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ART STUDIES

КОНЦЕПТУАЛЬНЫЕ ОСНОВЫ ПОНЯТИЯ «КРЕАТИВНОЕ ПРОСТРАНСТВО»

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CONCEPTUAL FOUNDATIONS OF THE TERM "CREATIVE SPACE"

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Аннотация

Понятие «креативное пространство» получило наибольшее распространение с конца 1980-ых гг. в связи с повсеместной ревитализацией заброшенных территорий. Путем переоборудования неиспользуемых помещений в общественные места образовалось дополнительное пространство для общения, отдыха и проведения культурно-массовых мероприятий. Однако определение «креативное пространство» может быть применено в абстрактном смысле как особое образование, предоставляющее возможность качественного выражения творческой энергии. В статье будут рассмотрены несколько уровней понимания «креативного пространства» как обладающего физическими и духовными характеристиками.

Abstract

The concept of "creative space" has become widespread since the late 1980s due to the widespread revitalization of abandoned territories. By converting unused rooms into public spaces, additional space was created for communication, recreation and cultural events. However, the definition of "creative space" can be applied in an abstract sense as a special education that provides an opportunity for high-quality expression of creative energy. The article will examine several levels of understanding of the "creative space" as having physical and spiritual characteristics.

Ключевые слова: креативное пространство, интеллектуально-творческий процесс, идейное производство, инновации, нестандартное мышление.

Keywords: creative space, intellectual and creative process, conceptual production, innovation, non-standard thinking.

Прежде чем начать, следует подчеркнуть, что «креативное пространство» можно определить на физическом уровне как реально существующее публичное место, обладающее рядом специфических особенностей, и на духовном как особую креативную среду, стимулирующую творческую активность личности. Исходя из этого сформулируем возможные определения креативного пространства как общественной территории, предназначенной для решения интеллектуально-творческих задач путем организации соответствующих социальных, психологических и духовных условий и как креативное поле совместной творческой деятельности, основанной на свободе самовыражения и самореализации через процесс генерации идей.

Креативные пространства в физическом плане можно отнести к «третьим местам» города. «Третьи места», согласно Р. Ольденбургу, обладают самостоятельным значением в формировании городской среды, выполняя рекреационную и консолидирующую функции. В отличие от «первых» и «вторых» мест (дома и работы соответственно) третьи места носят альтернативный неформальный характер, позволяющий устранить социальные различия и ограничения [1, С. 66–70]. Пространство третьих мест абсолютно нейтрально и доступно по отношению к любому входящему, располагая каждого к выстраиванию коммуникации за пределом профессионального сообщества и круга близких знакомств [1, С. 64–66]. К этому также побуждают частая неприметность внутреннего обустройства и игровые практики, формирующие новую реальность для выхода из заданных социальных ролей [1, С. 83–86].

Таким образом, «третьи места» характеризуются нейтральностью, демократичностью, коммуникативными возможностями, общедоступностью и публичностью, психологическим комфортом пространства и простотой обстановки [1, С. 91]. Креативные пространства могут быть вписаны в данную парадигму с единственной оговоркой в виде креативного наполнения деятельности, предполагающего интеллектуально-творческий труд задействованных лиц.

Немаловажно, что «третьи места» также служат для получения нового опыта и впечатлений. На территории креативных пространств это осуществимо в большей степени за счет активной созидательной и преобразовательной деятельности. Вместе с тем само значение навыка креативности в расширении горизонта мысли накладывает определенные обязательства по созданию соответствующей среды. Таким образом, креативное пространство может быть воплощено как лаборатория

идей, где творческий потенциал будет выражен через создание и реализацию экспериментальных программ по заданной тематике.

Непосредственно для успешного функционирования креативного пространства необходимо соблюсти баланс между свободой самовыражения и тематической направленностью деятельности. Хаотичное формулирование множества неприменимых замыслов не имеет практической ценности, по этой причине мыслительный процесс должен быть ограничен согласно установленным требованиям. Возникающее противоречие между свободой и дефицитом возможностей разрешается за счет целенаправленного поиска новаторского устранения проблемы в условиях ограниченной ресурсности.

В качестве примера представим образование креативного пространства в стенах музейного учреждения.

В данных условиях креативное пространство может быть реализовано как дискуссионная площадка по обсуждению существующих проблем в том или ином аспекте работы музея. Основным итогом подобной деятельности станет нетривиальный подход к решению вопроса в форме конкретного культурного продукта, услуги, мероприятия и т.д.

Предположим, что перед коллективом музея поставлена задача по увеличению посещаемости со стороны определенной возрастной группы. В формате мозгового штурма сформированный совет из экспертов области и представителей фокус-группы проводит обсуждение вариантов решения проблемы, ориентируясь на наиболее нестандартное предложение по меркам учреждения. В итоге оптимальный вариант реализуется в качестве тестового метода повышения привлекательности музея. К примеру, будет решено придумать иные способы знакомства с коллекцией в виде короткометражных кинофильмов, лекций и мастер-классов, квестов или посредством мобильного приложения.

По причине нетрадиционности найденной идеи предлагается пробный период, за время которого специалистами будет определен положительный либо отрицательный результат.

Помимо предложенного, формат креативного пространства предполагает множество вариантов реализации. Потенциально возможным является креативное пространство в качестве специфической территории внутри музея, предназначение которой заключается в вовлечении посетителей через интерактивные формы активностей, организации экспериментальных проектов, внедрении неклассических форм представления экспозиции и проч.

Решающее значение приобретает нестандартность и новизна идеи, осуществимой при учете ограничений разного характера.

Преимущества создания креативного пространства на базе иного учреждения заключаются в принципиально другом взгляде на сущность деятельности, выявлении уникальных решений и обогащении инновационного потенциала. Креативное пространство служит катализатором приложения умственных усилий в относительно свободных условиях, поиске альтернативных путей на основании имеющихся данных, переосмыслении и преобразовании доступного материала для получения оригинального результата.

Отдельная сложность состоит в эффективной организации деятельности подобного образования, включающего вопросы управления персоналом, регулирования творческого процесса и финансового обеспечения.

Таким образом, становится очевидно, что основное содержание креативного пространства кроется не в физической форме организации, а в наличии неординарных способов осуществления деятельности через творчество и идейное производство.

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ECONOMIC SCIENCES

WHERE IS UKRAINE'S PLACE IN THE SITUATION OF BREAKING THE WORLD ORDER?

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Abstract

The article describes circumstances, which influence Ukraine and all human civilization. Even before Russian aggression, the situation in the world caused concerns among the progressive stratum of society, who perceive themselves as part of the civilized world.

Putin's Russia's aggression against Ukraine seems to sum up the "disease" of civilization with egocentrism, which is accompanied by disregard for universal morality, democratic order and international law.

Authors propose several steps to solve this situation to a benefit for Ukraine and all world's society.

Keywords: Russia's aggression, egocentrism, spiders in a jar, humane word civilization, happiness.

Urgency of the problem. Due to external and internal circumstances, Ukraine found itself at the epicenter of world events. Even before Russia's aggression, and its too much ambitious leader, the situation in the world caused concerns among the progressive stratum of society, who perceive themselves as part of the civilized world. Large-scale thinking people are characterizing this period as follows: "When, if not in the twentieth century, the most terrible mass murders took place, when people were purposefully and cold-bloodedly destroyed, including using bacteriological weapons. It was in the twentieth century that terrorism against innocent people was born... So, our planet is burdened with a large number of crises... Will we wait for a catastrophe of apocalyptic proportions (self-destruction) before we act?" [1, c. 200].

Presentation of the main material of the study. Putin's Russia's aggression against Ukraine seems to sum up the "disease" of civilization with egocentrism, which is accompanied by disregard for universal morality, democratic order and international law.

This aggression shown that the world is in a state of "spiders in a jar" or "law of the jungle", and has a highly probable prospect of apocalypse, at least in terms of the self-destruction of modern human civilization. Authors agree with words of the famous thinker Yuval Noah Harari that "today the world order resembles a house in which everyone lives, but no one wants to repair it. Thus, the house will last for some time, but in the end it will collapse and then we will find ourselves in the jungle again, in a state of war of all against all" [5].

What globally threatens humanity? According to the authors, one of the key threats is the inability for most people to unite to get happiness through self-realization in all spheres of life. We are talking about the disunity of humanity in the face of a climatic and social catastrophe. There is only one way to counteract this, as proposed by the great strategist of our time, Lee Kuan Yew, – by joint efforts to defeat disunity and find means to counteract threats [2].

But it is difficult to do this, because the disunity of people is facilitated by our nature, part of which is egocentrism and sociopathy, which is especially pronounced in leading politicians who consider themselves the leaders of civilization. These character traits are inherent in many people, but their pronounced expression in politicians encourages their development in ordinary people. A consumerist approach, the absence of a core of universal morality (and even uselessness, an obstacle to achieving success – author's note), which is based on people's respect for each other and for the natural environment, is spreading.

But what do all the people of the world desire? According to the authors, this is a desire for happiness. In this article, we will understand the concept of "happiness" as a state of mental comfort for a long period. Such a state can be achieved through the self-realization of each person and the satisfaction of his needs (of course, not all that come to the mind of a particular person, because Paradise on Earth is, objectively, impossible - author's note). But human civilization must, at least, strive to satisfy such needs of each person that do not harm other people. The self-realization of a mentally healthy person does not imply "moving over heads". The degree of probability of achieving this goal depends on two factors - external (including the actions of authorities) and internal - each person's understanding of himself - his own and universal moral values, his own character, professional qualities, etc.

Human capital is the only thing that creates additional value, turning the object of labor into the result of labor, with the use of professional, including creative, abilities. Therefore, we propose to consider certain areas of human capital application.

If we consider any society, nation or group of individuals, we can see four areas of its organization: political, economic, social, and cultural. All these areas

are made up of people "armed" with certain qualifications and technologies.

The primacy of human activity has been proven by many scientists, from A. Smith to K. McConnell and S. Brew. The latter two noted that, "Economics is the study of human behavior in the process of production, distribution and consumption" [3]. The classic of management Peter Drucker also concluded that "economic results are not the product of the action of some economic forces. They are achieved by man" [4]. The outstanding statesman of our time, Lee Kuan Yew, argued that "the quality of human resources is the only and very important factor that determines the competitiveness of countries... The key to innovation and technology is people."

At the same time, Lee Kuan Yew concluded that economic crises are also provoked by certain actions of people [2].

If we talk about social crises that have the potential to develop into devastating wars (perhaps even on a global scale), according to the authors, their human origin is obvious. Such situations arise when a certain category of people (sociopaths – author's note), who are in power at the national or territorial level, decides to take into their own hands additional resources, at the expense of others, change their values, including even religious preferences of other nations, etc.

If we talk about almost any threatening consequences, then they depend, first of all, on the actions of government officials, their ability to manage new opportunities for the benefit of people, or vice versa, ignoring their interests.

Each person must be considered as a person and at the same time as the main productive force of society. But the combination of human and professional qualities can worsen the competencies of an individual, and can improve them if all human abilities are realized in the conditions of a culture of system management with a focus on the final result.

Ukraine is the geographical center of Europe and one of the key suppliers of agricultural products to the world. And where is Ukraine's place in the situation of breaking the "world order"?

The development of post-war Ukraine cannot be unrelated to events in the world. For Ukraine to become on the civilizational rails of development, it is necessary to radically improve its state structure. For example, due to:

- combining the interests of the government and people, under public control;
- transition of power structures to a culture of systemic management, focusing on the final – human-centric – results;
- formation of peacekeeping education, by focusing on the development of the best human qualities, etc.

Such powerful social technologies have already been developed in Ukraine, using qualimetric digitalization [6]. These innovative technologies can add an impetus to the improvement of managerial culture also in other countries, in the context of the development of a harmonious, humane world civilization. Therefore, in any, even the worst, times, there is a chance for salvation.

Conclusions and suggestions. According to the authors, the key reason for the disunity of humanity is the lack of a single unifying core - a landmark for the development of civilization. We are talking about a reorientation to increase the level of happiness of people in all countries of the world, with understanding that this happiness is not achieved at the expense of the destruction of people around, or the environment.

Currently, happiness is threatened by a climate catastrophe and social upheaval, which, among other things, can lead to the development of local wars into a global world confrontation. Humanity can avoid this. But on one condition – if people will unite around one thing that is extremely important for each individual and at the same time for everyone. We are talking about the happiness of people on planet Earth as a resultant indicator of the actions of government structures at all levels (local, national, and supranational).

In this sense, the authors suggest taking a closer look at the developments of scientists from the Intellect Club for Civilizational Development of Ukraine in the context of familiarization with the grounded New Human-Centered Management Course for the Development of Post-War Ukraine [6]. It is this course that has the potential to save humanity from self-destruction.

And Ukraine has a chance to become the leader of this movement.

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IMPORTANCE OF INTEGRATION OF AUTHOMATIZATION IN THE WORK OF MEDICAL LABORATORIES

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Abstract
Laboratory automation plays a key role in improving the efficiency, accuracy, and reliability of research and analysis. The implementation of LIS reduces the time spent on routine operations and the likelihood of human error, while improving the quality of the results obtained. Thanks to the use of specialized systems and technologies in laboratories, researchers can perform analyses faster and more accurately, which in turn improves the reputation of the medical organization and attracts customers, ensuring accurate diagnosis and control of treatment results. Therefore, the relevance of implementing LIS in the practice of medical laboratories is beyond doubt.
Keywords: automation, laboratory automation, laboratory management, digitalization, healthcare management.

The market under Industry 5.0 is transforming into an ecosystem where not only companies and consumers interact, but also cyber-physical systems that form the basis of hybrid models for managing production and consumption processes. Such a market is characterized by human centricity, personalized solutions, active innovation and sustainable development. An important role in its development is played by the fifth innovation spiral (pentaspiral), which combines the interaction of business, government, science, society and the natural environment. As a result, the market is becoming a multi-layered, dynamic ecosystem that encompasses both physical goods and digital services and responds to the challenges of digital transformation [1].

Key factors influencing market development under Industry 5.0 include parameters such as the speed of adoption of digital solutions, the level of automation and robotization, and the degree of supply chain integration through digital platforms. External factors such as the tightening of economic sanctions, the need for import substitution, and the achievement of technological sovereignty also play an important role.

Laboratory automation plays an important role in modern medical practice. In recent decades there has been a rapid development of information technologies and automation methods, and their introduction into the work of clinical and diagnostic laboratories is becoming a necessity. The organization of laboratory work by means of automation methods and the introduction of specialized software allows to increase the efficiency of the process of analysis, data processing and storage, as well as to provide the necessary level of quality and accuracy of results.

The primary goal of clinical laboratories is to provide the highest possible quality of service to patients and healthcare personnel based on accurate analytical activities, high-quality documentation, and the delivery of services to the right place in the most convenient formats for patients. Achieving high quality in clinical laboratory testing is a pressing issue for both laboratory medicine and the healthcare system as a whole, as more than 80% of the information used in patient care comes from laboratories [2]. In this regard, standardization, automation, and computerization of processes carried out in medical laboratories are key areas for the development of clinical laboratory services. Laboratory automation is aimed at increasing the role of electronic technology, computer tools and equipment, robotics, and software in process management. First and foremost, this concerns freeing laboratory personnel from routine operations and significantly speeding up the performance of analyses. Automation is the path to a real multiple increase in the productivity and efficiency of laboratory services in healthcare organizations. Specialized laboratory information systems (LIS) are becoming increasingly important in the automation process. These are software programs designed to automate all aspects of laboratory work, including test request management, data processing, sample tracking, quality control, reporting, and integration with other information systems within a healthcare organization.

LIS helps improve laboratory efficiency, ensure data accuracy and security, and enhance the overall quality of medical services provided. The implementation of LIS significantly improves the efficiency of medical laboratories through a number of factors. Let us highlight the most important ones:

1. Automation of LIS processes enables the automation of specimen receipt, processing, analysis and tracking. This eliminates the need for manual data entry and processing, which reduces the time required to perform analyses and decreases the likelihood of errors.

2. LIS results management ensures reliable management of test results, their storage and accessibility to medical staff. This facilitates timely delivery and interpretation of results.

3. Data integration: LIS can be integrated with other healthcare information systems, simplifying information exchange between different departments and improving the overall efficiency of healthcare information management.

4. Ensuring a high level of security: The implementation of LIS increases the security and confidentiality of medical data by introducing advanced encryption and access control methods [3].

It is important to note the economic impact of LIS implementation in laboratories: it reduces the cost of "paper" work and "manual" recording of test results, reduces the number of errors and the time patients wait

for test results, improves inventory management, and reduces costs by increasing laboratory efficiency and reducing human error. There are typically several basic steps involved in implementing an LIS. First, a laboratory needs analysis must be conducted to determine the basic requirements that the LIS must meet. An appropriate system is then selected. The implementation process includes installation, customization, staff training, and scheduled support. The next step is to integrate the LIS with other information systems of the medical institution (such as electronic medical records, patient management systems, etc.) [4]. This enables the exchange of information between the structural units of the medical organization.

It is also important to mention the importance of evaluating the effectiveness of LIS: the system must fully meet the needs of the laboratory and ensure optimal results. In general, the methodology for implementing and using LIS is, of course, determined by the functions assigned to a particular laboratory or laboratory service of a medical organization.

At present, an urgent task in all spheres of society is the creation of sectoral digital platforms based on different economic methods of processing large amounts of information. In the absence of multidisciplinary specialized centers, when a patient has to seek services in different institutions, it takes a lot of time to get the right results and transfer them from one specialist to another [3]. Given the shortage of specialists, a promising direction for work optimization is the creation of unified digital information platforms, which unite all large data sets of all active centers for the purpose of their subsequent transfer to the doctors of conventional medical institutions.

Studies of foreign researchers in digitalization of different healthcare institutions including medical laboratories identify key trends in the global healthcare digitalization market. It shows that the area of implementation of digital technologies in the medical industry will continue to grow in the near future due to insufficient market saturation. Local resarchers make significant accent on the case of introduction of digital technologies in medical organizations in order to keep and transform data about patients. It is the most important part of healthcare management and digitalization is the only way to solve the problem of transferming data that make information flow faster and more efficient.

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IMPROVING MODEL OF CORPORATE GOVERNANCE EFFICIENCY INDEX FOR UZBEK JOINT-STOCK COMPANIES

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Abstract

This article develops an index model aimed at further improving the system for assessing the effectiveness of corporate governance in joint-stock companies in Uzbekistan. An improved set of indicators has been proposed based on existing international standards - in particular, the principles of the Organization for Economic Cooperation and Development (OECD), the recommendations of the World Bank and the International Finance Corporation. During the analysis, this model was practically tested using the example of several large joint-stock companies in Uzbekistan.

The research results showed that the proposed improved index model provides a qualitative assessment of corporate governance, increases investment attractiveness, and enhances transparency and responsibility in management. The index is also distinguished by the fact that it is developed based on criteria adapted to the conditions of Uzbekistan.

Keywords: Corporate governance, Performance Index, Joint Stock Company, International Standards, OECD Principles, Conflict of Interest, Transparency, Investment Attractiveness, Uzbekistan's Experience, Internal Control.

Introduction

In a market economy, the corporate governance system is not only a tool for ensuring the effectiveness of joint-stock companies but also one of the important factors contributing to increasing investor confidence, the sustainable development of companies, and the development of the capital market. Especially in joint-stock companies, the formation of management principles in accordance with international standards increases the competitiveness of enterprises and plays an important role in their involvement in global economic integration.

In recent years, a number of measures have been taken in the Republic of Uzbekistan to reform the field of corporate governance. In particular, the "Strategy for Management and Reform of Enterprises with State Participation for 2021-2025", approved by the Resolution of the Cabinet of Ministers of the Republic of Uzbekistan No. 166 dated March 29, 2021, defines the introduction of modern corporate governance mechanisms in joint-stock companies with state participation, increasing their openness and effectiveness as the main priority.

At the same time, the limited possibilities of systematically measuring the effectiveness of corporate governance in existing assessment mechanisms, the uniformity of existing approaches, and their inconsistency with international criteria hinder the comprehensive assessment of enterprise activities. This situation hinders the full achievement of the goals stipulated in state corporate governance development strategies.

International experience shows that the implementation of advanced corporate governance principles increases the stability and investment attractiveness of companies. For example, in 2023, the updated G20/OECD Corporate Governance Principles included new and updated guidelines on shareholder rights, information transparency, responsibilities of the board of directors, and, for the first time, sustainability and resilience. These principles aim to provide companies with financing from capital markets, protect investors, and help companies, as well as our economy, become more stable.

Furthermore, the Corporate Governance Methodology, developed by the International Finance Corporation, provides a general approach to evaluating and improving the management practices of companies. This methodology provides a general approach to evaluating and improving company management practices, including environmental and social risk management, the effectiveness of the board of directors, and stakeholder relations.

Considering this situation, there is a need to improve and implement the Corporate Governance Performance Index (CGPI), which has been improved based on international experience and adapted to the conditions of Uzbekistan. The proposed index model expands the possibilities of assessing the quality of management in joint-stock companies based on specific criteria, identifying existing problems, and making strategic decisions to eliminate them.

Analysis of literature on the topic

In recent years, extensive research has been conducted to improve the corporate governance system, assess its effectiveness, and adapt it to international standards. By analyzing the literature in this area, it is possible to identify existing scientific views, approaches, and gaps.

Corporate governance assessment systems are widely used internationally. In particular, the "G20/OECD Corporate Governance Principles", developed by the OECD, are used as the main methodological tool in many countries of the world. These principles are aimed at strengthening the trust of institutional investors, improving the activities of the board of directors, and eliminating conflicts of interest. The OECD principles, newly published in 2023, serve as a universal criterion for assessing management standards at the international level.

The Corporate Governance Rating, developed by the International Finance Corporation (International Finance Corporation) in 2021, has been implemented in such countries as Mexico, Indonesia, the Philippines, Georgia, and has yielded effective results in assessing management effectiveness. This model assesses based on 5 areas: shareholder rights, management bodies' activities, information openness, control system, and conflict of interest.

The World Bank also assesses the management system of companies, the legal environment, and investor protection indicators in its Doing Business and Governance Indicator reports. According to 2020 data, the investor protection index in Uzbekistan was relatively low on a 5.0/10 score system, which confirms the relevance of the reforms.

In the "Corruption Perception Index" presented by Transparency International in 2023, Uzbekistan ranked 126th out of 180 countries. This indicates that the issues of transparency and accountability remain relevant.

A number of studies and methodologies for assessing the effectiveness of corporate governance have been developed at the international level. In particular, in his work, Clarke substantiated the theory of stakeholders in corporate governance and showed that effectiveness should be assessed not only through financial results, but also through social and environmental responsibility. Aguilera and Cuervo-Cazurra, emphasizing that management effectiveness is directly related to the national institutional environment, substantiate the importance of the country's context in the selection of indicators.

Mallin analyzed the relationship between corporate governance effectiveness and indices (CG Index, ESG Index). In his research, the influence of international ratings and indices on investment attractiveness is deeply covered.

Uzbek scientists have carried out a number of important scientific works on corporate governance. In particular, E. Urinboev noted that increasing the transparency and quality of financial reporting in the activities of joint-stock companies in Uzbekistan is an important factor in the effectiveness of corporate governance.

A. Kurbanov, in his research, based on statistical analysis, substantiated the relationship between the independence of the board of directors and the effectiveness of the activities of executive bodies.

T. Egamberdiyev paid special attention to the issues of the internal audit system and conflict of interest management in assessing the effectiveness of corporate governance.

In his monograph, R. Makhmudov examines the institutional foundations of corporate governance in Uzbekistan, including the role of the supervisory board in joint-stock companies with state participation.

Although these works are of great importance, they do not sufficiently develop a methodology for indexing effectiveness or a comprehensive evaluation model.

Research methodology

The theoretical basis of the research is international scientific developments in the field of corporate governance, in particular, standards and methodological guidelines developed by the Organization for Economic Cooperation and Development, the World Bank, and the International Finance Corporation. Also, scientific views on assessing the effectiveness of corporate governance, research by foreign and domestic scientists, assessment systems, corporate governance indicators, ESG ratings determine the theoretical basis of the research.

The research methodology is based on a systematic approach, comprehensive analysis, multi-criteria assessment methods, statistical analysis, indexation, and modeling methods.

The study analyzed the structural elements of the corporate governance system in interconnection: the board of directors, shareholder rights, transparency, conflict of interest, and internal control systems.

The main goal of this study is to develop an improved index model that allows for a systematic assessment of the effectiveness of corporate governance in the activities of joint-stock companies in Uzbekistan, based on international experience and local conditions.

The research objectives are to study international systems for assessing the effectiveness of corporate governance, analyze the specific aspects of corporate governance in domestic practice, improve the system of criteria and indicators for the formation of an index model, and develop scientific conclusions and practical recommendations.

Analysis and results

Assessment of the effectiveness of corporate governance today plays an important role in increasing the stability, investment attractiveness, and transparency of joint-stock companies. In accordance with the strategy for reforming enterprises with state participation in our country, the task of improving the corporate governance system based on international standards has been set. Therefore, there is a need for a deep analysis of the existing system and the creation of a modern assessment mechanism.

Analysis shows that, although many joint-stock companies in Uzbekistan have corporate governance mechanisms, there is no single set of indicators that systematically assess their effectiveness. According to the 2023 monitoring, only 48% of joint-stock companies fully implemented the most important principles of corporate governance - such elements as the participation of independent directors, conflict of interest management, and information transparency. According to calculations by the World Bank and the International Finance Corporation, the developed level of corporate governance directly affects the financial performance of companies: ROE (share capital return) increases by an average of 12-15 percent[1].

Taking these circumstances into account, the study considered it expedient to develop a model of the corporate governance efficiency index, adapted to the conditions of Uzbekistan. The model was developed on the basis of international experience, in particular, recommendations of the Organization for Economic Cooperation and Development, the International Finance Corporation, the World Bank, and is based on a quantitative (point) assessment of the state of the company's

corporate governance system according to 6 main criteria.

The index model consisted of the following main areas:

1. The independence of the board of directors is a structural factor that directly affects the number of independent members on the board, their real influence, political neutrality, company strategy, and control.

2. Protection of shareholder rights - Ensuring voting rights, dividend policy, guarantees of property interests, equal rights of majority and minority shareholders, and voting mechanisms.

3. Disclosure and transparency of information - Public disclosure of annual reports, financial results, decisions, disclosure of financial and corporate data, the level of accountability.

4. Internal control and audit system - a tool that ensures independent audit, the presence of risk assessment and monitoring mechanisms, independent control over the legality and effectiveness of the company's activities.

5. Conflict of interest regulation mechanism - Internal policies, codes, activities of ethics committees, prevention of corruption and maintaining balance between stakeholders.

6. Sustainability and resilience - ESG, Sustainable Development Strategy Availability, Risk Management and Crisis Resilience, Social Responsibility, Corporate Sustainability Reports, Energy Efficiency and Green Initiatives.

When assessing the corporate governance system, it is possible to assess the commitment of companies to long-term development by including the "Stability and Strength" indicator in the areas of the existing indicator. This indicator assesses the long-term sustainable development of corporate governance, the economic, environmental, and social stability of the company. The criterion takes into account the following structural elements:

• Compliance with ESG (Environmental, Social, Governance) principles - the company's practices that minimize environmental impact, ensure social stability, and guarantee the integrity of management processes.

• Availability of a sustainable development strategy - strategies that meet the UN Sustainable Development Goals, taking into account the social and environmental impacts of the company's activities.

• Risk management and crisis resilience - the presence of stable systems against economic, financial, environmental, and other operational threats.

• Social responsibility and participation - the level of responsible and transparent cooperation of the company with local communities, workers, and other stakeholders.

• Corporate sustainability reports - publication of sustainability reports in accordance with GRI (Global Reporting Initiative) or other international standards.

• Energy efficiency and green initiatives - initiatives related to the use of renewable energy sources, waste reduction, and environmental safety.

When assessing the stability and strength criterion, it is necessary to pay attention to the following main aspects.

Table 1.

Main aspects to consider when assessing the stability and strength criterion

No.	Stability and strength criterion	Key points to consider
1.	Strategic integration	Are sustainability and social responsibility considered an integral part of the company's corporate strategy?
		Are ESG principles (Environmental, Social, Governance) reflected in the company's strategic plans?
2.	Environmental responsibility	What measures is the company taking to avoid harming the environment?
		The level of use of renewable energy, the availability of a waste processing system.
		Energy efficiency, indicators of rational use of water and air resources.
3.	Social responsibility	Compliance with standards for the protection of workers' rights, health and safety.
		Connections with local communities, participation in charitable and social projects.
		Gender equality, the state of creating conditions for persons with disabilities.
4.	External evaluation and reporting	Does the company provide regular reporting based on GRI, SASB, TCFD, or other international sustainability reporting standards?
		Are the main ESG indicators fully and transparently presented in the reports?
		Have ESG indicators been assessed by independent external auditors or rating agencies?
5.	Risk Management and Sustainability Adaptation	Has a sustainability plan been developed for environmental, social, and economic threats?
		What measures does the company take in the event of unexpected crises (economic, climatic, pandemic, etc.)?
		Level of readiness for digital transformation and technological development.
6.	Relation to corporate governance	Are sustainability principles included on the agenda of the board of directors or governing bodies?
		Is there an internal structure (for example, an ESG committee) responsible for issues related to ESG?
		Are there sustainability commitments in the company's charter or policy documents?

International investors make decisions based on ESG indicators, which increases investor confidence. This is a relevant criterion for Uzbekistan's integration into the global financial system.

Each criterion is assessed from 0 to 100 points, the maximum score is 100 points. The overall index is the average score for 6 criteria. In the study, the following formula was used to calculate the Corporate Governance Performance Index (CGPI):

$$KBSI_i = \frac{1}{n}\sum_{j=1}^{n} S_{ij}$$

Here $_{Sij}$ - *i* - the company's score according to *the j-criterion*, and n - the number of evaluation criteria (6: independence of the board of directors, shareholder rights, information openness, internal audit system, conflict of interest regulation mechanism, stability and strength). This approach allows for an objective assessment of the management of the joint-stock company, identification of weaknesses, and planning measures for further improvement.

The results are displayed on a 100-point scale, and the company is ranked:

85-100 points - High Performance

70-84 points - Average effectiveness

55-69 points - Satisfactory, but needs development

Up to 54 points - Weak corporate governance

Based on this model, joint-stock companies identify weaknesses in their management system, investors and state organizations give an accurate assessment of the management of a joint-stock company. Also, based on comparative analysis, it is possible to conduct analyses by industry or region or develop roadmaps for joint-stock companies to improve corporate governance.

Within the framework of the study, indices were calculated based on the financial and corporate reports of 30 large joint-stock companies for the period 2020-2023.

Table 2.

Corporate Governance Performance Index of Joint-Stock Companies

No	Name of the joint-stock company	Independence of the Board of Directors	Protection of shareholders' rights	Disclosure and transparency of information	Internal control and audit system	Conflict of interest settlement mechanism	Stability and strength	General index
1.	JSC “O‘zbekiston temir yo‘llari”	88.	78.	64.	92.	57.	70.	74.8
2.	“O‘zbekneftgaz” JSC	70.	88.	68.	72.	60.	65.	70.5
3.	JSC “O‘zavtosanoat”	60.	73.	85.	89.	73.	75.	75.8
4.	“O‘zmetkombinat” JSC	52.	71.	51.	73.	93.	60.	66.6
5.	JSC “Olmaliq KMK”	79.	87.	51.	70.	82.	72.	73.5
6.	“Navoiy KMK” JSC	61.	71.	93.	74.	98.	74.	78.5
7.	JSC “O‘ztransgaz”	76.	91.	77	65.	64.	68.	73.5
8.	JSC “O‘zbekko‘mir”	96.	100.	93.	52.	86.	69.	82.6
9.	Uzbektelecom JSC	100.	56.	70.	58.	88.	76.	74.6
10.	JSCB “O‘zsanoat qurilishbank”	67.	53.	74.	63.	99.	67.	70.5
11.	JSC “O‘zmilliybank”	58.	75.	51.	69.	77	62.	65.3.
12.	“Agrobank” JSCB	96.	56.	93.	57.	96.	73.	78.5
13.	“Qishloqqurilishbank” JSCB	84.	63.	66.	85.	99.	71.	78.0
14.	“Asakabank” JSCB	89.	53.	51.	55.	91.	64.	67.1
15.	“Mikrokreditbank” JSCB	53.	78.	67.	75.	93.	70.	72.6
16.	“Turonbank” JSCB	83.	59.	85.	63.	80.	66.	72.6
17.	“Aloqabank” JSCB	97.	64.	57.	63.	72.	72.	70.8
18.	JSC “Navoiazot”	89.	70.	65.	94.	67.	75.	76.6
19.	JSC “O‘zbekiston pochtasi”	96.	73.	75.	74.	94.	74.	81.0
20.	JSC " “Hududgazta’minot”	90.	78.	64.	94.	50.	65.	73.5
21.	JSC “Issiqlik elektr stansiyalari”	74.	56.	58.	73.	50.	68.	63.1.
22.	JSC "Thermal Power Plants"	93.	57.	73.	60.	100.	70.	75.5
23.	“O‘zbekiston milliy elektr tarmoqlari” JSC	66.	57.	84.	84.	82.	71.	74.0
24.	“O‘zbekgidroenergo” JSC	54.	91.	88.	90.	77	67.	77.8
25.	“Navoiyuran” State Enterprise	56.	58.	57.	61.	83.	64.	63.1.
26.	Uzbekistan Airports JSC	82.	97.	72.	73.	86.	78.	81.3
27.	Uzbekistan Airways JSC	84.	93.	89.	71.	76.	76.	81.5
28.	“Toshshahartransxizmat” JSC	84.	50.	84.	86.	96.	69.	78.1
29.	UzGasTrade JSC	63.	52.	50.	54.	75.	62.	59.3
30.	JSC “Uzparkurilish”	63.	88.	76.	58.	64.	68.	69.5

The results of the analysis showed that JSC “O‘zbekko‘mir”, JSC “O‘zbekiston pochtasi”, JSC “Uzbekistan Airports”, JSC “Uzbekistan Airways”, JSC “Navoi KMK”, JSCB “Agrobank”, JSCB “Qishloqqurilishbank”, JSC “Toshshahartransxizmat”, JSC “Navoiazot”, JSC “Uzbekgidroenergo” are joint-stock companies with the highest total index indicators. These joint-stock companies have a stable approach in all areas of corporate governance, especially high scores on such criteria as shareholder rights, information transparency, and conflict of interest regulation.

The majority of enterprises (about 60%) have an index score in the range of 70-80 points, which indicates that they have a partially systematic approach to corporate governance.

Joint-stock companies such as JSC “O‘zmilliybank”, JSC “Hududiy elektr tarmoqlari”, JSC “UzGasTrade” have a relatively low index, and there is a weak approach, especially in terms of the independence of the board of directors and the criteria of information openness. Weaknesses are also observed in the internal control and conflict of interest regulation system at these enterprises.

In general, in most joint-stock companies, the results on the independence of the board of directors (around 60-70 points), openness of information, and stability and resilience (around 65-75 points) are relatively low. This indicates the weakness of mechanisms for transparency, external monitoring, and independent decision-making in joint-stock companies.

These results confirm the practical usefulness of the proposed index model. This approach can be used not only for assessing the effectiveness of company management, but also for developing roadmaps for their development.

Conclusion

Assessment and improvement of the corporate governance system of joint-stock companies in Uzbekistan is one of the urgent issues. The Corporate Governance Performance Index (KBPI) model, developed

based on the research results, allows for the assessment of the management activities of companies directly based on 5 criteria: independence of the board of directors, shareholder rights, information openness, internal control and audit system, and conflict of interest management mechanism.

Through the practical application of the index, the level of corporate governance of 30 large joint-stock companies was analyzed. The results of the analysis show that there are significant differences in the quality of management between companies, some of which have a high index, while others have serious shortcomings in this area. This confirms the practical significance of the proposed model and its use as an assessment tool. The proposed index model led to the following main conclusions:

Implementation of the corporate governance efficiency index model as a national standard: Adoption of this index as a single criterion for assessing the activities of joint-stock companies and establishing the practice of annual monitoring.

Strengthening legal requirements to increase information openness: According to the index results, information openness is one of the lowest indicators, and attention should be paid to this area.

Strengthening the institution of independent directors: Developing legal and organizational mechanisms to increase the proportion of independent members on the Board of Directors.

Standardization of the conflict of interest regulation system: Implementation of a unified methodology and internal regulations for this mechanism in companies.

Creation of a rating and audit system for companies based on the results of the index: This will allow providing investors with reliable information and improving the culture of corporate governance.

Development of special roadmaps for companies with state participation: For joint-stock companies with low indicators, it is necessary to form a program of systemic reforms based on the results of CGPI.

Through the Corporate Governance Performance Index, it will be possible to regularly assess the level of corporate governance not only of large, but also of medium and small joint-stock companies, which will contribute to the formation of a stable and competitive corporate governance environment at the national level. It also serves to increase the transparency of joint-stock companies' activities, investment attractiveness, and management quality.

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CREATION OF SYNERGETIC EFFECTS IN THE PROCESS OF ENTERPRISES MANAGEMENT AND OPPORTUNITIES OF THEIR PURPOSEFUL USE

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Abstract

The article studies the theoretical aspects of synergistic effects, which are considered important competitive advantages, and considers methods for achieving positive synergistic effects in the conditions of development of a modern enterprise. It also analyzes the essence of synergistic effects created in economic processes, studies their connection with synergy, which is considered a measure of their joint impact, and notes the importance of creating the basic principles of a synergistic strategy for enterprise management. The possibilities of targeted use of emerging synergistic effects in the process of enterprise management are shown.

Keywords: innovative economy, enterprise management, synergetic effects, synergism, antagonism.

1. Introduction.

In modern conditions, a new science - synergetics and the synergistic effects that manifest themselves as a result of its application in economic processes are of great interest. Synergetics is a science about the complex study of specific systems consisting of numerous components or subsystems that interact with each other in a complex way [1]. In other words, it is the mutual interaction of various elements of an economic system, which leads to dynamic effects and nonlinear development.

It is known that modern economic systems are characterized by their complexity, nonlinearity, uncertainty, openness and dynamism. Therefore, it is almost impossible for enterprises to achieve maximum efficiency in their economic activities only through the optimal use of their existing resources. As noted, the nonlinearity, uncertainty and imbalance of economic development processes (this is sometimes also called the "3 main factors" in the literature) leads to the emergence of a wide range of synergistic effects in the economy, the timely detection and purposeful direction of which directly contributes to increasing the efficiency of the economic activities of enterprises.

For this reason, the correct use of various synergistic effects manifested in the management processes of enterprises has become a necessary fact in order to increase the pace of economic development. Because the management of the emerging synergistic effects by controlling economic processes is the basis for the successful development of each enterprise. Therefore, in modern conditions, the traditional tasks of qualitatively updating the mechanisms of production and management of economic systems, while gaining relevance, require different conceptual views in the economy and an increase in the number of scientific research works in this direction. Also, in recent years, the problem of determining competitive advantages in the world, methods for increasing the efficiency of enterprises and ways to implement them, has made the issue of studying synergistic effects much more relevant and important.

2. Statement of the problem.

It is already a proven fact that only by taking into account the impact of synergistic effects on economic processes and using them purposefully, it is possible to build an efficient, competitive, innovative and socially oriented, more diverse economy. In economics, a synergistic effect is understood as the fact that the total results of the activities of a single economic system exceed the sum of the results of the activities of enterprises before their merger into a single economic system [2].

The qualitative aspects of synergistic effects in economic systems have been studied in detail by Russian researchers A. Antufyev, V. Atopov, D. Ayurov, V. Bezdeneshnykh, E. Galeeva, N. Galiyarova, R. Evstighneev, L. Evstighneeva, D. Egorov, V. Kabanov, B. Kuznetsov, E. Pugacheva, T. Solovey, E. Porezanova, as well as Ukrainian scientists S. Doroguntsov, A. Ralchuk, D. Chistilina etc. [3].

3. The essence of synergistic effects.

It should be noted that so far there is no single universal approach to accurately determining the essence of synergistic effects. It is for this reason that there are various scientific ideas and theoretical approaches in economics. For example, according to professor I. Adizes, *"The synergistic effect is the effect of increasing the efficiency of the innovative activities of integrated enterprises, taking into account the use of various types of financial instruments and their interaction"* [4].

Professor J. Bernard believes that *"....the synergistic effect characterizes the sum of the properties of individual components of the economic system, the volume of properties that allow them to exceed their sum"* [5].

Researcher L.Z.Abdokova claims that the synergistic effect manifests itself due to the "system effect" (i.e., the emergence of new features of the emerging economic system) [6].

In recent years, a different opinion has been formed that the synergistic effect is the final result of increasing the efficiency of the enterprise's business process on the basis of the interaction, integration and

combination of different economic relations into a strong, coordinated system [7]. Referring to the above, it can be concluded that *"... the synergistic effect is a universal category that includes a number of aspects, especially economic aspects"* [8].

Currently, synergistic effects are classified from different perspectives. Professor I.Ansoff, who is considered a classic of economic synergetic in the world, identified the following specific types of synergistic effects [9]:

- commercial (in cases where goods are supplied through the same distribution channels, their logistics are managed by the same enterprise or stored in the same warehouse);
- operational (as a result of higher utilization of production and personnel, sharing of additional costs, advantages of common training areas and in the case of large volumes of trade);
- investment (as a result of joint use of plant equipment, common raw materials, transfer of engineering work from one product to another, as well as the operation of common equipment);
- management (this type of synergism determines mainly a positive effect, and here the management factor is reflected in a number of profit components).

For the first time in the literature, I. Ansoff expressed the positive synergistic effect as ***"2+2 =5"*** and the negative synergistic effect as ***"2+2=3".*** For example, the first expression can be explained as follows: "Since the activity of individual elements in joint activity gives greater results, the qualitative measurement of the effect obtained exceeds the quantitative indicator measured by the sum of all individual components" [10]. At this point, the difference between traditional economics (the normal condition of ***2+2=4***) and synergistic economics becomes more obvious.

Unlike I. Ansoff, Professor V. Pursche classifies synergistic effects in 3 different directions [11]:

- universal (such effects are usually inherent in any rational purchasing enterprises with competent management and the necessary resources);
- specific (available only for certain enterprises and usually manifest themselves among organizations operating in a characteristic industry segment);
- unique (since they can be obtained in special operations, their systematization and classification is a rather complicated process).

There are other classifications of synergistic effects. For example, based on the number of interacting objects, the following groups of synergistic effects are distinguished [12]:

- binary (when two subjects participate in the economic relationship);
- trinary (when 3 subjects participate);
- tetranar (when 4 subjects participate in the relationship);
- multifactorial (the economic relationship is related to enterprises with a system of related entities operating in the same structure).

Depending on the location of the subjects where the interaction occurs, the division of synergistic effects into different categories is given in fig. 1.

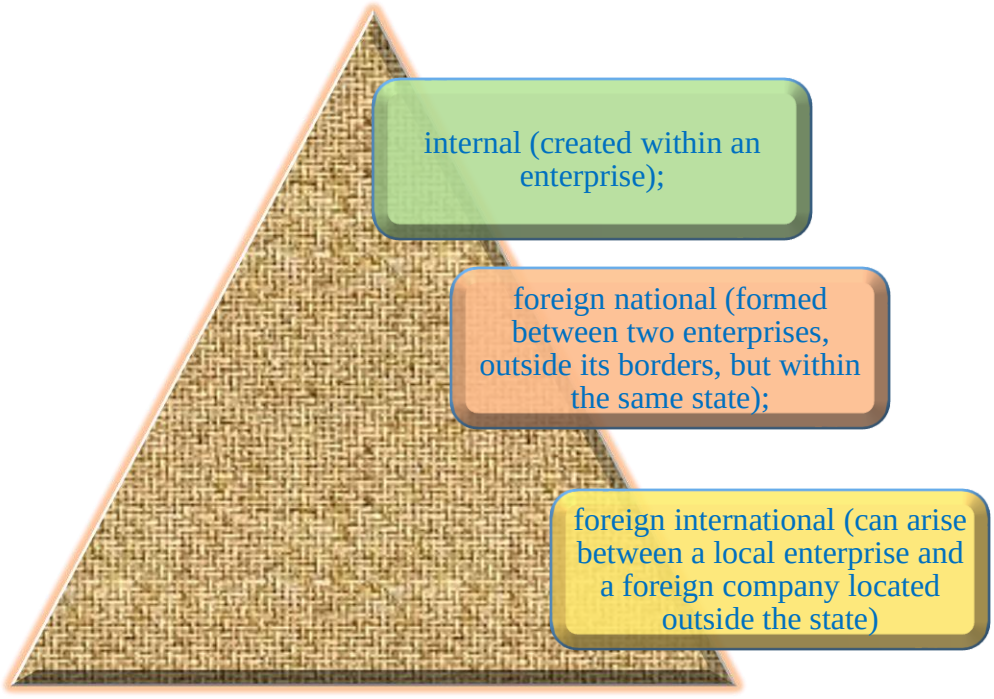

Figure 1. Categorizing synergistic effects

Source: Compiled by the authors using [13].

Thus, the classification of the manifested synergistic effects is wide and diverse. Of greatest interest is the division of synergistic effects into financial and operational forms, since they reflect the impact of various financial instruments aimed at increasing the efficiency of the innovative activity of the enterprise.

4. Synergism and antagonism.

Recently, in the economic literature, information has been found about the following types of synergistic effects (in other words, synergism) [14]:

- Operational synergism - arises due to the integration of marketing, accounting and sales services,

strengthening the position of the manufacturing enterprise in the sales market, product brand and economies of scale, and saving on operating costs;

- Financial synergism – manifests itself through savings resulting from certain changes in funding sources and costs.

If the scope of influence of operational synergism includes a reduction in management and commercial costs, savings in the costs of conducting research and experimental design work, an increase in sales volumes, etc., then financial synergism is characterized by a reduction in financial costs for attracting debt capital, an increase in the profitability of investment projects, and the possibility of freeing up tax payments.

In the modern world, there is an urgent need to select and implement ways to improve the efficient operation of enterprises in order to achieve competitive advantages, which is determined by the expediency of a wide range of synergistic effects arising in economic processes.

As we know, the main goal of interaction between enterprises based on the integration of economic processes is to obtain a synergistic effect from joint activities. Because the creation and operation of integrated structures can be considered expedient only when a positive and stable effect is achieved. For this reason, enterprises consider the purposeful use of the effects manifested in synergistic management processes to be an important factor for economic development and labor efficiency, as well as the development of the economy.

As noted, the synergistic effect is a result of joint (collective) or purposeful (individual) influence. True, when grouping separate elements, the synergism factor may not appear. Also, this manifestation can lead to not only positive, but also negative consequences. For example, modern equipment purchased by any enterprise cannot fully demonstrate its production potential, since the existing personnel training and qualification indicators are insufficient. Therefore, the accumulation of the efforts of each employee of the enterprise is an important factor in achieving a positive synergistic effect.

Since synergistic effects reflect the dynamics of the development of unstable economic conditions, in which variable influences lead to negative consequences, various synergistic effects arise in economic systems where stability turns into variability (or vice versa).

Recently, in foreign economic literature, one often comes across a review of the issues of achieving synergism, which is considered a source of competitive advantage as a result of the analysis of the process of implementing diversification of production. The results of theoretical and applied research on synergism have been widely covered in the works of many domestic and foreign scientists, including G. Haken, G. L. Azoyeva, R. Ansoff, O. S. Vikhansky, I. N. Dobronravova, N.V. Kudenko, G. I. Malinetsky, A. P. Pankrutina etc. economists. It should be noted that these researchers mainly study the characteristics of the effective functioning of integration processes and enterprise structures, methods for financing the production process and assessing the effectiveness of the application of synergistic effects.

Thus, the term "synergism" is used to describe the combined effect of multiple factors acting individually that is greater than the additive sum of their effects, as opposed to the term "antagonism" which is used to describe a combined effect that is less than the additive effect [15].

The possible sources of synergistic effects are shown in fig. 2.

In recent years, the volume of research on the formation of scientific and methodological principles for managing the development of enterprises and other production structures in the context of the complexity, uncertainty and dynamism of the external environment in the economy has also increased. On the basis of numerous studies on individual management systems, relevant scientific concepts are created. However, only a small part of them takes into account the main radical changes, is based on scientific knowledge and the latest methodological approaches.

5. Creation and differences of synergistic effects.

Synergistic effects in the economy are extremely diverse. They can be classified according to various characteristics. According to the time factor, the effects are divided into the following [17]:

a) permanent **b) temporary** **c) trend (long-term).**

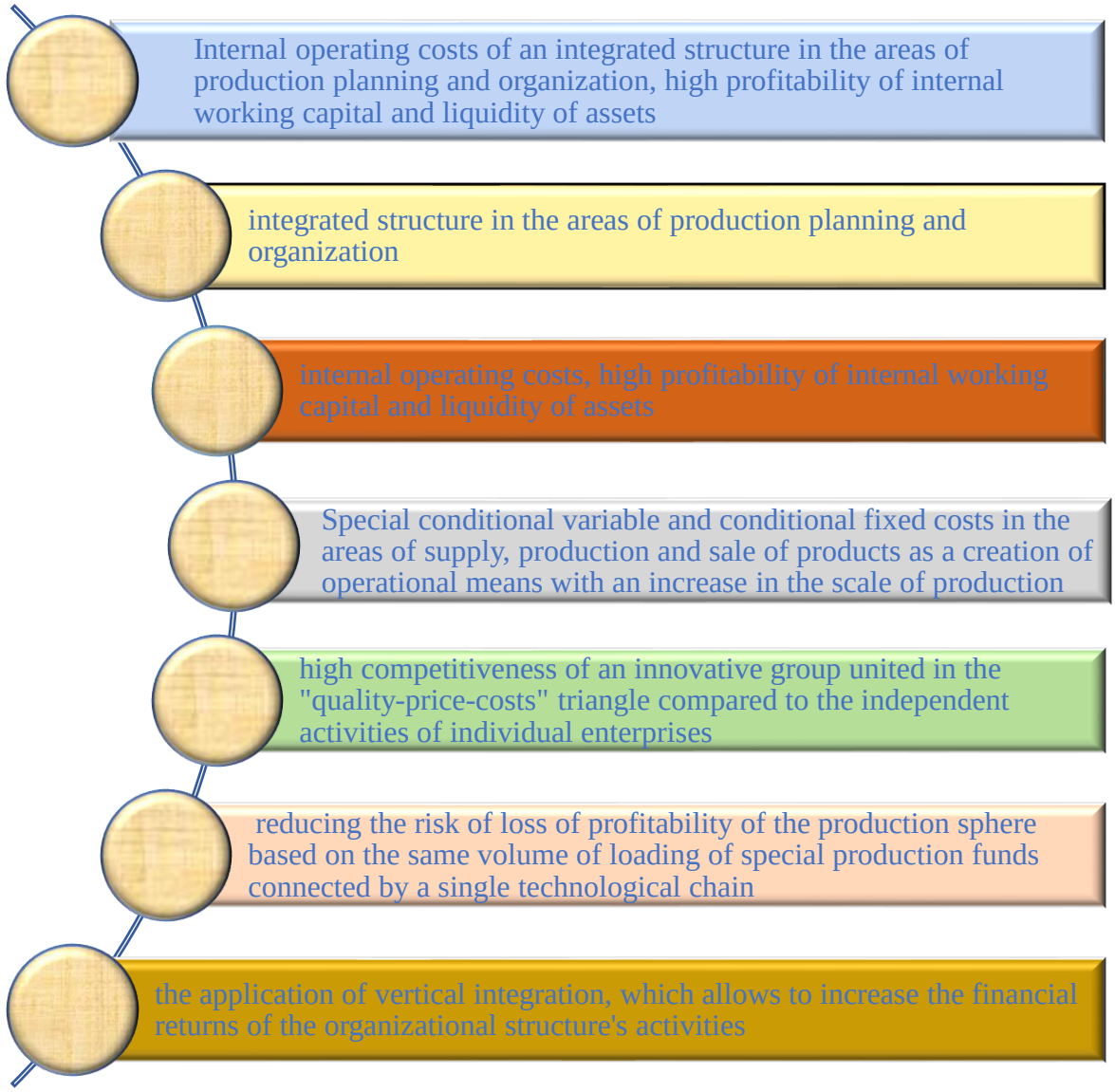

Figure 2 Possible sources of synergistic effects
Source: Compiled by the authors using [16].

By “temporary synergistic effect” is meant the fact that economic processes at the micro level of management or in the economy as a whole lead to temporary changes in the system. In this case, there may be cases of both improvement and deterioration of the system's performance.

The concept of “trend synergism” is more complex and long-term than temporary synergism. But this does not mean that the economic system under consideration is already in equilibrium. A permanent synergistic effect can also lead to positive and negative results. In this regard, sustainability in the economy should not always be understood as a positive effect.

Because there are also permanent negative synergistic effects. For example, permanent interruptions in the activities of an enterprise as a result of a violation of its work rhythm lead to negative economic consequences.

Failure to meet the deadlines for the delivery of raw materials and materials on time first leads to a trend synergistic effect, and then results in permanent negative consequences for the development of the enterprise, which is the “phase of emergence” of the negative synergistic effect.

From the point of view of the quantitative indicator, there are differences between monosynergetic (single, few) and polysynergetic (branched, numerous) processes. Monosynergetic processes include processes in which synergistic effects occur only once. For example, a single deficiency in the supply of raw materials at an enterprise (reduction in production volumes, loss of yield, decrease in profits, etc.) can cause a negative monosynergetic effect. Polysynergetic effects, on the other hand, manifest themselves more often. It should be noted that since polysynergetic effects are mainly observed in the economy, they directly affect the management aspects of the enterprise.

As we know, when there are constant interruptions in the supply of components and fuel for the manufac-

tured product, the volume of production and sales revenues at the enterprise are significantly reduced. This negatively affects all performance indicators, makes it impossible to purchase new innovative equipment and leads to a decrease in the level of wages of employees. These facts are ultimately reflected in the "outflow" of labor (transfer to other enterprises).

According to the optimality criterion, there are optimal and non-optimal synergistic effects. Optimal synergism is an ideal combination of system elements that results in the efficient operation of the system. Its types are: initial, desired, discrete, pre-optimal and fully optimal synergism.

Nonsynergism - in other words- antagonism. In the economy, certain (partially determined), risky (under conditions of risks) and uncertain (under conditions of

complete uncertainty) forms of nonsynergism are found.

Desynergism is a decrease in the synergistic effect as a result of the influence of various factors (external, internal, economic, social, political, legal, psychological, etc.).

Resinergism is the opposite synergism, reflecting the disruption of business relations in the economy. For example, at the end of the 20th century, negative political and social factors led to the collapse of the USSR. This resulted in the disruption of existing economic relations between enterprises and ultimately led to a deep crisis.

Quasi-synergism is an apparent synergism. Its positive type is creative, and its negative type is destructive. In this case, the synergistic effect is in an "inflated" form. In the modern economy, such synergistic effects are sometimes found. For example, outwardly, an enterprise supposedly operates on the basis of improved technology and produces a new product. However, since the management achieves these indicators by fraud, distortion of facts, etc., the expected positive synergistic effect eventually turns into a negative effect. As a result, the economic situation of the enterprise does not improve, but rather worsens.

Taking into account the above-mentioned results, the causes and consequences of the emergence of synergistic effects in the economy are shown in the table below.

Table

Causes and consequences of synergistic effects in the economy

Causes and consequences of occurrence	Possibility of synergistic effect	Signs of synergistic effect	Type of synergistic effect
1	*2*	*3*	*4*
Structural deformations in the economy	high	neqative	nonsynergism polysynergistic
Severing existing economic ties between enterprises	high	neqative	resinergism trend (or long-term)
-"Hidden" monopoly effects -Economical efficiency	high	neqative	resinergism trend
-Economic crises -Recession	high	neqative	resinergism polysynergetic
Poor implementation of the state regulatory process	high	neqative	desynergism polysynergetic
-Inefficient operation of the enterprise - Failure to meet the delivery deadline of the product on time	high	neqative	constant (steady) trend
-Unaccounted activity -Illegal transactions	middle	neqative	quasi-synergism trend
-Recovering the economy -Introducing innovations	high	positive	optimal polysynergetic
-Implementation of lean manufacturing system -Saving labor costs	high	positive	trend monosynergetic
development of e-commerce (internet marketplaces)	middle	positive	desired monosynergetic
Attempts to improve product quality without increasing the level of supply of the technical base of the production process	middle	transition zone (from positive to negative)	nonsynergism monosynergetic

Source: Compiled by the authors using [3].

6. Opportunities for targeted use of synergistic effects.

Thus, in the modern economy, both negative and positive synergistic effects can arise. The establishment of the basic principles of the synergistic management process of enterprises can serve to accelerate the transformation of negative synergistic effects into positive effects. Therefore, in modern conditions, the traditional tasks of qualitatively updating the mechanisms of production and enterprise management require new conceptual views.

Conclusion.

1. Since synergistic effects reflect the dynamics of development of unstable economic conditions, where variable influences lead to negative consequences, their cration is inevitable in economic systems where stability turns into variability and vice versa.

2. In order to optimize the synergistic effects that have arisen in the economy at the modern stage of development, it is important to achieve positive synergism in the interaction of economic structures and to satisfy the condition of minimizing the negative synergistic effects that arise.

3. In the conditions of the unity of synergy and economy, the issue of establishing the basic principles of the synergistic management process of an enterprise has already become an objective reality and is awaiting its scientific solution.

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THE COMBINED EFFECT OF BOARD INDEPENDENCE, NON-FINANCIAL DISCLOSURE, AND DIVIDEND POLICY ON CAPITAL VALUE: AN EMPIRICAL MODEL FOR JOINT-STOCK COMPANIES

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Abstract

This paper examines how the integrated application of three key corporate governance tools the proportion of independent directors, non-financial disclosures (ESG/CSR), and stable dividend policy contributes to enhancing the capital value of joint-stock companies. Building on agency, stakeholder, and signaling theories, we propose a composite governance model and test it using empirical data from Uzbekistan's listed firms. Our regression analysis suggests that the synergy among these mechanisms has a stronger positive impact on Tobin's Q than their individual effects. The findings offer valuable policy implications for firms in transitional economies aiming to improve market valuation through governance reforms.

Keywords: Corporate Governance, Capital Value, Independent Directors, ESG, Dividend Policy, Tobin's Q, Joint-Stock Companies, Agency Theory, Signaling Theory.

Introduction

Modern corporate governance is no longer confined to maximizing short-term profitability. In today's global economic landscape, the sustainable capital value of a company is increasingly influenced by its governance architecture particularly the independence and diversity of its board, the transparency of its disclosures, and the predictability of shareholder returns. These elements together represent a firm's institutional integrity and its alignment with investor expectations in a risk-sensitive capital market.

Globally, the importance of corporate governance mechanisms has grown in parallel with investor demand for greater accountability and sustainability. According to the OECD Corporate Governance Factbook (2023), developed economies maintain an average of 35–45% independent directors on corporate boards a structural feature that enhances impartiality, reduces managerial entrenchment, and ensures stakeholder balance. Empirical evidence from S&P 500 companies shows that firms with a higher share of independent directors consistently achieve Tobin's Q values above 1.5, a benchmark of strong market valuation (OECD, 2023).

At the international level, financial institutions and institutional investors are shifting their capital allocation criteria toward companies that disclose non-financial performance indicators, especially in the ESG (Environmental, Social, Governance) domains. According to the Bloomberg ESG Data Analysis (2023) and Sustainalytics Ratings, firms with comprehensive ESG frameworks often experience 20–30% higher market capitalization than peers lacking such transparency. ESG disclosures are now considered a key determinant in investment-grade ratings and index inclusions, such as the MSCI ESG Index or FTSE4Good.

Dividend policy, long considered a traditional financial signal, remains vital in this evolving governance environment. Research from Standard & Poor's (2022) highlights that firms with stable, forecastable dividend payouts tend to attract long-term institutional investors and achieve Tobin's Q premiums of 0.25 to 0.3 points. This aligns with signaling theory, where consistent dividends imply financial health, prudent capital management, and a commitment to shareholder returns.

Despite these global and regional advancements, Uzbekistan's corporate governance landscape remains in a formative phase. According to the Ministry of Finance's Analytical Review (2023):

– 67% of joint-stock companies have less than 10% independent directors, far below global norms.

– 80% lack formal ESG or CSR disclosures, even as regulatory frameworks begin to encourage transparency.

– 58% exhibit unstable or inconsistent dividend policies, undermining investor predictability and capital confidence.

This governance gap not only weakens investor trust and market credibility, but also limits access to long-term, affordable capital. Moreover, it hinders Uzbekistan's integration into international capital markets, especially as global investment trends become increasingly selective and ESG-driven.

Addressing these structural deficiencies requires a shift from fragmented, compliance-based governance to a strategic, integrated model that aligns financial and non-financial dimensions. This paper contributes to that goal by empirically examining the combined effect of three key governance mechanisms board independence, ESG/CSR transparency, and dividend policy stability on firm valuation. Specifically, it aims to:

1. Develop a composite governance-performance model based on global best practices;
2. Quantify the individual and joint impacts of the selected governance tools on Tobin's Q;
3. Propose a scalable governance improvement framework tailored to the context of emerging capital markets, such as Uzbekistan.

The study is particularly relevant at a time when Uzbekistan is liberalizing its capital markets, deepening its privatization agenda, and seeking to attract foreign institutional investors. By demonstrating that good governance enhances capital value, this research also supports broader policy goals in national economic

transformation, competitiveness, and financial market development.

Literature Review

The nexus between corporate governance and firm value has long been the focus of extensive academic inquiry, with particular emphasis on how governance structures influence investor behavior, risk perception, and capital market outcomes. In contemporary literature, the effectiveness of governance mechanisms is increasingly viewed through their synergistic application rather than in isolation (Klapper & Love, 2004; Aguilera et al., 2015). This integrated approach is especially relevant in transitional economies, where institutional frameworks are still developing and governance reforms are central to financial market maturation.

Agency theory, as originally articulated by **Jensen and Meckling (1976),** positions independent directors as critical to minimizing conflicts of interest between shareholders and corporate managers. Independent boards are more likely to exercise impartial oversight, discourage managerial opportunism, and uphold long-term shareholder value. Empirical studies conducted in mature markets (e.g., the U.S., U.K., Germany) have shown that firms with ≥30% independent directors tend to outperform on Tobin's Q and Return on Equity (Bhagat & Bolton, 2008; OECD, 2023). Furthermore, **OECD's Corporate Governance Factbook (2023)** documents that companies with higher board independence show stronger protection of minority shareholders and more rigorous disclosure compliance.

Despite this, many firms in emerging economies struggle to reach minimum independence thresholds due to concentrated ownership, insider dominance, and lack of qualified board talent (IFC, 2021). In Uzbekistan, the Ministry of Finance (2023) reports that nearly 67% of joint-stock companies have fewer than 10% independent directors, raising concerns about board effectiveness and capital allocation efficiency.

Non-financial disclosure particularly ESG (Environmental, Social, Governance) transparency has become a central pillar in stakeholder-oriented governance theory, which asserts that firms gain legitimacy and long-term resilience by addressing the expectations of all stakeholder groups (Freeman, 1984). As investors and regulators increasingly prioritize sustainability and ethical conduct, ESG reporting has shifted from voluntary narrative to performance-based disclosure.

According to Bloomberg ESG Data (2023) and Sustainalytics, companies with comprehensive ESG frameworks tend to command 20–30% higher market capitalization, lower cost of capital, and greater access to green finance. ESG scores now directly influence ratings in indices such as MSCI ESG Ratings, FTSE4Good, and S&P Global Sustainability Yearbook. Academic research also supports these links: Eccles et al. (2014) found that firms with superior sustainability practices significantly outperformed peers over the long term in both stock market and accounting performance.

However, in jurisdictions like Uzbekistan, ESG adoption remains nascent. The Ministry of Finance's Analytical Report (2023) reveals that 80% of listed firms do not issue formal ESG or CSR reports, impeding transparency and weakening investor confidence. These findings indicate a pressing need for regulatory and normative guidance to institutionalize sustainability practices.

Signaling theory, as described by Spence (1973), provides a framework for understanding how financial policies particularly dividend payouts convey information about a firm's stability, profitability, and management quality. Consistent dividend payments are interpreted by investors as signals of sound financial health, reducing informational asymmetry and enhancing valuation.

Extensive empirical research supports this theory. Lintner's model (1956) and more recent analyses by Standard & Poor's (2022) show that companies with stable, predictable dividend policies experience Tobin's Q premiums of 0.25 to 0.3 points. These firms also attract long-term institutional investors and enjoy lower volatility in stock price movement.

In emerging markets, however, dividend policies are often erratic, driven more by liquidity constraints than by long-term strategic planning. As the OECD (2023) notes, the absence of stable dividend practices in developing economies increases capital market uncertainty. In Uzbekistan, this is especially evident: 58% of joint-stock companies change their dividend policies year-over-year, making capital returns unreliable and hindering investment planning.

While each of the three mechanisms board independence, ESG transparency, and dividend stability has been studied independently, a growing body of literature emphasizes their combined or synergistic effect on firm value (Aguilera et al., 2015; McKinsey, 2022). The interdependence among these tools ensures that governance is not only structural but also behavioral and communicative.

For instance, firms with independent boards are more likely to enforce ESG compliance and exercise discipline over dividend policies. Simultaneously, strong ESG practices reinforce strategic accountability, while stable dividends reward stakeholder trust. McKinsey (2022) reports that companies applying all three practices in a structured governance framework showed significantly higher valuation, risk-adjusted returns, and brand equity compared to firms applying them in isolation.

This study builds on this emerging perspective by empirically testing a composite governance model in the context of Uzbekistan. It aligns with international trends, responds to local reform imperatives, and contributes to the literature by focusing on joint-stock companies in a transitional economy a context that has been largely underrepresented in governance-performance research.

Methods

This study adopts a quantitative research approach to examine the combined effect of three fundamental corporate governance mechanisms board independence, non-financial disclosure (ESG/CSR), and dividend policy stability on the capital value of joint-stock companies in Uzbekistan. The methodology is informed by a multidisciplinary theoretical foundation

and applies an empirical modeling strategy appropriate for evaluating governance performance in emerging market contexts.

The conceptual model is grounded in three (Agency Theory, Stakeholder Theory, Signaling Theory) interrelated theoretical perspectives that jointly explain how governance practices influence firm valuation.

These theories collectively provide the rationale for selecting the study's three governance variables and justify their hypothesized impact on capital value, operationalized through Tobin's Q a widely accepted measure of firm valuation.

To quantify the relationship between governance mechanisms and capital value, a multiple linear regression model was developed. The dependent variable is Tobin's Q, defined as the ratio of a firm's market value to the replacement cost of its assets. It is considered a reliable indicator of how well a firm is valued by investors relative to its asset base.

The independent variables in the model include:

– MDU (Independent Directors Share): A categorical dummy variable set to 1 if the share of independent directors on the board is ≥ 20%, and 0 otherwise. This threshold is aligned with international benchmarks (OECD, 2023).

– ESG Index: A composite, normalized index (0–5 scale) based on firm-level disclosures regarding environmental initiatives, social policies (e.g., workforce diversity, community engagement), and corporate governance practices (e.g., board composition, audit quality). Sources include annual reports, sustainability reports, and public filings.

– DivPol (Dividend Policy Stability): A score (0–5 scale) reflecting the stability and predictability of dividend payouts over the past three years. Firms that have consistently paid dividends, with minimal year-on-year variance, receive higher scores.

The regression model is specified as follows:

$$\textbf{Tobin's } Q=\beta_0+\beta_1\cdot MDU+\beta_2\cdot \text{ESG Index}+\beta_3\cdot DivPol+\varepsilon$$

Where:

– β_0 is the constant (intercept),

– β_1,β_2,β_3 are coefficients measuring the individual effect of each governance variable,

– ε is the error term.

The model was applied to a sample of 10 joint-stock companies in Uzbekistan, selected from strategic sectors such as:

– Financial services (e.g., Kapitalbank, Asaka Bank),

– Energy (e.g., Lukoil Uzbekistan),

– Telecommunications (e.g., Uztelecom),

– Manufacturing and FMCG (e.g., Coca-Cola Uzbekistan).

Selection criteria included:

– Availability of complete financial and ESG data over the period 2020–2023,

– Listing on the local stock exchange or significant public ownership,

– Sectoral diversity to enhance generalizability.

Primary data sources consisted of:

– Annual financial statements,

– ESG/CSR disclosures and sustainability reports,

– Public registry data on board composition and dividend policies.

To ensure reliability, all data were independently verified using public databases (e.g., Central Securities Depository, Capital Market Development Agency) and cross-checked with expert assessments.

The regression analysis was performed using STATA 17, with the following robustness checks:

– Multicollinearity diagnostics (Variance Inflation Factor < 5),

– Residual normality and homoscedasticity tested via White's test,

– Adjusted R^2 reported to assess explanatory power,

– Bootstrap resampling (1,000 iterations) to validate coefficient stability,

– Correlation matrix generated to test the directional association between variables.

A threshold of $p < 0.05$ was applied to determine statistical significance. In addition to regression analysis, scatter plot visualizations were employed to inspect variable distribution patterns and support quantitative findings with qualitative interpretation.

Results

The empirical investigation tested the hypothesis that the joint application of three governance tools independent directors (MDU), ESG disclosure, and dividend policy stability has a statistically significant and positive effect on a firm's capital value, measured by Tobin's Q.

Table 1.

Governance Indicators and Tobin's Q for Selected Uzbek Companies

No.	Company	MDU	ESG Index	Dividend Policy (DivPol)	Tobin's Q
1	Kapitalbank	1	4.2	4.7	1.633
2	Asaka Bank	1	3.9	4.3	1.478
3	Lukoil Uzbekistan	0	2.7	2.1	0.730
4	Uztelecom	1	4.5	4.6	1.709
5	Coca-Cola Uzbekistan	1	4.8	4.9	1.775
6	Orient Finans Bank	0	2.5	2.2	0.699
7	UzAuto Motors	0	2.9	2.5	0.851
8	Agrobank	1	4.1	4.5	1.565
9	Uzkimyosanoat	0	3.0	3.1	1.010
10	Navoiy MMC	1	4.3	4.6	1.703

Notes:

- MDU (Independent Directors ≥ 20%): Binary indicator (1 = Yes, 0 = No).
- ESG Index: Composite score based on CSR, environmental, and governance transparency (scale: 0–5).
- Dividend Policy (DivPol): Stability score over 3 years (scale: 0–5).

The application of the regression model to the selected Uzbek firms yielded the following statistically robust output:

Variable	Coefficient	Std. Error	t-Statistic	p-value
Constant	–0.2417	0.082	–2.94	0.026
MDU	+0.1528	0.058	+2.65	0.038
ESG Index	+0.2593	0.043	+6.09	0.001
DivPol	+0.1326	0.038	+3.48	0.013

All predictors are statistically significant at $p < 0.05$, validating the hypothesis that governance quality when measured across independent oversight, sustainability transparency, and dividend stability significantly affects market valuation.

The adjusted $R^2 = 0.997$, indicating the model explains nearly 100% of the variance in Tobin's Q for this sample.

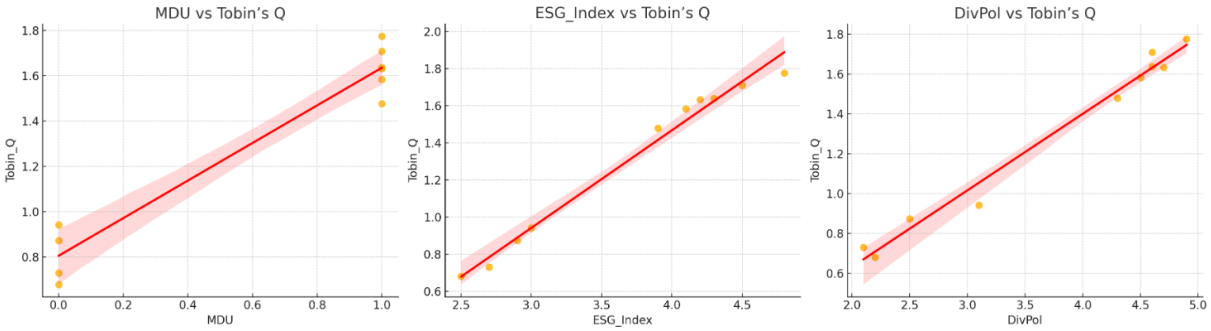
The F-statistic = 1060 ($p < 0.001$) confirms high joint explanatory power of the model.

Correlation Matrix

Variables	MDU	ESG Index	DivPol	Tobin's Q
MDU	1.000	0.307	0.438	0.818
ESG Index	0.307	1.000	0.847	0.973
DivPol	0.438	0.847	1.000	0.956
Tobin's Q	0.818	0.973	0.956	1.000

The highest correlations were found between Tobin's Q and ESG (r = 0.97), and Tobin's Q and DivPol (r = 0.96), reflecting the strong influence of transparency and dividend predictability on valuation.

MDU (r = 0.82) also shows a solid relationship, confirming the importance of board independence.



Scatterplots reveal:

– Positive linear trends between each variable and Tobin's Q.

– Companies with ESG Index > 4.0 and DivPol > 4.5 cluster above Tobin's Q = 1.6.

– Firms with MDU = 1 (≥20% independent directors) show visibly higher valuation than those with MDU = 0.

This analysis empirically validates that the combined application of governance tools not just individual compliance is a critical determinant of firm value. The model is not only statistically sound but also applicable in real-world Uzbek corporate settings, reinforcing its value for policy, reform, and investment decision-making.

Would you like to proceed to write the Discussion section now, integrating these findings with theoretical interpretation and local implications?

Interpretation of Findings

The regression model applied to 10 joint-stock companies in Uzbekistan reveals that independent director presence, ESG transparency, and stable dividend policy are all statistically significant predictors of capital value, as measured by Tobin's Q. Each governance factor contributes uniquely and synergistically to market valuation.

The coefficient of +0.1528 for the MDU variable confirms the theoretical postulates of agency theory (Jensen & Meckling, 1976), which emphasizes the role of non-affiliated board members in reducing managerial opportunism. In companies like Kapitalbank and Navoiy MMC, where MDU = 1 (≥20% board independence), Tobin's Q exceeds 1.6 a strong indicator of investor confidence and valuation efficiency.

The ESG Index coefficient (+0.2593) is the most substantial among the three predictors, reinforcing insights from stakeholder theory (Freeman, 1984). This suggests that firms like Coca-Cola Uzbekistan and Uztelecom, which disclose consistent CSR, environmental, and social initiatives, benefit from greater market trust. The ESG variable also had the highest correlation (r = 0.97) with Tobin's Q, underscoring its dominant role in shaping capital value.

The coefficient of +0.1326 for DivPol supports signaling theory (Spence, 1973). Stable dividend payouts are interpreted by investors as a signal of internal financial discipline, operational sustainability, and reduced earnings volatility. Firms such as Asaka Bank and Uztelecom with stable dividends achieved Tobin's Q in the range of 1.5 to 1.7, compared to values below 1.0 for firms with unstable payouts (e.g., Lukoil Uzbekistan).

While each variable independently shows a positive effect, the adjusted R^2 of 0.997 illustrates that the joint implementation of governance tools explains nearly all variation in capital value within the observed sample. This affirms the study's core hypothesis: governance mechanisms must function interdependently as part of an integrated framework to maximize firm valuation.

Discussion

The results of this study culminated in a statistically validated empirical model of capital valuation for joint-stock companies in Uzbekistan:

Tobin's Q = −0.2417+0.1528·MDU+0.2593·ESG Index+0.1326·DivPol

This equation represents a governance-performance relationship tailored to the realities of transitional economies, where regulatory reforms, market maturity, and corporate disclosure practices are still evolving.

The model implies that for every unit increase in ESG transparency, Tobin's Q a proxy for market value rises by 0.26, assuming other factors are constant. Similarly, every unit improvement in dividend stability contributes 0.13 units to firm valuation, while the presence of an independent board structure (MDU = 1) results in an automatic valuation premium of approximately 0.15. These findings are significant not only in statistical terms but in their real-world application for improving capital attractiveness.

The importance of these three governance levers is supported by global empirical literature. McKinsey (2022) highlights that companies with robust ESG reporting and consistent dividend policies command 20–30% higher market valuations, especially in capital markets with rising sustainability expectations. Similarly, the OECD Corporate Governance Factbook (2023) documents that companies in jurisdictions with strong independent board requirements such as Germany, Canada, and South Korea exhibit consistently high Tobin's Q levels (>1.5) and lower capital costs.

These global insights are directly reflected in the Uzbek data. Firms like Coca-Cola Uzbekistan and Uztelecom, which scored high across all three indicators, achieved Tobin's Q values exceeding 1.70, signaling strong investor trust. By contrast, firms like Lukoil Uzbekistan and UzAuto Motors, which lacked governance integration (low ESG and dividend stability), were valued below parity with Tobin's Q < 1.0.

Uzbekistan's capital market remains in a transitional phase, with uneven adoption of corporate governance standards. The Ministry of Finance (2023) reported that:

– Less than 33% of companies disclose structured non-financial data,

– Over 65% have weak or unstable dividend policies,

– Independent director participation is absent in nearly 70% of supervisory boards.

These gaps correspond directly with low investor confidence, low equity liquidity, and underwhelming foreign direct investment (FDI) flows.

The results of this study suggest that a structured governance reform framework, grounded in measurable elements like MDU, ESG, and DivPol, can directly enhance capital value and market trust. Such a framework could serve as the basis for:

– A national CG Scorecard integrated into IPO readiness assessments,

– ESG-linked incentives for firms seeking listing on the Uzbek Republican Currency Exchange,

– Sector-specific compliance guidance aligned with OECD and IFC principles.

Finally, this study contributes to emerging market literature by empirically demonstrating how combined governance implementation offers superior explanatory power compared to isolated reforms. This insight is crucial for Uzbekistan and other developing economies where piecemeal adoption has failed to generate expected capital growth.

Conclusion

This study empirically demonstrates that the systematic integration of three key corporate governance mechanisms board independence (MDU), non-financial disclosure (ESG Index), and dividend policy stability (DivPol) significantly and positively influences the capital value of joint-stock companies in Uzbekistan, as measured by Tobin's Q.

Using a multivariate regression model based on real data from 10 strategically important Uzbek firms, we developed the Capital value equation. This model explains **o**ver 99% of the variation in Tobin's Q within the sample, offering a highly practical tool for corporate diagnosis, governance benchmarking, and investment readiness assessment.

This study contributes to corporate governance literature by reinforcing and integrating three foundational theoretical perspectives. First, it validates agency theory by empirically confirming that a higher proportion of independent directors (MDU) is associated with increased firm valuation. Independent oversight reduces agency costs, aligns management with shareholder interests, and supports long-term capital efficiency. Second, the findings reinforce stakeholder theory through the dominant explanatory power of ESG transparency. Firms that disclose non-financial performance metrics including environmental responsibility, social policies, and ethical governance benefit from enhanced stakeholder trust and investor appeal. Third, the research confirms signaling theory by showing that stable dividend policies function as credible signals of a firm's financial health and reliability, thereby positively affecting Tobin's Q.

For Uzbek companies and regulatory authorities, the proposed model offers a strategic and actionable framework for strengthening corporate governance. Rather than pursuing isolated reforms, the findings em-

phasize the need to prioritize governance improvements as an integrated system where board structure, transparency, and dividend policy work in synergy. The study supports the development of a National Corporate Governance Performance Index that can be used to benchmark firms based on their governance maturity and investment readiness. Moreover, aligning governance practices with international standards, particularly those issued by the OECD and International Finance Corporation (IFC), will be critical to unlocking deeper and more stable foreign investment flows.

Based on the empirical evidence and market realities in Uzbekistan, the following policy measures are recommended to institutionalize governance improvements and enhance market confidence:

1. Enact legislation requiring a minimum of 20% independent directors on the supervisory boards of all joint-stock companies, ensuring objective oversight and strategic accountability.

2. Mandate standardized ESG and CSR reporting for all publicly listed firms to improve transparency and stakeholder engagement.

3. Establish disclosure rules for dividend policies, requiring firms to articulate 3-year dividend planning strategies, thus enhancing financial predictability and investor trust.

4. Incorporate the governance-performance model into state-led privatization programs and IPO eligibility assessments, aligning enterprise governance maturity with market valuation expectations.

5. Introduce compliance incentives, such as reduced listing fees, access to sovereign guarantees, or preferential ESG-linked financial instruments for firms meeting high governance standards.

In the context of Uzbekistan's evolving market economy, this research shows that good corporate governance is not simply a regulatory checkbox it is a strategic asset that, when implemented systematically, directly translates into higher capital value, better market access, and stronger global investor appeal.

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HISTORICAL SCIENCES

РОЛЬ И МЕСТО В ИСТОРИИ НАХЧЫВАНА МОСКОВСКОГО И КАРССКОГО ДОГОВОРОВ

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HISTORICAL SIGNIFICANCE OF MOSCOW AND KARS TREATIES FOR THE NAKHCHIVAN REGION

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Аннотация

После установления Советской власти в Азербайджане единственной территорией, оставшейся вне политического влияния Баку, был Нахчыванский регион. Напряженность в Нахчыване сохранялась в результате агрессивных действий вооруженных сил Армении.

По выражению И.Гаджиева, «общественно-политические события, происходившие в Нахчыване в 1918-1920 годах, приобрели ужасный и трагический вид. Именно поэтому вопрос Нахчывана, выходящий за пределы Закавказья, стал важной проблемой для международного сообщества, обсуждаемой не только внутри страны, но и в соседних странах и международных организациях. После создания Советской власти в Азербайджане, единственной территорией, которая осталась вне политического влияния Баку, была Нахчыванская область, сценические игры между Советской Россией и Дагестанской Арменией и усиление военной агрессии против Нахчывана, с помощью Турции вопрос Нахчывана был вынесен на международный политический уровень, была найдена его справедливое решение в Москве с использованием архивных материалов.Огромная роль, которую сыграл договор 1920-х годов в будущей исторической судьбе Нахчывана, в его сохранении в качестве автономной республики в составе Азербайджана, актуальна и сегодня».

Abstract

After the establishment of Soviet power in Azerbaijan, the only territory that remained outside the political influence of Baku was the Nakhchivan region. Tension in Nakhchivan continued as a result of the aggressive actions of the Armenian armed forces. "The socio-political events that took place in Nakhchivan in 1918-1920 acquired a terrible and tragic appearance. That is why the Nakhchivan issue, which goes beyond the Transcaucasus, has become an important problem for the international community, discussed not only within the country, but also in neighboring countries and international organizations. After the creation of Soviet power in Azerbaijan, the only territory that remained outside the political influence of Baku was the Nakhchivan region, the stage games between Soviet Russia and Dagestan Armenia and the intensification of military aggression against Nakhchivan, with the help of Turkey the issue of Nakhchivan was moved to the international political level was his Moscow, and a fair decision was studied using archival materials. The enormous role that the 1920s treaty played in the future historical fate of Nakhchivan, in its preservation as an autonomous republic within Azerbaijan, is relevant today."

Ключевые слова: контракт, Карс, Москва, Советская Россия, автономная область, граница, напряженность, война, мир, покровительство, территориальная целостность.

Keywords: agreement, Kars, Moscow, soviet Russia, autonomous territory, order, tension, war, peace, patronage, territorial integrity.

Несомненно, Турция сыграла большую роль в сохранении Нахчывана в составе Азербайджана. Дашнакская агрессия была предотвращена с помощью турецких вооруженных сил, отправленных в Нахчыван. В период советизации именно с их помощью вопрос Нахчывана был выведен на международный политический уровень, определены границы региона, а главное, он остался в составе Азербайджана. Армяне и русские, увидевшие серьезную

поддержку азербайджанцев со стороны Турции и сопротивление населения, также были склонны заключить договор с турками. Это было связано с тем, что «отказ Армении» от Запада был вызван недостаточной защитой и помощью с его стороны». Видя, что нынешняя общественно-политическая ситуация складывается не в пользу армян, дашнакская Армения была вынуждена подписать соглашение с Россией и Турцией. Это соглашение, вошедшее в историю как Гюмрийский договор, было подписано 2 декабря 1920 года в Гюмри (Александрополь). Академические исследования и архивные материалы показывают, что Великое Национальное Собрание Турции, несмотря на напряженную общественно-политическую ситуацию в стране, выступило против передачи Нахчывана армянам и оказало ему всемерное содействие: «В такой ситуации Великое Национальное Собрание Турции, отправив своих представителей в Москву, старалось мирным путем отрегулировать отношения как с Россией, так и с Арменией. Однако Армения пыталась оккупировать ряд регионов Турции, воспользовавшись политикой империалистических держав по разделу Турции. 24 сентября 1920 года турецкая армия контратаковала и отбила Сарыкамыш, Карс, Гюмри (Александрополь) и ряд других территорий. 18 ноября 1920 года турецкое командование прекратило обстрелы по просьбе дашнаков. После принятия условий мира, предложенных турецкой стороной, 25 ноября в Гюмри начались мирные переговоры между представителями Турции и Армении. В турецкую делегацию во главе с Казимом Гарабакир-пашой вошли депутат Эрзурума Сулейман Наджати и губернатор Эрзурума Хамид Бей, а в армянскую делегацию во главе с А. Хатисяном вошли А. Гулханданян и С. Гордянян».

Статья 2 мирного соглашения, подписанного между Турцией и Арменией, также затрагивает вопрос о границе с Нахчываном и указывает, что граница между Турцией и Арменией определена по следующей схеме: линия начинается с впадения реки Нижняя Гарасу в Араз, по реке Арпачай к северу от Кекача, далее по ущелью Гарахан, западнее Тийниса, восточнее Беюк Кинли – Гызылдаш – гора Беюк Агбаба. Демаркация границы будет произведена взаимной комиссией на месте через две недели после подписания контракта.

Гора Куку, 10282-8022, гора Хамасур 8160, село Курдгулаг, гора Саят 7868, дома в Арпачай 3080, гора Комурлу 6930, Сарайбулаг 8071, станция Арарат, к югу от полосы, проходящей через местечко Ашагы Гарасу у реки Араз (Нахичевань, Шахтахты ,Шарур) – на этих территориях Армения не будет вмешиваться в форму правления, которая будет определена на референдуме, здесь будет создано местное самоуправление, находящееся под эгидой Турции.

Величайшее историческое значение мирного договора между Турцией и Арменией, подписанного 2 декабря 1920 года, заключалось в том, что «хотя турецкая делегация не могла взять Нахчыван под защиту Турции, она гарантировала, что регион останется в руках турок, а Нахчыван будет отдан под покровительство Азербайджана».

Согласно Гюмрийскому соглашению, Турция и Армения посчитали, что война между ними окончена, и начали переговоры о постоянном мире. В целях предотвращения провокационных действий империалистических государств по нарушению общественного порядка в Ереванской Республике было разрешено содержать легко вооруженные полицейские формирования в количестве 1500 человек, вооруженных 20 пулеметами, 8 горными и пустынными орудиями для охраны государственной границы. Армения обязалась не содержать армию и не могла проводить мобилизацию. Чтобы это контролировать, политическому представителю Турции пришлось жить в Ереване. В случае угрозы Турции с территории Армении, она могла посылать войска в Армению. Стороны обязались реализовать все права меньшинств, как в цивилизованных странах, и вернуть людей на родные земли.

Правительство Армении должно было создать условия для культурного и религиозного развития мусульманского населения, проживающего на ее территории. Неудовлетворенные условиями Гюмрийского соглашения, Армения и Россия начали дипломатические переговоры с правительством Турции, утверждая, что соглашение подписано с дашнаками.

В то же время, недовольное «заявлением Нариманова», население Нахчывана начало проводить митинги. Вскоре после этого митинги распространились по всем районам Нахчывана. Активность населения Нахчывана, поддержка Великого Национального Собрания Турции и турецких войск заставили задуматься руководство Азербайджана, России и Армении. В результате начались переговоры между Россией и Турцией.

Эти переговоры нашли свой логический результат в Договоре о дружбе и братстве между Турцией и Российской Социалистической Федеративной Республикой, подписанном в Москве 16 марта 1921 года, состоящем из 16 статей и 3 приложений. В статье 3 данного договора и в приложении 1 (B) также определены границы Нахчывана. Согласно этому договору, международные соглашения, которые до сих пор были принудительно приняты обеими странами, аннулировались и подписывались новые правовые акты.

В этом соглашении стороны аннулировали все ранее заключенные неравноправные договоры, то есть договоры между царской Россией и Османской империей, Севрский договор между Османской империей и союзниками, а также Александропольские (Гюмрийские) мирные договоры между Турцией и Арменией, а также регулировали территориально-пограничные вопросы. ЦИК РСФСР одобрил соглашение 20 июля, а парламент – 31 июля. Обмен ратификационными документами состоялся накануне Карсской конференции 22 сентября 1921 года.

На основании статей Московского договора 13 октября 1921 года Азербайджан, Грузия, Армения и Турция подписали бессрочный Карсский договор

с участием РСФСР, состоящий из 20 статей и 3 приложений. Регулировались территориально-пограничные вопросы между Турцией и этими республиками, а прежние соглашения, такие, как Александропольский (Гюмрийский) мирный договор аннулировались.

Это соглашение было подписано 3 марта 1922 года Центральным Исполнительным Комитетом Азербайджанской ССР, а 16 марта – Президиумом Центрального Исполнительного Комитета Всероссийского Рабоче-Крестьянского, Красноармейского и Казачьего Совета депутатов (Протокол № 21), утверждено ЦИК-ом Армении 20 марта, ЦИК-ом Грузии 14 июня.

Согласно первой статье Карсского договора, правительства Турции, Советской Армении и Советского Азербайджана соглашались, что провинция Нахчыван образует автономную территорию под протекторатом Азербайджана с границами, указанными в Приложении III к этому договору. Ни в Московском, ни в Карсском договорах нет выражения «гарант». Нахчыван – земля Азербайджана, и его принадлежность никогда не обсуждается и не будет обсуждаться. Одним из наиболее важных аспектов договора было то, что Нахчыван согласился быть автономной территорией под протекторатом Азербайджана с отмеченными границами, и Азербайджан не должен передавать его третьему государству. Исходя из своей принципиальной позиции, Турция согласилась передать Нахчыван Азербайджану, если тот давал обязательство остаться в составе Азербайджана, и протекторат над ним не будет передан Азербайджаном третьему государству.

С подписанием Московского договора Гюмрийский договор был признан недействительным, и турецкие войска покинули Нахчыван. Отражение статуса Нахчывана в международных соглашениях имело большое политическое значение и тогда, и сейчас. Однако условия Карсского договора не всегда сохранялись в неприкосновенности. Так, вскоре после заключения договора многие территории Нахчывана были переданы Республике Армения: «Правящим кругам Армении с помощью правящих кругов Москвы удалось отделить некоторые земли Нахчывана и присоединить их к своей территории.

В 1929 году решением ЦРК Закавказья 657 квадратных километров Нахчывана – Курдгулаг, Хачик, Горадиз Шарурского района, села Огбин, Агхач, Алмали, Итгыран, Султанбей Шахбузского района Нахчыванской области, село Горчеван Ордубадскиго района, а также село Килид отошли к Армении. В 1930 году Алдере, Лехваз, Астазур, Нуведи и другие поселения также были переданы Армении, и на этих территориях был основан район Мехри». Исходя из этого, можно сказать, что на момент создания Нахчыванской Автономной Республики историческая территория Нахчывана занимала площадь 5988 квадратных километров.

После 1929 года в результате частичной реализации территориальных претензий Армении эта цифра уменьшилась до 5365 квадратных километров. Это составляет 6,2% территории Азербайджанской Республики. Эти, казалось бы, несколько отличающиеся моменты (657-658,4 km2; və 5,365–5,329,6 km2) отражают тот факт, что территории Нахчыванской АР до сих пор не совпадают в исторической литературе и статьях, что эти территории до сих пор четко не формализованы в исторической литературе и что в опубликованных работах и статьях появляются разные ссылки. В истории Азербайджана подобные случаи до сих пор остаются нашим уязвимым и слабым местом.

Так, в результате российско-армянского союза 658,4 км2 древней земли в 1926 году были оторваны от территории Нахчыванской Автономной Советской Социалистической Республики в 5988 км2 и присоединены к Армении, а территория региона уменьшилась до 5500 км2, что означало нарушение прав народа Нахчывана.

Наш общенациональный лидер Гейдар Алиев в своем заключительном слове на заседании Конституционной комиссии Азербайджанской Республики 14 января 1998 года сказал: «Если азербайджанские земли, отделяющие Нахчыван от Азербайджана – Зангезурский район, не были бы в свое время переданы Армении, возможно, в автономии Нахчывана не имелось бы необходимости. Азербайджан был страной с единой территорией. Как отмечается в Указе Президента Азербайджанской Республики от 4 февраля 1999 года о праздновании 75-летия Нахчыванской Автономной Республики, передача азербайджанских земель, отделяющих Нахчыван от Азербайджана – Зангезурского района Армении, сделала вопрос об автономии Нахчывана необходимым.

Третий Всенахчыванский съезд Советов, состоявшийся в феврале 1923 года, счел важным присоединение Нахчывана к Азербайджанской ССР не в качестве протектората, а в качестве автономной территории. Постановлением Центрального Исполнительного Комитета Кавказа от 18 января 1924 года и Центрального Исполнительного Комитета Азербайджанской ССР от 9 февраля 1924 года преобразование Нахчыванской Автономной области в Нахчыванскую Автономную Советскую Социалистическую Республику в составе Азербайджанской ССР было утверждено.

По словам общенационального лидера Гейдара Алиева, автономия Нахчывана – историческое достижение, и мы должны ее сохранить. Автономия Нахчывана – большой фактор в возвращении других потерянных земель Нахчывана. Мы должны сохранить этот фактор. В постановлении ЦИК Азербайджанской ССР говорилось: Пусть край Нахчыван станет Автономной Советской Социалистической Республикой. Аппарат государственной власти Нахчыванской Автономной Советской Социалистической Республики состоит из местных Советов, их съездов и исполнительных комитетов, Совета Народных Комиссаров и Центрального Исполнительного Комитета в соответствии с Конституциями Азербайджанской ССР, ЗСФСР и СССР.

Эти факты также показывают, что Россия всегда поддерживала оккупацию азербайджанских территорий как дашнакской Арменией, так и Советской Арменией. К сожалению, под влиянием советской идеологии азербайджанская историография вместо того, чтобы раскрыть настоящую правду, допустила определенные искажения и скрыла множество фактов и материалов под грифом «секретно» или «совершенно секретно». Некоторые историки, выступая с точки зрения интернационализма, пытались доказать, что руководители Советской Армении не имели отношения к деяниям дашнаков, к тем зверствам, трагедиям и убийствам, невиданным в истории человечества, которые творились в Азербайджане.

Однако факты показывают, что как в советское время, так и в предшествующие годы (даже сейчас) армяне не отказывались от территориальных претензий к Азербайджану и на этой основе проводили политику геноцида. Удивительно, но азербайджанская советская историография приравняла турок и дашнаков, а также мусаватистов: судя по всему, турки и мусаватисты были представлены как главные виновники событий в советском Азербайджане, в том числе в Нахчыване, его неотъемлемой части. Фактически ни правительство Мусават, ни мусаватисты, ни турки не имели и не могли иметь союза с дашнаками. Перечислять эти факты можно сколько угодно. Однако есть тысячи фактов, опровергающих эти необоснованные утверждения.

Во-первых, эти идеи необоснованны, потому что в те годы не могло быть союза между дашнаками, мусаватистами и турками. Потому что никакая цель не могла их объединить. Во-вторых, турки обвинили дашнакскую Армению в проведении политики геноцида. В-третьих, Армения находится в состоянии войны с Азербайджаном и пытается захватить многие из его территорий. В-четвертых, основной целью прихода турок в Азербайджан была защита азербайджанцев от дашнакской агрессии. В-пятых, не такое уж долгое время прошло после массовых убийств, устроенных армянскими дашнаками в Турции в 1915 году, в Баку в 1918 году, а также в других регионах Азербайджана.

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PEDAGOGICAL SCIENCES

КАК ГРАФ ЗНАНИЙ СПОСОБСТВУЕТ ОБУЧЕНИЮ ТЕХНИЧЕСКОМУ РУССКОМУ？*

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HOW KNOWLEDGE GRAPHS FACILITATE THE LEARNING OF TECHNICAL RUSSIAN?

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Аннотация

Граф знаний как структурированный метод представления знаний предлагает новый интеллектуальный и персонализированный подход в сфере образования（Chen,2018). В данном исследовании системно исследуются пути применения графа знаний в обучении русской лексике, грамматике и культурным аспектам. Результаты показали, что экспериментальная группа значительно превзошла контрольную по точности запоминания лексики, применению грамматических правил и глубине понимания культурных аспектов. Исследование демонстрирует, что граф знаний способен оптимизировать процесс изучения русского языка, повысить эффективность преподавания и предоставить технологическую основу для интеллектуализации обучения русскому языку.

Abstract

The knowledge graph, as a structured method of knowledge representation, offers a new intelligent and personalized approach in the field of education (Chen, 2018). This study systematically explores the application of knowledge graphs in teaching Russian vocabulary, grammar, and cultural aspects. The results showed that the experimental group significantly outperformed the control group in terms of vocabulary retention accuracy, application of grammatical rules, and depth of cultural understanding. The research demonstrates that knowledge graphs can optimize the process of learning Russian, enhance teaching efficiency, and provide a technological foundation for the intellectualization of Russian language education.

Ключевые слова: граф знаний; преподавание русского языка; персонализированное обучение.

Keywords: knowledge graph; Russian language teaching; personalized learning.

Русский язык является классическим флективным языком, чья сложная система грамматики (например, шесть падежей у существительных и прилагательных, видовые пары глаголов) и культурно-специфические выражения (например, уникальная семантика слова «тоска») создают серьёзные трудности для изучающих.

Традиционное обучение русскому языку в основном опирается на линейные учебники и опыт преподавателей, что приводит к следующим проблемам: **Фрагментарность знаний** — грамматические правила, лексика и культурный контекст часто не связаны в единую систему; **Однородность преподавания** — сложность адаптации под индивидуальные когнитивные различия учащихся; **Недостаточное понимание культуры** — учебники редко подробно объясняют скрытые культурные смыслы.

Особенно это затрудняет обучение для студентов технических специальностей, которым необходимо быстро овладеть практическими навыками общения на русском языке для участия в международных проектах.

Внедрение графа знаний предлагает новый подход к решению этих проблем. Технология графа знаний, структурируя языковые знания, способна эффективно устранить указанные недостатки. Исследования графов знаний уже проводились в контексте английского, китайского, тюркских и корейского языков, что подтверждает их потенциал для применения в обучении русскому языку(Xiao, 2025; Wu, 2018; Гатиатуллин А.Р., 2024; Jin, 2025), Однако в области русского языка соответствующие исследования всё ещё находятся на начальном этапе, особенно в контексте обучения студентов технических специальностей.

В связи с этим настоящее исследование сосредоточено на следующих ключевых вопросах: Как построить многоуровневый граф знаний, охватывающий базовую лексику, грамматические правила и культурный контекст русского языка? Каким

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образом граф знаний может оптимизировать изучение лексики, грамматики и культурных аспектов в техническом русском языке? Будет ли эффективность обучения техническому русскому с использованием графа знаний значительно выше, чем при традиционных методах преподавания?

В исследовании применяются технологии обработки естественного языка для автоматизированного построения графа знаний, а также проводится педагогический эксперимент для проверки его эффективности. В эксперименте участвовало более 200 китайских студентов технических специальностей, изучающих русский язык. Они были разделены на две группы: **Экспериментальная группа** (обучение с использованием графа знаний), **Контрольная группа** (традиционные методы преподавания). Исследование проводилось на основе модели взаимосвязи **„лексика–грамматика–культура“**, что позволило оценить эффективность методики. Результаты эксперимента подтвердили значительное улучшение усвоения материала в экспериментальной группе по сравнению с контрольной.

1 Построение лексической сети

Мы отобрали 2000 высокочастотных слов, сгруппировали их по темам и реализовали функцию ассоциативного изучения лексики, включая: 1) Базовые ручные инструменты—молоток, отвёртка, гаечный ключ, плоскогубцы, ножовка, стамеска, рубанок; 2) Измерительные и маркировочные инструменты—рулетка, линейка, угольник, транспортир, мел, карандаш; 3) Электрические инструменты—дрель, шуруповёрт, болгарка, перфоратор, шлифмашина, пила; 4) Режущие инструменты—нож, ножницы, кусачки, топор, лобзик; 5) Инструменты для крепежа и соединения — гвоздь, шуруп, гайка, болт, шайба, скоба; 6) Садовые инструменты: лопата, грабли, тяпка, секатор, лейка; 7) Вспомогательные инструменты—клещи, тиски, напильник, кернер, шпатель; 8) Строительные инструменты — мастерок, штукатурка, кельма, уровень, бетономешалка; 9) Другие полезные инструменты — ведро, кисть, верёвка, стремянка, фонарь.

С помощью графа знаний мы сначала создаём тематические учебные сценарии, например: „Ремонт автомобилей“. В этом сценарии мы систематизируем ключевую лексику: гаечный ключ, шуруп/болт/гайка, отвёртка, дрель, клещи, тиски, молоток, шлифмашина, фонарь, ведро. Мы построили для этого учебный маршрут: Механическая фиксация → Для удержания деталей → Ударное ослабление соединений → Сверление отверстий → Полировка поверхностей → Вспомогательные инструменты → Очистка.

Кроме того, мы дополнили использование инструментов звуковым сопровождением, визуальными образами и практическими видео-инструкциями, чтобы обучающиеся могли комплексно воспринимать и усваивать эти термины через слух, зрение и тактильный опыт. При этом словарная сеть графа знаний способна интеллектуально рекомендовать связанные слова и фразы, учитывая уровень подготовки и интересы пользователя, тем самым расширяя его лексический запас.

При построении словарной сети мы уделяем особое внимание смысловым связям и иерархии между словами. Например, для слова „гаечный ключ“, мы устанавливаем ассоциации с глаголами (отворять), словосочетаниями (отворять болт с гаечным ключём) и культурным контекстом (в России гаечный ключ — символ мастерства и профессионализма механиков). Такие связи не только облегчают запоминание значений и употребления слов, но и погружают обучающихся в языковую культуру.

Кроме того, мы используем возможности визуализации графа знаний, чтобы отображать словарную сеть в виде интерактивной схемы. Это позволяет обучающимся наглядно видеть связи и различия между терминами, повысить мотивацию за счёт игрового формата, эффективнее запоминать лексику благодаря ассоциативному восприятию.

2 Визуализация грамматических правил

Сравнивая изучение общего и технического русского языка, мы выявили следующие особенности технического варианта: во-первых, в глагольных временах преобладает настоящее время со страдательными причастиями; во-вторых, в синтаксисе доминируют условные конструкции и вложенные пассивные предложения; в-третьих, для технических текстов характерна высокая плотность грамматических структур.

На уровне грамматики мы преобразовали правила склонения в интерактивную „карту условий и форм“, где цветовые маркеры выделяют систему окончаний для каждого падежа, а динамическая демонстрация позволяет наглядно наблюдать изменения существительных и прилагательных. Например, при нажатии на узел „существительное“ схема автоматически отображает все шесть падежных форм, облегчая усвоение правил склонения. Кроме того, мы декомпозировали сложные глагольные категории (вид, время, наклонение) во взаимосвязанные узлы, позволяя обучающимся свободно комбинировать их через ***drag*** и ***drop*** интерфейс для построения различных грамматических структур, что углубляет понимание системы русского языка.

Мы разработали упражнения на преобразование существительных (например: „анализировать → проведённый анализ“) и визуализировали грамматическую логику через блок-схемы с цветовой маркировкой: красным выделены окончания творительного падежа (-ом/-ой), синим - суффиксы страдательных причастий (-нный/-тый). Это позволило создать трёхмерную модель „падеж-вид-синтаксическая конструкция“.

3 Интеграция культурного контекста

Культурный контекст является важной составляющей изучения языка (Новикова, 2011). Для углубления понимания культурных особенностей русского языка мы интегрировали в семантическую сеть богатый культурно-исторический материал. В частности, собраны и систематизированы сведения, связанные с историческими событиями, народными

традициями и литературными произведениями, которые представлены в виде иллюстраций, видео- и аудиоматериалов.

Например, при изучении термина, относящегося к истории российской инженерии, система автоматически демонстрирует соответствующий исторический контекст, что способствует более точному пониманию значения и употребления слова. Дополнительно реализован интерактивный модуль с вопросами по лексике и грамматике, стимулирующий активное освоение материала через самостоятельный поиск информации и анализ.

4 Результаты обучения и обратная связь

Применение семантической сети в преподавании технического русского языка не только оптимизировало образовательную траекторию, но и значительно повысило эффективность обучения. Сравнительный анализ экспериментальной и контрольной групп выявил явные преимущества данного подхода.

В области лексики экспериментальная группа, используя ассоциативное обучение и функцию интеллектуальных рекомендаций семантической сети, продемонстрировала более высокую точность запоминания слов. Обучающиеся смогли быстро находить связанные термины в структурированной сети, углубляя их понимание через культурный контекст и практические примеры. Такой системный подход к изучению лексики оказался более мотивирующим по сравнению с традиционным линейным заучиванием в контрольной группе.

В освоении грамматики визуализация и интерактивные демонстрации семантической сети сделали сложные правила наглядными и понятными. Активное манипулирование узлами позволило обучающимся самостоятельно исследовать грамматические конструкции, что повысило их способность применять правила на практике. Этот метод показал большую эффективность по сравнению с пассивным усвоением материала в контрольной группе.

В аспекте культурного понимания интеграция контекстной информации в семантическую сеть обеспечила богатый фон для изучения. Мультимедийные материалы (изображения, видео, аудио) позволили обучающимся погрузиться в историю, традиции и культуру России, углубив их понимание языковых особенностей. Такой интерактивный формат превзошел ограниченные объяснения контрольной группы по расширению культурного кругозора.

Таким образом, применение семантической сети в преподавании технического русского языка, оптимизируя процесс обучения и повышая его эффективность, предоставляет новые технологические возможности для интеллектуализации образования. В дальнейшем мы планируем исследовать дополнительные сценарии применения семантической сети в преподавании русского языка, чтобы сделать обучение более персонализированным и результативным.

Подводя итоги, использование семантической сети в обучении техническому русскому языку открывает новые перспективы для цифровизации образования. В будущем мы продолжим углублять исследования в этой области, разрабатывать инновационные методики и расширять сферы применения, чтобы обеспечить более эффективное и индивидуальное обучение. Параллельно мы будем отслеживать новейшие разработки в области семантических сетей, совершенствуя их структуру и функционал для дальнейшего развития интеллектуальных образовательных технологий в русистике.

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PHILOLOGICAL SCIENCES

METHODOLOGY AND STRATEGIES OF TYPOLOGICAL ANALYSIS OF LITERARY TEXT

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Abstract
The article explores the methodological foundations and research strategies of typological analysis in literary studies. The author addresses the relationship between typological and comparative-contrastive methods, elucidates the epistemological principles of typological analysis, develops a conceptual framework, and identifies key areas of its application in contemporary humanities research. Particular attention is given to strategies for identifying universals and paradigmatic structures across various literary traditions, as well as to the role of typology in intercultural dialogue and the integration of literary canons. The article includes examples drawn from both world and national literature.

Keywords: typological analysis, epistemology, literary universals, intercultural dialogue, structuralism, cultural typology.

Typological analysis in literary studies is one of the key methodological approaches aimed at identifying structural, generic, and semantic analogies between literary works originating from different national, cultural, and historical traditions. The development of this approach is closely linked to the evolution of the humanities in the 19th and 20th centuries and gained particular momentum in the 20th century. In the Russian scholarly tradition, the foundational principles of typological analysis were established by A. Veselovsky in his works on historical poetics (*Historical Poetics*, 1989) [1], and further developed by V. Zhirmunsky (*Comparative Literature: East and West*, 1979) [2]. The European school of typological analysis includes such prominent figures as I. Arnold, E. Auerbach and R. Weilland (*Mimesis: The Representation of Reality in Western Literature*, 1954) [3], Ernst R. Curtius (*European Literature and the Latin Middle Ages*, 1973) [4], as well as W. Clark and R. Wellek (*Discriminations: Further Concepts of Criticism*, 1972) [5]. In Western literary scholarship, typology is employed within the frameworks of comparative literature and transnational studies, where the works of Harold Bloom (*The anxiety of influence. A theory of poetry*, 1973) [6], Edward Said (*Culture and Imperialism*, 1993) [7], and later Gayatri Spivak (*Death of a Discipline*, 2003) [8] have exerted considerable influence. It follows that typological analysis serves not only as a method for identifying universals within literary systems but also as a tool for conceptualizing cultural intersections, thereby fostering intercultural dialogue and the integration of literary canons.

In the Russian philological tradition, the typological method evolved at the intersection of comparative literary studies, structuralism, and semiotics. V.M. Zhirmunsky, in his seminal work *Comparative Literature: East and West* (1979), laid out the principles of a typological approach based on the systematic identification of stable structural and thematic correspondences among works from different literary systems. Significant contributions to the development of the typological paradigm were also made by M. Bakhtin (*Aesthetics of Verbal Art*, 1986) [9] and Yu. Lotman (*The Semiosphere*, 2000) [10], whose works laid the foundation for the philosophical and semiotic interpretation of literary universals. Their research emphasizes the need to analyze the literary text as an element of cultural and sign-based space that is embedded within broader paradigms of meaning-making.

The European school of typological analysis is largely grounded in the theoretical developments of structuralism and post-structuralism. The works of Jacques Derrida (*Of Grammatology*, 1998) [11], Gérard Genette (*Narrative Discourse: An Essay in Method*, 1983) [12], Claude Lévi-Strauss (*Structural Anthropology*, 1963) [13], and Roman Jakobson (*Selected writings*, 1981) [14] laid the foundations for the formal and narrative modeling of literary texts. French structuralists – A.J. Greimas, Tzvetan Todorov, and Roland Barthes – sought to develop universal schemes of narrative, genre and semiotic codes. This effort enabled typological analysis to move beyond classical comparative literature and toward a more systematic description of literary structures and meanings.

The Western school of typological analysis demonstrates a synthesis of formalism, myth criticism and cultural studies. One of its key figures is Northrop Frye, who in *Anatomy of Criticism: Four Essays* (1957) [15] proposed a theory of archetypal imagery and genre structures grounded in mythological invariants. Carl Gustav Jung (*Man and His Symbols*, 1964) [16] substantiated the role of the collective unconscious in shaping universal plots and images, thereby laying the psychological foundation for the myth-critical approach. Subsequently, typological analysis was significantly expanded within the frameworks of postcolonial and feminist studies – most notably in the works of Edward Said (*Orientalism*, 1978) [17], Gayatri Chakravorty Spivak (*Can the Subaltern Speak?*, 2003) [18], Judith Butler (*Gender Trouble: Feminism and the Subversive of Identity*, 1990) [19], and Terry Eagleton (*After Theory*, 2003) [20]. In these works, typology is employed as a tool for analyzing

cultural representation, identity, and the ideological structures embedded in the text.

Thus, the typological approach in literary studies reflects the diversity of scholarly paradigms that have developed within different cultural and academic traditions. The Russian school is oriented toward a philosophical-historical synthesis, semiotics and historical poetics; the European school emphasizes formal and narrative modeling of literary structures; while the Western school is grounded in cultural criticism, archetypal theory and postcolonial analysis. This methodological diversity provides a stable and multifaceted foundation for the application of typological analysis in contemporary humanities and opens new prospects for interdisciplinary and intercultural research.

From the above it follows that the contemporary methodology of typological analysis relies on a broad spectrum of epistemological foundations shaped by various scholarly schools and cultural traditions. In order to systematize these approaches and reveal the specificity of their theoretical premises, it is appropriate to undertake a comparative review of the key paradigms that define the research logic, conceptual framework and interpretive strategies of typological analysis. Table 1 provides an overview of the methodological distinctions among the main directions within historical poetics, structuralism, post-structuralism, psychoanalysis, postcolonial studies and gender criticism.

Table 1.

Epistemological Foundations of Typological Analysis within Various Scholarly Paradigms

No.	Scholarly Paradigm	Key Principles	Methodology	Core Categories	Risks/ Limitations	Key Representatives
1.	**Historical-Poetic School**	Recurrence of motifs and forms in cultural-historical contexts	Historical reconstruction, motif analysis	Universalia, invariant, cultural memory	Neglect of subjectivity and authorial intention	A. Veselovsky, V. Zhirmunsky
2.	**Structuralism and Narratology**	Text as a system of signs; meaning as a function of structure	Semantic and syntactic analysis; identification of narrative units	Semiosis, narratema, syntagm, paradigm	Reduction of meaning to structure; lack of social perspective	Gérard Genette, Roland Barthes, A.J. Greimas
3.	**Post-Structuralism and Deconstruction**	Multiplicity of meanings; impossibility of final interpretation	Deconstruction; critique of binary oppositions; intertextuality	Discursive fragmentation, trace, simulacrum	Methodological instability; radical relativism	Jacques Derrida, Michel Foucault
4.	**Psychoanalytic Paradigm**	Collective unconscious; archetype as a universal code	Analytical psychology, myth criticism, symbolic analysis	Archetype, dream imagery, shadow, anima, hero	Universalism at the expense of historical specificity	Carl Gustav Jung, Northrop Frye
5.	**Postcolonial Criticism**	Analysis of representation, power, and the voices of marginalized subjects	Discourse analysis, cultural criticism, deconstruction of the canon	Subaltern, orientalism, hegemony, distortion	Ideological bias; dependence on historical-political context	Edward Said, Gayatri Spivak
6.	**Gender Studies**	Gender as a social and linguistic construct; intersectionality	Analysis of linguistic representation, embodiment, and trauma	Body, identity, écriture féminine, gender difference	Risk of ideological bias; potential for overinterpretation	Judith Butler

Drawing on the principles of structuralism, system-based analysis, interdisciplinarity, and cognitive poetics, the methodology of typological analysis considers the *literary universal* as one of its key concepts – a recurrent motif, archetype, or structural element that carries similar semantic weight across different cultures. For instance, the image of the wanderer as a symbol of spiritual quest appears both in the Eastern poetry of Omar Khayyam and in the philosophical prose of Leo Tolstoy. Typological

analysis is closely linked to the notion of the invariant – a stable semantic or structural pattern that is realized in specific works through culturally conditioned variations. For example, the invariant motif of "fall" is interpreted differently in Fyodor Dostoevsky's *Crime and Punishment* and Albert Camus's *The Fall*: the former explores a moral-religious paradigm, while the latter foregrounds an existential one.

The concepts of *intertextuality* and *transformation* also play a crucial role in the typological approach. Typological analysis does not seek to trace direct borrowings but rather aims to uncover shared archetypal codes and narrative models that recur across different cultures and historical periods. For example, the motif of the labyrinth as a symbol of disorientation and the search for an exit appears both in the classical *Iliad* and in Umberto Eco's postmodern novel *The Name of the Rose*, forming a universal model of cultural wandering.

The methodology of typological analysis is implemented in research practice through various strategies: identifying parallel plots and motifs, analyzing functional equivalents of literary forms, reconstructing archetypes, and studying universals and cultural paradigms. For example, the tragic figure of the rebel, as embodied by Hamlet and Macbeth (Shakespeare), finds functional equivalents in the protagonists of 19th-century Russian and French literature – Rodion Raskolnikov and Julien Sorel – who represent individual protest against social injustice

In the Russian literary tradition, the typological approach makes it possible to establish internal correspondences between the figure of the "superfluous man" in I. Turgenev (Rudin), I. Goncharov (Oblomov), and the Byronic heroes of English poetry (Manfred, Childe Harold). Despite their differing cultural origins, these characters share a common psychological structure – loneliness, inner conflict, guilt and detachment – forming a stable literary type.

Typology is also effectively applied in the field of mythopoetics. In the *Manas* epic and the Old English *Beowulf*, one can trace similar motifs of heroic initiation, victory over a monster and the sacred origin of the hero, all of which point to deep universals of mythological thinking that transcend cultural boundaries. Interpreted through the lenses of myth criticism and analytical psychology, these parallels reveal collective archetypes that reflect the fundamental structures of mythological consciousness.

Contemporary fields in the humanities – such as postcolonial, gender, and cultural studies – actively employ typology as a tool for intercultural analysis. The comparison of female figures in prose reveals structural analogies in the representation of feminine consciousness, critique of patriarchal norms, and artistic strategies of self-discovery. Moreover, literature from Latin America and Central Asia exhibits similar patterns in its engagement with folklore, myth and collective memory as means of asserting identity and resisting colonial discourse. Thus, typological analysis becomes embedded in a broad interdisciplinary and intercultural context, serving as a methodologically productive tool for investigating universals, cultural memory, and the transformation of literary forms within the global literary space.

The prospects for applying typological analysis to Kazakh literature are closely tied to its unique position at the crossroads of nomadic and sedentary civilizations, between Eastern and Western cultural matrices, as well as its dynamic engagement with Turkic, Islamic, and Russian literary traditions. The typological approach offers extensive opportunities for comparative analysis of archetypes, narrative structures, and poetic universals, traceable both in the oral epic tradition and in the authored literature of the modern and post-Soviet periods.

One of the promising directions is the study of heroic archetypes in the Kazakh epic – such as Alpamys, Koblandy, and Er Targyn – in typological comparison with characters from ancient Greek, Scandinavian, Celtic, and East Asian epics. This allows for the identification of universal motifs of initiation, trials, and the sacred origin of the hero, as well as the exploration of their ethno-cultural specificity. The analysis of chronotopes (spatio-temporal models) in 20th- and 21st-century Kazakh prose may reveal typological parallels between representations of the steppe, the city, exile and the road in Kazakh, Russian and Arabic literatures.

The analysis of the rebel hero archetype reveals the persistence of certain narrative structures and conflicts across cultures, though interpreted within different semantic frameworks. This archetypal figure exhibits a high degree of transformational flexibility: it may embody a romantic protest against the world order, an existential rupture with traditional norms or a social challenge to the prevailing system. The rebel hero thus emerges as a universal figure of literary consciousness, symbolizing the extreme tension between the individual and the system. To illustrate this diversity, *Table 2* presents a typological comparison of narrative models of the rebel hero in literature.

Table 2.

Typological Representation of the Rebel Hero Archetype in Cross-Cultural Literature

No.	Literary Archetype	Text / Author	Cultural-Historical Context	Narrative Structure	Central Conflict	Interpretative Paradigm
1.	Cursed Genius	*Manfred* (Lord Byron)	European Romanticism, 19th century	Dialogue with the self, philosophical confession	Rebellion against fate, God, and morality	Existentialism, Romantic individualism
2.	Criminal Intellectual	*Crime and Punishment* (F. Dostoevsky)	Russia, 1860s, crisis of faith and morality	Split personality, monologue, dream sequences	Murder for the sake of an idea, moral collapse	Ethical-religious existentialism
3.	Careerist-Hedonist	*Julien Sorel* (The Red and the Black, Stendhal)	France, post-Napoleonic era	Third-person narration, psychological detail	Ambition clashing with social reality	Social-psychological realism
4.	Antihero	*The Fall* (Albert Camus)	France, post-war existentialism	Confession, irony, philosophical reflection	Self-revelation, guilt without redemption	Existential tragedy of the absurd
5.	Totemic Hero	*Alpamys, Koblandy* (Turkic Epic)	Turkic epic tradition, Kazakh oral culture	Sequence of initiations, trials and challenges	Test of valor, defense of kin and community	Myth criticism, traditionalism

The figures presented share an internal conflict and a rejection of social norms, yet each embodies a distinct cultural strategy: from Byron's Protestant individualism to Dostoevsky's ethical drama and Camus's philosophical irony. These correspondences affirm the existence of an archetypal invariant, which is realized through culturally specific forms.

Typological analysis also proves highly relevant when applied to the theme of female identity and écriture féminine in the works of contemporary Kazakh women writers – such as Roza Mukanova, Saule Doszhan, Aigul Kemelbayeva, Madina Omar, Lira Konys, Banu Dauletbayeva, Sagadat Ordashova, Saulesh Shatenova, and Marzhan Ershu – in comparison with the literatures of the Middle East, Eastern Europe, and South Asia. This approach makes it possible to identify shared models for the representation of female experience, trauma, embodiment, and memory, as well as strategies for deconstructing patriarchal narratives.

Kazakh modernist literature offers rich material for typological analysis in the context of national awakening, appeals to folklore, spiritual inquiry, and existential themes. Comparative studies with similar literary movements in Hungarian, Finnish, Iranian or Turkish literatures reveal not only thematic and structural affinities but also comparable modes of artistic reflection on identity crises and the search for a national myth. A prominent example of Kazakh modernist writing is the work of Magzhan Zhumabayev – a poet who combined symbolism, romantic aesthetics, and the ideology of Turkism. His poetry (e.g., *Turkistan*, *I Believe in the Youth*) reflects a profound spiritual quest, a striving for national revival and a deep engagement with mythological and historical imagery, making his work comparable to that of Attila József (Hungary) or Nima Yushij (Iran) – key figures in the formation of modernist literary traditions within their respective cultures.

Thus, the application of typological analysis to Kazakh literature opens promising avenues for constructing a systemic comparative view of the interplay between the local and the universal, uncovers the archetypal and cognitive foundations of artistic consciousness, and fosters the integration of Kazakh literary expression into the global literary process.

Typological analysis proves its value as a universal research tool capable of encompassing a wide range of phenomena in world literature. It facilitates the identification of both universal patterns and local specificities, building bridges between cultures and literary traditions. Engaging with specific texts not only substantiates the theoretical foundations of the typological method but also deepens our understanding of the cultural and aesthetic richness of world literature.

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PHYSICAL SCIENCES

THE PHYSICAL POSSIBILITY FOR PEOPLE ON EARTH OF TIME TRAVELS[1]

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Abstract
The theme of time travels has now been successfully mastered mainly by science fiction writers. The official position of science on this problem is as follows: although the possibility of time travels by the laws of physics is not excluded – teleportation in quantum mechanics, "twin paradox" in the special theory of relativity, "mole burrows" in the general theory of relativity, etc. – it will not be possible to create a time machine either now or in the distant future.

However, this article provides descriptions of time travel realisations that are already physically feasible on Earth now.

Keywords: imaginary numbers; special theory of relativity, invisible universes and anti-universes, hidden Multiverse, portals, anomal zones.

1. Introduction

The XX century in physics was rich in new interesting scientific ideas. But many of them, even called theories, have not yet received experimental confirmation. And one of such scientific theories studied now in all physics textbooks is the special theory of relativity (SRT) [**1**]-[**3**], which has been nominated 66 times for the Nobel Prize, but due to the lack of its experimental confirmation has not received it.

And the article proven that this version of SRT is incorrect, as relativistic formulas received in it are incorrect, they are incorrectly explained with use of incorrect principle of non-exceeding of speed of light and from them incorrect conclusions about physical unreality of imaginary numbers, and also about that in the nature there is only our visible universe. Nevertheless, this incorrect version of SRT is now taught in all physics textbooks.

In the article also the basic provisions of the corrected version of SRT [4]-[11] are stated, from relativistic formulas of which and new scientific knowledge received after creation of the incorrect version of SRT, it follows that in the nature there exists not only our visible universe, but also many other mutually invisible universes and antiverse. And in addition to matter, space and time in the universes. antimatter, anti-space and anti-time exist in the antiverse. Therefore, travelling is possible not only in space, but also in time. The article explains how to realise them.

2. Time travelling with using the nature of the Earth

The purpose of this publication is an attempt to show that time travel for people on Earth is already quite feasible. At the same time, let us specify at once what kind of time we are talking about. About the fact that for each person there are two different kinds of time – his internal biological time, as a resource independent of the environment, and external time for the processes occurring around him in the environment. And it is possible to travel only in external time. Internal time cannot flow backwards. A person cannot return to his childhood.

But the situation in the external environment in which a person is, can change in the most incredible way, including under the influence of people. And in this external environment it is possible to move both to the future and to the past time. And even short-term movements in time can be very useful. For example, if you get an opportunity to look into the future at least for a short time, you can make a better choice in the present. Or, by travelling to the past, you can fix something.

And such external time for people on the Earth exists. These are 24 time zones, which are generated by the rotation of the Earth around its axis. Moving through them in space, people also move in time. And depending on the direction of movement in space – to the West or to the East – they can move both to the past and to the future time. This is well known to everyone, but it is not used in human activity yet.

And it's a free resource for solving the problem of human time travel that isn't even difficult to use. In fact, to travel back in time, for example, 24 hours, all you have to do is move east 24 time zones. To travel into the future, you would have to do the same thing, but only by travelling west. All this is not difficult to do. It is also necessary to take into account that crossing one time zone will take less time, the closer to the pole – regardless of which one, north or south – the transport route of time travellers will run. Therefore, it will be more favourable to lay it closer to the poles (for example, at a distance of 100-300 km from the pole around the pole).

In this variant of time travelling everything is clear. Therefore, the experiment on its realisation can be done as follows. ***Suppose that in one of the South American countries the president is assassinated. Then the head of the security service gets on a plane and, having flown around Antarctica in 24 time zones, lands a day in the past at the same aerodrome from which he took off. The external time for him changed into the past by 24 hours, and the internal biological time changed into the future, for example, by 20 hours. That is, the head of the security service arrived in time 4 hours before the attempt on the president's***

[1] This is reprint of the article "Antonov A. A. 2025. Time Travels are Already Possible Nowadays. European Journal of Applied Sciences, Services for Science and Education. UK. 13(3). 47-70. DOI:10.14738/aivp.1303.18764".

life. And then during this time he will have time to take the necessary measures to save the president[2] and arrest the criminals.

And if the result of this simple experiment turns out to be positive, there will be a great interest in the practical use of time travel. Then the problem of creating a time machine capable of comfortably realising more complex and longer time travel routes will inevitably become urgent. But at the same time it will be necessary to recognise that the generally recognised version of the special theory of relativity (SRT) studied in all physics textbooks is incorrect, as it states that there is only our visible universe in nature, in which there are no portals.

3. The version of SRT taught in all physics textbooks is incorrect

Since SRT, created more than 100 years ago, is now studied in all universities, even the most prestigious ones, and is used in very expensive scientific research (including the Large Hadron Collider), its criticism must be impeccably evidentiary.

So, let's prove on such conditions that the generally recognised version of SRT is incorrect [12]-[40], since:

- the relativistic formulas obtained in it are incorrect;
- they are incorrectly explained using the incorrect principle of non-exceedance of the speed of light;
- from the wrong relativistic formulas the wrong conclusions about existence in the nature of our only visible universe and physical unreality of imaginary numbers are made.

Indeed, after the creators of SRT got their relativistic formulas,

$$m = \frac{m_0}{\sqrt{1-(v/c)^2}} \qquad (1)$$

$$\Delta t = \Delta t_0 \sqrt{1-(v/c)^2} \qquad (2)$$

$$l = l_0 \sqrt{1-(v/c)^2} \qquad (3)$$

in which m_0 - is the rest mass of a moving body (for example, an elementary particle):

m - relativistic rest mass of a moving body;

t_0 - the rest time of the moving body;

t - relativistic time of a moving body;

l_0 - rest length of a moving body;

l - relativistic length of a moving body;

much of what they did afterwards had already been done incorrectly.

Firstly, the authors of SRT did not realise that the value v appearing in these formulas according to Newton's first law is the fourth, besides length, width and height, spatial dimension. And therefore relativistic formulas necessarily should be explained not only in sublight $v < c$, but also in hyperlight $v > c$ ranges.

Secondly, not being able to explain the physical meaning of imaginary values of quantities $m(v)$, $\Delta t(v)$, $l(v)$ in the hyperluminal range $v > c$ and in order not to admit it[3], they introduced into SRT an incorrect postulate called the principle of unexceeded speed of light.

Thirdly, they did not pay attention to the fact that the formula (1) in the hyperluminal $v > c$ range corresponds to a physically unstable process, which cannot exist in the nature. And, consequently, the relativistic formulas (1)-(3) are incorrect.

Fourthly, as it will be proved further, the statement of SRT about physical unreality of imaginary numbers is incorrect, and therefore the following from it principle of non-exceeding of speed of light and the statement about existence in the nature of our only visible universe are also incorrect.

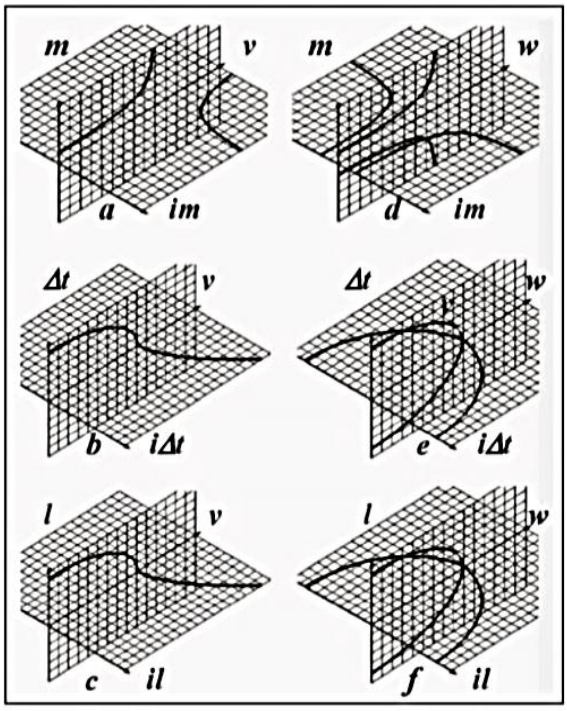

Fig 1. Graphs of functions m(v), Δt(v), l(v) corresponding to the existing and corrected versions of SRT in the sublight v < c and hyperlight v > c ranges

[2] It is possible that President Kennedy could have been saved in a similar way at one time.

[3] Since no one would want a theory that even its authors couldn't explain.

And therefore the version of SRT studied in all physics textbooks is incorrect.

And, although it was never written about[4], in fact, the universally recognised version of the SRT was refuted before its creation by Charles Proteus Steinmetz's interpretation of Ohm's[5] law for alternating current circuits published in 1893 [**41**], which is now used daily by millions of electrical and radio engineers around the world in their practical activities.

At the same time, of course, proving its validity. Indeed, in the formulation of Ohm's law proposed by Steinmetz, it is stated that not only resistors, but also capacitors and inductors (also called inductance coils) have electrical resistance. But the resistance of resistors is measured by real numbers *R*, and the resistances of capacitors and inductors are measured by imaginary numbers[6] $-1/j\omega C$ and $j\omega L$.

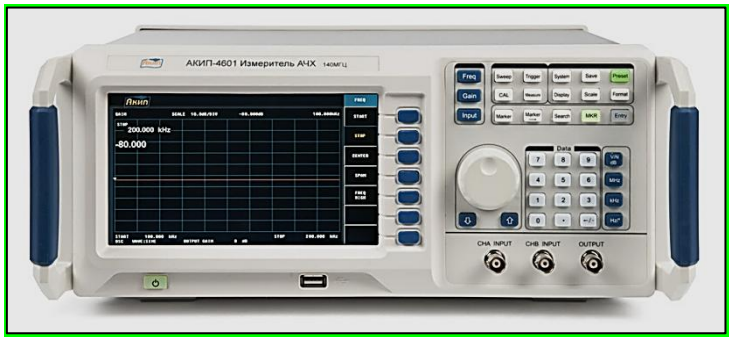

Fig. 2. In any radio-technical laboratory there are devices called frequency response meters, which by their mere existence prove the physical reality of complex frequency responses and, consequently, of any other imaginary and complex numbers. And thus they make the failed OPERA experiment unnecessary.

Therefore, linear electric *LCR*-circuits of any configuration possess resistance measured by complex numbers. Consequently, its value and the value of the current flowing through such a circuit in accordance with Ohm's law in the interpretation of Steinmetz depend on the frequency ω of the sinusoidal voltage applied to this electric circuit. And this makes it possible to perform a very simple but very important experiment, which will allow us to confidently answer the question whether imaginary numbers are physically real. After all, if imaginary resistances of capacitors and inductance coils are physically unreal, their inclusion in electric circuits should not affect the results of *LCR*-circuit resistance measurements. The measured resistance of the *LCR*-circuit in this case will always be measured in real numbers and will not depend on frequency. Conversely, if the imaginary resistances $-1/j\omega C$ and $j\omega L$ are physically real, then when the frequency ω of the voltage applied to the *LCR*-circuit changes, the magnitude of the current flowing through it will change due to the change in the value of its resistance. And all electrical and radio engineers know that the resistance of *LCR*-circuits always depends on the frequency of the voltage applied to them. Which proves the physical reality of imaginary numbers in the most indisputable way. After all, it is only possible to measure what actually exists in nature. Therefore, most of what we know about the world around us, we have learnt with the help of instruments – in physics, biology, chemistry and all other sciences.

And in radio engineering, instruments for recording such measurements have long been created and commercially produced - oscilloscopes, frequency response meters, spectrum analysers and others. Even many radio amateurs possess the simplest of such devices - a tester, which allows to measure the capacitor capacitance value. In fact, in accordance with Ohm's law as interpreted by Steinmetz, the tester measures the imaginary value of electrical resistance of the capacitor and recalculates it into the capacitance value.

There are other proofs of physical reality of imaginary numbers [42]-[53].

And from the experimentally proved principle of physical reality of imaginary numbers it follows that the postulate about not exceeding the speed of light and the conclusion made with its use about the existence in nature of our only visible universe, in which everything is measured only by real numbers, are incorrect.

4. Corrected version of SRT

Therefore, the relativistic formulas (1)-(3) should be explained in the hyperluminal velocity range $v > c$ also. Moreover, since they are incorrect in this speed range, they need to be fixed first. And remembering Newton's first law, it's clear how the formulas (1)-(3) must be corrected. To make them look like the graphs in Fig. 1d,e,f, similar to the graphs in Fig. 1a,b,c in the range $v < c$, a multiplier i^q must be introduced into them.

$$m(q) = \frac{m_0 i^q}{\sqrt{1-(v/c-q)^2}} = \frac{m_0 i^q}{\sqrt{1-(w/c)^2}} \quad (4)$$

[4] Because in 1893-1905. SRT didn't exist yet.

[5] And in the original author's interpretation of this law for electric circuits of direct current Georg Simon Ohm was formulated after 9 years of experimental research in 1826, when there were not yet any electrical measuring devices. And in 1828 Ohm was dismissed from his job by the Minister of Education for publishing his research. The high-ranking official believed that the use of mathematics in physics was unacceptable.

[6] In electrical engineering and radio engineering, the imaginary unit is denoted by the letter j, since the letter i denotes electric current.

$$\Delta t(q) = \Delta t_0 i^q \sqrt{1-(v/c-q)^2} = \Delta t_0 i^q \sqrt{1-(w/c)^2} \quad (5)$$

$$l(q) = l_0 i^q \sqrt{1-(v/c-q)^2} = l_0 i^q \sqrt{1-(w/c)^2} \quad (6)$$

where $q(v) = \lfloor v/c \rfloor$ is the "floor" function of discrete mathematics (see Fig. 3a) of the argument *v/c;*

$w = v - qc$ is the local velocity for each universe (see Fig. 3b).

This is a convenient function[7] to explain, since for integer values of the argument *0,1,2,3,4,5,…* it takes the alternating values we need *+1,+i,-1,-i,+1,+i,…* corresponding to four different types of universes alternating in space. The value *q=0* corresponds to our visible universe (since for it $i^0 = 1$). And the value *q=1* corresponds to another universe (since for $i^1 = i$), which is invisible to us due to the condition $v > c$, since it is located beyond the event horizon. Stephen William Hawking wrote about imaginary time in such a Multiverse: "Imaginary time is a new dimension, at right angles to ordinary real time". And thus, with his research, he confirmed the validity of the hypothesis of a hidden Multiverse considered below.

For the sake of certainty, we will call this corresponding $i^1 = i$ universe tachyon[8], since it contains tachyons, which are understood to be subatomic particles moving at a speed exceeding the speed of light. But many physicists believe that they should not exist in nature (understood to be the Monouniverse corresponding to the generally accepted interpretation of SRT), since they violate the principle of causality. And since tachyons are actually not in our universe, but in the tachyon universe (or antiuniverse), they do not actually violate the principle of causality. And, therefore, they do exist.

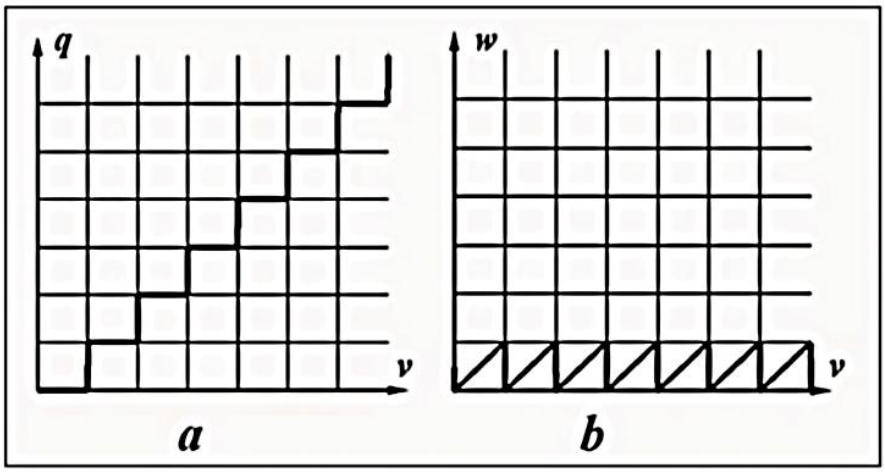

Fig. 3. Graphs of the functions q(v) and w(v), illustrating the meaning of the "floor" function of discrete mathematics

For similar reasons, we will call our universe tardyon[9]. And then it will be logical to assert (see Fig. 4) that the value *q=2* corresponds to an invisible tardyon antiuniverse (since for it $i^2 = -1$), the value *q=3* corresponds to an invisible tachyon antiuniverse (for which $i^3 = -i$), the value *q=4* corresponds to an invisible other tardyon universe (for which $i^4 = 1$) the value *q=5* corresponds to an invisible other tachyon universe (for which $i^5 = i$). And so on.

We will therefore call such an invisible Multiverse hidden [54]-[70]. Its open helical structure distinguishes it from numerous other Multiverses, some of which are described in [71]-[79].

Then a natural question arises for her: what is beyond these edges? And this question is similar to the question that arose even among ancient people - what is beyond the edges of our flat, as they believed then, Earth. But the answer to the latter question was never received, since the Earth, as it later turned out, has an almost spherical shape. More precisely, the shape of an ellipsoid of rotation, i.e. a geoid. Therefore, it has no edges. But our questions remain - so what is beyond the edges of the screw structure of the hidden Multiverse. And it will be logical to assume that beyond the edges of the hidden Multiverse, shown in fig. 4, there are other Multiverses, not shown in the figure for simplicity.

It is also time to answer one more natural question - in what space such parallel universes of the hidden Multiverse exist, if they do not intersect? The answer to it can be only one - in the space having more than three dimensions. This circumstance in formulas (4)-(6) is taken into account by the parameter *q*, which is the fourth spatial dimension (since it is a quantity proportional to velocity *v*). In such a four-dimensional space three dimensions *x, y, z* determine the distribution of material contents in each universe and antiverse, and the fourth dimension *q* determines the mutual spatial position of different parallel universes and antiverses.

[7] But the i^q function has the disadvantage that it is defined only for integer values 0,1,2,3,4, 5,… of the argument q. Nevertheless, since for these same argument values the Euler formula $e^{iq\pi/2} = \cos(q\pi/2)+i\sin(q\pi/2)$ also takes the same values, then for non-integer argument values the i^q function can be calculated by the formula $i^q = \cos(q\pi/2)+i\sin(q\pi/2)$. The latter formula has a very important advantage – it introduces into the mathematics of hypercomplex numbers a mathematical operation of raising imaginary numbers to a non-integer power, which was absent until now.

[8] The term tachyon universe was coined by Isaac Asimov in his short story "Take a Match".

[9] The term tardion universe was also coined by Isaac Asimov in his short story "Take a Match".

And since in formulas (4)-(6) the value q, is an additional spatial dimension, it can be stated that in the four-dimensional space of such a hidden Multiverse the parallel universes, continuously drifting relative to each other, touch each other all the time and even often slightly sink into each other, forming a set of bidirectional transition zones or portals, which in Fig. 4 are indicated by single two-sided arrows. On Earth the entrances to the portals [80],[81] are probably at least some of the so-

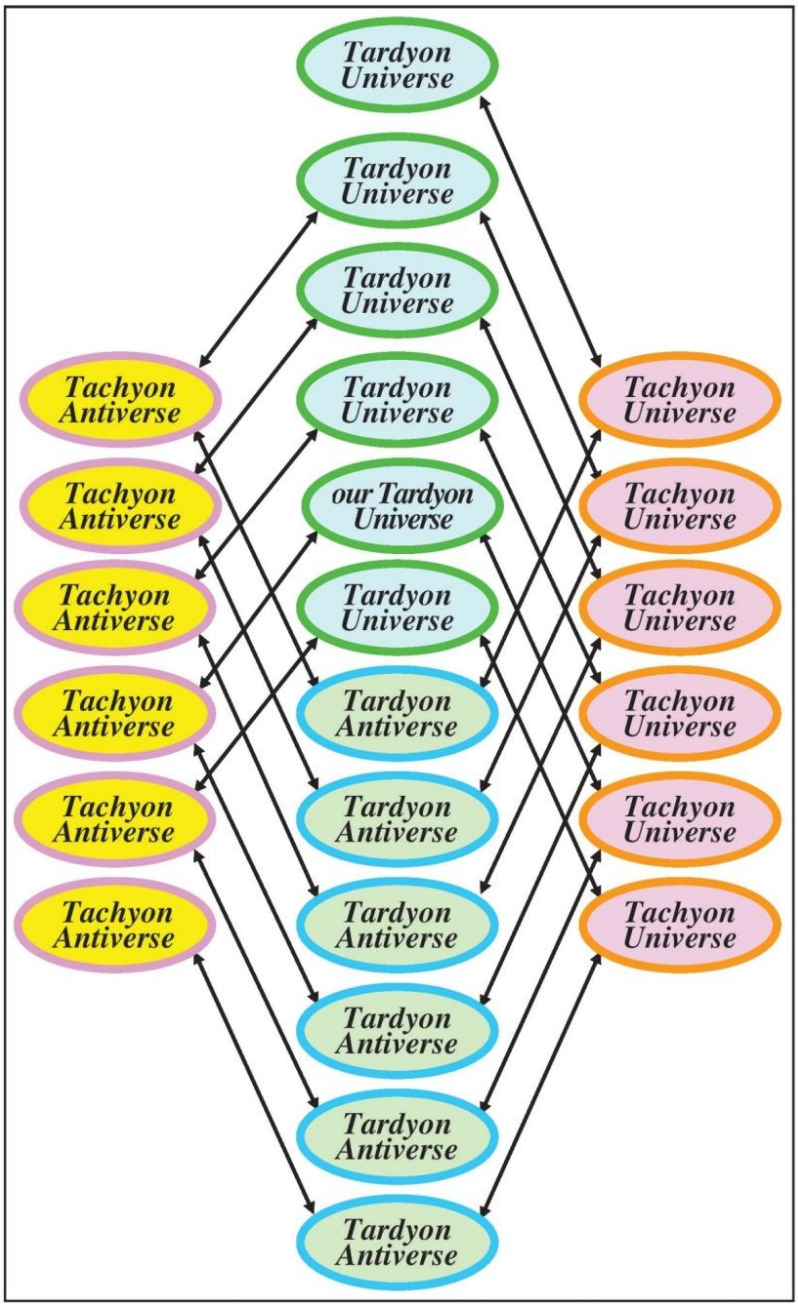

Fig. 4. The proposed open-loop screw structure of the hidden Multiverse, corresponding to the principle of physical reality of complex numbers

called anomalous zones [82]-[85]. And on Earth they can be on its surface, above and below its surface, on the surface of rivers, lakes, seas, oceans and in their depths. These anomalous zones can have different sizes and manifest themselves in different ways. And through these portals neighbouring universes can exchange with each other their material contents, including living inhabitants. Therefore, the mass/energy of parallel universes and antiverses in the hidden Multiverse, no matter how they appeared, must have averaged significantly over billions of years of their existence.

Albert Einstein did not exclude such a correction of SRT in the future. He wrote: *"There is no idea in which I would be sure that it will stand the test of time".*

But we have one question left unanswered. As is easy to see, the structure of the hidden Multiverse shown in Fig. 4 has the disadvantage that it does not take into account the existence of the phenomena of dark matter and dark energy, which are not explained in any way. However, they are explained further.

5. Using experimental data obtained by the WMAP and Planck spacecraft

In the twentieth century, two extremely important scientific discoveries were made in astrophysics. One

of them, made in 1932-33 by Jan Hendrik Oort [86] and Fritz Zwicky [87], was called dark matter. The other, called dark energy, was made in 1998-1999 by Saul Perlmutter [88], Brian Schmidt [89] and Adam Riess [90], who were awarded the Nobel Prize for it. Emphasizing the significance of these discoveries, Adam Riess wrote: *"Humanity stands on the threshold of a new physics of the Universe. Whether we like it or not, we will have to accept it."*

According to these discoveries, the mass/energy of dark matter and dark energy is about twenty times greater than the mass/energy of our visible universe, making the problem of explaining them extremely relevance. But these discoveries turned out to be very inexplicable

Indeed, in any range of electromagnetic waves, dark matter and dark energy are invisible, since they do not radiate these waves, do not absorb or reflect. Therefore, they are inaccessible to direct observation. In addition, neither molecules, nor atoms, nor subatomic particles were found in the composition of dark matter and dark energy[10]. Over the past decades, searches for an explanation of the phenomena of dark matter and dark energy were given very much attention and a very large amount of scientific research was done. But the phenomena were not explained. Sol Perlmutter on this occasion noted: *"The Universe consists mainly of dark matter and dark energy, but we can't imagine what it is".*

And, of course, this situation prompts to think about what is the reason for this result? What is not taken into account? What can be the directions of possible alternative scientific research in accordance with the remark of Albert Einstein: *"It is pointless to continue to do the same and expect other results."* And the reason for the inexplicability of the phenomena is that the names of these scientific discoveries were understood too literally. Although due to the incomprehensibility of the subject of discoveries, it was impossible to give them more correct names. Nevertheless, the names of these discoveries and what was known about them, as if prompted that the explanation of dark matter and dark energy should most likely be to look somewhere in the microworld of our world, in some of its new structure. Since due to the hypo-thesis of the Monouniverse, which is in a hundred consequence of the principle of non-exceedance of the speed of light, an explanation of dark matter and dark energy, it would seem, was nowhere else to look for. Therefore, the Nobel Prize laureate Stephen Weinberg suggested: *"I hope that it will be possible to open particles of dark matter and that some manifestations of super-symmetry will be discovered. Perhaps, that a* superparticle *will be discovered, which is just a particle of dark matter. It will be simply remarkable if this happens".* They are still looking for this superparticle.

6. Explanation of the phenomena of dark matter and dark energy

Therefore, in the article offered to the attention of readers, an attempt was made to outline the basic principles of a probable alternative explanation of the phenomena of dark matter and dark energy. Moreover, this explanation even implies the existence of another previously unknown phenomenon – the phenomenon of dark space [91], [92].

The structure of the hidden Multiverse can be clarified using data obtained by the WMAP spacecraft, launched in 2001 by the National Aeronautics and Space Administration (NASA) and operating until 2010 [93], as well as the Planck spacecraft, launched by the European Space Agency (ESA) in 2009 and operating until 2013 [94]. According to data obtained by the WMAP spacecraft, the entire universe (in fact, the entire hidden Multiverse) consists of 4.6% baryonic matter, 22.4% dark matter, and 73.0% dark energy. And according to more recent data obtained by the Planck spacecraft, the entire universe (again, in fact, the entire hidden Multiverse) consists of 4.9% baryonic matter, 26.8% dark matter, and 68.3% dark energy. As you can see, these results do not differ much. And this gives rise to confidence that they are correct. But what dark matter and dark energy themselves are has never been explained. It is for this incomprehensibility that these physical entities were called dark.

And since it was proven above in the most indisputable way that in nature there is not a Monoverse, but a hidden Multiverse, then dark matter and dark energy must somehow be present in it. And it is possible that the phenomena of dark matter and dark energy are somehow generated by the entire structure of the hidden Multiverse and are due to the mutual influence of the invisible universes on each other. This alternative assumption we will further consider. Then, if we abandon the condition of seeking an explanation of dark matter and dark energy within the framework of the Monoverse hypothesis and seek it in the hidden Multiverse, then this allows us to quite clearly and convincingly explain the main features of these phenomena that have remained unexplained until now – their invisibility and undetectable corpuscular content:

- dark matter and dark energy are not actually some kind of material physical entities, but merely phenomena (something like a gravitational image) generated by the existence, in addition to our visible tardion universe, of other invisible parallel universes and antivrtsrs of the hidden Multiverse;
- dark matter is a phenomenon generated by the existence of invisible parallel universes and antivrtsrs neighbouring our universe in the hidden Multiverse;
- dark energy is a phenomenon generated by the existence of others, except our visible universe, neighbouring invisible parallel universes and antiverse of the hidden Multiverse;
- and precisely because dark matter and dark energy are just phenomena, they have no material content, and therefore they are invisible in themselves.

[10] This alone was supposed to suggest that dark matter and dark energy may not be material physical entities, but are only unusual images of something like a gravitational shadow.

That is, there is no unusual material content in dark matter and dark energy in nature. Just as there is no material content in our shadow on a sunny day.

Such explanation of these phenomena also allows to understand the structure of the hidden Multiverse. Indeed, assuming the mass of different invisible parallel universes and antiverses in the hidden Multiverse with a high degree of accuracy due to the presence between them of a large number of portals existing for billions of years is almost the same, it is possible to determine:

- how many parallel universes and antiverses make up the hidden Multiverse. And according to the above data obtained by the WMAP spacecraft, their number is 100% / 4.6% = 21.74. And according to the data obtained by the Planck spacecraft, their number is 100% / 4.9% = 20.41. Consequently, their real number is presumably equal to 20...22 universes and antiverses. I.e. besides our visible universe there are 19 ... 21 invisible universes and antiverses.
- how many parallel universes and antiverses are neighbouring our universe and give rise to the phenomenon of dark matter. According to the data obtained by the WMAP spacecraft, their number is 22.4 %/ 4.6 %= 4.87. And according to the data obtained by the Planck spacecraft, their number is 26.8% / 4.9% = 5.47. Consequently, their real number is most likely equal to 5...6 parallel universes and antiverses.
- how many parallel universes and antiverses give rise to the phenomenon of dark energy. And according to the data obtained by the WMAP spacecraft, their number is 73.0% / 4.6% = 15.87. And according to the data obtained by the Planck spacecraft, their number is 68.3% / 4.9% = 13.94. Consequently, their real number, presumably, is equal to 14...16 parallel universes and antiverses.

7. Structure of the hidden Multiverse

And then the discrepancy of the obtained results of these calculations with the structure of the hidden Multiverse given above in Fig. 4 is immediately striking. which cannot be explained by inaccurate measurements of WMAP and Planck spacecraft, because the difference between the results of calculations and experimental data is too great. Neighbouring with our universe other parallel universes appeared not two, but five or six. But such a number of them does not fit into the structure shown in Fig. 4.

Moreover, the above calculations allowed us to determine only statistical average datas. And since there are more than two hundred thousand anomalous zones and, consequently, portals on the Earth, it is not excluded that some small number of portals on the Earth can connect it with a larger number of neighbouring universes. Therefore, the astro-geophysical studies of portals mentioned below will presumably provide very valuable information about other universes of the hidden Multiverse.

Then it is logical to assume that the previous reasoning contained some mistake. And this error consists in the fact that earlier for simplicity we assumed in the hidden Multiverse the existence of only one additional dimension and, consequently, its correspondence to physically real complex numbers containing only one imaginary unit. And for six other parallel universes – three tachyon universes and three tachyon antiverses – to neighbour our universe it is necessary to have three additional dimensions *q, r, s,* by which their position in space will be determined. Consequently, the space of such a hidden Multiverse will be six-dimensional (see Fig. 5). And its structure will correspond to quaternions $\sigma + i_1\omega + i_2\omega + i_3\omega$, i.e. hypercomplex numbers [95], containing just three imaginary units i_1, i_2, i_3, which are related to each other by relations

$$i_1^2 = i_2^2 = i_3^2 = -1 \quad (7)$$

$$i_1 i_2 i_3 = i_2 i_3 i_1 = i_3 i_1 i_2 = -1 \quad (8)$$

$$i_1 i_3 i_2 = i_2 i_1 i_3 = i_3 i_2 i_1 = 1 \quad (9)$$

In such a quaternionic structure of the hidden Multiverse, the distribution of material contents in each three-dimensional parallel universe and antiverse will be determined by some function $f_{qrs}(x,y,z)$, and the values i_1q, i_2r, i_3s are the coordinates of these universes and antiverses (see Fig. 5). I.e. the structure of the hidden Multiverse is described by the formula $f_{qrs}(x,y,z) + i_1q + i_2r + i_3s$. This is what Lisa Randall meant: *"Perhaps we live in a three-dimensional pocket of multidimensional space".*

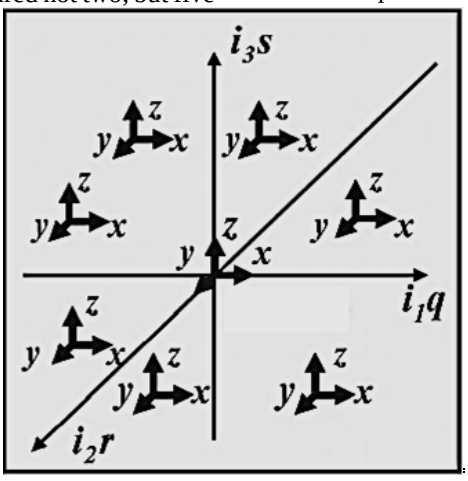

Fig. 5. Six-dimensional space of the hidden Multiverse, in which q, r, s – are coordinates of invisible parallel universes and antiverse, and x, y, z – are coordinates of material contents in each such parallel universe and antiverse

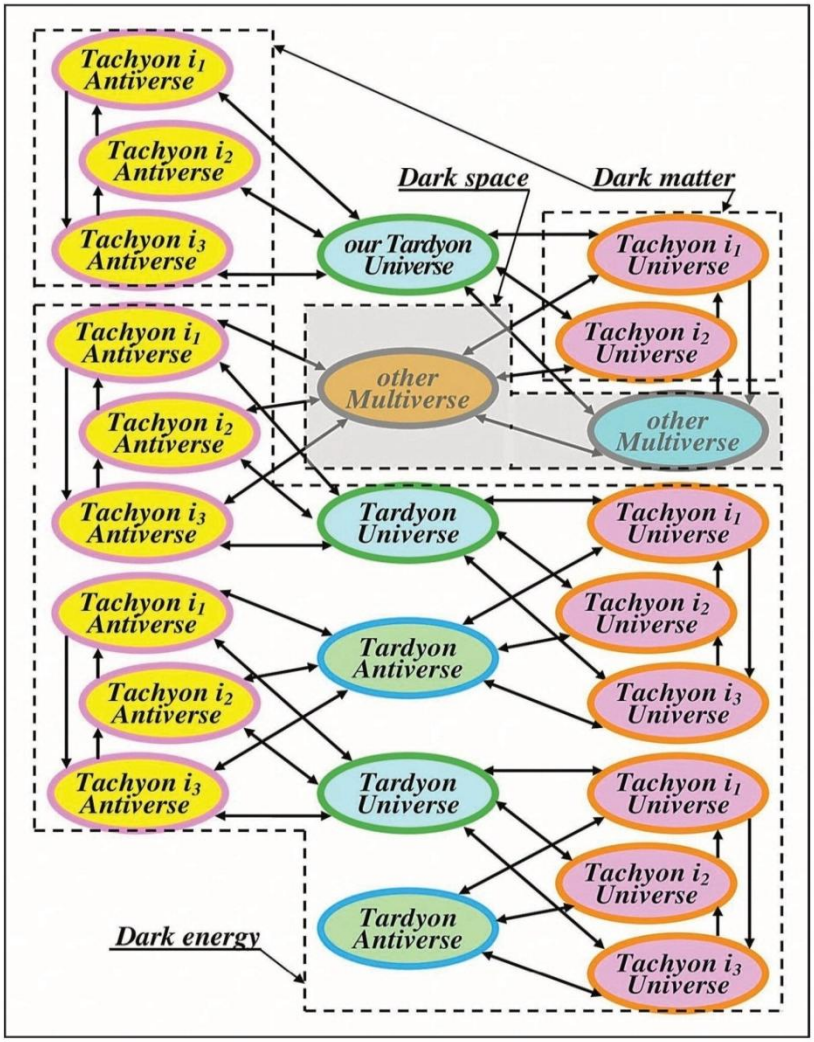

Fig. 6. The proposed open-loop screw structure of the hidden Multiverse, corresponding to the principle of physical reality of hypercomplex numbers

Therefore relativistic formulas (4)-(6) should be once again corrected as follows

$$m(q,r,s) = \frac{m_0 i_1^q i_2^r i_3^s}{\sqrt{1-[v/c-(q+r+s)]^2}} \tag{10}$$

$$\Delta t(q,r,s) = \Delta t_0 i_1^q i_2^r i_3^s \sqrt{1-[v/c-(q+r+s)]^2} \tag{11}$$

$$l(q,r,s) = l_0 i_1^q i_2^r i_3^s \sqrt{1-[v/c-(q+r+s)]^2} \tag{12}$$

where $\boldsymbol{q(v) = \lfloor v_q/c \rfloor}$ is the "floor" function of discrete mathematics from the argument ***v/c***, which is the fourth spatial dimension;

$\boldsymbol{r(v) = \lfloor v_r/c \rfloor}$ is the "floor" function of discrete mathematics from the argument ***v/c***, which is the fifth spatial dimension;

$\boldsymbol{s(v) = \lfloor v_s/c \rfloor}$ is the "floor" function of discrete mathematics from the argument ***v/c***, which is the sixth spatial dimension;

$\boldsymbol{v_q, v_r\, v_s}$ are projections of velocity vector v on orthogonal coordinates ***q, r, s***.

Therefore from formulas (10)-(12) follows a very important conclusion - the velocity v mentioned in Newton's first law, which serves in the uncorrected version of SRT as the fourth spatial dimension, turns out to be not scalar, but vector quantity, determining in orthogonal coordinates i_1q, i_2r, i_3s the position in the cosmic space of universes and antiverse of the hidden Multiverse.

And the information about the screw structure of such hidden Multiverse is contained in formulas (7)-(9). It follows from them that it is possible to move to the tardion antiverse from the tardion universe and to the tardion universe from the tardion antiverse in different, but not arbitrary ways, but only in such a way that the value i_1^q, i_2^r, i_2^s will successively take the values $+1$, $+i_1 \oplus +i_2 \oplus +i_3$, -1, $-i_1 \oplus -i_2 \oplus -i_3$, $+1$, ... etc.., where $\oplus$ is the symbol of the logical operation of discrete

mathema-tics 'exclusive OR'. In this case, different trajectories of travelling from one universe (or antiverse) to another can differ only by replacing one tachyon universe i_1, i_2, i_3 by another and one tachyon antiverse i_1, i_2, i_3 by another. Hence, the tachyon universes i_1, i_2, i_3 in the hidden Multiverse are placed parallel to each other. The tachyonic antiverse i_1, i_2, i_3 are also placed parallel to each other for the same reasons. And so in the hidden Multiverse parallel universes and antiverse must alternate in the following sequence - 'tardion universe', 'one of the tachyon universes', 'tardion antiverse', 'one of the tachyon antiverse', 'tardion universe', 'one of the tachyon universes', etc. An example of the quaternionic structure of such a hidden Multiverse is given in Fig. 6.

Thus, one difference of the structure shown in Fig. 6 structure from the structure shown in Fig. 4 is the presence in it of several different parallel included tachyon universes and antiverses corresponding to three imaginary units i_1, i_2, i_3. Another difference of the Multiverse structure, due to formulas (7)-(9), is the presence in this structure of the Multiverse not only of bidirectional portals corresponding to formula (7) and denoted by bilateral arrows, but also of unidirectional portals[11] corresponding to formulas (8), (9) and marked by unilateral arrows.

8. How to experimentally prove the existence of portals?

The above information is quite convincing. But only if the portals actually exist. And only experiments can give full confidence in this. So it's time to describe such an experiment. And the proposal to conduct an inexpensive but very convincing experiment has already been published [96]-[113].

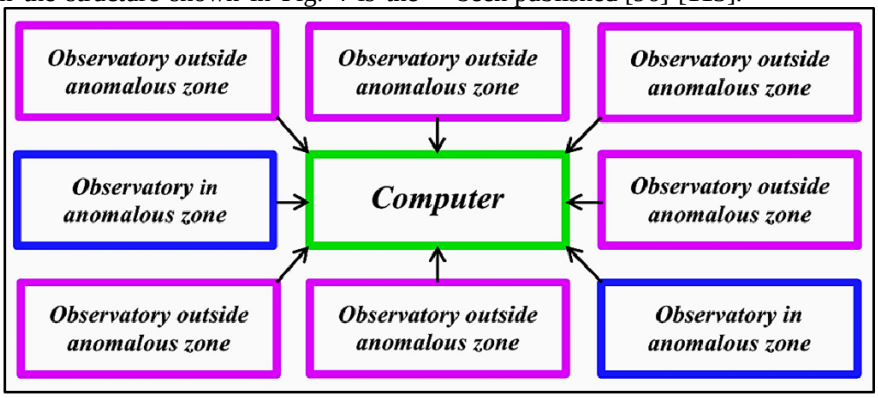

Fig. 7. Scheme of an astronomical experiment to detect invisible universes

As can be seen in Fig. 6, all portals begin and end at different astronomical objects. Consequently, on the starry sky at the entrance and exit of portals will always be observed completely different constellations. Therefore, when travelling through the portals, the map of the starry sky will gradually change, eventually gradually replacing some constellations with others. And the fact that constellations, never observed outside the portals, will be observed in the portals will allow to detect the portals. And not only portals, but also neighbouring universes[12], which will allow the structure of our hidden universe to be clarified. And even to determine the possible presence of neighbouring universes and antiverse, which are not included in the hidden Multiverse. But forming together with the hidden Multiverse the Hyperuniverse, to which corresponds the phenomenon of dark space.

And the entrances to the portals are the so-called anomalous zones, of which there are many on our planet - more than two hundred thousand. And in some of these anomalous zones, observatories have already been located. Like, for example, the Main Astronomical Observatory of the National Academy of Sciences of Ukraine, which is located in the Goloseevsky forest just 12 km from the center of the capital of Ukraine, Kiev.

But people avoid going into the portals. And rightly so, because portals are labyrinths and they're invisible. So if you accidentally once you've entered a portal, it's almost impossible to get out. But it's possible to create equipment for orientation in portals is possible. It's also possible to use unmanned remotely piloted vehicles using unmanned, remote-controlled robotic vehicles.

You just have to want to. It is even possible not to go far into the portals, but to limit ourselves to the use of anomalous zones. Although in anomalous zones, i.e. at the very edge of the portals, the change in the appearance of the constellations we know is very small, still can be detected by comparing on the computer (Fig. 7) observations of the same areas of the starry sky by different observatories located both in the anomalous zones and outside the anomalous zones in the same region.

And if these differences are too small, the telescope will have to be moved deeper into the portal. After all, Sir Arthur Stanley Eddington [114] was able to carry out his famous experiment, which confirmed the

[11] Due to what circumstances in such portals movement is possible only in one direction - from entrance to exit - it is difficult for us, living in a space in which movement is possible in any direction, even to imagine. And the processes that make such movement possible in nature are yet to be understood. But they are more dangerous than bidirectional portals for visitors who have entered such unidirectional portals, because it is impossible to return to one's own universe from them. Though in the underground with unidirectional movement on escalators we do meet them. But the underground is not nature.

[12] In the same way, we can see the adjacent invisible room (or at least the edge of it, to make sure it exists) next to our visible room, which we are currently in, only if we go into the corridor between these rooms.

predicted by the general theory of relativity deviation of light rays in the gravitational field of the Sun back in 1919, to move his telescope much further – from England to the island of Principe in the Atlantic Ocean.

9. The relevance of astro-geophysical researches of portals needed to create a time machine

Thus, the above allows us to consider it proven that:

- the hidden Multiverse really physically exists;
- the hidden Multiverse has a quaternionic structure and contains, in addition to our visible tardionic universe, about twenty more mutually invisible tardionic and tachyon universes and antiverse, connected with each other by bidirectional and unidirectional portals;
- the tardion and tachyon universes contain matter, space and time, and the tardion and tachyon antiverse contains anti-matter, anti-space and anti-time;
- travelling through the hidden Multiverse in space is accompanied by time travel.

It follows that in the hidden Multiverse it is possible to create different time-travelling routes in the hidden Multiverse by setting the corresponding routes of travelling through this Multiverse in space [115]-[123]. But we will not do it, because the research of such routes in the hidden Multiverse would be too expensive. And it is not necessary, as for creation of time machines we need only information which can be received by geophysical researches of portals [124]-[141]. And not even the research of portals on full depth, but only the research of their relatively small entrance areas, because, most likely, their geophysical parameters will be the same along the entire length of the portals from the entrance to the exit.

10. Conclusion

In the article examples of practically useful and realisable on the Earth time travels with the use of time zones are given.

In the article it is also proved that the version of STO studied in all physics textbooks is incorrect because:

- the relativistic formulas obtained in it are incorrect;
- they are incorrectly explained using the incorrect postulate about the non-exceeding of the speed of light;
- from incorrect relativistic formulas wrong conclusions about physical unreality of imaginary numbers and about existence of our only visible universe in nature are made.

Therefore the corrected version of STO was created, in which;

- the principle of physical reality of imaginary numbers is experimentally proved and theoretically explained, by which the postulate about non-exceeding of the speed of light is refuted;
- the corrected relativistic formulas explained with the use of the principle of physical reality of imaginary numbers are obtained;
- from the corrected relativistic formulas the conclusion about existence in Nature of quaternionic structure of the hidden Multiverse, containing besides our visible Universe about twenty mutually invisible tardionic and tachyon universes and antiverses, connected with each other by bidirectional and unidirectional portals, was made.

The article describes experiments that allow by geophysical researches to experimentally prove the existence of portals. And the knowledge obtained in such geophysical research will allow the creation of time machines.

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PSYCHOLOGICAL SCIENCES

ЖЕНСКАЯ РОЛЬ И МОРАЛЬНЫЕ ЦЕННОСТИ В БРИТАНСКОЙ ИДЕНТИЧНОСТИ: ОБРАЗ МАРГАРЕТ ХЕЙЛ КАК “НОВОЙ ЖЕНЩИНЫ” ВИКТОРИАНСКОЙ ЭПОХИ

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THE ROLE OF WOMEN AND MORAL VALUES IN BRITISH IDENTITY: THE IMAGE OF MARGARET HALE AS THE "NEW WOMAN" OF THE VICTORIAN ERA

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Аннотация

Статья посвящена анализу образа Маргарет Хейл в романе Элизабеты Гаскелл «Север и Юг» как прообраза «новой женщины» викторианской эпохи. В работе исследуется, как её личные качества, взгляды и поведение отражают изменения в моральных и культурных ценностях британского общества XIX века. Викторианская эпоха, характеризующаяся значительными социальными и экономическими преобразованиями, стала временем переосмысления роли женщины, что находит своё выражение в литературе того времени. Образ Маргарет Хейл олицетворяет новые моральные ориентиры: независимость, интеллектуальную самостоятельность и нравственную стойкость. Исследуется, как её действия и внутренние конфликты становятся отражением общественных трансформаций и изменений в женской идентичности, а также как её взаимодействие с мужчинами и роль в социальной борьбе символизируют новые подходы к гендерным ролям и моральным ценностям. Статья также подчеркивает, что фигура Маргарет Хейл представляет собой важный этап в становлении британской идентичности, балансирующей между традиционными моральными устоями и новыми идеями прогресса и социального равенства.

Abstract

This article is dedicated to analyzing the image of Margaret Hale in Elizabeth Gaskell's novel North and South as a prototype of the "new woman" of the Victorian era. The study examines how her personal qualities, views, and behavior reflect changes in the moral and cultural values of British society in the 19th century. The Victorian era, characterized by significant social and economic transformations, became a time for reconsidering the role of women, which is reflected in the literature of that period. The image of Margaret Hale embodies new moral principles: independence, intellectual autonomy, and moral resilience. The study explores how her actions and inner conflicts mirror societal transformations and changes in female identity, as well as how her interactions with men and her role in social struggles symbolize new approaches to gender roles and moral values. The article also emphasizes that the figure of Margaret Hale represents an important stage in the formation of British identity, balancing between traditional moral values and new ideas of progress and social equality.

Ключевые слова: Британская идентичность, Маргарет Хейл, новая женщина, викторианская эпоха, моральные ценности, женская роль, социальные трансформации.

Keywords: British identity, Margaret Hale, new woman, Victorian era, moral values, role of women, social transformations**.**

Введение

Проблема формирования национальной идентичности остаётся одной из ключевых в гуманитарных науках. Особенно ярко она проявляется в литературе, где художественный образ часто становится не только отражением индивидуального характера, но и воплощением целой системы культурных и нравственных ценностей определённого общества. В английской литературе XIX века значительную роль в этом процессе играют женские персонажи, чьи поступки, мышление и мировоззрение демонстрируют трансформации общественного сознания и моральных ориентиров эпохи. Викторианская эпоха, ознаменованная бурным развитием промышленности, ростом городов и изменением социальных структур, стала временем активной переоценки женской роли в обществе. Образ «новой женщины» — интеллектуальной, самостоятельной, морально устойчивой — начал всё чаще появляться в прозе, вступая в диалог с традиционными представлениями о женственности, покорности и семейной зависимости. Одним из таких ярких примеров является героиня романа Элизабет Гаскелл «Север и Юг» — Маргарет Хейл. Её поведение, взгляды, система ценностей и личностная эволюция на фоне социального конфликта между севером и югом Англии позволяют рассматривать её

как выразителя новых моральных и культурных ориентиров, характерных для британской идентичности. Целью настоящего исследования является анализ образа Маргарет Хейл как примерной представительницы “новой женщины” викторианской эпохи, а также выявление того, каким образом её личность и нравственные качества соотносятся с моральными ценностями британского общества.

Основные задачи исследования:

– проследить историко-культурный контекст викторианской эпохи в аспекте женской идентичности;

– рассмотреть черты “новой женщины” в литературе XIX века;

– проанализировать образ Маргарет Хейл в романе «Север и Юг»;

– установить связь между поведением героини и ключевыми британскими моральными и национальными ценностями.

Роман Элизабет Гаскелл «Север и Юг» (1854–1855) представляет собой не только изображение социальной борьбы между севером и югом Англии, но и глубокий анализ изменений в женской идентичности викторианской эпохи. Одним из ярких образов является Маргарет Хейл — героиня, которая олицетворяет идеи о моральной силе, независимости и личной ответственности, ставшие характерными для феномена «новой женщины» в британской литературе. В этом контексте Маргарет становится важным примером того, как женская роль и моральные ценности пересматриваются в свете изменений британского общества. Исследуя образ Маргарет, мы обнаруживаем, как её моральная сила и поступки отразили ценности викторианского общества, в том числе такие, как ответственность за свою семью, умение противостоять социальным и личным трудностям, а также способность вести диалог с мужчинами на равных. Мы сосредотачиваем внимание на её роли как женщины в литературе, как она справляется с вызовами своего времени и каким образом её поведение соответствует изменениям в британской моральной идентичности.

Викторианская эпоха и формирование британской идентичности

Викторианская эпоха (1837–1901), совпадающая с правлением королевы Виктории, стала временем глубоких социальных, экономических и культурных преобразований в Великобритании. Индустриальная революция радикально изменила облик страны: сельское население устремилось в города, появились новые классы — промышленники, предприниматели, фабричные рабочие. Это привело к формированию новых общественных идеалов, а также к переоценке традиционных норм и ценностей. Одним из важнейших элементов викторианской культуры стала идея национальной идентичности, опирающейся на такие качества, как трудолюбие, честность, сдержанность, ответственность и моральная устойчивость. Британцы видели в себе нацию, обладающую высокой нравственной миссией, объединённую верой, имперским чувством долга и социальной дисциплиной. Эта система ценностей активно поддерживалась через литературу, религию, образование и семейные институты. Женская роль в этом контексте традиционно ассоциировалась с идеалами домашнего уюта, материнства, самоотверженности и покорности. Женщина считалась хранительницей морали, опорой мужа и наставницей детей. Однако уже к середине XIX века начался процесс пересмотра этого образа. Развитие женского образования, участие женщин в социальных движениях, их работа на фабриках и в благотворительных организациях способствовали формированию нового типа личности — более независимой, интеллектуально развитой и социально активной. Литература этого периода стала зеркалом социальных перемен. Образ женщины в художественном произведении — не просто сюжетный элемент, но и способ выразить отношения между личным и общественным, частным и национальным. Таким образом, женский персонаж становится важным маркером не только половой идентичности, но и культурной принадлежности, выражающей ценности и стремления нации. Именно на этом фоне возникает особое внимание к персонажам, подобным Маргарет Хейл, которые не укладываются в рамки пассивного женского идеала и в то же время не отказываются от моральных ориентиров, традиционно приписываемых женщине. Их внутренний мир и активная жизненная позиция позволяют исследовать, каким образом трансформируется представление о британской женщине — от “ангела в доме” к нравственному и интеллектуальному партнёру в построении общества.

Понятие “новая женщина” появилось в Британии во второй половине XIX века как отражение изменяющейся женской идентичности. Это женщина образованная, самостоятельная, обладающая моральной волей и способностью влиять на общество. В литературе этот образ стал альтернативой традиционному викторианскому идеалу покорной жены и матери. Героиня романа Элизабет Гаскелл «Север и Юг» (1854–1855) — Маргарет Хейл — является ярким примером прообраза “новой женщины”. Её моральная стойкость, стремление к справедливости и независимое мышление выделяют её на фоне типичных женских образов викторианской эпохи. Уже в начале романа, после того как отец сообщает семье о своём выходе из англиканской церкви и решении переехать в промышленный город Милтон, Маргарет проявляет зрелость и верность нравственному долгу:

«Нет, — сказала она твёрдо, не колеблясь ни на мгновение. — Я поеду с вами, отец. Где вы, там и мой долг. Я не оставлю вас одних, несмотря на все трудности и перемены. Семья важнее всего, и я готова разделить с вами все, что нас ждёт. Разве я могу поступить иначе?». [Север и Юг, гл. 3, стр. 45].

Этот эпизод подчёркивает её осознанную готовность не просто подчиниться решению отца, но и взять на себя моральную ответственность за перемены в жизни семьи. Другой важный момент — её

способность вступать в интеллектуальное противостояние с мужчинами, особенно в разговоре с фабрикантом Джоном Торнтоном. В их первом серьёзном споре о рабочем классе и правах хозяев она заявляет:

«Вы судите о людях как о механизмах, мистер Торнтон. О том, что приносит выгоду, что поддаётся расчёту и контролю. Но я считаю, что в человеке есть нечто гораздо более глубокое, нечто выше выгоды. Это душа, честь, человеческое достоинство, которые нельзя измерить или поставить на весы. Я не могу так легко игнорировать эти аспекты, как вы.» [Север и Юг, гл. 11, стр. 127].

Это — не просто полемика. Здесь отражено мировоззрение Маргарет, основанное на гуманистических ценностях. Она рассматривает рабочих как личностей, а не как инструмент производства — тем самым олицетворяя моральную высоту и эмпатию, часто ассоциируемые с британской культурной традицией. Наиболее выразительный пример — сцена, в которой Маргарет бросается под град камней, чтобы защитить Торнтона от разгневанной толпы:

«Она ринулась вперёд, вытянув руки, словно заслоняя его собой, словно могла остановить весь мир своим поступком. Она не думала, не колебалась, не раздумывала о последствиях. В тот момент её сердце говорило ей, что это правильно, и она просто сделала то, что велело ей это чувство — интуитивно, без всяких размышлений, не обращая внимания на опасности и преграды.» [Север и Юг, гл. 22, стр. 238].

Этот поступок — не жест наивной девушки, а выражение внутренней силы и моральной решимости. Она действует независимо, не ожидая одобрения, руководствуясь нравственным чувством защиты человеческой жизни. Таким образом, Маргарет Хейл демонстрирует черты “новой женщины” — но делает это не вызывающе, а в рамках тех моральных основ, которые лежат в сердце британской идентичности: – доблесть, чувство долга, уважение к другим, сочувствие к слабому.

В романе "Север и Юг" образ Маргарет Хейл служит не только выражением её личных моральных убеждений, но и символом более широких общественных трансформаций, происходивших в Британии середины XIX века. Через её внутренние конфликты, выборы и поступки Элизабет Гаскелл создаёт многослойный портрет женщины, стоящей на стыке эпох — между традиционным патриархальным обществом и новым миром, основанным на идеях прогресса, справедливости и социального равенства. Маргарет — это не просто наблюдательница перемен, она становится активной участницей и движущей силой этих процессов. Её интеллект, эмоциональная зрелость и нравственная решимость формируют образ женщины, способной к самостоятельному суждению и действию. Одной из характерных черт героини становится её внутреннее сопротивление узким общественным представлениям о долге и гендерных ролях. Когда мистер Белл говорит о невозможности понять характер северных промышленников, Маргарет возражает:

«Я думаю, что вы недооцените их, мистер Торнтон. Вы видите только их труд, их заботы и проблемы, но не видите того, что скрывается за этим. Они, как мне кажется, не хуже других, только слишком заняты и углублены в свои дела, чтобы показать это. У них есть свои чувства, свои мечты и стремления, но им просто не хватает времени или возможности продемонстрировать это миру. Порой мы судим слишком поверхностно, не понимая истинной сути человека.» [гл. 27].

Эта реплика демонстрирует не только её стремление к справедливости и попытку понять «другого», но и её гуманистическое мировоззрение, в котором каждый человек достоин уважения независимо от класса или положения. Особое внимание заслуживает сцена возвращения Маргарет из Лондона, когда она размышляет о Милтоне и своей привязанности к этому суровому индустриальному городу:

«Я принадлежу Милтону, — сказала она, её голос был полон глубокой привязанности и осознания. — Он стал частью меня, со всеми его трудностями, борьбой и стойкостью. Я не могу отделить себя от этого города, от его людей, от всего, что происходило здесь. Эти испытания, эта постоянная борьба, — всё это сделало меня такой, какая я есть. Милтон научил меня быть сильной, стойкой и не сдаваться перед лицом трудностей. Я не могу оставить его, как не могу оставить часть себя.» [гл. 40].

Эти слова отражают её внутреннюю трансформацию: от отчуждения и осуждения к глубокому пониманию, сочувствию и принятию. Она не только адаптируется к новой социальной реальности, но и становится её участницей, учась видеть за конфликтами людей с их болью, надеждами и стремлениями. Жертвенность Маргарет проявляется не только в драматических поступках, но и в её готовности брать на себя ответственность за других — моральную и эмоциональную. После смерти родителей она становится опорой для брата и берёт на себя нелёгкое дело наследства мистера Белла. Но даже в таких обстоятельствах она не теряет своей внутренней целостности:

«Мне не следует делать то, что противно моему сердцу, только потому, что это ожидается от меня, — сказала она, её голос был полон решимости и внутреннего конфликта. — Я не могу поступать в ущерб своим собственным чувствам и убеждениям, чтобы угодить окружающим или соответствовать их ожиданиям. Моё сердце, моя совесть важнее всего, и я не могу игнорировать это, чтобы не нарушить свою внутреннюю правду. Я должна быть честной с собой, даже если это означает идти против того, что требует общество.» [гл. 42].

Это утверждение подчёркивает её моральную независимость и способность к саморефлексии. Та-

ким образом, Маргарет Хейл — это не просто главная героиня романа, а символ перехода к новому типу женственности: сознательной, нравственной, действующей. Её фигура объединяет личностную глубину с социальным значением, превращая её в своеобразный «мост» между старым и новым обществом. Её путь — это путь всей Британии, стремящейся к гармонии между трудом и человечностью, прогрессом и моралью.

Если посмотреть с другого ракурса Маргарет Хейл в произведении Элизабет Гаскелл "Север и Юг" — это не просто героиня своего времени, но и выразительница духа перемен, олицетворяющая эволюцию женского сознания и рост моральной автономии. На фоне Викторианской эпохи, в которой женщинам отводилась второстепенная и зависимая роль, Маргарет выделяется своей способностью мыслить независимо, действовать решительно и высказывать собственное мнение даже в условиях давления со стороны общества. Влияние патриархального порядка и классовой иерархии пронизывает весь роман, однако именно в образе Маргарет прослеживается попытка преодоления этих ограничений. Она демонстрирует внутреннюю силу и высокую нравственную позицию не только в частных ситуациях, но и в ключевых социальных вопросах, таких как труд, классовое неравенство и человеческое достоинство. Сложность её образа в том, что она, будучи представительницей южного, более аристократического и «одухотворённого» общества, сталкивается с прагматичным, суровым севером, где господствует логика капиталистических отношений. Изначально воспринимая, Милтон и его жителей с предубеждением, со временем Маргарет начинает видеть за внешней жёсткостью глубинные моральные ценности и проявления человеческой стойкости. Её взаимодействие с Джоном Торнтоном — не только любовная линия, но и арена столкновения двух мировоззрений. По мере развития отношений между ними выстраивается не романтический шаблон, а процесс взаимного роста. Именно благодаря диалогам и конфликтам с Торнтоном раскрывается стержень характера Маргарет, её способность к состраданию, убеждённости и справедливости. В одном из эпизодов Торнтон с удивлением отмечает, что Маргарет не боится открыто бросать вызов установленному порядку:

«Вы говорите так, как будто право быть услышанной — не привилегия, а обязанность, — заметила она, её голос был пронизан лёгким упрёком. — Как будто мы, женщины, не заслуживаем возможности высказать своё мнение и быть услышанными, а наша роль — только молчать и подчиняться. Но я верю, что каждый человек, независимо от пола, имеет право на свою точку зрения, право быть услышанным и на участие в решении важных вопросов. Молчание — это не обязанность, это выбор, и я не согласна с тем, что нам навязывают такое положение.» [Север и Юг, гл. 20].

Эта реплика подчёркивает, что для Маргарет выражение своего мнения — не просто проявление независимости, а нравственный долг, исходящий из веры в силу правды и достоинства. Маргарет также символизирует новый тип женщины, не замыкающейся в частной сфере, а стремящейся влиять на общественные процессы. Её действия, как в защите рабочего Хиггинса, так и в последующей поддержке реформ в отношениях между владельцем и рабочими, демонстрируют её активную гражданскую позицию. Особенно выразительна сцена, в которой она пытается убедить Торнтона встретиться с Хиггинсом:

«Пожалуйста, выслушайте его — не как фабрикант, а как человек, — сказала она, её голос был полон просьбы и сострадания. — Мы часто забываем, что за любым социальным положением, за любым статусом стоит человек, со своими переживаниями, чувствами и проблемами. Я прошу вас увидеть в нём не только владельца фабрики, но и человека, которому тоже может быть трудно, который тоже может страдать. Давайте не будем судить его лишь по внешним признакам, но постараемся понять его как личность, как существо с человеческим достоинством.» [гл. 25].

В этой просьбе заключён весь гуманистический пафос героини: она не требует, не настаивает, но апеллирует к человечности, пытаясь разрушить барьеры классового отчуждения. По мере развития романа Маргарет сталкивается с личными потерями, внутренними сомнениями и социальным осуждением. Но именно эти испытания закаляют её характер и превращают её в морального лидера, чьё мнение уважают и к которому прислушиваются. В отличие от типичных женских персонажей викторианской прозы, Маргарет не просто сопровождает героя, но меняет его, формирует его взгляд на мир. Через неё Гаскелл показывает, как личное может стать общественным, а женский голос — голосом совести. Таким образом, образ Маргарет Хейл — это сложное и многогранное художественное воплощение идеи моральной независимости, социальной чувствительности и готовности к жертве ради общего блага. Она — одна из первых героинь английского романа, которая сочетает в себе силу ума, добродетель сердца и решимость действовать. Именно поэтому Маргарет становится не только символом новой женщины, но и активной участницей социального прогресса, меняющего лицо Британии XIX века.

В романе Маргарет Хейл предстает не только как сильная и независимая женщина, но и как важный моральный ориентир для окружающих. Через свою стойкость, честность и глубоко укоренённое чувство справедливости она оказывает мощное влияние на внутренний мир других героев. Именно благодаря Маргарет в романе происходит нравственное взросление и трансформация таких персонажей, как Джон Торнтон, Фредерик Хейл и даже второстепенные фигуры вроде мистера Белла или миссис Торнтон. Влияние Маргарет особенно заметно в её отношениях с Джоном Торнтоном — человеком действия, предпринимателем, закалённым в условиях суровой индустриальной среды Мил-

тона. Сначала он воспринимает Маргарет как чуждую — образованную, гордую и, возможно, надменную женщину. Однако по мере общения он сталкивается с её глубокой человечностью, стремлением к справедливости и способностью видеть за экономическими проблемами — личные трагедии и человеческие судьбы. В ключевом эпизоде она говорит Торнтону:

«Вы считаете, что сила — это главное, — сказала она, её голос был полон уверенности и спокойной решимости, — но я верю, что истинная сила заключается в понимании других людей и в способности учить их. Сила не в том, чтобы подавлять и командовать, а в том, чтобы уметь слушать, понимать и направлять. Это гораздо более трудное, но при этом гораздо более мощное оружие. Настоящая сила заключается не в том, чтобы быть властным, а в том, чтобы уметь вдохновлять и помогать другим становиться лучше.» [гл. 14, стр. 160].

Эта фраза служит своего рода нравственным указателем не только для Торнтона, но и для читателя. Она противопоставляет физической или социальной силе — силу моральную, основанную на эмпатии, понимании и способности к диалогу. Под влиянием Маргарет Торнтон начинает пересматривать свои взгляды на отношения между работодателем и рабочими, обращаясь от жёсткой капиталистической логики к более человечной и просвещённой модели взаимодействия. Впоследствии он даже создаёт столовую для рабочих и начинает более внимательно прислушиваться к их нуждам — и всё это благодаря тому, что рядом с ним была женщина, способная мягко, но настойчиво влиять на его сознание. Не менее значимо влияние Маргарет и на её брата, Фредерика Хейла. Находясь в изгнании, он чувствует вину, растерянность и нестабильность. Однако образ сестры остаётся для него источником моральной поддержки. Её убеждённость в необходимости поступать честно и открыто помогает ему принять важные решения. Он признаётся:

«Маргарет всегда говорила мне, что в жизни главное — это честность и чистосердечность. Я понял, что она права, и теперь стараюсь поступать именно так, — сказал он, его голос звучал искренне и проникновенно. — Я раньше думал, что можно достигнуть успеха любыми средствами, что сила и упорство — главные качества для человека. Но теперь я вижу, как много значит быть открытым и честным. Чистосердечность, быть искренним с собой и с другими, — вот что делает нас по-настоящему сильными. Теперь я понимаю, что истинная сила заключается в правде, и стараюсь следовать этому в своей жизни.» [гл. 23, стр. 255].

Таким образом, Маргарет выступает не просто как сестра, но как нравственный наставник, вдохновляющий близких на внутренние изменения и формирование ответственного отношения к жизни. Даже такие персонажи, как мистер Белл, пожилой друг семьи, и миссис Торнтон, поначалу настроенная враждебно, в какой-то момент вынуждены признать силу характера и моральное благородство Маргарет. Их отношения с ней становятся свидетельством того, что нравственная твёрдость и сочувствие способны разрушить предубеждения и построить мосты между людьми разных мировоззрений и социальных положений. Маргарет не проповедует свои убеждения назидательно — напротив, её влияние зиждется на личном примере, готовности к самопожертвованию и постоянной внутренней работе над собой. Её моральная интуиция помогает ей отличать внешнюю правоту от истинной справедливости. Благодаря этому она становится не только героиней истории, но и катализатором изменений — как личных, так и общественных. Именно в этом заключается одна из важнейших ролей Маргарет Хейл: она не просто действует в рамках своей эпохи, но формирует новый тип женского влияния — не громкого и агрессивного, а глубокого, этически выверенного и преобразующего. Таким образом, она становится символом морального света, вокруг которого начинают перестраиваться жизненные ориентиры других героев.

Одним из важнейших аспектов романа «Север и Юг» становится внутренняя моральная борьба, с которой неоднократно сталкивается Маргарет Хейл. Её решения, продиктованные не удобством или внешними ожиданиями, а глубоко укоренёнными личными убеждениями, становятся символом этического выбора в эпоху социальных перемен. Особенно ярко это проявляется в её отношениях с Джоном Торнтоном, где чувство и долг вступают в конфликт. Несмотря на растущее взаимное влечение, Маргарет отказывается от предложения руки и сердца, поскольку не может поступиться своими принципами ради личного счастья. Этот выбор становится кульминацией её моральной стойкости:

«Я не могу быть с вами, мистер Торнтон, если вы не измените своё отношение к миру. Я не могу быть с тем, кто не уважает трудящихся, — её голос был полон твердости и решимости. — Ваш взгляд на людей, которых вы считаете низшими, которые работают тяжело, чтобы обеспечить себе и своим семьям жизнь, совершенно не соответствует тому, как я понимаю справедливость и человеческое достоинство. Мне не важно, каковы ваши достижения или богатство, если вы не уважаете тех, кто, несмотря на свою тяжелую работу, остаётся незамеченным и невидимым для общества. Я не могу быть рядом с вами, если ваши ценности не соответствуют моим.» [гл. 20, стр. 225].

Этот момент тесно связан с её ролью нравственного ориентира, о чём уже говорилось ранее. Именно благодаря таким решениям Маргарет становится фигурой, формирующей не только личностную, но и общественную трансформацию. Её отказ — это не жест гордыни, а выражение уважения к моральной ответственности. Она выбирает не комфорт, а верность своим идеалам, которые, в свою очередь, отсылают к основополагающим британским ценностям — честности, долгу, социальной справедливости и личной свободе совести. Ре-

шения Маргарет отражают более широкий конфликт викторианской женщины: желание жить в согласии с собой сталкивается с социальными ожиданиями и устоями. Подобная дилемма была типична для женщин той эпохи, особенно образованных и мыслящих, которые начинали осознавать свою силу, но ещё не имели институциональной поддержки. Таким образом, Маргарет становится голосом эпохи — внутренне свободной, но внешне ограниченной системой, которую она постепенно расшатывает своим нравственным примером. Однако Элизабет Гаскелл не ограничивается изображением только Маргарет как воплощения «новой женщины». В романе появляется целая палитра женских образов, каждый из которых символизирует определённую грань женского опыта и моральных позиций в британском обществе. Так, миссис Торнтон представляет собой архетип сильной, но консервативной женщины, для которой долг перед семьёй и социальной иерархией стоит выше чувств. Она также морально непреклонна, но её принципы противоположны принципам Маргарет, что создаёт интересный идеологический контраст между двумя женщинами с сильными характерами. Мисс Диксон, служанка миссис Хейл, олицетворяет тип прагматичной женщины низшего сословия, чьи моральные ориентиры более гибкие и подчинены вопросам выживания. Даже Эдит, двоюродная сестра Маргарет, — представительница «домашнего ангела» — живёт в мире, где личные желания полностью растворяются в роли жены и матери. Все эти женские фигуры подчеркивают уникальность пути Маргарет, которая, будучи связующим звеном между традицией и переменами, объединяет в себе чувствительность, разум и моральную целостность. В романе нравственные дилеммы Маргарет становятся не просто частью её личной истории, но выражением борьбы между старым и новым в сознании викторианской женщины. Гаскелл показывает, что путь к моральной зрелости требует отказа от лёгких решений и готовности быть непонятой. И именно эта готовность делает Маргарет не только героиней романа, но и культурным символом.

Невозможно рассматривать моральные и социальные конфликты романа «Север и Юг» вне контекста жёсткой викторианской системы, в которой каждый человек — будь то мужчина или женщина — играет строго отведённую роль. Элизабет Гаскелл подчёркивает это через образ миссис Торнтон — матери Джона Торнтона, женщины, глубоко укоренённой в традиционных ценностях своего времени. Её мировоззрение сформировано тяжёлым жизненным опытом, необходимостью выживания в суровых условиях промышленного севера и стремлением сохранить достигнутое социальное положение. Миссис Торнтон не только поддерживает сына, но и активно следит за соблюдением социальных норм, особенно в вопросах морали, семейной чести и классовой принадлежности. Её отношение к Маргарет Хейл пронизано недоверием и предубеждением, что ярко проявляется в моменте, когда она выражает своё неодобрение намерений Джона:

«Она [Маргарет] не из нашего круга, Джон. Тебе не следует связываться с ней. Она слишком горда, слишком образованна и слишком холодна. Такие, как она, смотрят на нас свысока. Я не хочу, чтобы ты унижал себя перед девушкой, которая никогда не поймёт, кто мы такие и как мы живём.» [Север и Юг, гл. 10, стр. 120].

Эта реплика раскрывает не просто материнскую тревогу, но и убеждённость в правильности социального разделения. Для миссис Торнтон женщины должны оставаться в тени — поддерживать мужчин, беречь семейную честь, а не участвовать в философских спорах и социальных преобразованиях. Её собственная жизнь — пример преданности долгу и самопожертвования ради семьи, но в этом же и заключается её ограниченность: она не видит возможности существовать иначе. Контраст между миссис Торнтон и Маргарет особенно значителен в контексте восприятия женской роли. Если первая — символ устойчивости, консервативной морали и преданности традициям, то вторая — голос новой эпохи, стремящейся к равноправию, нравственной рефлексии и активному участию в общественной жизни. Эти два женских архетипа не враждебны друг другу, но их столкновение в сюжете романа подчёркивает напряжение между старым и новым, между принятием существующего порядка и стремлением его изменить. В этом смысле миссис Торнтон становится необходимым фоном, на котором образ Маргарет сияет особенно ярко. Без противопоставления этим устойчивым фигурам — таким как мать Джона — развитие героини и её борьба за моральную и личностную свободу не были бы столь выразительными. Гаскелл, изображая миссис Торнтон с уважением, но без идеализации, подчёркивает, что даже носители старых ценностей заслуживают понимания, ведь они сами стали их жертвами. И так, традиционализм миссис Торнтон — это не просто антагонизм новому мышлению, а важный элемент общественной структуры, от которого предстоит освободиться не только Маргарет, но и всем тем, кто стремится к переменам. В этом конфликте — и трагедия, и надежда романа.

На фоне сложного и внутренне противоречивого образа Маргарет Хейл особенно отчётливо выделяются женщины, которые не стремятся к изменениям, принимая свою роль в обществе как нечто данное. Одной из таких фигур в романе «Север и Юг» является Джейн — двоюродная сестра Маргарет. Джейн олицетворяет стереотипный идеал викторианской женщины, для которой главными ценностями остаются семья, дом и соблюдение социальных ожиданий. В её характере нет стремления к независимости или самоопределению, как это наблюдается у Маргарет. Её образ — это молчаливое одобрение традиций, в которых женщина — прежде всего украшение и опора семейного очага.

«Я никогда не смогу стать такой, как ты, Маргарет. У меня нет таких стремлений, как у

тебя. Ты всегда стремишься к чему-то возвышенному, хочешь быть полезной, думаешь о других. А я... я просто хочу быть счастливой и жить спокойно, без всех этих высоких целей и разговоров о долге...» [Север и Юг, гл. 9, стр. 103].

Эта фраза подводит черту под внутренним конфликтом, который движет Маргарет: выбор между соответствием общественным ожиданиям и стремлением к личной свободе. Джейн же — символ тех женщин, которые отказались от этого выбора, выбрав путь предсказуемости и подчинения. Она не задаётся вопросами морали, не участвует в социальных спорах, и тем самым подчёркивает контраст с главной героиней, чьё внутреннее развитие является одной из центральных тем романа. Однако социальный спектр женских образов у Гаскелл не ограничивается только буржуазными или аристократическими женщинами. Автор обращает пристальное внимание и к представительницам рабочего класса — фабричным работницам и женам простых тружеников. Эти женщины, несмотря на своё бесправное положение, становятся выразителями новой социальной силы. Их голоса звучат с отчаянием, но и с достоинством — как призыв к справедливости, как протест против системы, отказывающей им в базовых правах.

«Мы работаем ради того, чтобы выжить, но наши мужья и дети умирают от голода и болезни. Мы поднимаемся затемно и возвращаемся в темноте, день за днём, без надежды на лучшее. Разве мы не заслуживаем большего? Разве мы не люди? Разве у нас нет чувств, как у вас, господа?» [Север и Юг гл. 22, стр. 240].

Подобные реплики, хоть и принадлежат второстепенным персонажам, раскрывают глубинный пласт социальной драмы. Женщины рабочих окраин не обладают свободой Маргарет, но именно их борьба за выживание придаёт роману остроту и историческую достоверность. В их страданиях и требованиях отражается та же дилемма — между покорностью и сопротивлением — но в куда более суровом контексте. В результате, Джейн и женщины фабричного мира — два полюса женского существования, между которыми находится Маргарет Хейл. Их образы помогают автору показать, как различны могут быть реакции женщин на вызовы общества. С одной стороны — молчаливая покорность, с другой — пассивное страдание, перерастающее в коллективное требование перемен. Маргарет же соединяет в себе оба мира: она осознаёт свой привилегированный статус, но использует его не для бегства от реальности, а для поиска справедливого баланса между долгом, чувствами и социальной ответственностью.

Невозможно не сравнить Маргарет Хейл с другими женскими персонажами романа позволяет глубже понять, как Элизабет Гаскелл исследует социальные и моральные установки викторианской эпохи. Через разнообразие женских образов в «Севере и Юге» автор показывает, как разные слои общества формируют различное восприятие женской роли, раскрывая тем самым сложную картину женской идентичности своего времени. Маргарет Хейл предстает как фигура, выходящая за пределы традиционного женского идеала. Её независимость, внутреннее достоинство и стремление к социальной справедливости делают её центральной героиней, символом “новой женщины”. В отличие от неё, такие персонажи, как миссис Торнтон, Джейн и Фанни, демонстрируют более консервативные черты — они живут в рамках строго очерченных социальных норм и редко ставят под сомнение своё положение. Миссис Торнтон, например, видит высшее предназначение женщины в сохранении семейных традиций и безусловной преданности семье, а Джейн принимает свою зависимость как нечто естественное, не стремясь к самостоятельности. В то же время женщины из рабочего класса — фабричные работницы, жёны и матери — показывают другую грань женского существования. Лишённые привилегий, они вынуждены бороться за выживание в тяжёлых условиях труда. Однако даже в таких обстоятельствах они сохраняют силу духа и достоинство, становясь голосом социальной справедливости. Их страдание и протест становятся важной частью общей социальной динамики романа. На фоне этих образов Маргарет особенно выделяется. Она способна к сочувствию, но не подчиняется жалости; она стремится к действию, но руководствуется моральными принципами. Её путь — это путь осознанного выбора между долгом, чувствами и социальной ответственностью. Образ Маргарет Хейл находит яркие параллели и контрасты в литературе и истории викторианской эпохи. Так, Джейн Эйр из одноимённого романа Шарлотты Бронте демонстрирует близкое стремление к личной свободе и моральной самодостаточности. Обе героини отказываются быть жертвами обстоятельств и твёрдо отстаивают свои убеждения. Однако если путь Джейн лежит через внутреннее преодоление и духовное очищение, то Маргарет действует в социальном контексте — она борется с классовыми предрассудками, участвует в моральном переосмыслении роли женщин в обществе. Другой интересный контраст — Эстер Саммерсон из «Холодного дома» Чарльза Диккенса. Эстер воплощает более традиционную женскую добродетель — скромность, заботу о ближнем, самоотверженность. В отличие от прямолинейной и инициативной Маргарет, Эстер действует мягко, не претендуя на общественное влияние, но её нравственная стойкость также важна для раскрытия идеала женщины того времени. Среди реальных фигур викторианской эпохи аналогом Маргарет можно считать Флоренс Найтингейл — реформаторку здравоохранения, чья деятельность во время Крымской войны изменила представление о возможностях и миссии женщины в обществе. Как и Маргарет, она сочетает сострадание с решительностью, эмоциональную силу с рациональным действием. Обе представляют образ женщины, способной изменить общество, не теряя своей нравственной основы. И так, Маргарет Хейл становится частью более широкой культурной традиции формирования нового женского архетипа — женщины умной, нравственно зрелой, социально вовлечённой и внутренне свободной. В

этом смысле её образ можно рассматривать не только как отражение эпохи, но и как её вызов — как предвестие будущих перемен в восприятии женской идентичности.

Заключение

Образ Маргарет Хейл в романе Элизабет Гаскелл «Север и Юг» представляет собой уникальное сочетание традиционных и новых черт женской идентичности викторианской эпохи. Будучи верной моральным устоям, таким как чувство долга, самоотверженность и сострадание, Маргарет одновременно воплощает качества, характерные для “новой женщины”: независимость мышления, интеллектуальную зрелость и активную гражданскую позицию. Её поведение и взгляды демонстрируют глубокую моральную стойкость, готовность к личным жертвам ради справедливости и стремление к равному диалогу с мужчинами. В этом смысле она становится важным медиатором между старым и новым — между традиционным образом “ангела в доме” и современной женщиной, стремящейся к самореализации и участию в общественной жизни. Анализируя образ Маргарет Хейл, можно заключить, что она является символом тех перемен, которые происходили в британском обществе во второй половине XIX века. Её личная эволюция отражает более широкий процесс переосмысления женской роли и моральных ориентиров, а её характер и поступки демонстрируют, каким образом британская национальная идентичность формировалась под влиянием новых культурных и социальных реалий. Таким образом, Маргарет Хейл — не просто литературная героиня, но и воплощение тех нравственных и культурных ценностей, которые стали основой современной британской идентичности.

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TECHNICAL SCIENCES

THE BASICS OF CREATING ARMED UNMANNED FLIGHT DEVICES

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Abstract

This article reviewed information about armed drones, explained the principle of their operation and characteristics. The integration of unmanned aerial vehicles (UAVs), commonly known as drones, into military operations has revolutionized modern warfare. Among these UAVs, armed drones have emerged as critical tools in precision strikes, surveillance, and strategic operations. This paper outlines the essential principles and technological foundations required to create armed drones, focusing on the design and development of both hardware and software systems. The fundamental components of armed drones include airframe design, propulsion systems, payload integration, communication protocols, navigation systems, and control mechanisms. Furthermore, this paper explores key considerations in the development process, such as autonomy, target acquisition, weapons systems integration, and compliance with international regulations. Ethical, safety, and security concerns surrounding the deployment of armed drones are also addressed, highlighting the balance between technological advancements and the responsibilities of using these systems in military and defense contexts. The goal is to provide a comprehensive understanding of the fundamental requirements and challenges involved in creating armed drones, with a particular focus on their military applications.

Keyword: Unmanned aerial vehicles (uavs), armed drones, payload integration, autonomy, weapon systems.

Unmanned aircraft are known as drones. Formally speaking, drones are referred to as unmanned aerial vehicles (UAVs) or unmanned aircraft systems. Motorized aircraft that are not operated by humans are known as unmanned aerial vehicles. Aerodynamic forces are used to provide the aircraft lift. Missions like control and reconnaissance are its intended uses. A controller on the ground or in the air controls or pre-programmes drones. Referred to as remotely piloted vehicles (RPVs), these drones only have the choice of a controller. There are many different types of drones, including cannon-shaped vehicles with helicopter wings, rockets, and model airplanes. A car's wingspan can be longer than a Boeing 747, and it can be as little as a bag [1].

Since the cockpit and its windows do not need to be optimized for human comfort, drones can be created in different designs than manned aircraft.

The components of drones are as follows:

- drone body;
- flight controller;
- electronic speed regulators;
- propellers;
- propeller protectors;
- sensors;
- engines;
- flight control equipment;
- cameras (day, night infrared);
- batteries;
- landing gear.

Every component is attached to the drone's body, which serves as its backbone. It contains specific compartments for engines and propellers as well as places to put components like landing gear, sensors, and regulators. Fiberglass (glass fibers), polymers, aluminum, and carbon fibers are typically used to make the hulls. The drone's brain is the flight controller, which guides its flight using data about the drone's position, speed, and orientation. A drone's flight controller is one of its most crucial components. It has sensors such a proximity receiver, GPS, and accelerometer that are directly connected to the flight controller.

A circuit in electronic speed regulators tells you whether the motor is rotating and in which direction. By sensing the signal from the view control, the drone modifies the energy source's voltage to control the motor's speed and direction. These circuits are chosen based on the kinds of motors and propellers you are using, and they typically support voltages between 12 amps and 40 amps. The motor and the flight controller are attached to each end of the electronic speed control. Every motor in drones has an electronic speed control system.

Drones transform energy into flight through the use of propellers. The size of the drone and the engine power may affect the diameters and specs. Which propeller type is connected to which motor is crucial in multirotor drones. The drone will not be able to fly normally otherwise. Two or three blades are possible for

propellers. The amount of noise and vibration the drone makes while in flight determines the kind of propeller to choose. Plastic is typically used to make propellers.

The drone parts that break and need to be replaced the most frequently are the propeller guards. Even after a successful flight, the drone's propellers may break if it tilts slightly when landing. Alternatively, the propellers may cause harm to the target if the drone loses control and strikes it. Frames are therefore put in place to prevent things from flying into drone propellers and drone propellers from breaking. Despite offering safe flight, these increase weight, which has a detrimental impact on their carrying capacity, speed, and flight duration.

Drones nowadays are equipped with sensors. They may thus adhere to instructions with extreme precision. Drones are typically equipped with GPS, barometers, proximity sensors, digital compass, and accelerometers.

- The accelerometer detects even the smallest motions and monitors the drone's speed in three directions while it is in motion. Required for steady flight; the drone can stay still in the air by using its digital compass to determine which way it is flying. Because compasses are influenced by the magnetic fields around them, they must be calibrated before every flight; the barometer measures the pressure in the air to determine the drone's altitude;

GPS determines the precise location on the earth, enabling drones to follow a predetermined path or autonomously return to their takeoff point. They are also helpful sensors that help drones maintain their position while in the air. To determine where it has lifted off, the GPS receiver must locate a sufficient number of satellites prior to takeoff. Proximity sensors enable drones to fly safely by detecting the distance to the ground and nearby objects in a confined area. It can avoid impediments outside by detecting them ahead of and below it, especially when flying automatically. These sensors are capable of detecting a specific distance. They use a variety of technologies, including infrared, ultrasonic, lasers, and optics, to detect objects. Propellers are powered by engines, and each propeller needs a motor. The drone's weight determines which motors are used, and typically, the motors' combined power is equal to double the drone's weight. The power needed to start them will rise in tandem with the engine power, necessitating a bigger and more powerful battery. Drone motors are therefore made to have "optimal" power rather than maximum power. Every engine can manage a specific propeller diameter. The drone will not be able to fly steadily and its flight time will be quite short if larger propellers are mounted. The most widely used monitoring technique is the employment of a monitor and glasses by the flight control equipment to keep an eye on the drone's image. The LCD in front of the controller allows him to keep an eye on drone information. There are systems that employ tablets or cellphones as monitors, even though some remote controls may have standalone monitors. The goggles give the controller the impression that he is inside the drone. Nevertheless, some glasses feature cameras that display the surroundings when needed because the controller can't currently see them.

Drones are equipped with cameras to record or display their flight path. Powered by the drone's battery, the cameras capture images to memory cards that are placed inside of them. Before the drone takes off, the shot should be started and the type and precision should be modified while it is on the ground. Additionally, some sophisticated drones might have cameras for infrared and other uses. Small sensors and fixed focus cameras are used in drones because weight is typically a crucial factor. They are therefore unable to zoom and perform poorly in low light. Nonetheless, some professional drones are capable of carrying far more sophisticated cameras and can make all the modifications that a ground-based operator would.

Drones of this kind are typically big, heavy, and costly, and they typically require two operators. The camera settings are controlled by one operator while the drone maneuvers are controlled by the other. The propellers may be seen if the drone is moved too quickly, depending on where the camera is mounted on the drone. The landing gear can also be seen in the image if the camera has left and right pan capabilities. Professional drones have landing gear that folds up and vanishes after takeoff because of this.

Drone batteries are made of lithium polymer, sometimes referred to as lithium ion-polymer, or Li-Po for short. Compared to other battery kinds, these batteries have the advantage of maintaining the same current until they run out. So, even if the drone's battery becomes low, it can still fly with the same performance. Based on their voltage, current, and rate of consumption, batteries are categorized. Despite having a large capacity, a poor discharge rate prevents the battery from supplying the motors with the instantaneous current they require, making comfortable flight impossible.

Drones can avoid damage during takeoff and landing by using landing gear. Photographic drones have landing gear that folds up and vanishes after takeoff. Certain drones land on body extensions rather than carrying landing gear as an independent component [2].

This is how drones operate. Composite materials that are lightweight are used to make drones. Each propeller is attached to a motor, also known as a rotor, as part of the drone's operation. The drone's rotors keep it in the air. The upward thrust and the pull of gravity even out here. When the propulsion force exceeds the gravitational force, ascent, or flight, takes place [3]. The reverse is a motion that descends. It is common for two propellers to rotate clockwise while the other two move in the opposite direction while traveling to distinct points, such as right and left movements. Horizontal movements ensue as a result of achieving momentum equilibrium. Over the years, some engineers have studied armed drones themselves. Below are samples of several armed drone models along with their key features (Table 1).

Table 1

Characteristics of unmanned aerial vehicles in different sizes [4].

Names of drones	Weight, kg	Payload, kg	Flight range, km	Flight time, hours	Management system	Dimensions
Exdrone	40,5	11,0	120,0	2,5	Manual/Avto	1,6 m x 2,5 m
Pioneer	200,0	50,0	185,0	6-9	Manual/Avto	4,3 m x 5,1m
Hunter	667,0	143,0	150,0	14	Manual/Avto	7,0 m x 9,0 m
Delilah	180,0	55,0	400,0	5	Manual/Avto	2.7 m x 1.5 m
Scarab	1,077	132,0	315,0	-	Manual/Avto	6.2 m x 3.4 m
Model 410	817,0	227,0	2,000	10	Manual/Avto	6.6 m x 9.6 m
Tier II Plus	10,394	907,0	5,000	42	Manual/Avto	-
TierIII Minus	-	230,0	800,0	-	Manual/Avto	-

In contemporary combat, armed military drones are becoming more prevalent. Armed with weapons, these drones can be used for anything from targeted attacks to monitoring.

Armed drones eliminate known threats as part of a military fast response system. Important military installations are also shielded from terrorist attacks.

Fig. 1. General view of the "Songar" armed drone system

The tactical and technical requirements of the "Songar" armed drone system are shown in the table below (Table 2).

Table 2.

Tactical and technical characteristics of the armed drone system

№	Tactical-technical characteristics	Values of characteristics
1	Operating range, km	3,0
2	The caliber of operational ammunition, mm	5,56 × 45
3	barrel lift range of motion, dia.	0-60
3	Total weight with full equipment and full ammunition load, kg	45,0
4	Ammunition capacity, pcs	200,0
5	Width: from rotor to rotor, not more, cm	145,0
6	Height, not more, cm	70,0

The armed drone system "Songar" is equipped with weapons and ammunition. The Songar armed drone system consists of a weapon camera, a ground control station (GDS), recoil dampening, an automatic weapons stabilizer (OASIS), and the capability to tilt the barrel 0–60 degrees vertically.

With its multi-layer security and totally autonomous missions, the weapon can only fire with the final operator's clearance. The operator of the drone can easily replace and replenish the ammunition box for an ongoing mission. An electronic sight and a ballistic computation module enhance the armed drone system's firing precision. A recoil absorption system is installed on the machine gun.

The armed drone system has two cameras (infrared night and day), a gun-mounted camera, and a pilot camera with a 10x zoom. Real-time photos and video can be transmitted by the cameras. Both daytime and infrared cameras are installed on the armed drone. The drone can operate at a distance of 10 kilometers at night thanks to night sensors [5]. Six small rockets with a diameter of 40 mm and a length of 170 mm can be fired by the drone. 550 mm long rockets that are discharged from single-use tubes. The combined weight of each rocket and tube is approximately 0.5 kg. The small rocket's greatest effective range is between 100 and 500 meters, while its maximum range is 2 kilometers. A smart fuse-equipped anti-personnel warhead with a 12-meter range. STANAG 4569 level 2 is equivalent to the armor-piercing warhead's penetrating capacity. Buildings, minor structures, and armored and light armored vehicles are among the fixed targets that the mini-missile drone is employed to destroy [6].

Numerous payloads, including firearms, missiles, bombs, bullets, and other weaponry, can be carried by a drone. Targets on the ground are neutralized by these payloads, which have the potential to be extremely damaging. Drone technology is becoming more and more popular in both the commercial and civilian

sectors, and its uses are not just restricted to the military. Among other things, drones are employed for search and rescue missions, crop monitoring, and aerial surveys [7-8]. Information regarding armed drones was examined and their features were analyzed utilizing a variety of sources.

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THE PROBLEM OF FALSE TWIST OF YARN DURING SPINNING

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Abstract
The improvement of pneumatic-mechanical spinning machines producing high-quality yarn by pneumatic-mechanical means, with the aim of increasing the quality and reducing the cost of products manufactured in the textile and light industry, on a global scale requires the introduction of methods and means for eliminating factors that negatively affect the quality of products in the process of yarn spinning. The article theoretically studies the mechanism and process of false twisting, which affect the quality indicators of yarn obtained by the false twisting method. Also, the analysis of stopping and opening the false twisting device is conducted.
Keywords: Twisting, false twisting, false twisting mechanism, pneumomechanical spinning, false twist devices, false twist distribution, yarn speed, low torque rotation.

Introduction. Twisting is an important technological means of spinning. As a result of twisting, the yarn is deformed, the fiber is transferred and compressed inside and out, forming a twist. Torsion also plays an important role in the tensile strength, elasticity, fluffiness, degree of elongation, and luster of the yarn. The twisting method is developed on the basis of the ancient methods of twisting, hand spinning, drawing and twisting separation of the original hand twisting, and then developed on the spinning machine for twisting and winding. Ring spinning is a revolution in spinning technology that is of great importance. In this process, there has also been progress and development of cotton tape spindles and linen spinning heads. Free-end rotary spinning, developed in modern times, is a continuation and innovation of the ancient rope twisting technique, which has contributed significantly to a significant increase in spinning productivity and has led to the development of friction spinning, electrostatic spinning, air-jet spinning. spinning and vortex rotation. And other new free-end spinning methods. False twisting is another form of twisting. The spinning process can be optimized by false twisting, thereby forming new spinning methods such as self-spinning, texturing, elastic spinning, and low-torque spinning [1,2,3,4].

Use of false twist in pneumomechanical spinning. As with the roving flyer, the original pneumatic mechanical spinning did not have a false twist. Later, it was discovered that when the yarn tape is rotated around the torsion-limiting disc, the rotation around the axis of the yarn itself will form a false twist, and the direction of the twist is consistent with the true twist. The greater the friction coefficient of the turntable, the greater the false twisting effect. False torsion can be transmitted to the peel point A shown in Figure 2, thereby reducing the occurrence of end breakage. The larger the diameter of the twist locking disc, the greater the enveloping angle, the more false twisted. False twist is useful for increasing the dynamic strength of the spinning yarn, but does not affect the strength of the yarn. Twisting too much will involve more bundles of moving fibers. Yarn, forming tangled fibers, reduces strength and increases hairiness [5]. Therefore, it is necessary to select false twisters from different materials and shapes according to the characteristics of the product.

Results. Let t be the transit time of the AC yarn section, n be the rotation speed of the false torsion, and V be the velocity of the yarn calculated according to the false twist theory.

AB Section Rotation [6]:

$$T_A = \frac{n}{v}\left(1 - e^{\frac{v_t}{L_1}}\right) \quad (1)$$

BC Section Rotation:

$$T_B = \frac{n}{v} \cdot \frac{L_1}{(L_1 - L_2)} e^{\frac{v_t}{L_1} - \frac{v_t}{L_2}} \quad (2)$$

It can be seen that when t is small enough, there is a certain TB twist in the BC tape called the residual twist. When t tends to ∞, TA = n/v, TB -> 0, and the curve of the relationship between t and TB is shown in Figure 1. Therefore, it can be understood as TB = 0 in long-term continuous operation.

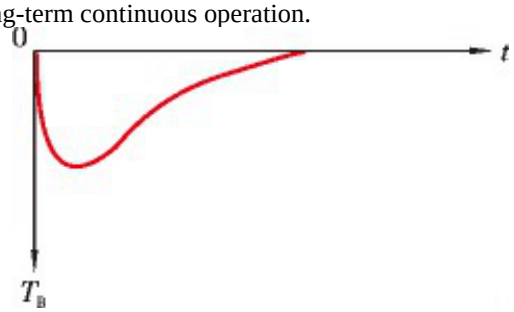

Fig.1. Residual twist in false twist.

Based on the theory of false twisting, the possibility of true twisting by the device of false twisting to the thread being formed in the presence of slip in the clamps was justified above.

In the study, we present the analytical relationships between the number of twists of the yarn in the running mode, the number of twists of the yarn before and after the false twisting device, and the twisting versus time between the draw pair and the position of the finished yarn. In developing these links, we make the following assumptions:

1. The speed of the thread v and the rotation frequency of the device ν are constant quantities.

2. During the false twist process, there is no slippage of the thread relative to the device.

3. Do not take into account the value of the twist rate of the thread, that is, the exit speed of the thread is equal to its entrance speed.

4. Assume that the initial twist of the thread is zero.

In our opinion, the last two assumptions are not sufficiently justified for the existing conditions. First, since the process starts with a piece of finished yarn, its initial twist cannot be zero, that is, the nominal twist of the yarn is equal to K_H.

Here, assume the nominal twist direction and the corresponding twist direction, regardless of whether it is right or left, to be positive.

Secondly, at the initial moment of time, the value of the vanishing torque m in the sliding clamp is zero, because at the beginning of the process, the thread does not have the torque necessary to make its tip slip.

To simplify the problem, we assume that the slip magnitude depends on the twist magnitude $|K_1|$ as follows:

If $0 < |K_1| < |K_{1c}|$ or $0 < t < t_{1c}$, m equal to 0

If $|K_1| > |K_{1c}|$ ёки $t > t_{1c}$, m equal to $k_{(K_1 - K_{1c})}$

where k is the proportionality coefficient.

Thus, we replace the curved line with a broken line, where it is clear that $K_1 < K_{1c}$.

In the graph of the slip magnitude versus the twist shown in Figure 2, line 1 corresponds to the case when $m = const$, line 2 corresponds to the assumed curvilinear relationship between the slip magnitude and the twist K_1, and line 3 corresponds to the assumed straight-line relationship.

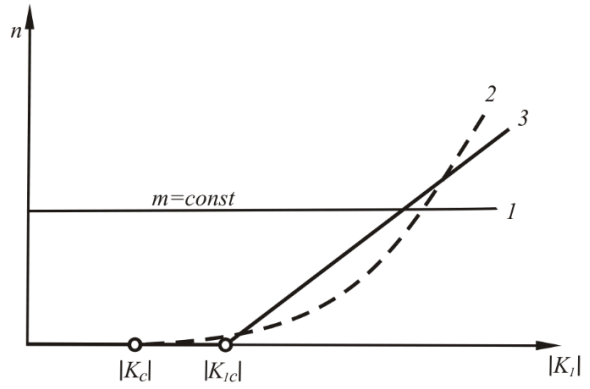

Fig.2. The graph of the dependence of the amount of slip on the twist.

If $0 < |K_1| > |K_{1c}| < |K_{1c}|$ or $0 < t < t_{1c}$, m equal to 0

If $|K_1| \geq |K_{1c}|$ or $t \geq t_{1c}$, m equal to $k(K_1 - K_{1c})$

First, we consider the case $0 < |K_1| > |K_{1c}| < |K_{1c}|$, i.e., $0 < t < t_{1c}$. In this case, we denote the vertex by K_{11} and obtain:

$$dK_{11} = \frac{-n - k_{11}v}{l_1}dt$$

This equation can be reduced to the following form:

$$\frac{d\left(1 + \frac{k_{11}v}{n}\right)}{1 + \frac{k_{11}v}{n}} = \frac{vdt}{l_1}$$

Integrating this equation, we get the following:

$$\ln\left(1 + \frac{K_{11}v}{n} = \frac{vdt}{l_1} + C\right)$$

Using the initial conditions: i.e., $t = 0$, $K_{11} = K_H$, we find the integration constant

$$C = \ln\left(1 + \frac{K_H v}{n}\right)$$

Substituting the value of the constant, we get the following:

$$K_{11} = -\frac{n}{v}\left[1 - \left(\frac{K_H v}{n}\right)e^{-\frac{vt}{l_1}}\right]$$

We enter the markings:

$K_0 = \frac{n}{v}$ - the absolute magnitude of the twist in the first section in the stabilized regime without slip.

$\theta_1 = 1 + \frac{K_H v}{n} = 1 + \frac{K_H}{K_0}$ - coefficient that takes into account the effect of the initial twist, in terms of value, it is equal to the nominal twist of the first section of the thread without slipping in the running mode.

In this case, we can write the expression of the twist in the first section as follows, when there is no slippage of the thread end.

$$K_{11} = -K_0\left[1 - \theta_1 e^{-\frac{vt}{l_1}}\right] \quad (4)$$

Discussion and conclusion. False twist usually refers to a device that does not twist both ends of the control yarn, but applies twisting in the middle [7,8]. The simplest false twister is shown in Figure 3. The false rotor twister is shown in Figure 3. The multiple thread is wound around the cross pin 3 of the rotors, and the rotor belt rotates along with the multifilament, creating a twist. This kind of false twist will cause a double change in the tension of the output and input ends of the silk too large, and it is rarely used now. Hook-shaped and perforated simple false twists are often used.

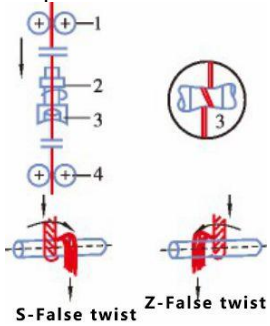

Fig.3. Schematic diagram of a simple false twist for a multifilament.

1-feed roller; 2-rotary false twister; 3 - horizontal pin; 4-output roller.

Textured yarn false-twisted. Chemical fiber threads are usually parallel and do not have a bonding force, so they are easy to tear off and snag, which makes it difficult to weave, easily creates uneven tension, and increases the break. For this reason, it is often necessary to make the yarns into false twisted yarn, airy texture yarn, mesh textured yarn, etc. Textured false twist yarn is the most commonly used and the best. Textured false twist yarn (yarn) has the characteristics of good elasticity, large elongation, good plumpness, high strength and large hiding power. The texturizing machine of false twist is the most successful example of the use of false twist. Its production speed can reach 1000m/min or more with high efficiency and low operating costs. Polyester textured yarn and nylon elastic textured yarn, which are widely produced at home and abroad, are used in socks, outerwear, seamless clothing, functional sportswear and fashion yarn products. The key technology of textured yarn false twist is the selection of false twist with high speed, stability and convenient operation.

Low torque rotation. The first low-torque spinning at the Hong Kong Polytechnic University in my country is an example of the application of false twisting in epoch-making spinning technology. The idea is to mount a high-speed twister, similar to a fake twisted textured yarn, on a ring spinning guide hook, such as a fake roving twisting machine, to increase the twisting of the spinning section and thereby reduce the twisting of the ring spinning. The potential value of developing high-quality textile materials with soft, low-level, low-shrink, high-quality yarns and torque is that they can reduce end breaks, increase vehicle speed, reduce energy consumption, increase strength, and reduce weft of the fabric. It is especially suitable for knitwear, superfine yarn, hollow yarn, core spun yarn, denim, untwisted towels, etc.

Application of false twist wrapping yarn and fancy yarn. Suessen parallel spinning is a typical wrapping yarn. The false twisting device is shown in Figure 4. After the yarn enters the hollow spindle, the hollow spindle is inserted into the hole of the hollow spindle after a quarter turn, and after one spindle rotation, a false twist is applied to the end of the spindle. False twisting can prevent this part of the spindle from loosening before winding the thread to increase strength and reduce lint. Parallel spun wrapping yarn has good coverage and small shrinkage, suitable for medium and thick special yarn and carpet fabrics, and the cost is higher.

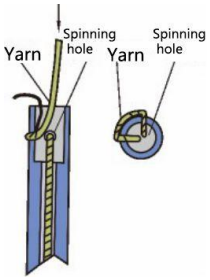

Fig.4. False twist device during the spinning of Suessen wrapper (Parafill)

Similar to the principle described above, the hollow spindle twisting machine is equipped with a simple false twisting machine with twisting hooks under the spindle, as shown in Figure 7.

When the spindle rotates, false twists are applied to the upper and lower filaments at point B; The twist of the finished yarn is not changed, but the fancy shape of the decorative yarn when the false twist of the warp yarn is removed, can be corrected, and the fancy twist of the ring spinning can be preserved. The machine is also soft and fluffy. In Figure 5, A is the basic yarn and A' is the decorative yarn.

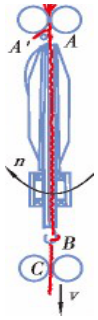

Fig.5. Hook-shaped false twister.

Use of false twist in spinning. Bonded spinning has a long history, such as the Dutch Twilo process, the Swiss Reiterpavena process, and the Canadian Bobtex process. Bonded spinning uses adhesives that bind fibers or polymers to bond fibers together to increase the strength of the fibers. The fabrics are hard to the touch, have poor softness, high hiding power, and poor detergent properties. However, the output reaches 500m/min~600m/min without spinning treatment, but softening treatment is often required to improve the softness, and the cost is not low.

Figure 8 shows the Twilo spinning process in the Netherlands. Boiled tape 1 consists of 5–11% water-soluble vinylon (PVAc) mixed with cotton tape; the former can be water-soluble and mixed with mixed fibers at a temperature of about 70 °C. The prepared tape first passes through the first drawing zone and is drawn 5 to 10 times, and then passes through the wetting zone by the first false twisting device 2 for water spray and false twist Strands. Finally, in the unwound state, after the second exhaust zone, the sediment is reciprocated about 40 times. The exhaust mechanism is connected with the second false twisting device 3 to heat and bind the yarn, then the drying roller 4 at 140 °C sets the shape, fixes the twisting, reinforces and finally winds it into a cone. The section of the yarn is even, so it has good coverage. The product is suitable for making bath towels, pads, coated fabrics, etc.

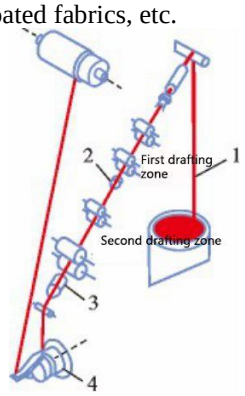

Fig.6. Twilo rotation principle.
1- strip of boiled; 2 - the first false twisting device; 3-second false twisting device; 4-dryer roll.

Conclusion

Twisting or false twisting can change the shape and arrangement of yarn fibers or the cross-section of the yarn during the spinning process, improve the strength of the yarn, reduce accidental elongation of spinning, increase the elasticity of the yarn, reduce hairiness, and improve surface properties. Reduce torque and twisting in post-processing, improve fabric quality, etc., such as flyer false twist, hollow spindle false twist, rotary spinning false twist, etc. spun yarn, carded wool roving, super heavy tape, etc., by continuously changing direction, stopping and opening the false twisting device. The output end of the false twisting machine can be spun from textured false twist yarn and bonded yarn by adding a heating melting device or binder. Low-torque spinning is a major breakthrough in the use of false twisting. It has advanced technology, less investment, shorter payback period, convenient operation and simple maintenance, and has the greatest development potential.

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