and increase financial discipline without any cost in terms of output volatility or reduced economic growth. The author notes a positive relationship between central bank independence and economic growth.

Trunin et al. (2010) note that the central banks of countries with emerging markets are still deprived of the legal, economic, and political independence characteristic of developed countries' central banks. In turn, the position of central banks in the CIS countries varies from absolute dependence on the executive branch to relative autonomy in decision-making. According to the results of their study, the banks of Eastern Europe and the Baltic countries turned out to be the most independent. The least independent are the central banks of Belarus, Ukraine, and Uzbekistan. At the same time, it can be assumed that the results obtained reflect only the formal independence of the Central Bank. In particular, if the high level of independence of the Central Banks of the Baltic States is not in doubt, then the comparable level of independence of the Central Banks of Kyrgyzstan and Tajikistan does not look very convincing. As for the place of Russia and Kazakhstan, the Bank of Russia and the National Bank of Kazakhstan are characterized by an average level of independence among the countries considered. The authors explain that the trend of decreasing independence of the Central Bank of the Russian Federation creates obstacles to reducing inflation in Russia. Considering that the Russian economy is currently struggling to get out of the crisis, the country's authorities can use the low level of CBI to solve current problems. Even though such solutions can stabilize the situation in the economy in the short term, their effectiveness in terms of long-term economic development may turn out to be insignificant.

Based on a survey study, Berger et al. (2001) showed that the negative relationship between CBI and inflation is strong. Klomp and De Haan (2010) performed a meta-regression analysis using 59 studies examining the relationship between

inflation and CBI. The authors show that the studies reviewed differ greatly in terms of the CBI indicator used, the sample of countries, the period covered, and the model specification. The authors concluded that the relationship between CBI and inflation is strong. Thus, the generally accepted argument of most researchers is that the CBI can keep inflation low.

Based on their assessments, Baumann et al. (2021) questioned the generally accepted fact that the CBI keeps inflation low. The authors concluded that, in general, there is only a weak, if any, causal relationship between independence and inflation. These results are obtained based on a statistical approach, which has not yet been used to analyze macroeconomic processes. The authors propose their own method for assessing the impact of the CBI on inflation. In particular, the researchers propose a method of long-term target maximum likelihood estimation (Longitudinal targeted maximum likelihood estimation). The evaluation procedure includes machine learning algorithms and is designed to solve problems associated with complex macroeconomic panel data. To describe and eliminate relevant confounding structures, the possible reasons that motivate a country's decision to accept a certain degree of central bank independence are taken into account; they range from the country's political institutions, political instability, history of inflation, and international pressure. Moreover, the authors use 17 measured variables, including money supply, energy prices, economic openness, institutional variables such as central bank transparency and monetary policy strategies, and political variables. The study was conducted for 60 countries at various stages of development between 1998 and 2010. The authors come to the important conclusion that the CBI does not have a clear effect on inflation; moreover, one cannot exclude even the impact that promotes the growth of inflation.

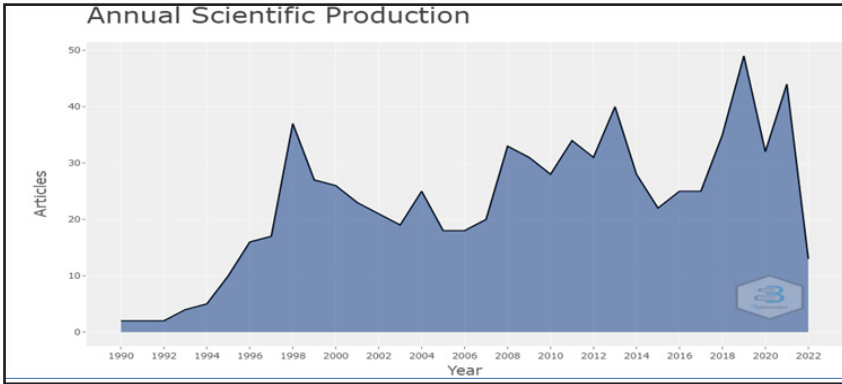
According to Haldane (2020), central bank independence has contributed to two important outcomes, such as low and stable inflation at no cost in an environment of output volatility and safe and sound banks. At the same time, central banks and central bank independence face new challenges. Not least, this is due to the rapid growth of central bank balance sheets over the past decade. This has contributed to a loss of understanding and perhaps some confidence in the role of monetary policy and the extent to which it is separated from government action.

Bibliometric analysis of literature

For the bibliometric analysis of the literature, a selection of scientific articles from the Scopus database was used, found in the search results for the keyword "central bank independence". Until March 2022, 762 publications were found in the database for this keyword.

Articles are analyzed against annual scientific production, important sources, relevant institutions, a network of coincidences, and thematic mapping and evolution to understand trends in the central bank independence body of knowledge. Bibliometric analysis was carried out using the R-package Biblioshiny tool.

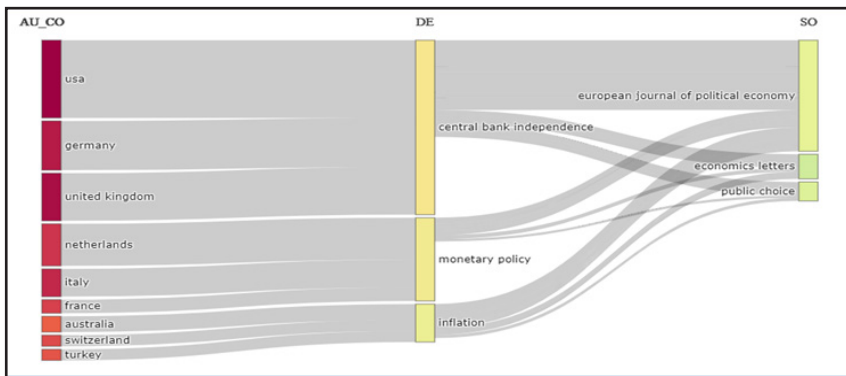
Figure 1. Annual Scientific Production



Source: The authors' compilation

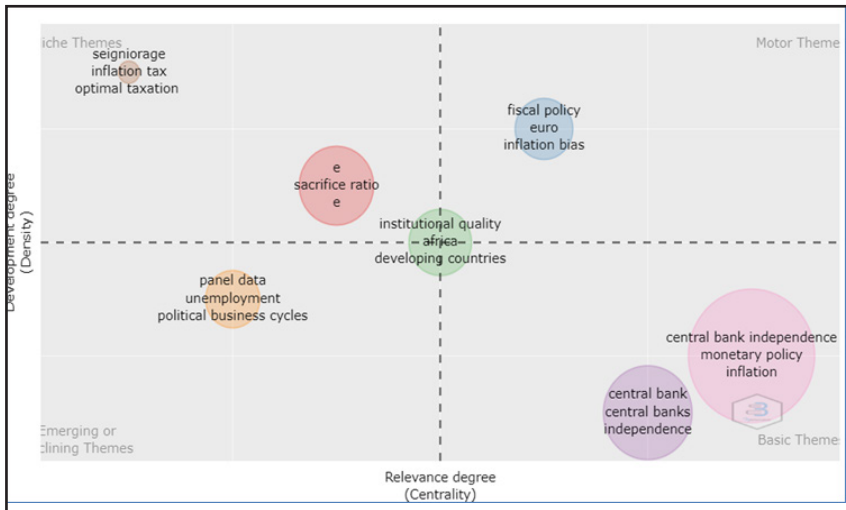
Figure 1 shows the annual production of academic research on central bank independence. As can be seen in the Figure, research on this topic began to be published in 1990, when 2 articles were published. Since 1993, there has been a noticeable increase in articles until 1998, when the number of studies reached 37. The highest publication activity is observed in 2019 – 49 articles were published during the year. In 2020, this indicator decreased, it can be assumed that the reason for the decrease in the number of studies on the independence of central banks was the pandemic. The scientific interests of many researchers have shifted towards research into the causes and consequences of the pandemic. In 2021-2022, an increase in publications is again noticeable, for 3 months of this year 13 works have already been published.

Figure 2. Three Fields Graph (Country – Keywords – Source)



Source: The authors' compilation

On the three-field graph, one can see the relationship of the attributes of publications. For example, Figure 2 shows which countries and journals are most involved in the study of central bank independence. Most of the articles came from the US, Germany and the UK. The relationship between central bank independence and inflation is most studied in France, Australia, Switzerland and Turkey. From this, we can conclude that mainly developed countries are involved in the study of the subject. Figure 2 also shows the top 3 journals that have published the most articles on central bank independence.

Figure 3. *Thematic Map*

Source: The authors' compilation

Figure 3 shows the state of the art in research on central bank independence. The author's keywords were used to obtain a thematic map, and a minimum clustering frequency of 5 points was set.

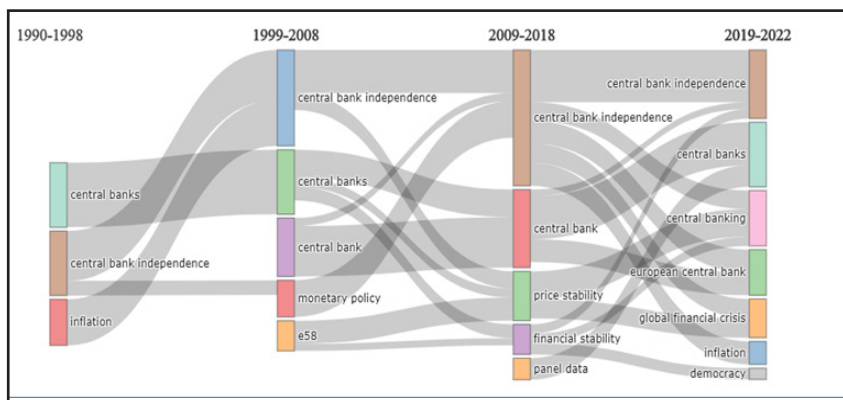
Among the central clusters, the largest is "central bank independence", which includes such frequently occurring keywords as "monetary policy" and "inflation". The cluster "quality of institutions" along with the keywords "Africa", and "developing countries" is about to become a central theme. That is, in developing countries, more and more attention is paid to the study of this topic.

As for the movement topics, the only cluster "fiscal policy" belongs to this category. Peripheral topics are "taxation" and "electronic crime".

A network of matches was also formed based on the author's keywords with the Louvain clustering algorithm.

There are three main clusters in the coincidence network. The base, central, and also the largest cluster is the "Central Banks Independence". "Inflation" is the second largest node, following the CBI node. "Inflation" is located inside the CBI node, which means that these two concepts are closely related to each other. Therefore, it is quite possible that most of the ongoing research explores these two concepts in conjunction. The same applies to "Monetary Policy", which is also within the borders of the CBI node. Other nodes in the same cluster, close to the central theme of the CBI, are "price stability", "inflation targets", "financial stability", "federal reserve", "panel data", and "European Central Bank". It can be assumed that all these topics are current research areas in connection with the CBI.

In addition to the current state of research, the thematic map shows changes in the temporal development of the topic. For thematic evolution, a complete sample of 762 articles was used. This dataset was split into quadruple slices. Time slices were selected according to the degree of publication activity. The

Figure 4. Thematic Evolution for 1990-2022

Source: The authors' compilation

first time slice (1990–1998) shows increasing publication activity (Figure 1), while the second (1999–2008) and third (2009–2018) time slices indicate the volatility of publication activity. As for the fourth time interval (2019–2022), it is characterized by the largest increase in publication activity.

Thematic evolution shows the expansion of research areas. The independence of central banks was initially studied in terms of price and financial stability. In the last 3 years, the relationship of central bank independence with topics such as the global financial crisis, inflation and democracy has been actively explored.

METHODOLOGY

To test the H_0 hypothesis, data on CBI were collected for three groups of countries according to the UN version for 2021 (UN, 2021):

- 10 post-Soviet countries, excluding Latvia, Lithuania, Estonia, Uzbekistan, and Turkmenistan: Azerbaijan, Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Ukraine. Latvia, Lithuania, and Estonia were excluded from the calculations because these countries have been part of the European Union since 2004 and belong to the category of developed countries. Uzbekistan and Turkmenistan were excluded from the calculations because there is no inflation data for these countries on the consumer price index;

- 18 developed countries, for which at least three editions of the Laws (acts) on the Central Bank are available: Canada, Australia, Belgium, Croatia, Cyprus, Estonia, Finland, Hungary, Latvia, Lithuania, the Netherlands, Portugal, Romania, Slovakia, Iceland, Norway, Switzerland, UK;

- 32 developing countries for which Central Bank Laws (acts) and inflation data are available: Zimbabwe, Cape Verde, Ghana, Nigeria, Brunei Darussalam, Cambodia, Indonesia, Malaysia, Mongolia, Philippines, Vietnam, Bangladesh, Bhutan, Bahrain, Iraq, Israel, Oman, Qatar, Yemen, Dominican Republic, Guatemala, Nicaragua, Panama, Ecuador, Tanzania, Lesotho, Mauritius, Botswana, South Africa, Sudan, Egypt, Libya.

The study's limitation is that there are no laws (acts) on the Central Bank in the public domain for many countries. For post-Soviet and developed countries, it was possible to find several versions of the Laws to trace the dynamics of change, and for developing countries, it was difficult to find even one version of the laws.

Data for assessing the independence of the central banks of these countries according to CWN and GMT indices were obtained from the Laws (acts) of the Central Bank of each country.

For each country, inflation data for 2001-2020 was collected from the official website of the World Bank (World Bank, 2022).

Variable designations have been introduced for all central banks:

inf01, inf02, ..., inf20 – inflation rate in the year 2001, 2002, ..., 2020, respectively,

cwn – CWN index,

cwn1 – personnel autonomy,

cwn11 – term of office of the central bank's management,

cwn12 – the institution that appoints the governor of the central bank,

cwn13 – early removal of the governor of the central bank from office,

cwn14 – the ability of the governor of the central bank to perform other functions in the government,

cwn2 – development of monetary policy,

cwn21 – the institution engaged in the development of monetary policy,

cwn22 – the institution that has the last word in conflict resolution,

cwn23 – central bank involvement in developing fiscal policy,

cwn3 – priorities and main objectives of monetary policy,

cwn4 – restrictions on financing the state budget deficit,

cwn41 – restrictions on the issuance of direct loans to the government,

cwn42 – purchase of government securities,

cwn43 – credit terms,

cwn44 – potential borrowers from the bank,

cwn45 – limits on lending by the central bank,

cwn46 – maturity of loans,

cwn47 – interest rates on loans,

cwn48 – transactions with government securities in the primary market,

gmt – GMT index,

gmt1 – GMT-sub-index of political independence,

gmt11 – the governor of the central bank is appointed without government intervention,

gmt12 – the governor of the central bank is appointed for a term of more than 5 years,

gmt13 – the board of the central bank is appointed without the participation of the government,

gmt14 – members of the board of the central bank are appointed for a term of more than 5 years,

gmt15 – no mandatory presence of government representatives on the board of the bank

gmt16 – no need to approve the main directions of monetary policy by the government,

gmt17 – fixing price stability in the legislation as the main goal of the central bank,

gmt18 – availability of legal support from the central bank in case of conflict with the government,

gmt2 – GMT-sub-index of economic independence,

gmt21 – there is no automatic procedure for issuing loans to the government,

gmt22 – the central bank does not participate in the initial placement of government securities,

gmt23 – the central bank independently sets interest rates for its operations,

gmt24 – supervision of banks is not included in the functions of the central bank.

CWN index: calculated based on sub-indices using the formula:

$$cwn = 0.2cwn1 + 0.15cwn2 + 0.15cwn3 + cwn4$$

The sub-indices included in this formula are calculated according to the sub-indices of the next level using the formulas:

$$cwn1 = 0.25cwn11 + 0.25cwn12 + 0.25cwn13 + 0.25cwn14,$$

$$cwn2 = 0.25cwn21 + 0.5cwn22 + 0.25cwn23,$$

$$cwn4 = 0.15cwn41 + 0.1cwn42 + 0.1cwn43 + 0.05cwn44 + 0.025cwn45 + 0.025cwn46 + 0.025cwn47 + 0.025cwn48.$$

The sub-indices included in them are calculated based on their sub-indices, for example,

$$cwn11 = cwn111 + 0.75cwn112 + 0.5cwn113 + 0.25cwn114,$$

where, if the term of office of the central bank governance is from eight years, $cwn111 = 1$, if from six to eight years, then $cwn112 = 1$, if five years, $cwn113 = 1$, if four years, $cwn114 = 1$, and 0 otherwise. All other sub-indices are calculated similarly.

A count index a GMT is easier than calculating the CWN index. It is equal to the sum of sub-indices of political and economic independence of the central bank:

$$gmt = gmt1 + gmt2$$

and each of them is equal to the simple sum of the values of their sub-indices.

Many publications take it for granted that higher central bank independence helps to reduce inflation (Berger et al., 2001; Klomp and De Haan, 2010; Levenkov, 2018). To test this statement, you can use the methods of correlation analysis and multiple regression. The linear regression model has the form:

where – a column of inflation rates for a sample of countries, – a matrix of values of explanatory variables, such as the values of CWN, GMT, or their sub-indices and constants, – a column of coefficients for model variables, is a column of random regression terms.

It was planned to build multiple linear regressions of the inflation rate for all years from 2001 to 2020 and for all indices and sub-indices. Data of CWN and GMT for 20 years were collected directly from central banking laws. They are weakly changeable since changes are rarely made to these laws. Therefore, the study included only countries for which at least three versions of the law on the central bank were found for the period 2001–2020.

The weak variability of CWN and GMT over the years explains the failure of attempts to build multiple regression models. Therefore, further, we limited ourselves to the study of pairwise relationships between the inflation rate and all indicators of the independence of central banks based on their correlation coefficients. Correlation, in this case, shows the statistical relationship between inflation and the indicator of the independence of the Central Bank. By using correlations to analyze, we keep in mind that there are other inflation factors.

Since the data are correlated over the years and change little, averaged data were used for 4 five-year intervals for 2 ten-year and 20-year intervals. They provide the same information about the relationship between the inflation rate and the central bank independence index or sub-index as paired linear regressions.

For example, the study used a pairwise linear regression model when there is only one explanatory variable, such as CWN or GMT. A statistically significant, negative value of the coefficient for this explanatory variable will confirm the hypothesis H_0 , i.e., will correspond to the fact that there is a negative statistically significant linear relationship between the increase in the central bank independence index or its sub-index and the inflation rate. Paired linear regression corresponds to pairwise correlation coefficients between dependent and explanatory variables. In this case, it is necessary to consider only those of them that are statistically significant, at least at the 5% level.

The influence of the independence of central banks on inflation can be assessed not only by their ability to influence the inflation rate but also by their ability to keep the inflation rate within a given corridor. The binary choice model, in this case, estimates the probability of inflation going beyond this corridor. The probit model is estimated based on the standard normal distribution. The probability distribution functions determine the probability that the dependent variable will take the value 1. Unlike linear regression models, a binary choice model requires more observations to obtain statistically significant relationships. Therefore, the probit model was evaluated using combined data for post-Soviet, developed, and developing countries. In total, a sample of 60 countries is obtained.

RESULTS AND DISCUSSION

Post-Soviet countries

Since the data on CWN and GMT are slightly variable over the years and there are no changes in these indicators between some neighboring years, we consider their average values for each country over five-year intervals 2001–2005, 2006–2010, 2011–2015, 2016–2020. Accordingly, the inflation values are also averaged. Four time periods remain, between which there are changes in CWN and GMT.

The fact that in Table 1 for inf01-05 all correlations (except for *cwn*) are about -0.70, and they are all marked with (*), means that there is a negative statistical relationship between the indicators and the annual average inflation rate inf01-05, and a significant at least at the 5% level. There may be positive correlations, but they were not statistically significant even at the 10% level and therefore are not shown in Table 1.

Figures 5–6 show graphs of the values of the CWN and GMT indices and inflation rates averaged across countries. Although these are averages, it can be seen that the rise in CWN and GMT corresponds to a decrease in the inflation rate.

If we look at the next interval 2006–2010 in Table 1, then in the corresponding column all cells are empty, i.e. all coefficients are insignificant even at the 10% level. The global financial crisis of 2008-2009 falls within this interval. It caused jumps in the inflation rate in many countries, and the statistical relationship between CWN and GMT and the inflation rate in this interval was broken.

The influence of central bank independence manifests itself at long time intervals. In Figures 5–6, for the post-Soviet countries, as can be seen, an increase in the CBI corresponds to a declining inflation trend. Deviations from the trend are explained by the influence of other factors of inflation. Their influence on inflation may distort and override the influence of central bank independence. This explains the presence of empty cells in Table 1, as well as positive values in some cells. In these cases, we explain this by the fact that the influence of other factors on inflation turned out to be stronger than the downward influence of the CBI.

Table 1. Pair correlation coefficients for indicators of central banks of post-Soviet countries on 5-year, 10-year and 20-year intervals

	inf01-05	inf06-10	inf11-15	inf16-20	inf01-10	inf11-20	inf01-20
cwn							
<i>cwn42</i>	-0.70*		-0.73*		-0.64	-0.83*	-0.72*
<i>cwn48</i>	-0.70*		-0.69*		-0.64	-0.77*	-0.72*
gmt							
<i>gmt15</i>	-0.67*				-0.65	-0.55	-0.59
<i>gmt2</i>	-0.68*				-0.61		-0.65
<i>gmt21</i>	-0.70*				-0.64		-0.72*
<i>gmt22</i>	-0.70*		-0.69*		-0.64	-0.77*	-0.72*

Source: The authors' calculations

All values given in Table 1 are negative, i.e. in some years, the *gmt* index and some sub-indices are negatively correlated with the inflation rate:

cwn42 – purchase of government securities,

cwn48 – transactions with government securities in the primary market,

gmt – GMT index,

gmt15 – no mandatory presence of government representatives on the board of the bank

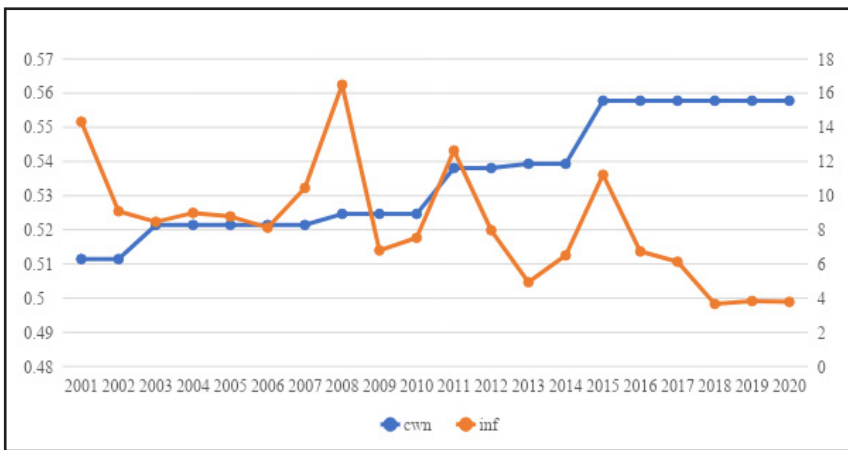
gmt2 – GMT-sub-index of economic independence,

gmt21 – there is no automatic procedure for issuing loans to the government,

gmt22 – the central bank does not participate in the initial placement of government securities.

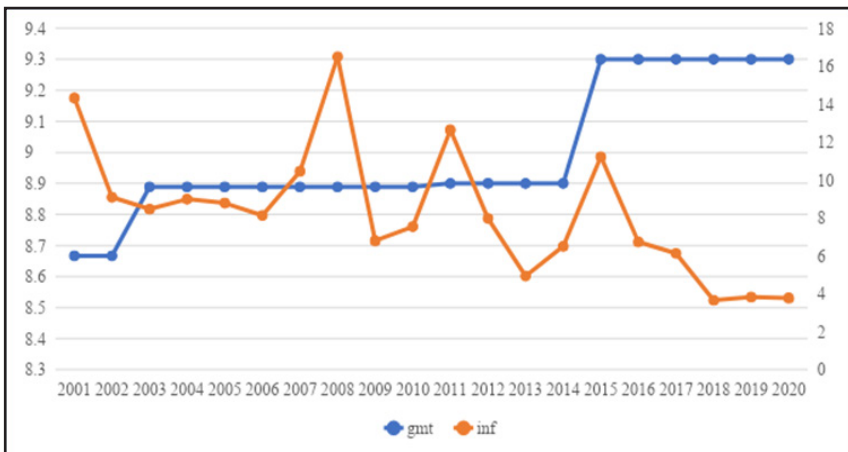
The increase in these indicators in some time intervals was accompanied by a decrease in inflation. However, there is no statistically significant negative relationship between the inflation rate and the CWN and GMT indices or their sub-indices for all intervals.

Figure 5. *CWN index (left axe) and inflation rate (right axe) in post-Soviet countries*



Source: The authors' compilation and the World Bank (2022)

Figure 6. *GMT index (left axe) and inflation rate (right axe) in post-Soviet countries*



Source: The authors' compilation and the World Bank (2022)

Table 2. *Pair correlation coefficients for indicators of central banks of developed countries on 5-year, 10-year and 20-year intervals*

	inf01-05	inf06-10	inf11-15	inf16-20	inf01-10	inf11-20	inf01-20
cwn	0.58*				0.46		0.40
cwn2			0.60*	0.47*		0.56*	
cwn22			0.58*	0.49*		0.58*	
cwn4	0.44						
cwn47	0.62*						
gmt	0.42						
gmt1	0.44						
gmt13	0.42				0.43		0.42
gmt24			0.41				

Source: The authors' calculations

Index coefficients *gmt*, subindices *gmt15* and *gmt2*, which are significant at the 5% level in the first 5-year interval from 2001 to 2005, turn out to be insignificant at the subsequent second, third, and fourth 5-year intervals. They are also not significant at the 5% level over the last 10-year interval from 2011 to 2020 and at the full interval from 2001 to 2020. We believe that this is due to relatively high inflation in the first 5-year interval compared to subsequent intervals.

Developed countries

Also, as for the post-Soviet countries, correlation coefficients were calculated for 5-year intervals 2001-2005, 2006-2010, 2011-2015 and 2016-2020, for 10-year intervals 2001-2010 and 2011-2020, and finally, for the full interval 2001-2020 according to the averaged data for each interval. The results are shown in Table 2.

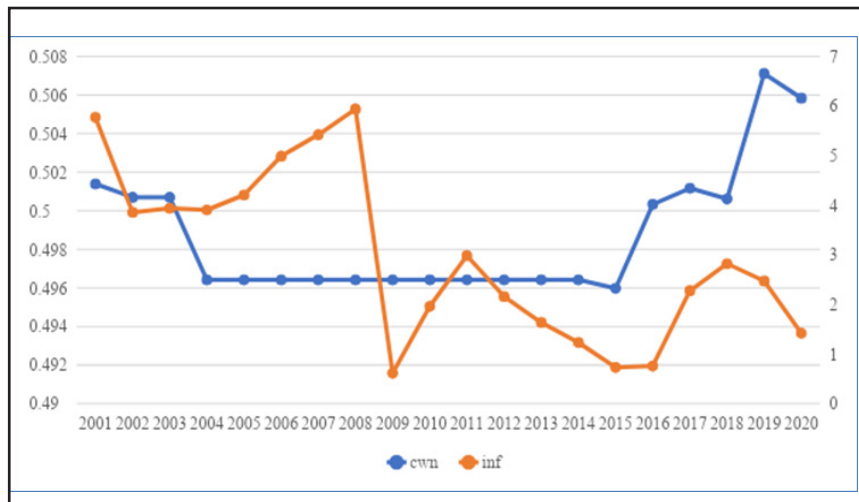
In Table 2, all correlation coefficients for developed countries are positive, while in Table 1, for post-Soviet countries, all coefficients are negative. In other words, the increase in the independence of central banks, which is associated with an increase in the CWN or GMT indices and their sub-indices, for developed countries, unlike the post-Soviet countries, did not have a downward effect on inflation over time intervals of 5, 10 and 20 years. This seems counterintuitive.

Figures 7 and 8 show that in the first five years, inf and cwn and inf and gmt move in the same direction in most cases. This corresponds to the positive signs of the correlation coefficients in the inf01-05 column of Table 2. In the remaining columns, inf06-10, inf11-15, and inf16-20, the cells corresponding to cwn and gmt are empty, i.e., their correlation coefficients are insignificant at the 10% level.

Here we put forward the following hypotheses: 1) CBI has a downward effect on the inflation rate, and the direction of movement of the CBI index is not significant; 2) the downward effect of CBI on inflation weakens when inflation is low, and it is more affected by other factors.

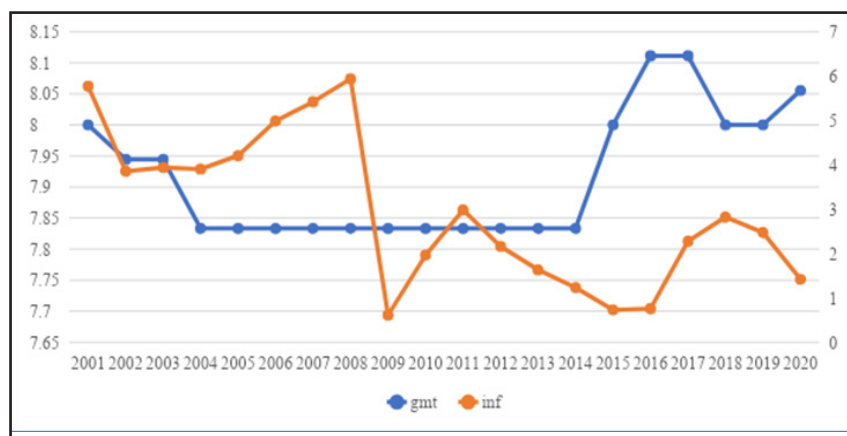
For developed countries, at the beginning of the first five-year interval, the inflation rate was at the level of 6% (Figures 7 and 8). Sufficiently high values of *cwn* and *gmt* contributed to its decrease. Then the impact of other factors, including the 2007-2009 Global Financial Crisis, led to spikes in the inflation rate. Since 2009, the average inflation rate has been in the range of 1 to 3 percent. There was no further decrease in the inflation rate below this corridor. The impact of COVID-19 can explain some decrease in the inflation rate in 2019 and 2020.

Figure 7. *CWN* index (left axe) and inflation rate (right axe) in developed countries



Source: The authors' compilation and the World Bank (2022)

Figure 8. *GMT* index (left axe) and inflation rate (right axe) in developed countries



Source: The authors' compilation and the World Bank (2022)

Hence, it can be argued that the effect of central bank independence on inflation weakens as inflation falls.

For developed countries, the average inflation rate in 2009–2020 was low at 1–3 percent, although *cwn* and *gmt* increased markedly, and the variations were not small, around 2 percentage points (Figures 7 and 8).

Thus, the CBI contributes to the formation of a downward trend for inflation, which may deviate from it under the influence of other factors, such as the global financial crisis, pandemic, and shocks to the global oil price.

Developing countries

The initial sample contains 87 developing countries for which the latest revisions of central bank laws are found. However, it turned out to be problematic to find previous editions of these laws on the Central Bank during the entire time interval 2001–2020. Therefore, for further analysis, from the general sample of developing countries, data were used for 32 countries for which the latest version of the law on the Central Bank was no later than 2010. For these securities, the values of the CWN, GMT and their sub-indices are unchanged throughout the entire interval from 2011 to 2020. Table 3 shows the pair correlation coefficients for developing countries based on averaged data at 5-year intervals for 2011–2015, 2016–2020, and at a 10-year interval for 2011–2020. Only those coefficients are shown, the significance of which is not lower than 10%, and coefficients significant at the 5% level are marked (*).

As can be seen in Table 3, for developing countries, the correlation coefficients of the *cwn* or *gmt* indices with inflation rates are not significant at the 5% level and even at the 10% level at all time intervals. Only some sub-indices have non-zero values. This means that the correlation coefficients are insignificant for the rest of the sub-indices, even at the 10% level. These sub-indices did not significantly correlate with the inflation rate at any time. This means that for developing countries, according to Table 3, we can also conclude that there is no statistically significant general relationship between the CWN or GMT indices and their sub-indices and the inflation rate in all years from 2011 to 2020.

Table 3. *Pair correlation coefficients for indicators of central banks of developing countries on 5-year and 10-year intervals*

	infl11-15	infl16-20	infl11-20
cwn			
<i>cwn21</i>	-0.33	-0.54*	-0.57*
gmt			
<i>gmt11</i>	0.38*		
<i>gmt13</i>	0.43*		
<i>gmt16</i>		-0.44*	-0.45*

Source: The authors' compilation and the World Bank (2022)

However, subindex *cwn21* “the institution engaged in the development of monetary policy” had a significant negative relationship with the inflation rate at all considered time intervals. Subindex *gmt16* “No need to approve the main directions of monetary policy by the government” also had a negative significance at 5% level of relationship with the inflation rate in the last 5-year interval and over the entire 10-year interval. At the same time, sub-indices *gmt11* “the governor of the central bank is appointed without government intervention,” and *gmt13* “the board of the central bank is appointed without the

participation of the government” in the first 5-year interval from 2011 to 2015 showed a significant 5% level but has a positive relationship with the inflation rate.

Binary Choice Models. Probit-model

We define the variable *infr5_m1* as equal to 1 if the inflation rate *infl120* is greater than 5 percent or less than minus 1 percent, and equal to zero in other cases. The Probit model makes it possible to estimate the probability that central banks will keep the inflation rate within the range from minus 1 percent to 5 percent. Table 4 shows the results of evaluating the Probit model with the explanatory variable *cwn*. The p-values show that both the coefficient of this variable and the constant are insignificant even at the 10% level. The same result can be obtained for a linear regression model.

Table 4. *Probit-model. Dependent variable infr5_m1*

Variable	Coefficient	P-value
const	0.69	0.35
cwn	-2.23	0.14

Source: The authors' compilation

The Probit model, estimates for which are given in Table 5, differs from the previous model only in that the variable *cwn2* is chosen as the explanatory variable. For this model, the coefficient at the variable *cwn2* is negative and significant at the 5% level. This means that an increase in *cwn2* reduces the probability that the inflation rate will surpass the interval [-1, 5].

Table 5. *Probit-model. Dependent variable infr5_m1*

Variable	Coefficient	P-value
const	0.54	0.171
cwn2	-1.97**	0.012

Source: The authors' compilation

The result of trying to narrow the range from minus 1 percent to 3 percent is shown in Table 6. The dependent variable *infr3_m1* takes on a value of 0 within this interval and a value of 1 outside of it. As can be seen, both the constant and the coefficient at the explanatory variable *cwn2* turn out to be statistically insignificant. It turns out that the newly chosen interval for the inflation rate is too narrow to keep inflation within its limits with an acceptable probability.

Table 6. *Probit-model. Dependent variable infr3_m1*

Variable	Coefficient	P-value
const	0.79	0.200
cwn2	-1.43	0.215

Source: The authors' compilation

Table 7 presents the results of the evaluation of the Probit model for the dependent variable *infr5_m1* and the explanatory variable *gmt21*, for which the coefficient turned out to be negative and significant at the 1% level.

Table 7. Probit-model. Dependent variable *inftr5_m1*

Variable	Coefficient	P-value
const	0.55	0.130
gmt21	-1.20***	0.004

Source: The authors' compilation

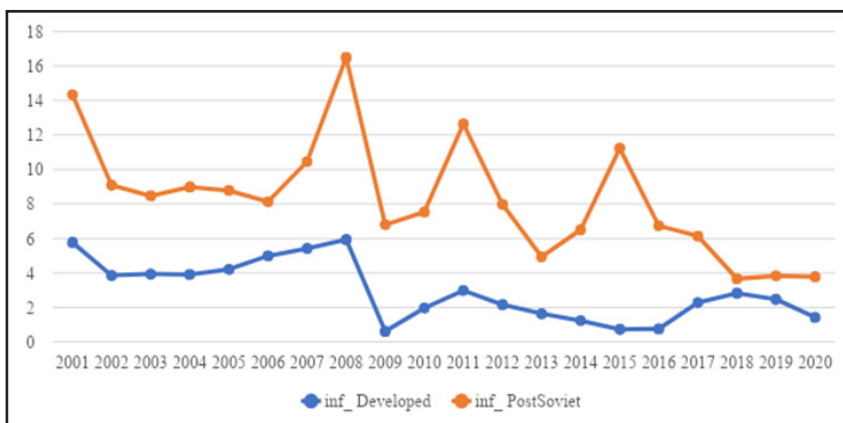
Discussion

Let's pay attention to the signs of the correlation coefficients in Tables 1-3. For the post-Soviet countries in Table 1, all correlation coefficients over time intervals are negative, including coefficients that are significant at least at the 10% level.

A completely different picture is for developed countries. In Table 2, all correlation coefficients calculated from averaged data over time intervals are positive. It turns out that the increase in the corresponding sub-indices created conditions for increasing of inflation.

For developing countries in Table 3, the situation is intermediate between post-Soviet and developed countries. It has both positive and negative coefficients.

Figure 9 shows the average inflation rate in post-Soviet and developed countries for 2001-2020. On average, inflation in developed and post-Soviet countries was declining, and its rate in post-Soviet countries was several times higher than in developed countries.

Figure 9. Average inflation rate in post-Soviet and developed countries

Source: The authors' compilation and the World Bank (2022)

The above differences in the signs of the coefficients in Table 1 for the post-Soviet countries and in Table 2 for developed countries can be explained by the difference in average inflation rates in these countries and suggest that the relationship between central bank independence and inflation weakens as it decreases.

CONCLUSION

For 10 post-Soviet countries, 18 developed countries, and 32 developing countries, we tested the hypothesis of a negative relationship between the independence of central banks and inflation based on average data over 5-year, 10-year, and 20-year time intervals. Although several authors favor this hypothesis, other researchers question it. The CWN and GMT indices are most widely recognized as criteria for the independence of central banks.

Econometric analysis has shown the absence of a general negative relationship between these indices and their sub-indices and inflation in certain years in developed, post-Soviet, and developing countries. Moreover, in some cases, on the contrary, their positive relationships were revealed.

The constructed tables of their pair correlation give a complete picture of the relationship between these indices, their sub-indices, and inflation rates. Although they showed the presence of a negative correlation in some cases, in general, it should be recognized that there is no statistically significant negative impact of the independence of central banks, measured by the CWN and GMT indices and their sub-indices, on inflation in developed, post-Soviet and developing countries, which is true throughout the entire time interval.

Based on the result of the binary choice model, we can conclude that high values of the CBI indices and their sub-indices help to keep inflation in a certain corridor.

For post-Soviet countries, all significant coefficients in Table 1 with indices or sub-indices CWN and GMT are negative, i.e. their increase helps to reduce the inflation rate. And for developed countries, such coefficients in Table 2 are all positive. This can only be explained by the fact that in the post-Soviet countries, the inflation rates in the considered time interval were significantly higher than in developed countries.

This fully confirms the main conclusion of the study based on quantitative assessments: the impact of central bank independence on inflation weakens as inflation decreases. Moreover, the results of this study allow us to conclude that the influence of central bank independence is manifested in the long run, and if inflation is high, CBI reduces it, and if inflation is low, CBI helps to keep inflation at a low level.

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TECHNOLOGICAL RISE OF CHINA

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ABSTRACT

This paper reviews China's technological development. It shows that the success of China's technological policy came from both international cooperation at national and firm levels and state support measures. The country's innovation development model is based on the central role of the government. Using foreign technologies, investments, and expertise, China created its own technology companies, which transformed into global corporations. Through investments in research and development and talent cultivation, China narrowed the technology gap with many developed countries, including the United States. Despite existing tensions, in particular, in the technology sector, United States corporations are interested in strengthening cooperation with China due to its growing market. This type of cooperation will further improve China's competitiveness and accelerate its technological development.

Keywords: China, Technology, Innovations, Robotics, Research and Development.

INTRODUCTION

The political and economic growth of China is one of the frequently discussed issues among experts. The historical transformation of China's policies, especially in terms of economy and technology, has led to significant achievements. China pays special attention to the development of innovations, utilizing tremendous resources and implementing a special support policy. China's government has played a key role in the country's technological rise. The country's transformation from a manufacturing powerhouse to a technology hub has intensified global competition, as innovations remain crucial for economic and political dominance. These changes have led to technology wars between the United States (US) and China, making innovation policies a developmental priority.

Hence, this paper aims to review China's technological policies and assess its progress in the development of innovations using statistical and comparative analysis. The paper showcases the early stages of China's technology development policy, which were mainly focused on cooperation with other countries. Later, following significant changes in China's foreign economic policy, the country began to attract international businesses, establish joint ventures, and capitalize on this opportunity as a key source of technology. Simultaneously, the country's government made substantial efforts to create local tech companies as an integral part of the operations of foreign businesses. Many of these companies transformed into technology giants and top global corporations. Utilizing data from the World Bank and the World Intellectual Property Organization (WIPO), the article demonstrates China's successful transformation into a technology hub. It's noteworthy that the country managed to narrow the technology gap with leading nations such as the United States, Germany, and Japan. Moreover, China transformed into one of the key markets for transnational corporations (TNCs) with production facilities in China. These TNCs, particularly those from the US, are interested in strengthening cooperation with China despite existing restrictions, thereby contributing to China's competitiveness. This will have long-lasting consequences for the global economy.

OVERVIEW OF CHINA'S TECHNOLOGICAL POLICY

Technology plays a key role in determining competitiveness at both the company and national levels. It improves productivity and contributes to the development of new products and services. Technological development depends on many factors, particularly human capital and investments in research and development (R&D). Governments play a pivotal role in the technological advancement of their businesses by providing different incentives and implementing policies to foster innovation. For instance, governments may offer tax breaks or directly fund the innovation activities of local businesses. Moreover, they can offer benefits to transnational corporations to attract their branches. These policies result in the transfer of technologies, knowledge, expertise, and skills, which have a positive impact on the local business environment. TNCs contribute to R&D and make local markets more competitive. The presence of international businesses can create local competitors and contribute to employment with high productivity.

China's experience shows that improving technological capacity requires the

implementation of a broad range of measures. China relied on international trade, foreign direct investment, migration – especially foreign education of students and workers – international research collaboration, and integration into global value chains. External actors played a pivotal role in China’s technological development and its rise. Historically, China has placed special emphasis on technology development through cooperation with foreign countries. In the 1950s, the former Soviet Union served as the primary source of technology for China. Following tensions between the two nations in the early 1960s, Western countries and Japan emerged as the main technology suppliers in heavy industry. With the initiation of the open-door policy, China began diversifying its technology transfer through the acquisition of turnkey plants and equipment, as well as disembodied technology encompassing licensing, technical consulting, technical services, and coproduction. In the 1980s, China reevaluated its policy and initiated reforms within its science and technology system. The country began relying on the acquisition of foreign technology as a primary strategy for technological sourcing. During the 1990s, the country introduced incentives for firms to establish R&D units. In 2006, China designated indigenous innovation as a strategic priority and started shifting its focus on innovation from externally acquiring knowledge to internally creating knowledge. The government encourages Chinese firms to invest in and acquire foreign technology companies abroad. Research institutions began establishing technology companies, often as independent incorporated entities. Many of these spin-off technology companies achieved significant success, prompting the government to incorporate large public R&D institutions as units within large business enterprises. For instance, Lenovo took over the management of the Institute of Computing Technology of the Chinese Academy of Science in 1995, approximately 10 years after Lenovo spun out from that Institute (Fu et al., 2016).

China’s policy to attract foreign companies and enhance its production capacity has proven successful. Apple, which commenced iPhone manufacturing in China in 2007, played a substantial role in driving innovation within the country. During that period, Chinese firms had limited capacity to produce the internal components of iPhones. China’s contribution to production primarily encompassed labor and accounted for less than four percent of the value-added costs. As time progressed, Chinese workers and companies gained experience and expertise, leading to a significant shift in their collaboration with Apple. By 2018, Chinese firms were responsible for manufacturing numerous sophisticated components within iPhones, including acoustic parts, charging modules, and battery packs. The share of Chinese tech firms in the device’s value-added costs exceeded 25%. China’s ascent in both manufacturing and technology was anchored in industrial clusters, which were established with the assistance of foreign companies. China has greatly accelerated its industrial development by directly learning from foreign firms. It’s important to note that, in China, innovation has emerged not only from universities and research labs but also through the learning process inherent in mass production itself, particularly in the capacity to manufacture products. The most important factor in China’s burgeoning tech industries is its manufacturing ecosystem. Over the past two decades, China has developed an unparalleled production capacity for tech-intensive industries, with extensive government support playing a key role. This policy has been successful in nurturing China’s giant technological companies. For instance, China is currently recognized as a solar superpower due to its

solar panels being not only the most cost-effective on the market but also the most efficient. The significant reduction in solar costs over the past decade has been propelled by manufacturing innovations in China. It's worth noting that CATL, a Chinese company established in 2011, has become the largest battery manufacturer globally. The company collaborates with major car manufacturers such as BMW, Tesla, and Volkswagen (Wang, 2023). As of July 2023, CATL boasts a market capitalization of \$135.27 billion, making it the world's 93rd most valuable company. Table 1 presents the market capitalization dynamics of CATL.

China developed various strategies to promote technological growth within its economy. In 2015, the country's government introduced its "Made in China 2025" strategy, aimed at achieving self-sufficiency in high-tech industries like telecommunications and artificial intelligence (AI). Additionally, authorities unveiled an economic plan called "dual circulation," with the intention of boosting both domestic and foreign demand for Chinese goods. Once again, the government played a pivotal role in the subsequent stages of China's technological transformation. To realize its objectives, the government utilized public-private partnerships, offered direct subsidies to private companies, and provided support for state-backed enterprises. China invested billions of to ensure it comes out ahead in the race for technological supremacy.

Table 1. *The market capitalization of the CATL, billion USD*

Year	Market capitalization
2018	\$23.55
2019	\$33.63
2020	\$125.40
2021	\$215.08
2022	\$137.77
2023	\$135.27

Source: <https://companiesmarketcap.com/catl/marketcap/>

In 2017, Beijing unveiled plans to become the global leader in artificial intelligence by 2030. It is anticipated that China will achieve this goal sooner, given that over the past decade, the country has invested at least \$10 billion in quantum technology, approximately ten times the investment of the United States government. A primary focus for the Chinese government is attaining leadership in semiconductor manufacturing by 2030. Currently, it trails behind the United States and its aligned counterparts, Taiwan and South Korea. Nevertheless, Chinese companies command 85% of the processing of rare-earth minerals used in these chips and other critical electronics, providing a significant leverage point over their competitors. China may employ its control over rare-earth minerals as a political tool, leveraging technological development and the capacity to supply technological products abroad to gain a heightened political advantage. Many developing countries rely on Chinese-supplied infrastructure, and countries in Africa, where Huawei's components constitute about 70% of 4G networks, have been reluctant to criticize Chinese human rights violations. Similarly, Taiwan's preeminence in semiconductor manufacturing acts as a

robust deterrent against invasion, as China has limited interest in jeopardizing its primary source of microchips (Schmidt, 2023).

The United States and China are strategic competitors. China's economic and political ascent is eroding the global position of the United States. The primary strategy to counteract China's rise is by competing in semiconductor manufacturing. The US policy's objective is to hinder China's access to critical technologies and limit its capacity to acquire innovations from Western nations. In August, the Biden administration enacted the CHIPS and Science Act, an industrial policy with a value of \$52.7 billion, designed to enhance research, strengthen supply chain resilience, and rejuvenate semiconductor production within the United States. Subsequently, in October, the administration introduced the most comprehensive restrictions to date on China's chip manufacturing sector. This new set of restrictions restricts the sale of advanced chips to China, depriving China of the computing power required for large-scale artificial intelligence training. Moreover, these restrictions expand further to encompass industries supporting the semiconductor supply chain, thereby cutting off both US expertise and the components needed for the tools used in chip manufacturing. Following the US' announced policy on global restrictions and export control, China released the 20th Party Congress report, which identified the ongoing trade conflict with the US as the "economic main battlefield" and pledged to "achieve high-level technology self-strength and self-independence." In the perspective of leader Xi Jinping, China has no alternative but to transition from a market-based innovation system to a security-based national innovation plan. However, the semiconductor drive in China is likely to result in enduring economic distortions due to the shortcomings of China's management system. For instance, innovation incentives for local officials may perpetuate China's investment-led economic model, which has resulted in various issues, including corruption, local debt, and a real estate crisis. Additionally, nurturing national champions can diminish the global competitiveness of Chinese firms. Entrepreneurs might shift their focus away from innovation and research to maintaining their government connections and securing state support. Subsidies and policy loans tempt high-tech firms into soft budget constraints, ultimately leading to a decline in productivity and market competitiveness (Li, 2023).

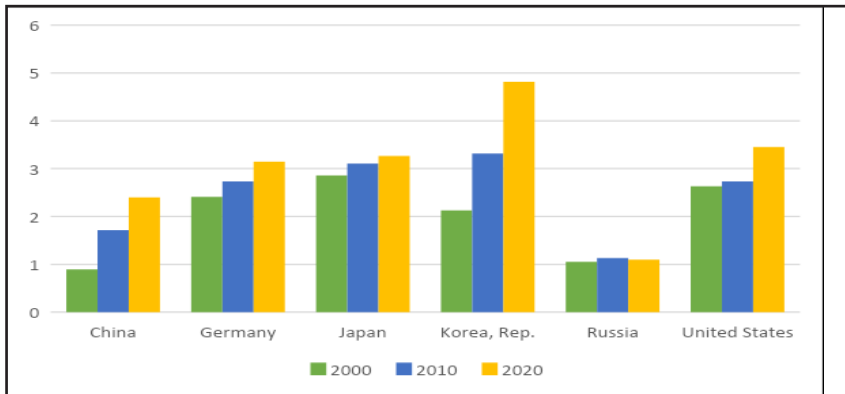
Despite the efforts of the US government, there are cases where companies from China have successfully acquired important technologies from the US. For instance, Chipuller, a startup in China's southern tech hub Shenzhen, acquired what is known as chiplet technology (Silicon Valley startup zGlue's 28 patents in 2021). Chiplet technology is a cost-efficient method for packaging groups of small semiconductors to create a powerful integrated unit capable of driving various applications, from data centers to home gadgets. These chiplets, which can vary in size from that of a grain of sand to larger than a thumbnail, are combined through a process known as advanced packaging. This technology has gained increased acceptance within the global chip industry in recent years, as the cost of chip manufacturing escalates in the race to create transistors so tiny that they are measured in terms of atoms. China's expenditure on chip packaging equipment surged to \$3.3 billion in 2021 from its previous peak of \$1.7 billion in 2018, although it decreased to \$2.3 billion in 2022 due to the chip market downturn. Since early 2021, research papers on chiplets have begun to appear, authored by researchers from the Chinese military People's

Liberation Army (PLA) and the affiliated universities it oversees. Moreover, state-run and PLA-affiliated laboratories are exploring the utilization of chips produced through domestic chiplet technology. It's noteworthy that Huawei has been actively filing chiplet patents. The company published over 900 chiplet-related patent applications and grants last year in China, a significant increase from the 30 filed in 2017. Over the past two years, there have been more than a dozen announcements for new factories or expansions of existing ones from companies employing chiplet technology in manufacturing across China's tech sector. These announcements represent a total investment of over 40 billion yuan. US lawmakers have criticized and called for reforms in the Committee on Foreign Investment in the United States, a powerful Treasury-led committee that reviews transactions for potential threats to US security. This committee did not intervene in the mentioned deal (Reuters, 2023). Thus, China's technological policy encompasses a wide array of measures, with the state playing a pivotal role. China's policy also promotes international collaboration and the attraction of transnational corporations (TNCs), which has aided in the creation of industrial zones and establishment of technology hubs. In the wake of technology-based tensions with the US, China has increased its support for local firms. Nevertheless, the acquisition of foreign technologies and startups remains both a priority and a significant aspect of the country's technological development.

COMPARATIVE ANALYSIS OF CHINA'S TECHNOLOGICAL PROGRESS

Innovative leaders at both the corporate and national levels tend to invest heavily in research and development. In 2014, the United States, Japan, and Germany were the largest three rich economies and invested more than 2.7% of their GDP in research and development, which was about three times as much as most developing countries. Transition to a more innovative economy needs a commitment to research and investment spending as well. In 1991, China invested 0.7% of its GDP in research and development. This figure was notably lower than that of technological leaders. In fact, due to China's competitiveness being primarily rooted in the utilization of its extensive cheap labor force, domestic research and development as well as innovation were not considered crucial during that period. Another indicator of innovation efforts is the proportion of researchers within the population. In 1996, China had 443 researchers per million people. In comparison, the corresponding numbers for the United States, Japan, and Korea were 3,122, 4,947, and 2,211 per million, respectively (Wei et al., 2017). By 2020, there had been significant changes in research and development investments in China. In that year, the country's investment indicator stood at 2.4% of GDP (Figure 1). While China remains behind the global leaders, it is making rapid strides in catching up. Although it trails behind countries like Germany, Japan, the Republic of Korea, and the United States, it surpasses Russia, which has not demonstrated any notable progress in research and development expenditures. Notably, the Republic of Korea stands as a global leader, with its indicator surpassing 4.8% of GDP.

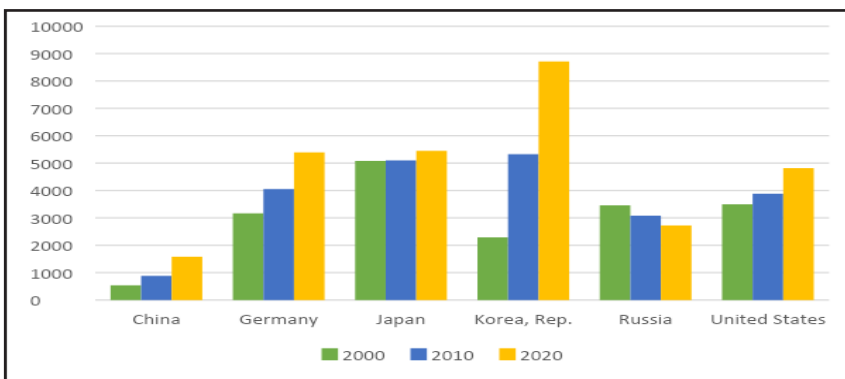
Figure 1. *Research and development expenditure (% of GDP)*



Source: Compiled by the author based on data from the World Bank (2023a).

The growth in the number of researchers reflects China’s technological progress. In Figure 2, China lags behind all the countries presented. However, the details are crucial. The number of researchers engaged in R&D in China increased from 539 in 2000 to 1585 in 2020 (with 885 in 2010) per million people (as shown in Figure 2). Thus, during the reported period, the number of researchers increased by more than 2.9 times. In the same timeframe, the number of researchers increased by 1.7 times in Germany, by 1.07 times in Japan, by more than 3.8 times in the Republic of Korea, and by 1.38 times in the United States. Russia is the only country that experienced a reduction in the number of researchers in R&D. Furthermore, in comparison to the aforementioned 1996 data, China managed to narrow gaps with all developed countries except the Republic of Korea. For instance, in 1996, the number of researchers in the US was more than 7 times higher than in China. In 2020, this gap had narrowed to a little over three times. The difference between Japan and China decreased from nearly 11.2 times in 1996 to 3.4 times in 2020. However, this gap widened with the Republic of Korea from almost five times to 5.5 times. In 2020, Russia had a number of researchers 6.4 times higher than China. But in 2020, this gap had narrowed to 1.7 times. Hence, China has demonstrated significant progress in terms of the number of researchers.

Figure 2. *Researchers in R&D (per million people)*



Source: Compiled by the author based on data from the World Bank (2023b).

In 2022, China ranked eleventh in the Global Innovation Index, marking one of the country's most significant achievements among 132 countries. Switzerland, the United States, and Sweden secured the top three spots in terms of innovation. The list of top 10 countries also included other Asian nations like the Republic of Korea (ranked 6th) and Singapore (ranked 7th). Back in 2015, China held the 29th position out of 141 countries, whereas the three most innovative countries were Switzerland, the United Kingdom, and Sweden.

What factors have determined China's progress and its recent jump in innovation indices? Table 2 illustrates China's advancements in key indicators that have contributed to the country's technological rise. China has enhanced its positions in research and development, with an increased gross expenditure on R&D. The country's corporations are actively supporting its technological progress.

Table 2. *Global innovation ranking of China*

	2015	2022
Overall index	29	11
Research & development	21	8
Researchers, FTE/mn pop.	47	48
Gross expenditure on R&D, % GDP	17	13
QS university ranking, average score top 3	11	3
ICT access	77	61
ICT use	71	39
GERD performed by business, % of GDP	13	12
GERD financed by business, %	3	3
University/industry research collaboration	31	5
State of cluster development	23	2
GERD financed by abroad, %	89	77
High-tech imports less re-exports, % total trade	8	5
Research talent, % in businesses	na	15
Domestic resident patent app./bn PPP\$ GDP (Patents by origin/bn PPP\$ GDP for 2022)	1	1
Scientific & technical articles/bn PPP\$ GDP	53	39
Citable documents H index	16	11
Growth rate of PPP\$ GDP/worker, % (Labor productivity growth, % for 2022)	1	1
High-tech exports less re-exports, % total trade	1	4
Creative goods exports, % total trade	1	1

Source: Compiled by the author based on data from Cornell University, INSEAD, and WIPO (2015) and WIPO (2022).

In 2022, China ranked third in terms of global corporate R&D investors. During the same year, corporate R&D investments reached \$93.8 billion. In the QS university ranking, China improved its position from 11th in 2015 to third in 2022. However, China was unable to enhance its position in terms of the number of researchers. Changes in ICT access and ICT use indicators indicate that China has also improved its technological infrastructure. In terms of university/industry research collaboration, China ranked second in 2022, a notable improvement from its 2015 position of 31st. China is also one of the leading countries in startup financing. In 2022, the country ranked 16th in terms of received venture capital and 31st in venture capital investors. China places special emphasis on the development of manufacturing, which it utilizes for testing innovations and

technology. China's domestic industry remains highly diversified, ranking 2nd in 2022. The substantial level of diversification allows for increased high-tech manufacturing, in which the country ranked 14th in 2022.

Over the past decade, the number of high-tech enterprises in China has risen from less than 40,000 to 400,000. In 2022, investment in high-tech industries in China surged by 18.9% year on year. Through investments in education, research and development, China has cultivated a multitude of highly skilled and motivated professionals who are at the forefront of innovation (Xinhua, 2023). As a result, China has made significant progress in terms of innovation development, substantially enhancing its global position and emerging as a leader in various aspects. These positive changes will enhance China's global competitiveness and further escalate the rivalry between technology powers.

PERSPECTIVES OF CHINA'S TECHNOLOGICAL DEVELOPMENT

China's global ambitions necessitate new approaches to the management of technological sectors. Recently, the country restructured its Ministry of Science and Technology and established a potent Central Science and Technology Commission to ensure more direct oversight by the Chinese Communist Party over the ministry. This change acknowledges that competing in technology with the United States demands direct supervision from the highest echelons of the party. According to Chinese President Xi Jinping, the enhancement of integrated national strategies and strategic capabilities is pivotal to China's aspiration of becoming a global power. By 2049, China aims to emerge as a global leader in three strategic technologies: space, AI, and quantum communications and computing, which are regarded as China's "new or critical infrastructure." China plans to invest approximately \$14.7 billion in AI in 2023, accounting for about 10% of global investment. By 2026, this figure is projected to reach around \$26 billion. China demonstrated its quantum communications lead to the world in 2017 when Chinese scientists transmitted entangled photons from the world's inaugural quantum communication satellite, Micius, launched in 2016. The fusion of space, AI, quantum computing, and communications is propelling China into a significant technological powerhouse (Goswami, 2023).

The US technology companies are interested in strengthening cooperation with China despite the existing tensions between the two countries. In 2023, Bill Gates, the co-founder of the US tech giant Microsoft; Elon Musk, co-founder of the electric vehicle front-runner Tesla; Intel CEO Pat Gelsinger; Tim Cook, CEO of Apple; and Cristiano Amon, CEO of Qualcomm, visited China, where they held meetings with Chinese government officials, including Xi Jinping. As the Chinese market becomes less accessible, these visits aim to maintain the positions of these companies. The US technology companies still rely crucially on China for a significant portion of their sales, as 17 of the top 100 global companies in terms of sales in China during the most recent fiscal year were US tech-related companies. Apple was the global company with the highest sales in China in 2022, amounting to nearly \$70 billion. Greater China remains Apple's second-largest source of revenue, following its home market. Apple's greater China revenue surged by 43% to \$74.2 billion in fiscal year 2022 from \$51.9 billion in fiscal year 2018. Qualcomm, a major US chip company, depends on

China for over 60% of its sales. In 2022, Tesla earned 22% of its total sales in China, up from 8% in 2018. Eight of the companies most dependent on China for sales were in the semiconductor sector – the area where the conflict between the US and China has been most severe. LinkedIn, Amazon.com, and Airbnb are experiencing lower revenue growth and planning to close their businesses in China. The US chip and semiconductor manufacturing companies are experiencing a significant reduction in revenues following the US tech restrictions. For instance, the US-based chip-equipment company Lam Research expects annual sales in 2023 to fall by \$2 to \$2.5 billion due to US restrictions. The US and some other Western nations have also moved to ban the use of Huawei and ZTE 5G equipment in their communications infrastructure. Experts predict a gradual decline in the US tech industry's dependence on China as many companies, including Apple and Google, are looking to move parts of their supply chains away from China and into other Asian countries (Tanaka and Li, 2023).

Another important direction in which China puts substantial effort is the development of robotics. The benefits of robot adoption in manufacturing include safety, speed, consistency, perfection, and higher levels of productivity, which can improve the competitiveness of firms. Robotic automation also helps create jobs in manufacturing, particularly in engineering, robot manufacturing, and systems integration (Universal Robots, 2022). However, robots can have displacement effects, and industrial robots may negatively impact jobs and wages. The impact of robots varies by region and industry. Estimates show that for every robot added per 1,000 workers in the US, wages decline by 0.42%, and the employment-to-population ratio goes down by 0.2 percentage points. Moreover, adding one more robot in a commuting zone (geographic areas used for economic analysis) reduces employment by six workers in that area (Brown, 2020). However, robotization and automation are among the key trends in the global economy. According to the 2022 McKinsey Global Industrial Robotics Survey, automated systems will account for 25% of capital spending over the next five years. Industrial-company executives expect to see benefits in output quality, efficiency, and uptime. It is worth noting that primary challenges to robot adoption include the capital cost of robots and companies' general lack of experience with automation (McKinsey & Company, 2023).

Annual sales of robots in China have risen dramatically. In 2000, sales amounted to a mere 380 units (0.4% of the world total). China's share rose to 3.7% of annual global sales in 2005 and 12.4% in 2010. In 2016, sales further rose to 87,000 units, accounting for about 30% of the global market's 294,000 units. China became the country with the largest operational robot stock in 2016, with 339,970 operational units (19% of the world's total). The top industries in China for robot adoption are automotive (accounting for 44.5% of all manufacturing robots), electronics (24.7%), metals (13.9%), plastics and chemicals (11.5%), and food and beverages (2.9%). In 2012, China produced about 5,800 robots. By 2017, the number of robots produced in China annually had risen more than 20-fold to 131,000. Local (non-foreign) firms manufactured almost 30% of robots. In 2005, the number of robotic firms in China amounted to 221, which increased to 6,478 by the end of 2015 (Cheng et al., 2019).

The industrial robotics market in China achieved robust growth, setting a new record of 243,300 installations in 2021 – a rise of 44% compared to the

previous year. Growth is evident across all industries, with the electrical and electronics sector being the dominant one, experiencing a 30% increase to reach 81,600 installations. The automotive industry also displayed a strong recovery, primarily driven by electric vehicle manufacturing in China. It saw an 89% rise in 2021 with 50,700 installations (International Federation of Robotics, 2023a).

China's massive investment in industrial robotics has elevated the country to a top ranking in robot density, surpassing the United States for the first time. The ratio of operational industrial robots to the number of workers reached 322 units per 10,000 employees in the manufacturing industry. Presently, China holds the fifth position. The world's top five most automated countries in manufacturing are South Korea, Singapore, Japan, Germany, and China. The Republic of Korea achieved an all-time high of 1,000 industrial robots per 10,000 employees in 2021. This figure is more than three times the number reached in China and positions the country as the global leader (International Federation of Robotics, 2023b).

The global rise of China's car industry is a direct result of its successful technological policy. For example, China has significantly increased the sales of its homegrown passenger car brands. Local brands captured 54% of China's wholesale car market in the first six months of 2023, up from 48% a year earlier. This marks the second consecutive time that local brands have surpassed foreign ones on a half-year basis. Wholesale figures include vehicle exports. China's automotive revolution is being propelled by its commanding lead in battery-powered and plug-in hybrid cars. Led by BYD, nine local manufacturers were among China's top 10 bestselling electric vehicle makers in June. Tesla was the only foreign carmaker on the list. Backed by billionaire investor Warren Buffett, BYD ceased producing cars powered solely by gasoline in March of the previous year. The company sold over 1.2 million electric vehicles and plug-in hybrids in China during the first six months of 2023, which is almost double the number from a year earlier. More than half of these were plug-ins. Chinese carmakers are also expanding globally. The country surpassed Japan in the first quarter of 2023 as the largest exporter of vehicles, although about three-quarters of the 1.1 million autos shipped abroad were internal combustion engine models. BYD and state-owned SAIC have announced plans to establish plants in Europe, Asia, and Latin America (Kubota, 2023).

Given China's manufacturing and technological capacities, it will be challenging to compete with China, whose position in the global market will strengthen. Estimates show robust evidence of the displacement effect of China's exports. A 10% increase in China's bilateral exports, on average, leads to approximately a 3.2% reduction, or an average decrease of US\$223,030, in the bilateral exports of a competing product by other countries to third markets (Pham et al., 2022). Therefore, technological self-sufficiency is a priority for China's policy. To achieve its goal of becoming a leading technology power, China will increase support measures for its local businesses and further develop its innovation ecosystem. It is worth mentioning that bilateral cooperation is of mutual interest to both China and foreign technology companies. China will leverage this collaboration to catch up with its competitors and achieve its ambitious goals of technological supremacy.

CONCLUSION

The technological rise of China is the result of successful international cooperation combined with internal efforts to support manufacturing and innovation. Developed countries and foreign companies have played a key role and continue to contribute to China's ascent as a technological power. High levels of expenditure on research and development and talent cultivation have transformed China into one of the leading countries in terms of innovation development. In 2022, China ranked eleventh in the Global Innovation Index, and the country is a global leader in many sub-indices. For instance, China excels in terms of patent applications, labor productivity, and exports of creative goods. Its universities have made significant progress in terms of QS ranking, which bodes well for the accelerated development of innovations. It's important to mention that China has created corporations that dominate global markets. For example, CATL is a key battery manufacturer, and in terms of car manufacturing, China has begun to outperform many traditional leaders, such as Japan.

Technology development is a key priority for China's authorities. The country's innovation development model is centered around the government's pivotal role. Recognizing the significance of global technological and economic competition, the government implements special programs aimed at achieving self-sufficiency in terms of new technologies and innovations. These developments are poised to play a crucial role in the country's future economic growth.

China quickly catches up with its main competitors, such as the United States, which will intensify global competition for markets. It is worth noting that the US and other Western corporations are interested in maintaining and enhancing cooperation with China, relying on China's market as one of the key revenue sources. Sustaining this cooperation will further bolster China's competitiveness and strengthen its position in the global markets. China's experience in implementing technological policies remains valuable for many developing countries.

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Research Article

EUROPEAN UNION'S SANCTION PACKAGES AGAINST RUSSIA: CONTENTS AND IMPLICATIONS

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ABSTRACT

With Russia's attack on Ukraine on February 24, 2022, the European Union began to impose a series of sanctions on the Moscow government. The history of sanctions began with the 2014 annexation of Crimea and is now being expanded to target various industries and individuals. In this context, in the study, the contents of the sanctions implemented and their effects on Russia are discussed. Based on the evaluation of experts in different regions and statistics, it was assumed that the sanctions did not have much effect on stopping the war but were effective in slowing down the country's economy and influencing different sectors.

Keywords: Sanctions, Russia, Ukraine, War, European Union.

INTRODUCTION

Sanctions are understood as prohibitions that one country imposes on another country, specific people, or companies. But this is only one of the varieties of sanctions. Sanctions are punishments for non-compliance with agreements or rules of work. They can be listed as criminal, administrative, disciplinary, property, and international sanctions. International sanctions are collective or unilateral coercive measures (sanctions) applied by states or international organizations to a state that has violated the norms of international law. In other words, an international sanction is a foreign policy measure the purpose of which is to support the maintenance or restoration of peace, international security, democracy, or the rule of law, the observance of human rights or international law, or the achievement of other goals provided for by the Charter of the United Nations (UN) or the common foreign policy and European Union (EU) security policy (Un.org, no date).

The purpose of imposing international sanctions in a narrower sense is to compel third countries or persons subject to sanctions to comply with the norms and principles of international law, make the continuation of the sanctioned activity as costly and inconvenient as possible, or prevent unacceptable actions by the target of the sanctions. International sanctions are imposed against a state, regime, organization, institution, unit, and individual, or in connection with condemned actions (Doxey, 1983; Biersteker and Bergeijk, 2015). International sanctions are imposed by a resolution of the UN Security Council (based on Article 41 of Chapter VII of the UN Charter) (Un.org), a decision and regulation of the Council of the European Union (based on Article 29 of the Treaty of the European Union) (Eur-lex.europa.eu) or by a state.

States prefer different foreign policy tools to use the available and most appropriate options to achieve their goals in international politics. In this context, economic sanctions appear as a frequently preferred foreign policy tool. Moreover, considering the fact that a military effort cannot be made regarding every international relations problem, economic sanction is a useful tool that ensures continuity in the impact on the target country (Sadiroglu, 2022). In terms of approach in the literature, some studies discuss success and failure, the reasons for failure, and the effectiveness of economic sanctions (Tsebelis, 1990; Allen, 2008). According to the experts mentioned, economic sanctions may not always be successful in achieving the intended purpose, but it is a good political tool to punish unlawful behavior, and it is a perfect intimidation for other actors not to act in the same manner.

The main question of the study is what the EU sanctions applied to Russia since 2014 involve and what kind of results they have. In this context, in this study, the contents of the EU sanctions packages applied against Russia, which violate international norms and rules, and their effects on Russia and the Russian economy will be analyzed with the assumptions of various experts and statistical data. The main thesis of the study is that the sanctions imposed on Russia by the EU to stop Russia's war activities in Ukraine continue today, expanding more comprehensively and negatively affecting different sectors of Moscow. While the imposed sanctions are weak in stopping Russia's war activities, on the other hand, they cause serious damage to some sectors of the country such as automobile production and defense, and slow down the development of its economy, making war activities in Ukraine difficult.

The reason for choosing the subject of study is that the EU's sanctions against Russia are a current and important issue, and the contents of each sanction package have been developed and continued to be implemented since 2014. In this context, the study will gain importance in terms of learning how it has affected Russia by analyzing the content of the sanctions packages since 2014 and will contribute to the readers.

CONTENTS OF THE EU SANCTIONS PACKAGES

Since the date Russia declared war on Ukraine, the European Union has announced 11 packages of sanctions against the Moscow administration (see Table 1). The first of the EU's sanctions against Russia began to be implemented in March 2014 (Tass.ru, 2022). The decision of the European Union to apply pressure measures to Russia "if there is no softening in Crimea" was taken at the emergency EU summit held on March 6, 2014. At the same time, negotiations on a visa-free regime and a new basic cooperation agreement were suspended. Subsequently, the EU introduced three sanctions packages against Russia, personal, sectoral, and the Crimean sanctions package. The EU summit in March 2015 decided that restrictions on Russia should remain in effect until the implementation of the Minsk agreements. Sanctions have been extended and expanded periodically. It is worth mentioning that the Minsk agreements were adopted in 2014 and 2015. The text fixed the main measures to resolve the situation in the Donbas and was signed by the Trilateral Contact Group which included representatives of Ukraine, Russia, and the OSCE (Osce.org, 2015).

Table 1. *The EU's Package of Sanctions against Russia*

Date of the Sanctions	Contents of the Sanctions
March 6, 2014	Personal, sectoral, and Crimean sanctions package, negotiations on a visa-free regime, and a new basic cooperation agreement were suspended
February 25, 2022	27 individual and legal persons, including banks and organizations that finance Russia's operations in Donbas, have been blacklisted
February 28, 2022	The assets of the Central Bank of the Russian Federation were frozen. 26 people, including Russian President's press secretary Dmitri Peskov, CEO Igor Sechin, Transneft's chairman Nikolai Tokarev, and insurance company Sogaz, came under the sanctions
March 15, 2022	15 individuals and 9 legal persons, including Roman Abramovich, Chelsea Football Club owner and the director of Channel One, Konstantin Ernst, and organizations such as Rosneft-aero and Rosoboronexport came under the sanctions
April 8, 2022	Imports of coal and other solid fossil fuels from Russia, participation of Russian Federation companies in public procurement in the EU, and transactions with some major Russian banks are prohibited
June 3, 2022	An embargo on oil for six months and oil products for eight months supplied by sea from Russia
July 21, 2022	A ban on direct and indirect imports purchases or transfers if originating in or exported from the Russian Federation
October 5, 2022	Setting a cap price for Russian oil supplies to third countries, export and import restrictions, as well as the provision of information technology and legal services to Russian entities, a ban on crypto wallets for Russians, and dozens of Russians were included in the sanctions list
December 16, 2022	New investment in the mining sector and the supply of drones and other equipment to Russia that can be used by its military forces
February 25, 2023	The anniversary package of sanctions targets those "who play an important role in the continuation of this brutal war"
June 23, 2023	A ban on the transportation of Russian oil through the northern branch of the Druzhba oil pipeline, a restriction on the entry of Russian-registered trucks into the EU, as well as measures against circumventing previously introduced restrictions

Source: Tass.ru, 2022.

In response, Putin imposed restrictions on apples, dairy products, and other goods from Western countries and the government tried to massively reorganize the economy to reduce dependence on imports. He supported tax policies and built the country's sovereign wealth fund into one of the largest in the world. Such a step can help the production of goods such as food. For example, cheese producers not only created an alternative to Italian parmesan cheese but also received very high marks from experts in the field (Eckel, 2022). In this case, it is sometimes possible to see that sanctions can bring benefits to the country rather than harm. The country started to produce the products it imported in its country before the sanctions, and it was able to reach the capacity to respond quickly to the sanctions. But this does not apply to all sectors. For example, since Russia does not produce computer chips for the IT and high-tech industry, it needs the programs and codes of the West. Therefore, the lack of such products seriously affects these sectors (Popova, 2023).

In February 2022, the European Union began to impose sanctions in connection with Russia's recognition of the independence of the Lugansk and Donetsk People's Republics (Lugansk and Donetsk declared independence in April 2014) and Russia's attack on Ukraine. On February 23, 2022, the EU imposed sanctions on 351 deputies of the State Duma of the Russian Federation who voted for the independence of Donbas (they were banned from entering the EU, and their assets were frozen). In addition, 27 individuals and legal persons, including banks and organizations that finance Russia's operations in Donbas, have been blacklisted. The European Union has also restricted access to the community's capital and financial markets by banning European companies from doing business with Lugansk and Donetsk and imposing sanctions on Russia's public debt (Concilium.europa.eu, 2022).

In connection with the start of the war in Ukraine on February 25, 2022, the EU has agreed on a second package of measures. 78 people including Russian President Vladimir Putin and Foreign Minister Sergei Lavrov (who are not banned from entering the EU but their assets can be frozen if found in EU banks), along with Prime Minister Mikhail Mishustin, State Duma deputies supporting the war in Ukraine and members of the Security Council of the Russian Federation, were included in the sanctions list. The EU prohibited state financing of trade with Russia and investment in the Russian Federation. 64 key structures of the Russian Federation have come under financial and technological sectoral constraints. Moreover, the EU has decided to limit the access of the Russian government, the Central Bank of Russia, Alfa-Bank, Otkritie, Rossiya Bank, and Promsvyazbank to the European capital market from April 12, 2022. The supply of products and technologies for oil refining is also prohibited. The sanctions have also affected the visa policy. On February 26, 2022, a ban on new deliveries, maintenance, and insurance of aircraft and a return order for leased aircraft were added to this package of sanctions (Tass.ru, 2022).

On February 28, 2022, the third sanctions package started to be implemented, and the assets of the Central Bank of the Russian Federation were frozen. 26 people, including Russian President's press secretary Dmitri Peskov, CEO Igor Sechin, Transneft's chairman Nikolai Tokarev and insurance company Sogaz, came under the sanctions. On March 2, 2022, the EU removed VTB, Rossiya, Otkritie, Novikombank, Promsvyazbank, Sovcombank, and VEB from the SWIFT international interbank payment system. The decision entered into force on March 12, 2022. On the same day, the EU banned the sale, supply, and export

of euro-denominated banknotes to Russia and investing in projects co-financed by the Russian Direct Investment Fund, banning the broadcasts of Sputnik and RT/Russia Today in the EU. On March 9, 2022, the new statement included 14 businessmen and their family members, as well as 146 parliamentarians who “voted for the approval of the Treaty of Friendship, Cooperation, and Mutual Assistance between the People’s Republics of Donetsk and Lugansk”. The EU has also imposed restrictions on the export of navigation and maritime radio communication technologies to the Russian Federation (Consilium.europa.eu, 2022).

The new sanctions have both immediate effects (mainly in the financial sector and air traffic, disruption of supply chains) and serious pending problems associated with the need to upgrade and repair high-tech equipment used in many production processes and infrastructure. Refusal to supply semiconductors can seriously affect the production of automobiles, the aerospace industry, and telecommunications equipment. For the population, this will mean another round of narrowing the available range of goods and services, a new round of inflation. For the economy, there is a threat of growing technological backwardness and risks of failure of the most important technological systems (if no analogs are found). An important consequence is that Russia finds itself in ever greater international isolation, while its dependence on China is growing (Zaicev, 2022).

On March 15, 2022, the EU started to implement the fourth package of restrictive measures. The list of sanctions has been expanded to include 15 individuals and 9 legal persons, including Roman Abramovich, Chelsea Football Club owner and the director of Channel One, Konstantin Ernst, and organizations such as Rosneft-aero and Rosoboronexport. The EU has also banned from doing business with 12 Russian companies in which state participation is more than 50%. Among them are the industrial company “Oboronprom”, Rosteh, “Gazpromneft” and “KAMAZ”. However, the ban did not include operations strictly necessary for the purchase, import, or transport of fossil fuels, in particular the transport of coal, oil, and natural gas, as well as titanium, aluminum, copper, nickel, palladium, and iron ore from or through Russia to the European Union. At the same time, the EU imposed restrictions on iron and steel products trade with Russia. Delivery of luxury goods, premium perfumes, alcohol, household appliances, and clothing (more than 300 euros per unit) to Russia is also prohibited (Tass.ru, 2022). With this decision, the bloc bans imports of about €3.3 billion (\$3.6 billion) of Russian steel products and investments in the Russian energy sector. Meanwhile, imports and exports of luxury products like caviar and wine were not on the list of sanctioned goods (Szucs, 2022).

On April 8, 2022, the European Council approved the fifth package of sanctions against Russia. Imports of coal and other solid fossil fuels from Russia, participation of Russian Federation companies in public procurement in the EU, and transactions with some major Russian banks are prohibited. The export of semiconductors, machinery, and transport equipment to the Russian Federation, the entry of Russian ships into EU ports, and the activities of shipping companies in the EU are prohibited. Restrictions were also imposed on some individuals (Consilium.europa.eu, 2022). This ban affects 25% of all Russian coal exports, which is about €8 billion. A few days earlier, on April 5, 2022, the head of the European Commission, Ursula von der Leyen, announced that the EU would ban coal imports from Russia for half the amount or €4 billion per year (Rbc.ru, 2022a).

On June 3, 2022, the EU adopted the sixth package, which includes an embargo on oil for six months and oil products for eight months supplied by sea from Russia. Temporary exemptions from the embargo are provided for imports via pipelines for EU countries that are heavily dependent on the Russian Federation and have no alternative, like Hungary and Slovakia, as well as Bulgaria and Croatia. The provision of services to Russian companies in the oil industry is prohibited. In addition, Sberbank, Rosselkhozbank, and Moscow Credit Bank were disconnected from SWIFT (from 14 June 2022), and the broadcasting of Russian state television channels Rossiya-24, RTR-Planeta, and TV-Center was prohibited. The European Union added 65 citizens of Russia and Ukraine and 18 legal entities to the sanctions list (Tass.ru, 2022). The discussion between the EU countries on the sixth package of sanctions lasted almost a month. During the debate, the oil embargo originally proposed by the European Commission was seriously blurred. Oil deliveries through the pipeline were excluded from it, several benefits were given for sea deliveries for individual countries, and the ban on oil transportation from Russia by tankers under the flags of the EU countries was abandoned.

On July 21, 2022, the European Council approved the seventh package of sanctions against Russia, including a ban on direct and indirect imports, purchases, or transfers if originating in or exported from the Russian Federation (Kneppelhout.com, 2022). At the same time, the EU has lifted certain bans on the supply of certain goods to the Russian Federation, such as food and fertilizers, and aviation services. 54 individuals and 10 legal persons are blacklisted, including Rossotrudnichestvo, Russian World Foundation, Gorchakov Foundation for the Promotion of Public Diplomacy (first-time restrictions on cultural and public diplomacy institutions), Sberbank, First Deputy Prime Minister of the Russian Federation Andrey Belousov, Moscow Mayor Sergey Sobyenin. In addition to expanding the EU blacklist, the new sanctions imply a ban on the export of gold from Russia. In 2021, Russia ranked second among the largest producers. The share of the leader - China - is 9% of the total volume of world production. 90% of the gold mined in Russia was exported. In 2021, Russia sold 23.3 tons of gold worth \$1.2 billion to Belarus, Moldova, Kazakhstan, India, Turkey, China (Hong Kong), UAE, and Armenia. In 2022, Switzerland, Germany, and Poland, worth \$0.7 billion and 12.8 tons, and Great Britain, worth \$15.4 billion and 266.1 tons abandoned Russian gold (Tass.ru, 2022a).

On October 5, 2022, EU countries agreed on the eighth package of sanctions against the Russian Federation in response to the annexation of the DPR, LPR, Zaporizhzhia, and Kherson regions. The list of sanctions included setting a cap price for Russian oil supplies to third countries, export and import restrictions, as well as the provision of information technology and legal services to Russian entities, a ban on crypto wallets for Russians, and dozens of Russians were included in the sanctions list (Ec.europa.eu, 2022). The European Union introduces into its legislative system regulation aimed at the actual establishment of marginal prices for Russian oil and oil products for third countries. The design of this restriction is as follows: In general, European companies and organizations are prohibited from providing sea transportation services, as well as technical assistance, mediation, financing, or insurance (reinsurance) in relation to the purchase of Russian oil by third countries. Such a clause (with the dates of entry into force from December 2022 for oil and from February 2023 for oil products) was introduced back in June as part of the sixth package of sanctions. However,

now an exception will be made from it: such services will be allowed if oil or oil products are purchased at a price equal to or below the marginal one.

Experts and market participants had many questions about this mechanism. Since the industry does not have a clear understanding of how it will work. A common place is the fear that the cap price may, on the contrary, lead to an increase in world oil prices.

The EU extended the embargo on imports of goods from Russia, banning more steel products, as well as imports of wood pulp, paper, cigarettes, plastics, cosmetics, and jewelry items (including some precious stones and metals, except for gold, the import of which the EU banned earlier). According to the European Commission, in total, the new bans will affect supplies from Russia worth €7 billion (according to data for 2021) (Rbc.ru, 2022). The EU closed its market for Russian ferrous metals and some products from them for an amount of approximately €3.3 billion per year, but then the embargo affected finished steel products from Russia, while semi-products (slabs, steel billets) were not affected. Now the sanctions are being extended to semi-finished products, although there will be a three-month transition period during which these products can still be supplied to European customers. In July 2022, the supply of iron and steel from Russia to the European Union dropped to \$243 million (from \$522 million in June and \$770-790 million per month last spring) (Rbc.ru, 2022).

In 2021, EU countries imported wood pulp from Russia (including pulp) worth \$158 million, paper and cardboard - \$645 million. Significant damage may also be caused to the supply of Russian plastics. In 2021, the EU purchased over \$1.5 billion worth of plastics and products from them. These products continued to be imported into the EU in 2022, although in smaller volumes: in July, European imports of plastics from Russia amounted to about \$57 million (Rbc.ru, 2022).

On December 16, 2022, the EU published the ninth package of sanctions against Russia, which limits new investment in the mining sector and the supply of drones and other equipment to Russia that can be used by the military. Three Russian banks, such as the Moscow Credit Bank, the All-Russian Regional Development Bank, and the Far East Bank, were hit by sanctions (Ec.europa.eu, 2022). European citizens are prohibited from holding senior positions in Russian companies that are controlled by the state, as well as from investing in the energy and mining sectors of Russia, except for activities related to critical raw materials.

On February 25, 2023, the European Union Council announced the 10th package of sanctions against Russia (Ec.europa.eu, 2022), where restrictions would affect the banking sector, advanced technologies, as well as the private military company “Wagner”. The anniversary package of sanctions targets those “who play an important role in the continuation of this brutal war”.

The latest 11th package of sanctions came into force on June 23, 2023, which included a ban on the transportation of Russian oil through the northern branch of the Druzhba oil pipeline, a restriction on the entry of Russian-registered trucks into the EU, as well as measures against circumventing previously introduced restrictions (Ec.europa.eu, 2023a). The sanctions imposed on the branch of the Druzhba oil pipeline will affect oil supplies to Poland and Germany. As noted by the media, this decision is largely symbolic. The two countries could receive oil through the northern section of the pipeline as an exception and with EU per-

mission but have already stopped receiving crude oil, fulfilling promises made last year. It is worth remembering that the Druzhba oil pipeline, with a length of about 4 thousand kilometers, has been used since Soviet times to supply raw materials to five countries that are members of the EU. Russian oil enters the Belarusian Mozyr, where the refinery is located, and then is divided into two branches - northern and southern (through Ukraine, Slovakia, the Czech Republic, and Hungary).

The Russian finance and banking sector has come to the fore as one of the key areas targeted by Western countries with sanctions. As of February 24, 2022, the Central Bank of Russia had a significant portion of its reserves of \$640 billion in Western countries, and due to sanctions, the bank's access to about half of these reserves was frozen. After this step, which Putin described as "theft and robbery", the Russian ruble rapidly depreciated against the U.S. dollar. While the Central Bank of Russia tried to rein in the Russian ruble, which rose from 70 to 130 against the U.S. dollar, it started to implement harsh capital controls due to the currency crisis. Subsequently, the ruble recouped its losses against the U.S. dollar, falling below the 60 level and trading at 67 as of December 27, 2022 (Abay, 2022). Today, the U.S. dollar, which is traded around 70-80, continues to maintain its position again by reaching the pre-war level.

The Consequences of the Sanctions

With all these sanctions imposed on Russia, the Moscow administration was excluded from most of the world, not only economically, but also in political, cultural and sports fields. Dan Baer, European Program Director of the Carnegie Endowment for International Peace, states that the threat of sanctions did not stop Russian President Vladimir Putin, but that their actual implementation could help end the war. On the other hand, he says that although optimistic thinkers expect that the sanctions will increase discontent within Russia and that the pressure it will create will cause Putin to reverse the course, this is not very likely (Rumer, 2022).

In addition to the statement above, it would be useful to provide below some excerpts from interviews conducted by Carnegie Europe writer Judy Dempsey (Dempsey, 2022) with some experts and officials in order to obtain a more comprehensive understanding of the implications of the sanctions against Russia.

Krzysztof Bledowski, Council Director and Senior Economist at the Manufacturers Association for Efficiency and Innovation says the scope and depth of the sanctions, as well as the ongoing private outflow of capital, trade restrictions, and diplomatic exclusion, probably surprised the Kremlin. According to the expert, the cost of failing to overthrow the Kyiv government and subjugate the Ukrainian people would be greater than the weight of Western sanctions.

According to Robert Cooper, a Member of the European Council on Foreign Relations, sanctions will be effective, but sanctions are not the only element necessary for success. According to Martin Ehlchief, Chief Commentator of the Czech newspaper *Hospodářské Noviny*, these are the most comprehensive sanctions ever faced by a superpower or a large, developed country since 1945. So, it can be expected that it will work. However, as history has shown us, sanctions alone are not enough to win the war.

According to Theresa Fallon, Director of the Center for Russian, European, and Asian Studies, such sanctions do not end the war. It may create difficulties for

the Russian people, but historically Russians are used to difficulties and official Russian propaganda will blame the sanctions directly on the West. According to the expert, the sanctions will make Russia even more dependent on trade with China and will make Russia increasingly a junior partner in the Sino-Russian alliance. This will give China greater access to Russia's enormous natural resources, thereby fueling China's economic growth and military buildup.

According to the US Ambassador to Germany, John C. Kornblum, sanctions alone do not work. Sanctions are tools that can substitute for more difficult options but have limited effect. The same was true in 2014 with Russia's annexation of Crimea. There were sanctions against Serbia in 1996 and 1997. Ultimately, it was NATO bombing, not sanctions, that forced Slobodan Milosevic to withdraw. However, NATO's cooperation in sanctions was the basis for the alliance's recourse to the military option.

According to Stefan Meisterhead, the International Order and Democracy Program of the German Council of Foreign Relations, the most comprehensive sanctions imposed on Russia by Western countries have seriously hit the Russian state, society, and economy. After these sanctions, Russia will not be the same as before. It is cutting the country off from the global economy while changing the way of life of the Russian people. But the sanctions, although important, will not deter Putin from fighting Ukraine. Putin is on a historic mission to take back Ukraine. It had been preparing for this war for years: it developed repressive devices to suppress all kinds of internal opposition, fortified the country's economy to resist all kinds of sanctions, and placed it under the full security umbrella of the Russian state.

To summarize, most experts argue that sanctions alone should not be capable of stopping the war. However, the imposition of sanctions is a warning to intimidate other actors and a reminder that acting in breach of international law has a penalty and a cost. Because, even if the comprehensive sanctions package does not stop Russia's activities in Ukraine, it can be assumed that it is effective in slowing down and weakening some sectors of the country.

Effects of Sanctions on Russia

These measures target the Russian political elite and impose direct costs on Russia for its war of aggression, as well as damaging Russia's industrial and economic ability to wage war, produce more weapons, and repair existing weapons systems. The sanctions deprive the Russian army and its suppliers of goods and equipment needed to wage war on the sovereign territory of Ukraine.

The sanctions have had a significant impact on the Russian economy. But the economy of the country was able to readjust. New markets were found for the export of products, new logistics supply chains were built, and parallel imports were launched to import the necessary goods through third countries. The introduced restrictions stimulated import substitution.

Mainly due to the problems experienced in logistics, some types of paints, plumbing and electrical materials, and foreign goods produced by European companies in general, had a deficit. Building materials from Europe were replaced by analogs from India, Türkiye, and China, which stabilized their prices. By the beginning of 2023, logistics had improved (Tikhonov et al., 2023).

Before agreeing on the ninth package of sanctions against Russia, the leadership

of the European Union assessed the consequences of the restrictions already imposed on the European economy. It follows that the negative impact of the sanctions was limited to only a few sectors of the economy. EU countries spent €525.5 billion (\$554 billion) to compensate for this damage from sanctions. According to an assessment prepared by the executive body of the European Union, imports of wood and precious metals sank most of all from the sanctions against Russia. However, the European economy has suffered much more from changing market trends and retaliatory restrictions from Russia. Due to retaliatory steps, for example, imports of rare gases, such as neon and xenon, which are necessary for the production of chips, have fallen (Nardelli, 2022).

The document notes that imports from Russia to EU countries fell to about 9% of total trade from 40-45% before the outbreak of hostilities. At the same time, the main imports were replaced by supplies from Türkiye, Brazil, South Korea, and India. The blow to a critically important raw material for the EU economy has so far been insignificant. Thus, the assessment showed that imports of aluminum, nickel, and titanium, on the contrary, increased, while supplies of palladium and copper decreased slightly.

It follows from the analysis that one of the most vulnerable places has become the dependence of the European Union on Russian railways and corridors for freight traffic from China. The paper notes that this problem will further increase transport costs (Commersant.ru, 2022).

According to Hungarian Foreign Minister Peter Szijjarto, the EU gave the worst response to the Russian aggression launched in Ukraine. After the restrictions led the European economy into recession, the normal reaction of European leaders would be their resignation. The fact that, by imposing sanctions, the EU did not achieve what it expected, was repeatedly reported in the Western media. The impact of the restrictions turned out to be not catastrophic, at the same time, sanctions cost European citizens much more than originally thought, wrote, in particular, the Italian newspaper *Il Fatto Quotidiano*. As the newspaper reported, the goals of the sanctions were quite clearly voiced by US President Joe Biden. The West wanted to achieve an economic crisis in Russia of such magnitude that it would lead to a change in political power, as well as the weakening of banking institutions, including the Central Bank, which would provoke an outflow of capital and the destruction of the national currency. However, nothing catastrophic happened, as a result, the inflation rate in Russia turned out to be quite stable, and the ruble remained stable (Reid, 2023).

According to the speaker of the Ukrainian Foreign Ministry, Oleg Nikolenko, the introduction of anti-Russian sanctions forced the Russian economy to roll back 30 years. In particular, referring to the data of the World Bank, the IMF, and the Council of Europe, he noted such consequences of sanctions for Russia as a fall in GDP from 5 to 9%, a decrease in the turnover of trade in goods and services in the country by 30–35%, a reduction in oil exports to countries EU by 90% by the end of 2022, inflation at 22%, as well as the impossibility of importing technologies and components (Ukrinform, 2022).

As a recent New York Post article noted, sanctions imposed by the US and the EU were supposed to destroy the Russian economy, but backfired, weakening the West and strengthening the ruble. At the same time, it is assumed that the sanctions did not work because of the sharply increased energy prices. Russia's main exports are oil and gas, so the country made more money than the previ-

ous year. Russia's GDP in the third quarter of 2022, according to preliminary estimates of Rosstat, decreased by 4% in annual terms. In the first quarter of this year, the Russian economy grew by 3.5%, in the second quarter it decreased by 4.1%. According to the forecast of the Ministry of Economic Development, by the end of this year, GDP will decrease by 2.9%, the forecast of the Bank of Russia is minus 3-3.5%. Even the International Monetary Fund (IMF) has improved its forecast for Russia's GDP for 2022. According to the fund, the fall of the Russian economy will be 3.4%, not 6%, as expected in July (Reuters.com, 2022).

According to the rating compiled by the RIA Novosti agency, Russia ranked 45th in the world in terms of annual inflation (13.7%). On the European continent, the highest inflation in September was recorded in Moldova - 34%. The second place is occupied by Ukraine - 24.6%, and the third - by Lithuania, which with 24.1% was the leader in price growth among the EU countries (Hse.ru, 2022).

As for the decline in oil exports to the EU countries, according to the results of the first three quarters of this year, it is not as strong as expected. Russian oil exports have so far proven resilient to sanctions, import embargoes, and buyer boycotts, reducing total oil exports to 7.7 million bbl/d in October 2022, just 400 kb/d below pre-war levels. Russia's crude oil exports in October remained largely unchanged at 4.97 mb/d compared to pre-war levels. Crude oil exports to EU member states were reduced by 1 mb/d to 1.5 mb/d. The decline in shipments to the EU was offset by increases to India, China, and Turkey. By October, crude oil exports to India increased by 965 kb/d to 1.1 mb/d; China 225 kbps to 1.9 mb/d; and Türkiye between 320 kb/d and 540 kb/d. Shipments to unknown or as yet undetermined destinations have also increased, due to the increased use of "dark" tankers and higher volumes of oil on the water.

It is seen that Russia has sharply reduced its natural gas supply to the European Union since it invaded Ukraine. For example, transfers via the YAMAL-Europe pipeline were cut completely in May 2022, while flows over the Nord Stream pipeline were gradually reduced and stopped completely in early September 2022. Pipeline deliveries to Estonia, Finland, Latvia, and Lithuania were halted altogether, while Russian pipeline deliveries via Ukraine in October 2022 were 80% lower than last year's levels (Iea.org, 2022).

Revenues from oil and gas-related taxes and export tariffs accounted for 45% of Russia's federal budget in January 2022. Considering current market prices, the export value of Russian pipe gas to the EU alone amounts to USD 400 million per day. Total export revenues for crude oil and refined products stood at around \$690 million per day in the first two months of the year, while it currently stands at around \$560 million per day (Iea.org, 2022).

Automobile production is among the sectors facing difficulties. About 600 thousand people work in this field in Russia. Until now, AvtoVAZ, which was controlled by the French company Renault Group, laid off people in some places. In March 2022 Volkswagen Group announced that it would stop production at two assembly plants in Russia. Even some companies in the field of defense in Russia faced difficulties in production. Manufacturers of military equipment buy some equipment from abroad. "Uralvagonzavod" and the Chelyabinsk tractor plant, engaged in tank production and repair, were forced to stop their work due to the lack of foreign parts. In this context, markets such as China and India, which have refused to sign Western sanctions, try to fill the gap from the West. In addition, large online marketplaces such as Yandex, Wildberries, and Ozon

started to find new ways for parallel import. They replaced retail players who had to leave the country (Eckel, 2022).

In world history, international sanctions have not always led only to negative consequences, but have been ineffective or even beneficial for the country. So the positive effect of the sanctions on Russia was the development of a domestic transaction instead of some canceled transactions in the country. For example, the departure of all brands from the country has been a major reason for the development of domestic production (Vedomosti.ru, 2023). Also, the termination of Visa and Mastercard with some Russian banks in 2014 spurred the emergence of the Russian payment system Mir. In 2022, after Visa and Mastercard cards were blocked outside the Russian Federation, Russian banks began issuing cards with the UnionPay payment system.

CONCLUSION

Since 2014, the West has employed these sanctions to target various sectors with the aim of inducing an economic crisis that could bring about a shift in political power and a reduction in the strength of banking institutions in Russia. However, none of these happened. As a result, the inflation rate in Russia has been fairly stable and the ruble has held its worth. At the same time, it is assumed that sanctions do not work due to sharply rising energy prices. In this context, it should be noted that since Russia's main export is oil and gas, the country earned more income compared to the previous year. According to the latest statistics and forecasts, the real state of the Russian economy is far from "collapse". While the effects of the restrictions did not bring a disastrous result, it can be said that the sanctions are also difficult for energy-dependent Europe.

Considering the EU's dependence on Russian energy resources and Russia's strong position in energy in the world, it's possible to say that EU sanctions were not effective in stopping the war in general, but were successful in slowing down the Russian economy and bringing difficulties. It is clear that even if the restrictions brought about some slowdowns in the economy, they did not have an effect that would cause turmoil in the country. For this reason, it can be suggested that the EU should not only impose sanctions that harm its economy but also solve the problem completely by choosing the way of negotiation while imposing sanctions. Because Russia's attacks on Ukraine resulted from Ukraine's rapprochement with the West. Accordingly, the EU can come to a table with Russia and conduct negotiations through diplomacy.

It is not possible to say for certain when the war will end, but it is an assumption that the parties can come together and resolve with an agreement at a negotiating table. The strength and weight of the sanctions, and their apparent negative impact on the Russian economy, will likely encourage Putin to seek an earlier solution and can be used as leverage against Russia's toughest demands. But to put it bluntly, sanctions will not lead to a good deal anytime soon. However, this will be no worse than the agreement reached without sanctions. In addition, although sanctions do not end this war, they are important in terms of both being the first urgent steps to be taken to ensure credibility and deter other actors who may take similar initiatives in the future.

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BOOK REVIEW

**EDUCATION POLICIES IN THE 21ST CENTURY
COMPARATIVE PERSPECTIVES**

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Birol Akgün, Yusuf Alpaydm (eds.). Education Policies in the 21st Century Comparative Perspectives. Singapore, Palgrave Macmillan: Maarif Global Education Series, 2022, pp. 292.

The Maarif Global Education Series is dedicated to the transformations taking place in economics, politics, technology, people, and society, and discusses how these areas and actors influence educational policy on a global scale from a macroeconomic perspective.

The works, published in the series as edited books and monographs, discuss the theory and philosophy of education from a global perspective, including both Western and Eastern educational experiences. Authors from different countries introduce the educational experience of different cultures and modern transformations in this area.

The book under review focuses on how education influences the various spheres of our lives and changes them. It consists of 3 parts and 11 chapters. The first part of the book examines the relationship between politics and education, in particular, the impact of the transformation of nation-states on educational institutions. The second part is devoted to the extremely topical problems of the transition from higher education to employment. The third part takes a detailed look at the international education sector. It begins with a discussion of the international schools created and funded by governments in the context of cultural diplomacy. New trends in international educational mobility are emerging today, such as international educational programs, branches of foreign universities, joint research projects, etc. Network of international schools is one of these trends. Among the authors of the book are representatives of universities in the USA, Türkiye, Spain, and the Czech Republic.

In the first section of the book Ibrahim Hakan Karatas, author of “The Transformation of the Nation-States and Education” chapter indicates three main functions of education: providing national solidarity, facing the trends of modernization, and supporting economic development. One of the main goals of education is “to ensure national welfare and social justice”. Karatas believes that global and regional associations such as UNESCO, World Bank, and European Union have played an important role for their respective member states in terms of

transforming their educational systems into an internationally integrated structure. Maintaining the quality of education systems required reforms related to immigration, the desire for democratization in education, and its digitalization.

Educational reforms have grown as comprehensive, system-wide initiatives and have strengthened standardization and control mechanisms in developed countries, while at the same time increasing dependence from developed countries to underdeveloped countries. As a result, constantly changing conditions lead to the fact that education has acquired various characteristics that can support global interaction by transferring cultural capital, promoting scientific progress, and enhancing organizational capacity in all the countries of the world involved.

Experts from Türkiye Yusuf Alpaydin and Kursad Kultur in the chapter “Improving the Transition from Higher Education to Employment: A Review of Current Policies”, focused on the responsibility of individuals, higher education institutions, employers, and governments for improving the transition from higher education to graduate employability and generating social returns from very expensive investments in higher education. The interaction between the labor market and higher education institutions depends on how well education is turned into an effective tool in the economic context. Improving access to employment opportunities and employment conditions, monitoring and improving the skills of graduates, and aligning them with labor market expectations are the subject of widespread discussion.

The authors suggest that monitoring activities with the participation of employers in an integrated form include experimental, project, interactive internships and seminars, and learning environments that simulate the workplace. In this regard, it is imperative to strengthen the link between the institute and industry, smoothing the transition from school to work and vice versa, as well as developing, along with the technical and professional skills required by employers, socio-emotional and cognitive skills, which are also critical. Indeed, in the process of transition from higher education to employment, the entire burden cannot be shifted to higher education institutions. For governments, it is important to provide “employment security, ensuring fairness and equality in access to employment, encouraging and regulating efforts between youth programs and labor market policies and higher education”, the development of innovative infrastructure, and the balancing of supply and demand. State priorities should also include the reduction of job search time. The transformative impact of innovation on both education and business must play an important role. Such policies take into account stability and sudden changes, especially for business continuity, market, human resources, and supply chains, which change radically with innovation. It is envisaged that providing young people with support for enterprises, taking into account innovative paradigms can create new employment opportunities in the future.

Metin Celik, the author of the chapter “International Schools in the Context of Cultural Diplomacy: Actors and New Approaches”, described an extremely interesting trend that has emerged in international education in recent decades. Influential states are beginning to promote their national interests in the field of education in the sphere of foreign policy and cultural diplomacy. The issues of education, science, culture, language, and accreditation are becoming more and more relevant and included in the international agenda. Historically, inter-

national schools have been around for a long time, but have undergone significant changes in purpose, institutional structure, target audience, and curriculum. Today, private companies provide education in globally influential languages (especially English) with an internationally accredited curriculum. The number of schools, students, staff, as well as market value are steadily increasing. France created a wide network of French-language schools abroad. Germany established German educational programs for this purpose in the language of the host country. The UK has chosen to create British Unions of Private Schools and Accrediting Organizations, thereby creating a virtual network of international schools. China has also discovered the possibilities of using the so-called “soft power” in the field of education by establishing Confucius Institutes.

Metin Çelik rightly believes that the main mission of the network of international schools spread around the world is to create a favorable and friendly attitude towards a foreign language, a different culture, as well as understanding and tolerance for other values that inevitably penetrate the host society through the education of the younger generation. Attraction of this kind may be more effective than any form of pressure, and more promising, given that today’s children can tomorrow become agents of influence of the country whose school they graduated from.

Overall, the book under review shows that globalization has paved the way for a common understanding of the interdependence of knowledge and has given rise to new trends and paradigms in education. It is becoming increasingly important to make the right timely investment in the education industry by learning about technology and seeing the future to be able to properly adapt to the changes and new demands that societies and governments place on existing education formats, content, and actors.

A deep and comprehensive overview of the trends and problems emerging in modern education allows us to evaluate this book as extremely informative and academically conscientious. The only wish I would like to express is that in books of this kind, there should be a wider representation of the author. It seems to us that to create a more complete picture in the global dimension, it would be very interesting to learn first-hand the sensitive aspects of the development of education in China or India, for example, which are becoming more and more serious actors in the international educational space.

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4. Body Text: The body of the article should be typed on A4 (29/7x21cm) paper on MS Word in Size 12 Times New Roman or a similar font using 1,5 line spacing. Margins of 2,5 cm should be left on all sides and the pages should be numbered. Articles should not exceed 8.000 words excluding the abstract and bibliography. Passages that need to be emphasized in the text should not be bold but italicized. Double emphases like using both italics and quotation marks should be avoided.

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Table 1. *Information Concerning Publications in Eurasian Research Journal*

Publication type	Number of publication	Number of pages			Number of references		
		N	X	SS	N	X	SS
Article	96	2,042	21.3	7.5	2,646	27.6	15.8
Book review	4	30	7.5	4.4	31	7.8	8.3
Total	100	2,072	20.7	7.9	2,677	26.8	16.1

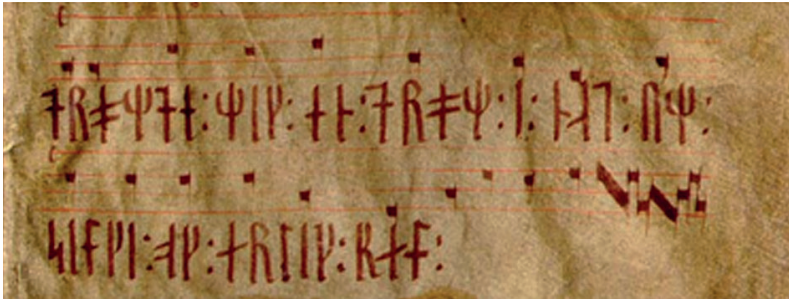
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Below is an example of a picture.

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Citations within the text should be given in parentheses as follows:

(Koprulu 1944: 15)

When sources with several authors are cited, the surname of the first author is given and 'et. al' is added.

(Gokay et al. 2002: 18)

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In this respect, Tanpinar (1976: 131) says ...

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www.turkedebiyatilisimlersozlugu.com [Accessed: 15.12.2014]

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Transliteration from the Ukrainian to the Latin alphabet should follow the system officially approved by the Ukrainian Cabinet of Ministers in 2010 (https://unstats.un.org/unsd/geoinfo/ungegn/docs/26th-gegn-docs/WP/WP21_Roma_system_Ukraine%20engl_.pdf). When transliterating place names, Ukrainian names are preferred to Russian equivalents: for example, Mykolaiv rather than Nikolaev, Kyiv rather than Kiev. However, for historical references to Ukrainian cities, it may be appropriate to use Russian names if they were in wide use at the time.

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Taner, Refika and Asim Bezirci (1981). *Edebiyatımızda Secme Hikayeler*. Basvuru Kitapları. Istanbul: Gozlem Yay.

If a source has more than three authors, the surname and name of the first author should be written, and the other authors should be indicated by et.al.

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Akyuz, Kenan et al. (1958). *Fuzuli Turkce Divan*. Ankara: Is Bankasi Yay.

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Example:

Berk, Ilhan (1997). *Poetika*. Istanbul: Yapi Kredi Yay.

Demir, Nurettin (2012). "Turkcede Evidensiyel". *Eurasian Research Journal, Turk Dunyasi Sosyal Bilimler Dergisi* 62(2): 97-117. doi: <https://doi.org/10.53277/2519-2442-2021.2-01>.

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Turkiye Cumhuriyet Merkez Bankasi. "Gecinme Endeksi (Ucretliler)" Elektronik Veri Dagitim Sistemi. <http://evds.tcmb.gov.tr/> (Accessed: 04.02.2009).

An article accepted for publication but not yet published can be cited in the following way:

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Atilim, Murat ve Ekin Tokat (2008). "Forecasting Oil Price Movements with Crack Spread Futures". *Energy Economics*. In print (doi:10.1016/j.eneco.2008.07.008).

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