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Germany

August, 2025
№ 10

Berlin, Germany
14-15.8.2025

International
Scientific
Conference

# Foundations and Trends in Modern Learning

UDC 001.1
P 97

Publisher.agency: Proceedings of the 10th International Scientific Conference «Foundations and Trends in Modern Learning» (August 14-15, 2025). Berlin, Germany, 2025. 191p

ISBN 978-8-2148-8817-1
DOI 10.5281/zenodo.16892013



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# Implementation of Digital Learning Models: Challenges and Opportunities in Educational Transformation

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**Abstract**

The implementation of digital learning models constitutes a pivotal driving force in the ongoing transformation of contemporary educational systems. With the rapid advancement of information and communication technologies, the proliferation of online learning platforms, and the increasing adoption of hybrid learning modalities, educational environments are becoming more flexible, interactive, and tailored to the needs of individual learners. This paradigm shift enables unprecedented opportunities, such as enhanced accessibility to educational content, personalized learning experiences, and seamless access to a diverse range of global knowledge resources. However, alongside these benefits, the integration of digital learning models also introduces significant challenges. These include infrastructural shortcomings, disparities in technological access among students, insufficient digital literacy and competencies among educators, as well as critical concerns regarding data privacy and cybersecurity. This study aims to conduct a comprehensive analysis of the implementation of digital learning models within educational settings, evaluating their multifaceted impacts on teaching and learning processes. Furthermore, it seeks to critically assess both the advantages and limitations associated with these models and to propose effective strategies and best practices that can facilitate their successful adoption. Ultimately, this research aspires to contribute to the discourse on educational transformation by providing actionable insights that support the optimization of digital learning frameworks, thereby enhancing the quality, equity, and sustainability of education in the digital age.

**Keywords**: Digital learning, educational transformation, learning models, online learning platforms, hybrid learning formats, implementation strategies, technological innovations in education, teacher digital competence, data security in education, educational modernization, e-learning infrastructure.

## 1. Introduction

he rapid development of information and communication technologies (ICT) has profoundly transformed the educational landscape, affecting not only the methods of content delivery but also the fundamental objectives and structures of education systems worldwide. Digital learning models, which encompass a range of approaches such as e-learning, blended learning, and mobile learning, have emerged as essential pillars of contemporary educational strategies. These models leverage technology to create learning environments that are more interactive, flexible, and tailored to the diverse needs and preferences of individual learners.

E-learning provides opportunities for education beyond the constraints of time and place, allowing learners to access instructional materials remotely and at their own pace. Blended learning combines traditional face-to-face instruction with online components, offering a hybrid approach that seeks to maximize the benefits of both modalities. Mobile learning further extends educational access by utilizing portable devices, enabling continuous and context-aware learning experiences.

Despite the significant advantages offered by these digital learning models, their successful implementation is contingent upon overcoming a variety of challenges. One critical issue is the availability and quality of technological infrastructure, including reliable internet access and adequate hardware, which varies significantly across different regions and institutions. Additionally, the effectiveness of digital learning heavily depends on the digital competence and pedagogical skills of educators, necessitating comprehensive and ongoing professional development programs. Furthermore, concerns regarding data privacy and cybersecurity have become increasingly prominent, requiring robust policies and safeguards to protect sensitive learner information and maintain trust in digital education platforms.

This evolving educational paradigm calls for a holistic approach that not only embraces technological innovations but also addresses these infrastructural, human resource, and ethical challenges to ensure equitable, secure, and high-quality learning opportunities for all participants.

## 2. Research Aim

The primary aim of this research is to conduct a comprehensive examination of the implementation of digital learning models and their pivotal role in driving educational transformation across various institutional and cultural contexts. This study seeks to evaluate both the advantages and limitations associated with the adoption of such models, considering factors such as learner engagement, accessibility, instructional effectiveness, and pedagogical adaptability. Furthermore, the research aims to identify and analyze practical strategies, frameworks, and best practices that facilitate the successful integration of digital learning approaches within diverse educational settings. By doing so, the study intends to provide valuable insights that can guide educators, policymakers, and stakeholders in optimizing the deployment of digital learning tools and methodologies, thereby enhancing the overall quality, equity, and sustainability of modern education systems.

## 3. Methodology

This study employs a comprehensive mixed-methods research design, integrating both quantitative and qualitative approaches to provide a holistic understanding of the implementation of digital learning models in educational settings. The research process begins with an extensive review of existing academic literature to establish a theoretical foundation and identify prevailing trends, challenges, and gaps related to digital learning adoption. Following this, a comparative

analysis of selected case studies from a diverse range of educational institutions—spanning different geographic locations, educational levels, and organizational structures—is conducted to explore practical applications and contextual variations in implementation strategies.

To gather primary empirical data, structured questionnaires were administered to a broad sample of educators and students, enabling the collection of quantitative data on perceptions, experiences, and outcomes associated with digital learning models. This quantitative phase aimed to quantify key factors such as user engagement, satisfaction, perceived effectiveness, and accessibility.

Complementing this, qualitative data were collected through semi-structured interviews with selected participants, including teachers, administrators, and learners, to gain deeper insights into the nuanced challenges and facilitators encountered during implementation. These interviews allowed participants to elaborate on their personal experiences, institutional support mechanisms, technological barriers, and pedagogical adaptations, thereby enriching the quantitative findings with contextual depth.

The collected data were subjected to rigorous analysis: quantitative data were processed using statistical techniques to identify significant patterns, correlations, and trends, while qualitative data were analyzed through thematic coding to extract recurrent themes and insights. The synthesis of these results facilitated the identification of common challenges and success factors, providing a comprehensive overview of the implementation process and informing recommendations for effective adoption of digital learning models in diverse educational contexts.

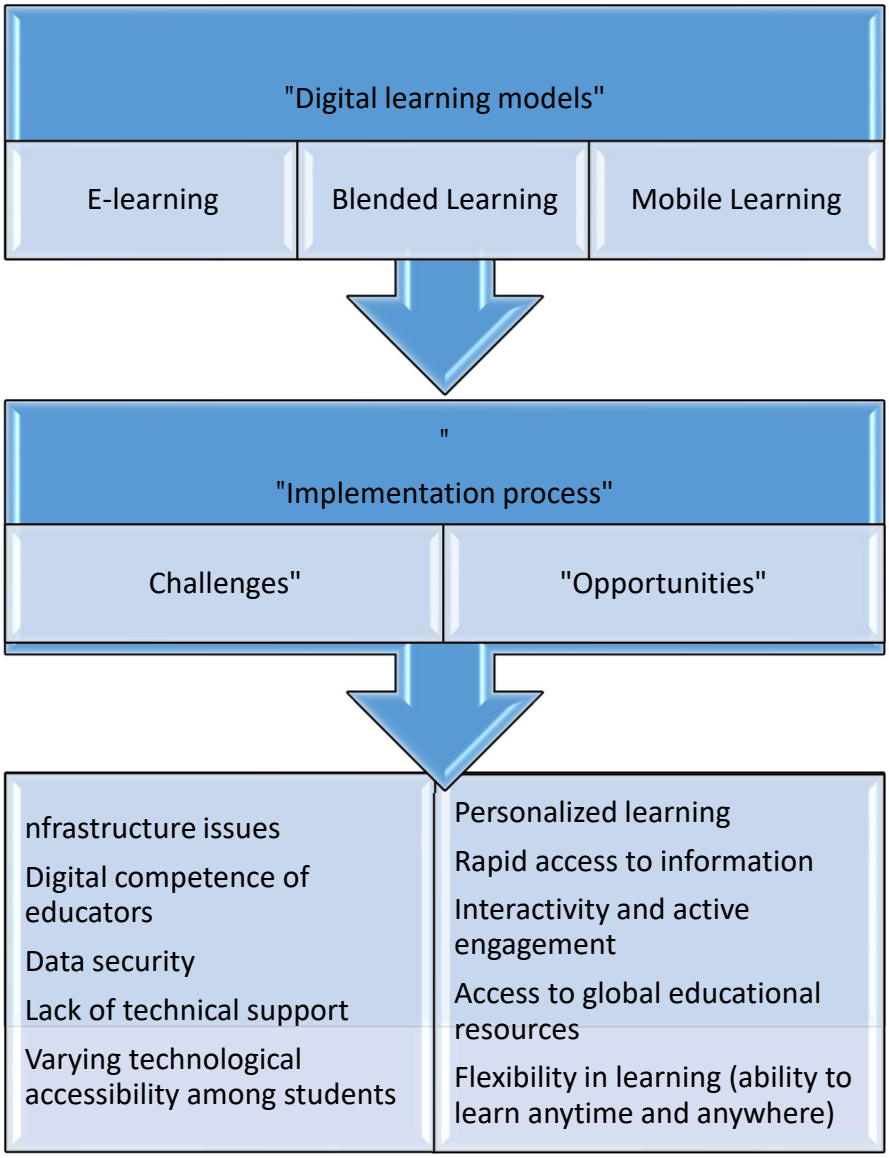


Diagram 1 : Implementation of Digital Learning Models — The Relationship Between Models, Challenges, and Opportunities

## 4. Conclusion

The implementation of digital learning models acts as a pivotal catalyst in driving the comprehensive transformation of contemporary education systems. These models significantly enhance the accessibility of educational resources by enabling learners to engage with content anytime and anywhere, thereby breaking down traditional geographical and temporal barriers. Moreover, digital learning fosters personalization by accommodating diverse learning styles, pacing, and preferences, which contributes to improved learner engagement and outcomes. Additionally, it facilitates global knowledge exchange, connecting educators and students across different regions and cultures, thus enriching the educational experience through diverse perspectives and collaborative opportunities.

However, the successful adoption of these digital learning frameworks is contingent upon the development and execution of a well-rounded strategic approach. This approach must address key factors including infrastructural readiness—such as reliable internet connectivity, appropriate

hardware, and supportive software platforms—to ensure uninterrupted and equitable access to digital content. Equally important is the continuous professional development and capacity building of educators, as teacher competence in utilizing digital tools and pedagogical methods directly influences the effectiveness of digital learning initiatives. Furthermore, the integration of robust cybersecurity measures is essential to safeguard sensitive student data and maintain trust in digital platforms.

By carefully balancing the exploitation of these opportunities with the proactive mitigation of inherent risks and challenges, educational institutions are better positioned to realize the full transformative potential of digital learning models. This holistic adoption not only promises to modernize instructional practices but also to foster inclusive, resilient, and future-ready educational ecosystems capable of adapting to the evolving demands of the digital age

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# Pedagogical Sciences

ӘОЖ 37.016:535-021.6

# «ОПТИКА» ТАРАУЫН ЖОБАЛАП ОҚЫТУ ӘДІСІНІҢ АРТЫҚШЫЛЫҒЫ

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**Аңдатпа.** Мақалада 8-сынып оқушылары үшін «Оптика» бөлімі бойынша жоба әдісімен оқытудың артықшылықтары қарастырылады. Зерттеудің мақсаты – бұл әдіс оқушылардың зерттеу дағдыларын, сыни ойлауын және функционалдық сауаттылығын дамытуға оң әсер ететінін көрсету. Зерттеу барысында 25 оқушыдан тұратын эксперименттік топ үшін 6 сабақтан тұратын арнайы жобалық бағдарлама әзірленіп, іске асырылды. Бағдарлама студенттердің белсенділігін арттыруға және теориялық білімді практикамен үйлестіруге бағытталған «Бес Б» әдісіне негізделген (проблема, жоспарлау, ақпарат іздеу, өнім, презентация). Әдістің тиімділігін бағалау үшін экспериментке дейін және одан кейін жүргізілген диагностикалық сынақтар қолданылды. Тест нәтижелері оқушылардың орташа баллы 11,4-тен 16,2-ге дейін өскенін көрсетті. Стьюденттің t-критерийі (paired t-test) арқылы деректерді статистикалық өңдеу $p < 0,05$ кезінде $t = 9,33$ нәтижесін беру арқылы өзгерістердің маңыздылығын растады. Бұл жобалық оқыту оқушылардың білім деңгейіне статистикалық маңызды әсер еткенін көрсетеді. Жалпы, «Оптика» бөлімі бойынша жобалық оқыту материалды сапалы игеруге, танымдық белсенділікті дамытуға және физикаға оң көзқарасты қалыптастыруға ықпал ететін тиімді педагогикалық әдіс болып табылады.

**Кілт сөздер:** оптика, жобалап оқыту әдісі, оптикалық нәрсе, оптикалық кескін, оқу нәтижелері, Стьюденттің t-критерийі, «Бес П» әдісі, зерттеушілік дағдылар

## ПРЕИМУЩЕСТВА ПРОЕКТНОГО ОБУЧЕНИЯ РАЗДЕЛА «ОПТИКА»

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**Аннотация.** В статье рассматриваются преимущества проектного обучения по разделу «Оптика» для учащихся 8-х классов. Цель исследования – показать, что этот метод положительно влияет на развитие исследовательских навыков, критического мышления и функциональной грамотности учащихся. В ходе исследования была разработана и реализована специальная проектная программа, состоящая из 6 уроков, для экспериментальной группы из 25 учащихся. Программа основана на методе «Пять П» (Проблема, Планирование, Поиск информации, Продукт, Презентация), который направлен на повышение активности учащихся и сочетание теоретических знаний с практикой. Для оценки эффективности метода были использованы диагностические тесты, проведенные до и после эксперимента. Результаты теста показали, что средний балл учащихся увеличился с 11,4 до 16,2. Статистическая обработка данных с помощью парного t-критерия Стьюдента (paired t-test) подтвердила значимость изменений, дав результат $t = 9,33$ при $p < 0,05$. Это свидетельствует о том, что проектное обучение оказало статистически значимое влияние на уровень знаний учащихся. В целом, проектное обучение по разделу «Оптика» является эффективным педагогическим методом, способствующим качественному усвоению материала, развитию познавательной активности и формированию положительного отношения к физике.

**Ключевые слова:** оптика, проектное обучение, оптический объект, оптическое изображение, результаты обучения, t-критерий Стьюдента, метод «Пять П», исследовательские навыки.

## ADVANTAGES OF PROJECT-BASED LEARNING IN THE «OPTICS» UNIT

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**Abstract.** The article discusses the advantages of project-based learning in the Optics section for 8th grade students. The aim of the study is to show that this method has a positive effect on the development of research skills, critical thinking and functional literacy of students. During the research, a special project program consisting of 6 lessons was developed and implemented for an experimental group of 25 students. The program is based on the "Five P's" method (Problem, Planning, Information Retrieval, Product, Presentation), which aims to increase student activity and combine theoretical knowledge with practice. Diagnostic tests conducted before and after the experiment were used to evaluate the effectiveness of the method. The test results showed that the average student score increased from 11,4 to 16,2. Statistical data processing using the paired Student t-test confirmed the significance of the changes, giving the result $t = 9.33$ at $p < 0.05$. This indicates that project-based learning had a statistically significant impact on the students' level of knowledge. In general, project-based learning in the Optics section is an effective pedagogical method that promotes high-quality learning, the development of cognitive activity and the formation of a positive attitude towards physics.

**Keywords:** optics, project-based learning, optical object, optical image, learning outcomes, Student's t-criterion, "Five P" method, research skills.

## Кіріспе

Қазақстан Республикасының «Білім туралы» Заңының 8-бабында білім беру жүйесінің басты міндеттерінің бірі – тұлғаның шығармашылық, зияткерлік және практикалық қабілеттерін дамыту екені нақты көрсетілген [1]. Бұл талап қазіргі заманғы білім беру әдістерін, оның ішінде жобалап оқыту сияқты оқушы белсенділігін арттыратын технологияларды қолдануды қажет етеді.

Физика пәніндегі «Оптика» тарауы күнделікті өмірмен тығыз байланысты: жарықтың таралуы, көру құбылыстары, оптикалық құралдардың жұмыс принциптері сияқты тақырыптар заманауи технологиялардың негізін құрайды. Сондықтан бұл тарауды жобалық әдіспен оқыту оқушылардың теориялық білімін нақты тәжірибемен ұштастырып, функционалдық сауаттылығын арттыруға септігін тигізеді. Сонымен қатар, Қазақстан Республикасы Президентінің «Цифрлық Қазақстан» мемлекеттік бағдарламасында да жастардың ғылыми-техникалық қабілеттерін дамытуға баса назар аударылған. Оптика саласындағы білім ақпараттық-коммуникациялық технологиялармен, медицинамен, инженериямен тығыз байланысты болғандықтан, оқушыларды осы бағыттарға бейімдеу – елдің адами капиталын нығайтудың маңызды аспектісі болып табылады [2]. Осылайша, «Оптика» тарауын жобалап оқыту әдісін қолдану – еліміздің білім беру жүйесінің мақсаттарына толық сәйкес келеді және оқушыларды XXI ғасыр талаптарына сай ғылыми және технологиялық ортаға дайындаудың маңызды тетігі болып табылады.

Қазіргі білім беру жүйесінде жобалап оқыту әдісі оқушылардың зерттеушілік дағдыларын, шығармашылығын және пәнге деген қызығушылығын арттырудың тиімді жолы ретінде кеңінен қолданыс табуда. Бұл бағытта Ж.Б. Қоянбаев пен А.К. Бейсенбаева оқушыларды ғылыми ойлауға жетелеу үшін жобалық әдістердің маңызын атап өтсе, А.М. Ахметов білім алушының белсенді танымдық әрекетін қалыптастырудағы ролін сипаттайды [3, 4]. Осыған ұқсас шетелдік зерттеулерде де жобалап оқытудың артықшылықтары нақты дәлелденген. Мысалы, Питтсбург университетінің ғалымдары арнайы «Оптика және фотоника» курсына жобалық тәсілді енгізіп, студенттердің пәнге деген ынтасының едәуір

артқанын, оқу үлгерімінің жақсарғанын көрсеткен [5]. Осы зерттеулер жобалық әдістің тек теориялық емес, тәжірибелік бағытта да тиімді екенін дәлелдейді.

Физика сабағында жобалық оқытуды қолдану оқу үдерісін өмірмен байланыстыруға және оқушылардың пәнді терең түсінуіне ықпал етеді. Н. Әбілғазиев орта мектептерде физика пәнін жобалық әдіспен оқытудың құрылымдық моделін ұсынып, бұл тәсілдің оқушы белсенділігін арттыратынын көрсеткен [6]. А.С. Мырзахметов болса, физиканы оқытудағы әрекетке негізделген жобалардың оқушылардың теориялық білімдерін практикалық қолданыспен ұштастыруға мүмкіндік беретінін дәлелдеген [7]. Шетелдік зерттеулер де осыған үндес: Гаврилин мен Лоури «Оптикалық құбылыстарды» жобалық форматта оқыту студенттердің логикалық ойлауын және бақылау қабілетін едәуір арттырғанын көрсеткен [8]. Бұл зерттеулер жобалық оқытудың пәндік мазмұнды меңгерту құралы ретінде өзектілігін арттыра түсетінін дәлелдейді.

Оқушылардың функционалдық сауаттылығын дамыту – заманауи білім берудің басты міндеттерінің бірі. Бұл салада Б.М. Жадрина мен С.Ә. Әбдіғаппар жобалық тапсырмалар оқушылардың нақты өмірлік жағдайлардағы мәселені шешу қабілетін дамытатынын атап көрсеткен [9]. Ал Р.М. Оралбаева зерттеуінде жобалық әдістің функционалдық сауаттылықтың кілті болып табылатынын ғылыми негіздеген [10]. Осы мазмұнды толықтыратын халықаралық тәжірибеде, мысалы, Рапопорт пен Чанг жобалық форматтағы оқытудың көмегімен оқушылардың өмірлік дағдылары, логикалық пайымдауы мен дербес шешім қабылдауы күшейетіні дәлелденген [11]. Бұл нәтижелер функционалдық сауаттылықты дамытуда жобалық оқытудың әлеуеті зор екенін көрсетеді.

Ғылыми зерттеу дағдылары – қазіргі білім алушының бәсекеге қабілетті болуын қамтамасыз ететін маңызды компоненттердің бірі. Бұл тұрғыда М.Қ. Қозыбаев пен Д.Ж. Сапарова өз еңбектерінде физика пәнінде зерттеу жобаларын ұйымдастыру оқушылардың ғылымға деген қызығушылығын арттырып, олардың дербес жұмыс жасауына жағдай жасайтынын көрсеткен [12]. Сонымен қатар, Л.Е. Есқалиева зерттеу жұмыстарын оқу бағдарламасына кіріктіру арқылы оқушылардың зертханалық және аналитикалық дағдыларын дамытуға болатынын айқындайды [13]. Шетелдік зерттеулер де осы бағытта бірқатар нәтижелерге қол жеткізген. Ford және әріптестері жобалық форматтағы зертханалық сабақтар оқушылардың ғылыми тәсілмен ойлауына, бақылау мен қорытынды жасау қабілеттеріне оң әсер ететінін нақтылаған [14].

Физика пәнінің мазмұнын өмірмен ұштастыруда практикалық бағыттылық ерекше маңызға ие. Т.Қ. Шалғынбаева мен Е.С. Сыдықов зерттеулерінде физика сабағында жобалық практикалық тапсырмаларды қолдану арқылы оқушылардың пәнге деген қызығушылығы мен оқу мотивациясы артатыны айтылған [15]. Г.Қ. Тілеубергенова тәжірибелік-эксперименттік зерттеуінде оқушылардың өз қолымен жасаған оптикалық модельдердің оларда жауапкершілік пен шығармашылықты қалыптастырғанын дәлелдеген [16]. Шетелдік зерттеулерде Стюарт пен Эдвардс физикалық жобаларды орындау арқылы оқушылардың практикалық құзыреттілігі артып, оқу нәтижесі сапалы болатынын дәлелдеген [17]. Бұл зерттеулер оқытудың тәжірибелік бағыттылығы арқылы білімнің өмірлік маңызын арттыру мүмкін екенін көрсетеді.

Осы бағыттағы зерттеулердің тиімділігін t-критерийі арқылы салыстырмалы талдау нәтижелері нақтылай түседі. Индонезиялық зерттеуші Юлианти оптика тарауын жобалық әдіспен оқытқанда эксперименттік және бақылау топтарының нәтижелерін t-критерийі арқылы салыстырып, жобалық тәсілдің статистикалық тұрғыдан сенімді нәтижелер бергенін көрсетті. Бұл әдіс оқушылардың тек білім көлемін емес, олардың дербес жұмыс жасау, ғылыми ойлау және сыни талдау дағдыларын дамытуға ықпал ететінін дәлелдейді [18].

## Материалдар мен әдістер

Орыс тіліндегі «Бес П» (Пять П) әдісі – жоба әдістемесінің негізгі қағидаттарын көрсететін қысқа және есте қаларлық формула. Бұл бес принцип жобалық жұмыстың негізгі кезеңдерін қамтиды:

1. **Проблема (Мәселе)**: Жобаның бастапқы нүктесі. Бұл кезеңде оқушылар немесе жобаға қатысушылар шешімін табуды қажет ететін нақты бір мәселені немесе сұрақты анықтайды. Мәселе өзекті, қызықты және зерттеуге лайықты болуы керек. Мысалы, «Неліктен қаламыздағы ауа сапасы нашар?» немесе «Оптикалық кескінді қалай үлкейтуге болады?».

2. **Планирование (Жоспарлау)**: Бұл кезеңде жобаны жүзеге асырудың стратегиясы жасалады. Оқушылар жобаның мақсаттарын, міндеттерін, қажетті ресурстарды, жұмыс кестесін және күтілетін нәтижелерді анықтайды. Бұл кезең – жобаның «жол картасы». Мысалы, «Ауа сапасын өлшеу үшін қандай құралдар керек?», «Қандай ақпарат көздерін қолданамыз?», «Жобаның әр кезеңіне қанша уақыт бөлеміз?».

3. **Поиск информации (Ақпарат іздеу)**: Жобаның мәнін ашатын, мәселені шешуге қажетті деректерді жинау кезеңі. Бұл кезеңде оқушылар кітаптардан, ғаламтордан, сарапшылардан, тәжірибелер мен бақылаулар арқылы ақпарат жинайды. Бұл кезеңнің мақсаты — жиналған деректер негізінде мәселені талдау және қорытынды жасау.

4. **Продукт (Өнім)**: Бұл – жобаның нақты, көрінетін нәтижесі. Ол физикалық нысан (модель, құрылғы), бағдарламалық өнім (сайт, қосымша), жазбаша жұмыс (баяндама, мақала), немесе іс-шара (презентация, көрме) болуы мүмкін. Өнім мәселені шешудің жолын немесе жауабын көрсетеді. Мысалы, ауа сапасын өлшеу нәтижелері көрсетілген инфографика немесе оптикалық кескінді үлкейту үшін жасалған телескоп моделі.

5. **Презентация (Таныстыру)**: Жобаның қорытынды кезеңі. Бұл кезеңде оқушылар өз жұмысының нәтижелерін, жасаған қорытындыларын және өнімін көпшілікке таныстырады. Презентация кезінде олар өздерінің зерттеу жолы мен мәселені шешу әдісін түсіндіріп, аудиторияның сұрақтарына жауап береді. Бұл – коммуникативті дағдыларды дамытуға мүмкіндік беретін маңызды кезең.

Бұл «Бес П» формуласы жобалық жұмыстың логикалық және жүйелі құрылымын қамтамасыз етеді. Ол оқушылардың сыни ойлау, зерттеу, жоспарлау және коммуникация. 1-суретте «Бес П» (Пять П) әдісінің схемалық кескіні бейнеленген.


1-сурет. «Бес П» (Пять П) әдісінің схемалық кескіндемесі

Енді осы жобалық жұмыстың негізгі кезеңдерін «Бес П» (Пять П) әдісі бойынша жасанды интеллектіні қолданып инфографикаға түрлендірейік (2-сурет).


2-сурет. Жобалық жұмыстың негізгі кезеңдері

Жоба әдісі теориялық білімді практикалық тәжірибемен ұштастыруға мүмкіндік береді, бұл күрделі физикалық құбылыстарды меңгеруде тиімділік танытады. Жоба барысында оқушылар зерттеу, талдау және синтез дағдыларын дамытады. Әрі қарай жоба әдісін қолданып, **Оптикалық нәрсе** және **Оптикалық кескін** ұғымдарын қалыптастыруды оқытуды келесідей ұйымдастырайық.

**Жобаның мақсаты.** Оқушылардың оптикалық жүйелердегі нәрсе мен кескіннің қалыптасу принциптерін тәжірибелік түрде зерттей отырып, терең түсінігін қалыптастыру.

**Жобаның міндеттері:**

- **Оптикалық нәрсе** ұғымын анықтау және оның негізгі сипаттамаларын (жарық көзі, жарықты шағылыстыру/өткізу қабілеті) түсіндіру.
- **Оптикалық кескін** ұғымын анықтау және оның түрлерін (нақты, жалған) және сипаттамаларын (тура, төңкерілген; үлкейтілген, кішірейтілген) ажырату.
- Жарықтың шағылу және сыну заңдарын еске түсіру және олардың кескіннің қалыптасуындағы рөлін анықтау.
- Жинағыш және шашыратқыш линзалардағы, сондай-ақ жазық және сфералық айналардағы кескіннің қалыптасуын практикалық түрде көрсету және талдау.
- Оптикалық кескіндерді салу әдістерін меңгеру.

**Жобаны жүзеге асыру кезеңдері. Алғашқы дайындық кезеңі (1-апта)**

- **Әдебиеттерді шолу:** Оқушылар жарық, шағылу, сыну, линзалар және айналар туралы негізгі ұғымдарды қайталайды. Ұсынылған оқулықтар мен ғылыми-көпшілік басылымдарды зерттейді.
- **Теориялық негіздеме:** Жарықтың геометриялық оптикадағы негізгі принциптері (Ферма принципі, жарық сәулесінің таралуы) қарастырылады.
- **Зертханалық құралдарды дайындау:** Оптикалық скамья, жарық көздері (лазер, шам), жинағыш және шашыратқыш линзалар, жазық және сфералық айналар, экран, сызғыш, транспортир сияқты құралдар дайындалады.

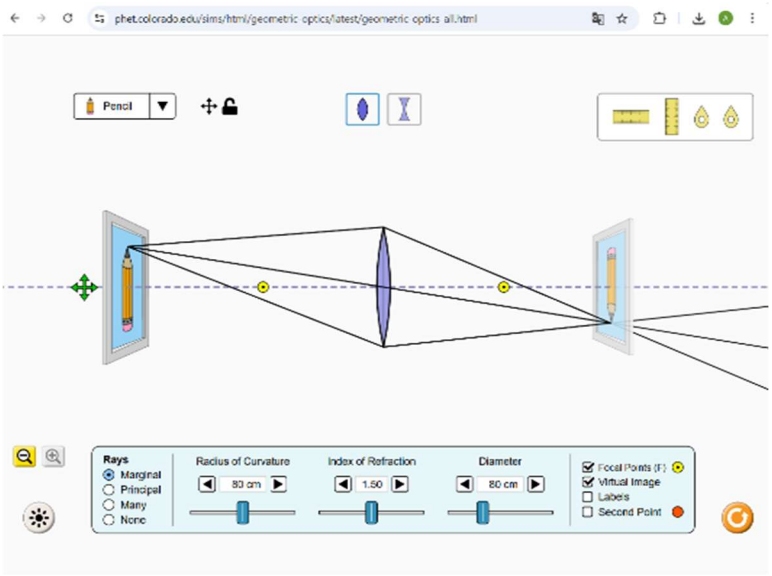
Екінші – практикалық кезең (2-3 апта)

*Оптикалық нәрсенің сипаттамасы*

**Тәжірибе 1:** Нүктелік жарық көзінен (оптикалық нәрсе) тарайтын жарық сәулелерінің бағытын зерттеу. Әртүрлі бұрыштардағы сәулелердің таралуын бақылау.

**Талдау:** Сәулелердің әртүрлі бағыттарда таралуы нүктенің оптикалық нәрсе ретіндегі сипатын көрсетеді.

**Қорытынды:** Жарық сәулелері нүктелік көзден барлық бағытта түзу сызық бойымен таралады. Сәулелердің әртүрлі бұрыштарда бірдей таралуын және геометриялық оптиканың негізгі заңдарын дәлелдейді.




*Оптикалық кескіннің қалыптасуы*

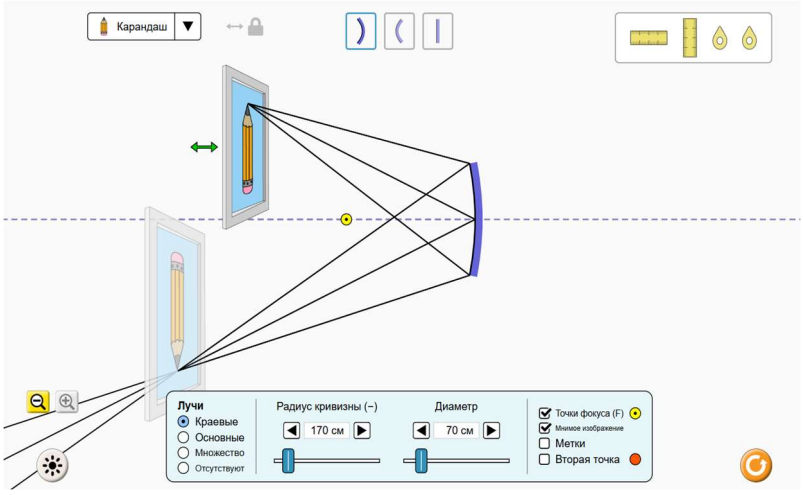
**Тәжірибе 2: Жазық айнадағы кескіннің қалыптасуы.**

Нәрсені жазық айна алдына орналастырып, оның кескінін бақылау.

Кескіннің орналасуын, өлшемін және сипатын (нақты/жалған, тура/төңкерілген) анықтау. Сәулелердің жолын сызу арқылы кескіннің қалыптасуын графикалық түрде көрсету.

**Талдау:** Жазық айнада сәулелер шағылып, көзге кері бағытта таралғандықтан, бізге нәрсе айна артында тұрғандай болып көрінеді. Сондықтан кескін жалған, тура және нәрсемен бірдей болып шығады.

**Қорытынды:** Жазық айнада әрқашан жалған, тура және нәрсемен бірдей өлшемді кескін қалыптасады.




**Тәжірибе 3: Жинағыш линзадағы кескіннің қалыптасуы.**

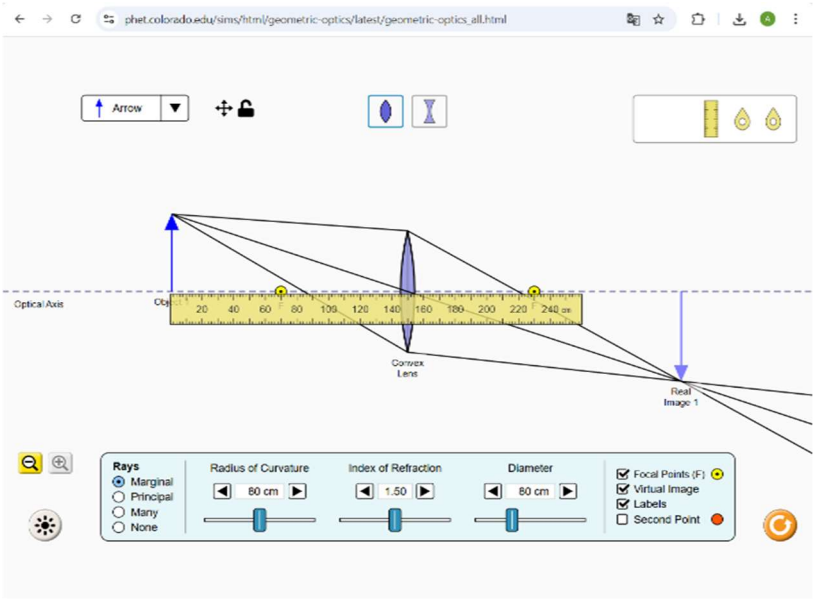
Әртүрлі қашықтықтардағы нәрселердің (мысалы, шамның) жинағыш линза арқылы қалыптасқан кескіндерін экранда алу.

Нәрсенің линзадан фокус аралыққа қатысты орналасуына байланысты кескіннің сипатының (нақты/жалған, үлкейтілген/кішірейтілген, тура/төңкерілген) өзгеруін зерттеу.

Әр жағдай үшін сәулелердің жолын сызу және математикалық есептеулер жүргізу (жіңішке линза формуласы).

**Талдау:** Нәрсе фокустан тыс орналасқанда нақты, төңкерілген кескін, ал фокус ішінде жалған, тура кескін қалыптасады.

**Қортынды:** Нәрсе фокустан тыс тұрса – нақты, төңкерілген кескін шығады. Фокус ішінде тұрса – жалған, тура, үлкейтілген кескін пайда болады.




**Тәжірибе 4: Шашыратқыш линзадағы кескіннің қалыптасуы.**

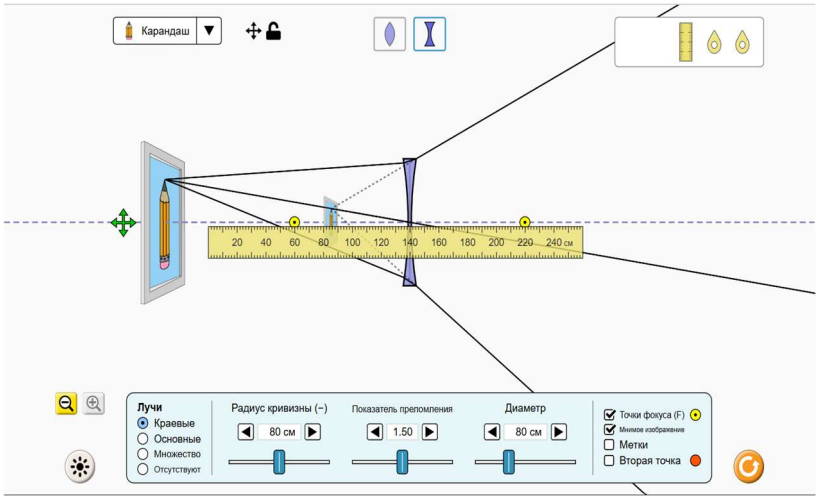
Шашыратқыш линзадағы нәрсенің кескінін бақылау.

Оның сипатын анықтау.

Сәулелердің жолын сызу.

**Талдау:** Шашыратқыш линзада сәулелер жан-жаққа шашырайды, сондықтан бізге зат линза артында тұрғандай көрінеді. Сол себепті кескін әрқашан жалған, тура және кішірейтілген болады.

**Қорытынды:** Шашыратқыш линза әрқашан жалған, тура және кішірейтілген кескін береді.




## Үшінші қорытынды кезең (4-апта)

- **Нәтижелерді жүйелеу:** Әрбір тәжірибе бойынша алынған деректер мен бақылаулар кестелерге, графиктерге және диаграммаларға түсіріледі.
- **Талдау және түсіндіру:** Оқушылар кескіннің қалыптасу механизмдерін жарықтың таралу заңдарымен байланыстырады.
- **Есептер шығару:** Оптикалық нәрсе мен кескінге қатысты есептерді шешу арқылы теориялық білімді бекіту.
- **Презентация дайындау:** Жобаның қорытындыларын, алынған нәтижелерді және тұжырымдарды қамтитын презентация дайындау.

**Жобаның қорытындысы.** Жоба әдісін қолдану арқылы **оптикалық нәрсе** мен **оптикалық кескін** ұғымдарын қалыптастыру оқушыларға бұл күрделі тақырыпты тереңірек түсінуге мүмкіндік береді. Практикалық тәжірибелер мен бақылаулар арқылы оқушылар теориялық білімді нақты мысалдармен ұштастырады, бұл олардың пәнге деген қызығушылығын арттырып, ғылыми зерттеу дағдыларын дамытады. Осы жобаның нәтижесінде оқушылар оптикалық құралдардың жұмыс істеу принциптерін, сондай-ақ күнделікті өмірдегі оптикалық құбылыстарды ғылыми тұрғыдан түсіндіре алатын болады.

## Нәтижелер мен талқылаулар

Зерттеу жұмысы 2025 жылдың қаңтар-наурыз айлары аралығында НИШ 8-сынып оқушылары арасында жүргізілді. Эксперименттік топ ретінде 25 оқушы таңдап алынды. Зерттеу мақсаты – «Оптика» тарауын жобалап оқыту әдісі арқылы білім деңгейінің өзгерісін анықтау.

Эксперимент барысында оқушылармен 6 сабақтан тұратын арнайы жобалық бағдарлама құрылып, тапсырмалар оқушылардың зерттеушілік, шығармашылық және практикалық дағдыларын дамытуға бағытталды. Әр сабақта оқушылар шағын топтарда жұмыс жасап, жарық құбылыстары мен оптикалық құралдарға байланысты мини-жобалар орындады.

Білім деңгейінің өзгерісін анықтау үшін зерттеу басында және соңында бірдей құрылымдағы диагностикалық тест тапсырылды. Оқушылардың «дейінгі» және «кейінгі» тест нәтижелері салыстырмалы түрде бағаланды.

Жиналған деректердің статистикалық өңдеуі үшін Стьюденттің тәуелді t-критерийі (paired t-test) қолданылды. Бұл әдіс бір топтың екі түрлі уақыттағы орташа нәтижелері арасындағы айырмашылықтың статистикалық тұрғыдан мәнділігін анықтауға мүмкіндік береді. Есептеулер Microsoft Excel бағдарламасы арқылы жүргізілді, сенімділік деңгейі 95% ($p < 0,05$) деп алынды.

Эксперимент барысында НИШ 8-сыныптың 25 оқушысы «Оптика» тарауын жобалап оқыту әдісімен оқытылды. Білім деңгейін бағалау мақсатында оқушыларға зерттеу басында және соңында бірдей құрылымдағы диагностикалық тест тапсырылды. Тест нәтижелері олардың тақырыпты қаншалықты меңгергенін және жобалық әдістің тиімділігін анықтауға мүмкіндік берді (3-сурет).


3-сурет. Оқушылардың тест нәтижелерінің өзгерісі (t-критерийі бойынша талдау)

Диаграммада көрсетілген мәліметтерді нақты әрі құрылымды түрде көрсету мақсатында, оларды төмендегідей кесте түрінде ұсынуға болады (1-кесте).

1-кесте. Оқушылардың тест нәтижелері

| Оқушы № | Тест нәтижесі (дейін) | Тест нәтижесі (кейін) | Айырмашылық |
|---|---|---|---|
| 1 | 10.3 | 15.3 | 5 |
| 2 | 15.8 | 15.4 | -0.4 |
| 3 | 10 | 15.1 | 5.1 |
| 4 | 10.8 | 16.9 | 6.1 |
| 5 | 10.5 | 16.2 | 5.7 |
| 6 | 10 | 17.7 | 7.7 |
| 7 | 12 | 18.4 | 6.4 |
| 8 | 11.2 | 18.2 | 7 |
| 9 | 13.2 | 13.5 | 0.3 |
| 10 | 13.1 | 11.4 | -1.7 |
| 11 | 13.5 | 17.5 | 4 |
| 12 | 11.2 | 16.6 | 5.5 |
| 13 | 9.2 | 17.8 | 8.6 |
| 14 | 9.4 | 14.7 | 5.3 |
| 15 | 8.5 | 16.1 | 7.6 |
| 16 | 10.1 | 15.6 | 5.5 |
| 17 | 13.3 | 17.3 | 4.1 |
| 18 | 9.2 | 18.2 | 9 |
| 19 | 12.6 | 17.1 | 4.5 |
| 20 | 13.1 | 16.1 | 3.1 |
| 21 | 15.8 | 18.8 | 3.1 |

| | | | |
|---|---|---|---|
| 22 | 13 | 18.2 | 5.2 |
| 23 | 12.7 | 16.6 | 3.9 |
| 24 | 10 | 17.3 | 7.3 |
| 25 | 11.1 | 15.3 | 4.2 |

1-кестеде 8-сыныптың 25 оқушысының «Оптика» тарауын жобалық әдіспен оқытудың алдында және кейінгі тест нәтижелері көрсетілген. Кесте әр оқушының «бұрын» және «кейінгі» баллдарын, сондай-ақ олардың арасындағы айырмашылықты нақты салыстыруға мүмкіндік береді. Бұл деректер жобалық оқыту әдісінің жеке білім алушылар деңгейінде қаншалықты тиімді болғанын айқын бейнелейді.

Кесте деректеріне талдау жасай отырып, оқушылардың басым бөлігінде (23 оқушыда) оң өсім байқалатынын байқауға болады. Бұл олардың «Оптика» тарауын меңгеруде белсенділік танытып, жобалық тапсырмалар арқылы теорияны практикамен байланыстыра алғанын көрсетеді. Мысалы, 3-оқушының нәтижесі 10,0 баллдан 15,1 баллға дейін өссе, 4-оқушыда бұл айырмашылық 6,1 баллды құрады. Мұндай өсім жобалық оқытудың оқушыны қызықтырып, оны терең меңгеруге итермелейтінін дәлелдейді.

Сондай-ақ, 2 оқушыда аздаған кері өзгеріс не тұрақты нәтиже тіркелген (мысалы, 2-оқушыда -0,4 балл). Бұл оқушыларда тақырыпты меңгеру қарқынының төмен болуын немесе сыртқы факторлардың әсерін көрсетуі мүмкін. Алайда бұл азшылық жалпы оң динамикаға кедергі келтірмейді.

Кестенің соңғы бағанында ұсынылған «Айырмашылық» көрсеткіші – осы зерттеудің маңызды диагностикалық көрсеткіші. Айырмашылықтың орташа мәні 4,8 балл шамасында, бұл жобалық оқыту әдісінің тиімділігін сапалық әрі сандық тұрғыдан сипаттайды.

Жалпы алғанда, 1-кесте арқылы алынған деректер диаграмма мен статистикалық талдаулармен тығыз байланыса отырып, жобалап оқыту әдісінің оқушылардың жеке білім нәтижелерін арттыруда нәтижелі педагогикалық құрал екенін нақтылайды.

Аталған өсімді сандық тұрғыда бағалау үшін Стьюденттің paired t-критерийі қолданылды. Бұл әдіс бір топтың екі түрлі уақыттағы нәтижелерінің (бұрын және кейін) орташа мәндерінің айырмашылығының статистикалық мәнділігін анықтауға мүмкіндік береді. Есептеулерде төмендегідей нәтижелер алынды:

- $t = 9.33$,
- $p = 0{,}000000002$ ($p < 0{,}05$).

Бұл p мәні айырмашылық кездейсоқ емес, нақты қолданылған әдістің нәтижесі екенін дәлелдейді. Яғни, жобалап оқыту оқушылардың білім деңгейіне статистикалық тұрғыдан сенімді әсер еткен.

Осылайша, 1-кестеде ұсынылған нақты деректер мен олар бойынша жүргізілген t-критерийлік талдау жобалық әдістің тиімділігін дәлелдеп қана қоймай, оны орта мектеп физикасында кеңінен қолданудың практикалық маңызын айқындайды.

## Қорытынды

Зерттеу барысында 8-сынып оқушыларына арналған «Оптика» тарауын жобалап оқыту әдісі арқылы меңгертудің тиімділігі тәжірибе жүзінде дәлелденді. Оқушылардың оқу нәтижелерінің «оқытудан бұрын» және «оқытудан кейін» көрсеткіштері салыстырылып, нақты өзгерістер тіркелді. Эксперимент барысында алынған тест нәтижелері, 1-кестедегі деректер мен диаграмма арқылы бейнеленіп, Стьюденттің paired t-критерийімен статистикалық тұрғыда өңделді. Алынған $t= 9.33$, $p <0{,}000000002$ нәтижелері білім деңгейіндегі өзгерістің статистикалық тұрғыдан өте мәнді екенін көрсетті.

Жобалық оқыту әдісі тек оқушылардың пәндік білімін арттырып қана қоймай,

олардың зерттеушілік дағдыларын, сыни ойлау қабілеттерін және функционалдық сауаттылығын дамытуға да оң әсерін тигізді. Сабақ барысында оқушылардың белсенділігі артты, тәжірибеге қызығушылық танытып, білімді өмірмен байланыстыруға ұмтылды.

Жалпы алғанда, «Оптика» тарауын жобалап оқыту – оқушылардың сапалы білім алуына, танымдық белсенділігінің дамуына және физика пәніне деген оң көзқарасының қалыптасуына ықпал ететін тиімді және өзекті педагогикалық әдіс екенін бұл зерттеу нақты дәлелдеді.

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# Научно-методические рекомендаций по поддержке сетевой коммуникативной культуры и цифрового этикета преподавателей и студентов для устойчивого развития образования

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**Аннотация**

В цифровой трансформации вузов исключительно важную роль играет проблема формирования сетевой-коммуникативной культуры и цифрового этикета преподавателей и студентов. В рамках проекта «Кастомизация системы формирования сетевой коммуникативной культуры, цифрового этикета преподавателей и студентов в “on-line community” вуза» (BR21882318) разработаны научно-методические рекомендации для высших учебных заведений по совершенствованию сетевых коммуникаций преподавателей и студентов. Рекомендации рассмотрены в трех аспектах: теоретико-методологическом, нормативно-правовом, учебно-методическом и технологическом, которые ориентированы на формирование ответственного цифрового поведения в онлайн-коммуникациях.

**Ключевые слова:** сетевая коммуникативная культура, цифровой этикет, транспрофессионализм, цифровая трансформация, цели устойчивого развития ЮНЕСКО.

В условиях цифровой трансформации образования ключевое значение приобретают вопросы обеспечения качественной сетевой коммуникации и соблюдения цифрового этикета. Новые формы виртуальных коммуникаций актуализировали формирование новых профессиональных компетенций у субъектов образовательного процесса высшей школы. Стремительное развитие цифровых технологий стало определяющим фактором и индикатором перемен и модернизации образования. ООН характеризует цифровые технологии как «фундаментальную движущую силу перемен в этом столетии». Согласно Программе развития организации объединенных наций «Цифровая стратегия на 2022–2025 годы» (United Nations Development Programme, 2022), идентифицирующий позицию ПРООН к внедрению цифровых ресурсов для реализации ЦУР особое внимание уделено на воздействие цифровизации на будущее, которое имеет «глубокие последствия, требующие как действий на местах, так и глобального лидерства для переосмысления развития в цифровую эпоху» [1]. Принципы этичного развития и использования ИИ, защита прав

человека, прозрачность, защита личных данных обосновывается в Глобальном нормативном документе, рассмотренном и принятом 193 государствами–членами ЮНЕСКО «Рекомендации ЮНЕСКО по этике искусственного интеллекта (2021)» [2].

Важность информационно-коммуникативных компетенций и сохранения этики в цифровой коммуникации раскрывается в Глобальном докладе о будущем образования в эпоху цифровой трансформации (UNESCO, 2021) [3]. Четвертая промышленная революция поставила актуальные задачи поиска каждой страной оптимальных решений и выходов перед вызовами и неопределенными рисками будущего. Главный посыл этой технологической революции заключается в том, что современный цифровой мир является как «временем великих начал, так и непредвиденных рисков и больших опасностей» [4].

Применительно к высшему педагогическому образованию ***сетевая-коммуникативная культура*** рассматривается как синтез ценностей, знаний, умений, этических норм, цифровой ответственности субъектов образовательного процесса, обеспечивающих конструктивное и профессиональное выстраивание отношений в онлайн-community вуза. Также ***цифровой этикет*** представляет собой совокупность четких норм, правил, подкрепленных и регулирующихся нормативными, правовыми требованиями к повышению ответственности в цифровом образовательном пространстве. В новой виртуальной образовательной среде наблюдаются частые случаи нарушения академической честности, этики сетевого общения, и исходя из этого, повышение недоверия к сетевым коммуникациям в образовательных сообществах.

Поэтому для вузов Казахстана, особую актуальность приобретает задача разработки научно-методических рекомендаций для поддержания грамотного функционирования сетевой коммуникативной культуры и цифрового этикета преподавателей и студентов в онлайн-community вуза. Такие рекомендации должны разрабатываться на основе мировых стандартов, современных достижений в области мировой педагогики и с учетом специфики национальной образовательной среды.

В рамках реализуемой в Казахстане Программы целевого финансирования на базе Казахского национального педагогического университета имени Абая на тему «Кастомизация системы формирования сетевой коммуникативной культуры, цифрового этикета преподавателей и студентов в «on-line community» вуза» (BR21882318) разработанные научно-методические рекомендации, включают несколько базовых аспектов: теоретико-методологические основы и принципы; нормативно-правовые; учебно-методические и технологические аспекты.

***Теоретико-методологическая фасилитация*** формирования сетевой коммуникативной культуры и цифрового этикета преподавателей и студентов в онлайн community вуза была основана на разработке инновационной теоретической модели данного процесса, определению основных компонентов, механизмов реализации, этапов внедрения. Также для теоретической поддержки ППС были разработаны: Тезаурус категориального аппарата для кастомизации системы формирования СКК и ЦЭ преподавателей и студентов в «on-line community», Концепция кастомизации системы формирования СКК и ЦЭ преподавателей и студентов в «on-line community», Трактат «Методология кастомизации системы формирования СКК и ЦЭ преподавателей и студентов в «on-line community», виртуальный словарь терминов по цифровой этике и СКК, монография «Кастомизация системы формирования сетевой коммуникативной культуры, цифрового этикета педагога и студента в «on-line community»: актуальные проблемы, опыт, решения», монография «Сетевая коммуникативная культура студентов в цифровой образовательной среде: теории и практики», а также статьи и аналитические обзоры в рецензируемых научных изданиях, индексируемых в базах данных Web of Science и Scopus.

***Нормативно-правовые аспекты фасилитации*** формирования сетевой коммуникативной культуры и цифрового этикета преподавателей и студентов в онлайн community вуза были обеспечены разработкой Кодекса этики преподавателя и студентов в on-line community» на основе систематизации разработанного тезауруса, основное содержание которых более детально раскрывается в учебно-методических пособиях.

Учебно-методические и технологические аспекты поддержки формирования исследуемой культуры и цифрового этикета были разработаны на основе разностороннего анализа литературных источников и сравнительного анализа мирового опыта цифровой трансформации вузов. В этом контексте для учебно-методического обеспечения формирования сетевой коммуникативной культуры и цифрового этикета были разработаны *Учебный гид* «Межличностная и межгрупповая коммуникация в «on-line community», составлены характеристики Портрета виртуальной личности преподавателя и портрета виртуальной личности студента, *Программа элективного курса* «Основы сетевой коммуникативной культуры и цифрового этикета обучающихся вуза»; *дополнительный модуль* «Сетевая коммуникативная культура, цифровой этикет» в базовой дисциплине «Психология в образовании, взаимодействие и коммуникация» Образовательной программы бакалавриата направления подготовки «Педагогические науки»; *программы курсов повышения квалификации* для преподавателей вузов «Теория и практика формирования сетевой коммуникативной культуры, цифрового этикета обучающихся вуза»; *учебное пособие* «Модифицированный инструментарий оценки сетевой коммуникативной культуры преподавателей и студентов в «on-line community», *дорожная карта* формирования СКК и ЦЭ преподавателей и студентов в «on-line community», зарегистрированная в Национальной палате предпринимателей Республики Казахстан Атамекен, «Коммуникативный альбом» (*самоучитель сетевой культуры*), *учебно-методическое пособие* по «Сетевой коммуникативной культуре и цифровой этике в цифровом пространстве «on-line community» вуза» для преподавателей и студентов, *видеотека* «Сетевая автобиография» (преподавателей и студентов), создана платформы on-line-community «CyberEdNetworks», *практикум* по формированию СКК и ЦЭ преподавателей и студентов в «on-line community», разработан контента МООК «Культура СКК и ЦЭ» на платформе OpenKZ, методический сценарий создания сообщества онлайн-обучения. Учебное пособие «Рефлексивная технология формирования СКК: траектория преподавателя и студента», методические сценарии психологических тренингов: «Конверсия сетевых межличностных отношений», «Сетевая самопрезентация коммуникативных связей»; методические сценарии психологических тренингов: «Конверсия сетевых межличностных отношений», «Сетевая самопрезентация коммуникативных связей», база данных исходного состояния СКК и ЦЭ преподавателей и студентов в «on-line community.

На основе вышеизложенного следует обозначить общие рекомендации по соблюдению цифровой этики в образовательной онлайн-среде ***для преподавателей и студентов***.

1) В онлайн-среде вуза между преподавателями и студентами, а также между группами студентов должен сохраняться ***деловой и профессиональный стиль коммуникации***, основанный на взаимоуважении. Такая коммуникация включает соблюдение уважения к выступающим во время видеоконференций, очередность выступлений, соблюдать тактичность, не перебивать лектора и одногруппников, не высказывать резких реплик, неуместных комментариев и флуда (flood - *поток, наводнение*) - обмен бессмысленными по содержанию сообщениями, не относящимися к обсуждаемой теме между пользователями во время онлайн-коммуникаций, форумов, групповых чатов.

2) ***Соблюдение дисциплины в образовательной онлайн-среде*** является залогом эффективной организации учебного процесса, влияющего на качество процессов обучения и

учения. Слово «дисциплина» в переводе с латинского языка означает учить, поучать. С психологической точки зрения *дисциплина* имеет два важных аспекта: выполнение социальных требований, исходящих извне и выполнение требований к самому себе, внутренняя установка на дисциплинированность. Дисциплинированность рассматривается как интегральное качество личности, проявляющееся в соблюдении норм и общепринятых правил поведения, а также как результат ценностного отношения к человеку. Дисциплина в образовательной онлайн-среде включает в себя соблюдение субординации, следование общепринятым порядкам, саморегуляцию, выработку силы воли. Следует воздерживаться параллельного использования других социальных сетей, вести переписки в других чатах, разговаривать по телефону и т.д. Естественно, профессиональная коммуникация не приемлет кибербуллинга, троллинга, агрессии, оскорблений, токсичного поведения, которые могут повлечь за собой дисциплинарные меры. Как преподавателям, так и студентам надо помнить, что в цифровом пространстве произнесенные слова в сети могут иметь широкий охват, быстрое распространение и долгосрочные последствия.

3) ***Тайм-менеджмент в образовательной онлайн-среде вуза***. Время – это основной регулятив в онлайн-обучении. Вся онлайн-система структурируется и дозируется по времени. Преподаватель заранее составляет электронное расписание, прикрепляет ссылку к расписанию и идентификатор конференции. Цифровой этикет требует от преподавателей и студентов своевременного подключения к видеоконференциям, избегать опозданий, эффективно распределять время для изложения нового материала, дискуссий и обсуждений. Преподаватель устанавливает сроки сдачи промежуточных тестов и или рубежных контрольных, дедлайны сдачи творческих или дополнительных заданий, тестов. Особо необходимо напомнить о том, что не стоит писать сообщения преподавателям и студентам слишком поздно вечером или рано утром, если это не оговорено заранее.

4) ***Организация активного учебного взаимодействия*** способствует развитию учебной коллаборации пользователей, что включает активную вовлеченность студентов в групповые обсуждения, выполнение командных case study, защита проектов и др. Чтобы добиться активизации познавательной деятельности преподавателю необходимо интегрировать в онлайн-занятия различные техники и технологии с игровыми элементами, соревновательного характера как например Kahoot, и др. Важным условием активизации групповой деятельности студентов во время онлайн-занятий является утверждение преподавателем правил групповой работы. Эти правила могут быть обсуждены и обозначены с участием самих студентов. Также мотивирующим механизмом таких правил может быть критерии оценивания с четкими разбалловками. Для оптимизации онлайн-взаимодействия студентов можно использовать встроенные функции платформ для разделения на сеансы, работу в микрогруппах, можно создать несколько тематических чатов, назначить модераторов в каждом сеансе. Важным признаком объективности и честности преподавателя является равномерное распределение ответственности среди групп студентов. Каждый студент должен быть активным участников при выполнении групповых заданий, а не перекладывать работу и ответственность на других членов группы.

5) ***Исправность технического функционала*** является необходимым условием запуска онлайн-коммуникации. Если, например нет Интернета или он слабый, или нет зарядного устройства для ноутбука, то все старания преподавателя по проведению хорошей учебной коммуникации будут тщетны. До начала занятий преподавателю или его ассистенту следует проверять исправность электронной техники, доступ к Интернету, работу компьютера, веб-камер и микрофонов. По правилам цифрового этикета участникам конференций необходимо сидеть с открытыми ***веб-камерами***, чтобы преподаватель и другие участники видели ваше присутствие и вовлечённость в учебный процесс. Также важно, чтобы при включенной камере у участника фон был статичный, без отвлекающих видео

изображений, то есть не подключаться в многолюдных местах, шумных улицах, в общественном транспорте и т.д. Следует также заранее выключить ***микрофоны*** чтобы снизить акустические эффекты и помехи, и включать его только тогда, когда участнику необходимо включиться в разговор, ответить на вопросы или задать вопрос преподавателю. При необходимости видеозаписи онлайн-занятий необходимо об этом уведомить всех участников и получить их согласие на размещение записи на портале или на сайте университета.

6) ***Учет приватности и личных границ в онлайн-среде вуза*** требует уважения личного пространства, уважения прав и свобод как преподавателей, так и студентов. Личные границы – это условное пространство личности, в которое нет доступа для окружающих. Необходимо различать профессиональную и личную информацию. Каждый пользователь в сети имеет сугубо личную информацию (финансовые данные, домашний адрес, адрес проживания, и др.), которую необходимо защищать. В целях защиты данных не следует делиться переписками, фотографиями, аудиосообщениями в сетях, они могут быть использованы без вашего согласия. На платформах онлайн-коммуникаций можно установить специальные параметры конфиденциальности, что позволит контролировать тех пользователей, которые интересуются вашими личными данными. В ходе занятий важно уважать не только личные границы студентов и преподавателей, но и эмоциональные границы. Это очень деликатная сфера, поэтому не следует просить студентов делиться, тем, чем им не хочется делиться, что причиняет им психологический дискомфорт. Образовательные платформы не должны использоваться для эмоциональных давлений, быть ареной разбора конфликтов, агрессий и манипуляций.

7) ***Ответственное отношение к использованию цифровых ресурсов*** в образовательной онлайн-среде вуза включает уважение авторских прав на интеллектуальную собственность, копирование чужих материалов и выдавание их за собственные, нулевая терпимость к любым формам мошенничеств, плагиата, компиляции, недопущение дезинформации и лжи, честность при сдаче экзаменов и объективность и прозрачность оценивания учебных достижений студентов. Академическая сфера требует использования студентами реальных имен и фамилий в учебных аккаунтах, так как их фамилии автоматически переводятся в электронные ведомости. Поэтому анонимные профили не будут соответствовать зарегистрированному учебному аккаунту и может быть расценены как несерьёзное отношение к требованиям вуза. Заслуживает уважения умения преподавателя грамотно пользоваться цифровыми инструментами, хорошо ориентироваться в общих рабочих пространствах , например Google Docs, для вовлечения всей команды и чтобы они могли следить за прогрессом, и могли вносить свои изменения в общую работу.

8) В онлайн образовательных коммуникациях как для преподавателей, так и студентов также важным требованием является ***сохранение делового стиля одежды,*** прически, предпринятой как при оффлайн обучении. Культура сетевого взаимодействия требует участия в обсуждениях с открытой камерой, так как визуальный контакт имеет большое значение при профессиональных взаимодействиях и формирует умения студентов к открытому диалогу, выражению своих мыслей, что особенно важно при подготовке будущих педагогов.

9) ***Сетевое взаимодействие в онлайн-группах студентов*** играют важную роль в академической жизни вуза. Онлайн-группы созданы как прототипы оффлайн-групп и служат для организации онлайн учебного процесса, обмена информацией между студентами и преподавателем, ссылками на электронные учебники, лекции, презентации, а также для координации и реализации общих программ обучения, совместного использования образовательных платформ, распределения заданий в рамках общих проектов, доступа к

полезным цифровым ресурсам, учебным материалам. Преподавателям легче отправлять уведомления об изменениях в расписаниях или отправке материалов лекции и для feedback. Однако могут быть и проблемы работы с вузовскими онлайн-группами: перегрузка информацией и риск потери учебного фокуса, недостаточное соблюдение общих правил группового взаимодействия, неправомерное использование личной информации, нарушение прав на интеллектуальную собственность, распространение недостоверной информации.

По исследованиям агентства *Datareportal,* который ежегодно проводит анализ мирового цифрового пространства, был опубликован отчет «Digital 2024: Kazakhstan». По итогам данного отчета было установлено, что в Казахстане количество пользователей социальных сетей ежегодно увеличивается, и в январе 2024 года в Казахстане число активных пользователей социальных сетей выросло до 14,10 миллионов (примерно 71,5% казахстанцев), в том числе, большую часть составляет студенческая молодежь образовательных организаций.

В онлайн образовательной среде формируется медиа портрет преподавателя и студентов. Составляющие виртуального портрета педагога и студента могут складываться из нескольких параметров: *онлайн-публикаций* (статьи, электронные ресурсы, посты и др.), *онлайн-поведения* (соблюдение цифрового этикета, IT-friendly), *технические навыки* применения на онлайн-занятиях интерактивных технологий (разрабатывать обучающие квесты, Case study, викторины,), *активность в социальных сетях* (количество followers, подписки на популярные аккаунты и др.).

10) Для активизации вовлечения студентов в онлайн-взаимодействие преподавателям необходимо владеть современными онлайн-инструментами, которые способствуют экономии учебного времени, быстрому анализу и мониторингу цифрового следа и результатов работ студентов. Овладение преподавателем данными сервисами повышает его имидж и цифровую компетентность. Наиболее распространенные в интернет-пространстве онлайн-инструменты и сервисы образовательных платформ представлены в таблице. (Таблица 1).

Таблица 1. Сервисы и основной функционал образовательных онлайн-платформ

| № | Интерактивные сервисы онлайн-обучения | Основные функциональные возможности онлайн сервисов |
|---|---|---|
| 1 | **Classcraft** https://www.classcraft.com/ru/ | Classcraft умеет работать в трёх направлениях: увеличивается мотивация, учит взаимодействию в команде и контролирует поведение |
| 2 | **Flippity** https://www.flippity.net/ | Модифицирование электронных таблиц в набор интересных онлайн-карточек, рандомизаторов, интерактивных временных шкал, таблицу лидеров, менеджер слов для проверки орфографии, групповые игры, тесты самооценок, турнирные сетки и др. |
| 3 | **Quizlet** https://quizlet.com/kz | *Quizlet* создает учебные средства на основе ИИ, с которыми можно освоить любой предмет, можно создавать проверочные игры, экономит время преподавателя на создании дидактических и раздаточных материалов |
| 4 | **MindMeister** https://www.mindmeister.com/ru | Совместное планирование проектов, управление совещанием, создание интеллект-карт в виде режиме списка, фокусировки, медиа-вложения, и др. |
| 5 | **LearningApps** https://learningapps.org/ | Создание интерактивных заданий, упражнений, проверочных заданий, проведение рефлексии |
| 6 | **Online Test Pad** https://zenclass.ru/ponyatno/interactive-services | Удобный сервис для создания для создания кроссвордов, тестовых заданий, анкет с удобной подачей теоретического материала. На платформе имеется различные готовые шаблоны создания кроссвордов, филвордов, сканвордов. |
| 7 | **Cacoo** https://nulab.com/cacoo/ | Имеется огромный выбор готовых шаблонов и иконок, помогающих пользователям синтезировать сложные идеи в привлекательные визуальные представления, создание ментальных карт, диаграмм, командная работа |
| 8 | **Kahoot!** https://kahoot.it/ | Организация индивидуальных и командных соревнований, викторин и др. |
| 9 | **Tricider** https://www.tricider.com/home | Сбор идей, голосование, обсуждение, мультимедиа, конкурсы, оптимизирование для смартфонов, экспорт в Excel, диаграммы результатов, дизайн |
| 10 | **Wordwall** https://wordwall.net/ru | Различные способы создания мини-игр, анаграмм, упражнений, лабиринтов. Выполненное задание можно преобразовывать в другой вид задания в редакторе |
| 11 | **AhaSlides** https://ahaslides.com/ru/ | Универсальный инструмент для презентаций, онлайн-обучения |
| 12 | **ThingLink** https://www.thinglink.com/ | Инфографика, презентации, виртуальные экскурсии, видео |
| 13 | **Gimkit, GimKit Ink** ***GimKit Live*** https://www.gimkit.com/ | Геймификация обучения, игровой режим, соревнования и др. |

| | | |
|---|---|---|
| 14 | **Padlet** https://ru.padlet.com/ | Создание общей рабочей доски, постера, совместная групповая работа, |
| 15 | **Quizizz** https://quizizz.com/?lng=ru | Организация викторин, проверка знаний, тесты, анкетирование, закрепление учебного материала, качественная система подсчетов результатов и др. |
| 16 | **Simpleshow** https://simpleshow.com/ | Визуальные элементы, видеоролики по шаблонам, музыка, голос и др. |
| 17 | **Canvas LMS** https://www.instructure.com/canvas | Упрощение преподавания, обучение для всех, развитие креативности, увлекательность преподавания и др. |
| 18 | **Explain Everything** https://explaineverything.com/ | Интерактивная доска для совместного использования и объяснения материала, можно добавление медиафайлов, аудиочата, создание диаграмм, презентаций и др. |
| 19 | **Nearpod** https://nearpod.com/ | Создание интерактивных уроков, синхронизация уроков с гаджетами студентов, создание индивидуальных заданий и отслеживание их выполнения и др. |
| 20 | **Hippo Video** https://www.hippovideo.io/ | Записывать видео с веб-камеры, скринкасты и аудиодорожки, инструменты аналитики |
| 21 | **ClassMarker** https://www.classmarker.com/ | Тестирование знаний, анализ успеваемости, ндивидуальные викторины и др. |
| 22 | **Buncee** https://app.edu.buncee.com/ | Создание презентаций, развитие критического мышления, навыков общения, сотрудничества и творчества |
| 23 | **BotHelp** https://bothelp.io/ru | Создание различных сценариев и запуск чат-ботов |
| 24 | **Slido** https://www.slido.com/?experience_id=22-b | Создание презентаций, фокус на встречах команд, обучение, система аналитики и др. |
| 25 | **Poll Everywhere** https://www.polleverywhere.com/ | Создание сессий вопросов и ответов, интерактивные изображения и др. |
| 26 | **Miro** https://miro.com/ru/ | Виртуальная интерактивная доска, можно использовать в удаленном режиме, проведение мозгового штурма, создание блок-схем, получение обратной связи, распределение заданий и др. |
| 27 | **PlayPosit** https://go.playposit.com/ | Интерактивная обучающая среда для создания и обмена интерактивными видеоуроками. Учителя используют любое видео (screencasts, Khan Academy, TED и т. д.) и трансформируют его в интерактивное задание для студентов, встраивая вопросы, уточнения и др. |

Изучение данных платформ и интегрирование их в онлайн учебный процесс повышает качество преподавания, мотивацию студентов к познавательному процессу и улучшает атмосферу виртуальной коммуникации преподавателей и студентов. Эффективное использование цифровых ресурсов и сохранение цифрового этикета способствует

вовлечению студентов к конструктивной онлайн-коллаборации и формированию культуры сетевого общения.

Студенческая молодежь представляет собой более продвинутую часть участников сетевых взаимодействий, с более высоким уровнем цифровой готовности. Однако формирование сетевой коммуникативной культуры студентов должно быть основой развития ***транспрофессиональных компетенций студентов***. В связи с этим для организаций высшего образования важное значение имеют следующие ***научно-методические рекомендации*** для поддержки устойчивого развития образования и повышения его качества в условиях цифровизации.

- Во всех направлениях подготовки будущих специалистов ***интегрировать модули, курсы или практики в образовательные программы*** по развитию сетевой коммуникативной культуры студентов как основы формирования их транспрофессионализма;

- Для развития транспрофессионального мышления студентов и сетевой коммуникативной культуры ***создавать междисциплинарные образовательные среды*** (организация проектных и учебных форм работы для студентов разных специальностей);

- Поступательно развивать цифровую инфраструктуру университета с постепенным ***выравниванием межпоколенческого и межрегионального разрыва*** в условиях организаций образования за счет вовлечения субъектов высшего образования к работе на онлайн-платформах, дистанционных форматах обучения.

- Мотивировать студентов к развитию собственных цифровых компетенций как базового компонента ***транспрофессиональных компетенций для формирования адаптивности и гибкости*** на рынке труда.

- Разрабатывать механизмы стимулирования студентов к вовлечению в сетевые профессиональные академические сообщества для расширения инфо-коммуникативного опыта и адаптивности к вызовам непредсказуемого будущего.

- Внедрение мониторинговых систем формирования у студентов транспрофессиональных компетенций как залога их профессиональной успешности и развития самореализации.

- Развитие цифровой самоидентификации студентов на основе развития рефлексии и самооценки цифрового следа, самоанализа осознанного поведения в сетевых взаимодействиях, формирования своего виртуального портрета и цифрового имиджа.

Обобщая вышеуказанный анализ различных подходов к формированию сетевой коммуникативной культуры как основы транспрофессионализма студентов следует подчеркнуть необходимость коллаборационных образовательных внутриуниверситетских и межуниверситетских, а также общенациональных и международных сетевых коммуникаций, как главного индикатора цифровой зрелости и адаптивности к требованиям будущего. Такое стратегическое направление трансформации вуза расширяет доступ к инновационным практикам, обеспечивает устойчивость развития высшего образования.

Разработанные рекомендации методического характера имеют стратегическое значение для реализации ЦУР №4 и ЦУР №16, которые способствуют:

- формированию в вузе этически устойчивой, благоприятной образовательной среды;

- укреплению доверительных отношений между преподавателями и студентами;

- развитию у преподавателей и студентов компетенций цифровой гражданственности;

- предотвращению нарушений академической этики, профилактике кибербуллинга;

- повышению эффективности обучения и академической успеваемости студентов;

- развитию конкурентоспособности организаций высшего образования в условиях глобальной цифровизации.

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# Sens propre et sens figuré en français

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Les mots sont susceptibles de deux sortes de sens : Le sens propre et le sens figuré.Le sens propre d'un mot est aussi appelé : sens premier.

C'est à partir de ce sens premier que l'emploi s'est étendu à d'autres domaines et que le mot a pris un ou des sens figurés. Le sens propre est le premier sens d'un mot. C'est le sens le plus simple et le plus courant d'un mot. Il a une réalité concrète. Dans le dictionnaire, c'est le sens qui est écrit en premier.

-Mon petit frère a cassé le vase ancien de ma grand-mère. (action de briser, mettre en morceaux)

Si l'on schématise un peu, on peut dire que le sens propre est le sens fondamental du mot, premier, comme par exemple dans la phrase suivante,le sent du mot voiles :

-Un vaisseau comprend une coque et des voiles.

Le sens figuré est un sens second, qui parfois ne peut se comprendre que dans un contexte particulier :

-Je vois cent voiles. (= vaisseaux) à l'horison

Il faut toutefois prendre garde à ne pas conclure que le sens non figuré soit une expression première considérée comme ,,normal'', ce qui pourrait laisser penser qu'un langage idéal serait dépourvu de figures. La figure ne doit pas être défini comme un écart par rapport au bon usage.

L'étude du sens figuré est tradutionellement réservée à la rhétorique. Le passage du sens propre au sens figuré s'obtient par divers mécanismes qui donnent lieu à différents types figures, parmi lesquelles on cite souvent les métaphores, les metonomies et les synesdoques. La métaphore peut être considérée comme une figure fondée sur la ressemblance, la similitude.Elle s'appuie sur des analogies existant dans le réel ou construites par le sujet parlant.Il est intéressent d'examiner à ce propos le mot aile . Au sens propre ailes désigne les organes que possèdent certaines espèces animales et qui leur permettent de se déplacer et se soutenir dans l'air.

Parmi les sens segonds de ce mots, on trouve entre autres les ailes d'avion.Malgrè les différences qui distinguent ces deux sortes d' ailes , on peut trouver des ressemblances entre elles à la fois au niveau de leur forme qu'au niveau de leur fonction.Le mot est employé aussi pour d'autres référents sur la base d'une simple ressemblance d'aspect :

Ailes du nez
Ailes d'une armée ou d'une équipe sportive.
Ailes d'un bâtiment
Ailes d'un moulin

C'est donc par métaphore que dans le mot aile tous ces sens se trouvent reliés.Tous ces signifiés ont des sèmes en commun.

On peut remarquer que l'esprit humain a la capacité de découvrir sans cesse des analogies
qui permettent d'utiliser un mot existant avec un sens nouveau, de l'appliquer à de nouveaux référents. Pour que procédé entre en jeu, il suffit en effet d'une vague ressemblance concernant par exemple :

-la forme :

Les dents d'une scie - Les dents de la bouche
la situation :
les pieds d'une table - les pieds d'une personne debout
la fonction :
Une machine marche - une personne marche
Une propriété, réelle ou supposée :
Un jeune loup = un jeune homme ambitieux
Un renard = une personne rusée
Un mouton = une personne crédule et passive,qui se laisse facilement mener
En effet,un être humain peut être traité de loup, de renard ou de mouton, entre autres,sur la base des traits caractéristiques qu'on attribue habituellement à ces derniers référents et qui font partie de la connotation de ces termes quand ils sont employés au sens propre.
Très souvent, on assiste à la substitution d'un terme abstrait par un terme concret :
Un cœur de pierre pour un caractère insensible
Un alibi en beton pour un alibi inattaquable

Mais l'analogie peut aussi concerner deux termes concrèts :
Le phare de la nuit pour la lune
La petite lucarne pour la télévision
La synecdoque joue sur les relations de contiguité entre objets qui existent dans le monde.Elle remplace le nom de l'un des deux objets par celui de l'autre.Les deux objets, à la différence de ce qui se pase dans la métonymie, ne sont pas indépendants l'un de l'autre et sont liés par un lien de type définitionnel.On peut distinguer

- La synecdoque de l'espèce :

La saison du lilas pour la saison des fleurs
On peut noter que la synecdoque joue souvent sur les rapports du concret et de l'abstrait.On a donc cette figure quand on entend par la jeunesse l'ensemble des jeunes : la jeunesse est une propriété que les individus jeune possédent forcément.
Parfois, le sens premier du mot a été oublié ; seul le sens figuré est resté dans l'usage.
Ex :le mot ,,tête'' vient du latin testa qui signifiait ,,pot de terre'' !
L' emploi du mot au sens figuré est dû à la ressemblance de forme qui existe entre un pot de terre et...une ! Mais cette association a été rapidement oubliée et le mots n'est passé dans la langue que dans son sens figuré. Le sens propre est le sens le plus courant d'un mot. Il renvoie à la signification concrète d'un mot, généralement donné en premier dans le dictionnaire. En d'autres mots, c'est le sens logique que donne aux mots. Par exemple, lorsqu'on dit : 1.Le lion dévore sa proie.
Le mot ,, dévore'' est utilisé à son sens logique, c'est à dire que le lion mange à proie.
*2. Pleuvoir à boire debout :* pleuvoir abondamment
*3.Donner sa langue au chat :* demander la réponse à une question, à une énigme
*4.Ne pas avoir sa langue dans sa poche :* parler facilement
On comprend mieux le sens propre et le sens figuré en les confrontant puisque ces deux formes de langage s'opposent.
Les étoiles **brillent**.
— Le mot *brillent* est employé au sens propre et signifie « luire, répandre une lumière ».
Martin **brille** à ce concours.
— Le mot *brille* est employé au sens figuré et signifie « se distinguer ».
Le sens propre est le sens littéral, celui qui est le plus proche de la réalité.

Il se réfère à la définition de base d'un mot, telle qu'on la trouve dans le dictionnaire. Le sens figuré est le sens qu'on donne à un mot lorsqu'on l'emploie dans un autre domaine ; le mot est alors utilisé dans un contexte différent, de façon imagée ; mais ce qu'il désigne fait penser au sens propre du mot. Notre voisin nous casse les pieds ! (il nous agace, nous embête)
Comparons les sens propre avec le sens figuré :
Les pies sont de petits oiseaux très malins.(sens propre) - Léa bavarde trop. C'est une vraie pie.(sens figuré)
L'alpiniste arrive au sommet du Mont Blanc. .(sens propre) - Cet acteur est au sommet de sa gloire.(sens figuré)
Distinguons le sens propre et le sens figuré :
Il arrive que certains mots aient plusieurs significations ; leur sens dépend de la phrase dans laquelle on les trouve.
**Le sens propre**, c'est le sens premier, il décrit la réalité.
Ex. : *Thomas a photographié la **Lune**.*
Il a photographié l'astre appelé Lune.
**Le sens figuré** est une signification imagée.
Ex. : *Cet élève est souvent dans la **lune**.*
L'expression « être dans la lune » signifie que l'élève a la tête ailleurs, qu'il n'est pas concentré.

Le sens figuré est le sens segond d'un mot.C'est une utilisation imaginée qui est faite d'un mot.Ce sens figuré peut utiliser une comparaison.Il est signalé dans le dictionnaire par l'abréviation :fig. Exemples :
Il est souvent dans la lune. ,, La lune'' est ici employé pour indiquer que la personne rêve, n'est pas attentive.
- Elle nage dans ce pull.Ici le mot ,,nager'' signifie que le pull est trop grand.
- Vous faites grise mine ce matin. ,,Grise'' indique ici la tristesse qui se lit sur le visage.

Le sens propre ou le sens premier correspond souvent au sens étymologique, mais ce n'est pas toujours le cas. On distingue alors le sens étymologique, le sens propre et le ou les sens figurés d'un mot. Des évènements imprévus et surprenants peuvent arriver dans la vie d'un individu ou plusieurs personnes ; il s'agit là aussi d'une aventure. Par ex : ,,Hier je suis allé faire de la randonnée avec mes frères.Nous avons croisé plein d'animaux sauvages et nous avons pêché....que d' aventures !.

L'écrivain Milan Kundera donne définition de l' aventure qui serait ''une découverte passionnée de l'inconnu,, .

Une aventure c'est aussi une relation amoureuse, sexuelle ou sentimentale avec une personne, souvent de courte ou moyenne durée.Ex :
-Maurice a eu une aventure avec la femme du boucher. Mais :
-Dom Juan est connu pour ses nombres aventures avec les dames - sens propre.

Emploi d'un mot au sens propre : emploi au sens simple et courant **:**

-Il s'est marié en bleu- habillé de bleu.

Emploi d'un mot au sens figuré **:** on passe d'une image concrète à des relations abstraites : Ne signez jamais un chéque en blanc - un chéque non rempli.
Le sens figuré donne du style, alors que le sens propre est neutre. D'ailleurs, plusieurs figures de style font partie du langage figuré, c'est pourquoi elles posent un défi important de compréhension. Il en est de même pour les expressions figées, qui existent grâce au sens figuré des mots et deman En français, le passage du sens propre au sens figuré implique l'utilisation d'un mot ou d'une expression dans une signification différente de son sens littéral ou original. Le sens propre est le sens habituel, concret et direct d'un mot, tandis que le sens figuré est une interprétation imagée, souvent poétique ou métaphorique, qui s'écarte de la réalité.

Il est très rare qu'un mot ait un seul sens. Quand on apprend une langue, on apprend généralement le sens propre d'un mot, c'est-à-dire le sens premier, le sens le plus courant, son sens concret.
Mais quand on avance dans l'apprentissage d'une langue, on est rapidement confronté au sens figuré des mots. Le sens figuré est le sens abstrait, le sens imagé d'un mot.
Si je dis par exemple «*Je donne ma langue au chat.*», cela ne signifie pas que je découpe ma langue pour la donner au chat. Dans cette expression, le mot langue est employé au sens figuré. Donner sa langue au chat signifie demander la solution d'une question à laquelle on n'a pas trouvé de réponse.

- « Briller » signifie « émettre une vive lumière ».
Hier, le soleil a brillé toute la journée.
Au sens figuré, il est employé au sens figuré pour signifier « exceller dans un domaine particulier » ou « se distinguer par une qualité exceptionnelle ».
Martin a brillé à son concours. Il peut être fier de lui.
- Une corde est un long fil ou une tresse de fibres naturelles ou synthétiques utilisé pour attacher, hisser ou suspendre des objets. On utilise également une corde pour fabriquer des sons. On parle alors d'instruments à cordes.
Tom va bientôt devoir changer les cordes de sa basse.
« Corde » peut également s'utiliser métaphoriquement dans l'expression pleuvoir des cordes pour décrire une pluie très forte et abondante.
Hier, il a plu des cordes toute la journée.
C'est un sens dérivé, imagé, qui utilise le mot dans une autre situation ou pour évoquer une idée différente de son sens original.
Le sens figuré permet d'enrichir le langage, de rendre une idée plus imagée, plus précise ou plus poétique. Il permet également de créer des expressions idiomatiques et des jeux de mots. Il est donc essentiel de bien comprendre le sens propre et le sens figuré pour bien comprendre et utiliser la langue française.

# LIFE STORY ANALYSIS THROUGH NARRATIVE AND PROJECTION

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## Abstract

The text of the paper itself presents the theoretical background of narrative and projective methods. It describes their applicability in the context of evaluating life stories in the context of research. Each methodological approach represents a particular path for the researcher in valorising a life story, which is followed in seeking answers to the questions posed at the outset of exploring the life stories of people with disabilities. The paper includes an analysis of the life story through narrative, focusing on the pre-school period.

## Keywords

Narrative, narrative research, design methods, life story

## Narrative interviewing in life story

Brinkmann (2013) argues that in the context of life story research, the interview provides a space for participants to detail their experiences, personal challenges and key events that have shaped their lives. There are several types of interviews used in the field of life story research, which have different levels of structuring and are used depending on the research objectives. Broadly speaking, interviews can be divided into structured interviews *(The researcher has set the wording of each question and its order. This can be a questionnaire or multiple choice questions);* semi-structured interview *(This is a looser type of interview. The researcher has a list of questions prepared in advance. The way and form of answering the questions by the interviewing participant is free);* unstructured interview *(This is a label for an in-depth interview and is specific in its looseness. The researcher has no predetermined questions)*. Wengraf (2001) refers to narrative interviewing as a qualitative research method in which the respondent is given the space to freely tell his or her own life story. According to Lieblich et al. (1998), the method is well-suited for exploring more complex life circumstances as it provides deep insight into the personal, cultural and social aspects of the respondent's life. Brinkmann (2013) states that narrative interviewing is not just a mechanical recording of individual events. Primarily, it is a process during which the participant has the ambition to give complexity and meaning to his or her life story. Narrative interviewing has the potential to reveal what the participant has experienced or to record the consequence of an action in the context of shaping his or her personality. According to Wengraf (2001), the main feature of narrative interviewing is the freedom of narrative. Lieblich et al. (1998) state that narrative interviewing allows the respondent to express themselves naturally, freely and without constraints from the researcher. The researcher intervenes in the interview only when something needs to be clarified or when motivation to talk is needed. Narrative interviewing is particularly effective in mapping turning points that represent important events that have significantly affected the participant's life. These key points in the life story can be identified through the participant's extensive and detailed narrative, which is often associated with strong emotional experience. Based on the data thus collected, it is possible to set up therapy targeted to the specific areas that have most affected the respondent's psychological and emotional state. Although narrative interviewing offers a number of advantages, its implementation also brings certain limitations. The researcher is obliged to pay due attention to what the participant is telling,

while also taking into account how he or she is telling it - he or she must analyze the structure of the story, the emotions and the implicit meanings that the respondent leaves in his or her narrative. This carries the risk that the researcher may bring his or her own interpretations into the analysis, which may distort the original meaning of the accounts.

### Narrative-oriented research

Narrative-oriented research is a model introduced by David Hiles and Ivo Čermák at the 10th European Congress of Psychology in Prague in 2007. In practice, it is used to interpret and analyze data, which are usually collected through narrative interviews (Hiles, Čermák, & Chrz, 2010). Riessman (2008) emphasizes that narrative-oriented research is a complex model which also includes data collection methodology. As a rule, it begins with defining the research question from which the strategy for conducting narrative interviews is derived. The narrative- oriented research model requires the narrative interview to be recorded, which generates an audio recording that is subsequently transcribed. The transcription produces a 'rough transcript' from which the data can then be analysed. We can go back to the audio recording and clarify the details of the rough transcript (Cermak, Hiles, & Chrz, 2007). Riessman (2008) adds that due to research ethics, it is necessary to ensure that participants' personal details remain confidential during transcription. The smaller parts into which the text is divided in the narrative analysis are referred to as discursive units (or segments) with numerical labels. Sandelowski & Barroso (2006) state that these segments are used for segmentation and are numbered and divided according to the natural structure of the narrative. Riessman (2008) adds that such text is then edited to include sufficient space for notes and comments, allowing for more detailed interpretation. This edited text is referred to as the working transcript, which serves as the basis for the next stages of analysis. The analysis then proceeds by selecting appropriate interpretative perspectives. Cermak, Hiles, & Chrz (2007, pp. 53-54) list six basic approaches to analysis. Each of the types of analysis presented provides a slightly different perspective to understanding narrative research, although it is clear that they overlap at certain points. Nevertheless, we may feel that there is something missing in this approach. According to Emerson & Frosh (2009), this is an approach that focuses on the interplay between personal narratives and broader social contexts. It explores how individuals understand their experiences, how these experiences are influenced by social norms and power structures, and also reveals how these narratives can be placed in opposition to dominant discourses. Narrative-oriented research is a broad and flexible model for analyzing narratives, which provides researchers with a variety of tools for interpreting (not only) life stories (Lieblich et al., 1998). In particular, the aforementioned authors' collective points to the combination of multiple analytical approaches that allow narratives to be examined from different perspectives, thereby increasing the level of understanding of the participant's story.

### Projective and expressive-formative approaches

A life story does not need to be told or written; it can be expressed in other ways, e.g. using different art forms, the choice depending on the capabilities of the participant.

In the process of **art therapy,** the client expresses his/her emotions, thoughts or inner conflicts through artworks such as drawings, paintings or other visual creations as a way of completing the life story. According to Kováčová et al. (2016), art therapy utilizes various creative modalities and is significantly involved in changing thinking from logical to abstract. It also has an impact on the formation of self-image and self-criticism, and its various methods can be applied in the process of creating life stories.

**Drama therapy** is also one of the therapeutic-formative approaches, which according to Jones (2007) is the systematic and purposeful use of theatrical and dramatic processes in order to promote the psychological, emotional and social development of individuals. Dramatherapy

effective in life stories for the reason that it provides the client with a safe space in which to explore their past experiences and emotional experiences. Guillaume & Kováčová (2010) argue that through the use of dramatic metaphor, a person is able to 'enter' the story and identify with the character, which has a positive effect on emotional release and subsequent distancing from the problem. This approach is also effective and used in practice when constructing life stories, particularly in situations where challenging periods in life that may be difficult for the client to talk about directly need to be dealt with sensitively. Moschini (2018) states that drama therapy, as well as art therapy, are also effective in constructing life stories due to their ability to help recall the details of different life events and experiences. As part of drama therapy, the so-called Hero's Journey is often used in the construction of life stories (Landy, 1994). Each story contains four basic components namely the hero, the obstacle goal and the helper. The hero represents the main actor in the story who has to accomplish a task and faces obstacles in doing so. The goal represents the destination the hero wants to reach or the state he desires. This goal is the direction of the hero's aspirations and his greatest desire. Obstacles represent everything that prevents the hero from achieving the goal. Thus, obstacles can be various problems in life, disasters, but also persons who prevent the hero from fulfilling his desires. Each story contains the hero's journey, which can be either a journey out of the house or a journey home. The journey from home symbolises new experiences and different adventures, while the journey home represents family, or something that represents stability and a sense of security. Another suitable method, called Six-Part Story-Making *(6PSM: Six-Piece Story-Making)* is described in more detail by Lahad & Dent-Brown (2012) as a structured method at the interface of art therapy and drama therapy, which is used in practice specifically to capture life events and then construct a life story. The life story depicted through art is also a suitable method for non-verbal people or people who refuse to talk for specific reasons (shame, frustration, trauma, etc.). Liebmann (2015) recommends another option, the reminiscence method, as an approach aimed at recalling events from a person's life. Through that approach, we can uncover otherwise hidden aspects and significant moments from the participant's life that not only enrich his or her story but also provide deeper insight into his or her identity.

The last method from the category of therapeutic-formative approaches, which we would like to introduce in this subchapter and which we have also used in our research, is the projective method of the Lines of Life, proposed by the Czech psychotherapist Jiří Tyl. The Life Line method is a well-established source in research for gathering information about the participant's attitudes, relationships, events, interpretations and expectations in their life story. The Life Line activity is used by Liebmann (2015) as one of the self-concept techniques by which the participant can represent his or her life in the symbolism of a line, in the form of a map, a road, or a river. Shickova (2002) applies the real form of the line (thread, string, wool in a ball) in the intermedia art therapy etude Ariadne's Thread designed for work with adult clients. In connection with the use of the line, there is a possibility to apply the activity e.g. as part of warm-up activities with construction into concrete units according to creativity and spontaneity; tactile exercises where through different materials a baseline is created as part of the working territory, etc. (Kováčová & Tomášová, 2008). As line work in art therapy is an interesting article in the art therapy process, its inclusion in art therapy etudes is not a rarity. For this reason, for plasticity and concreteness, we also present a sequence within the organisation of the instructions. The task of the group is to arbitrarily classify themselves in the free space next to each other (real progression: *a spontaneous suggestion to classify themselves according to the size of the pencils in the hands of the students changed, due to the dissatisfaction of some participants and the emerging tension in the group, to an agreement to classify themselves according to the height of the figure*). Within the group, determine the beginning and the end of the line (real progression: *the assignment to each workspace was defined by the group, with the request from the shortest to the tallest student*). Collectively draw a

continuous line along the continuous row of blank papers created to represent the Line of Life. One paper always belongs to one student; the progression of the line can be arbitrary, it just has to connect to the previous line drawn by the previous student (realistic progression: *Possibility to capture dominance or submissiveness of group members*). Divide the developmental periods of the participants' lives in the age range from five to nineteen years. To portray an idea of a particular age, to depict a specific (and significant to the student) aspect of that period through one's own experience or the experiences of loved ones experiencing a particular period (realistic progression: *each participant portrayed the age period individually, a situation did not arise that would create a collaborative pair on one age*). To carry out a mutual conversation, discussion (in groups of four) about their drawings, asking and answering each other's questions, explaining ambiguities (Kováčová & Tomášová, 2008).

Narrative interview with the participant

In the narrative interview phase, focusing on specific domains, we repeatedly asked Matilde (participant, 24 years old, disabled) structured questions in the context of the different developmental periods. We focused on the pre-school period.

Despite her limited memories of this period and the relatively small amount of data collected, we decided to process the preschool period in order to maintain the continuity of the life story. Matilda's preschool period is characterised by a predominantly carefree childhood, and her memories are fragmentary and often rely on information obtained from her family. V Matilda's pre-school period, she was coping with her first experiences of disability, although her memories of this period are rather fragmentary and often mediated by her family. She herself admits that she does not recall many events directly *[(M-PV-1)...but I only know what my mother told me, that we went to different doctors...]*. She had already undergone a number of medical treatments and rehabilitation during this period, but as a young child she did not perceive them dramatically *[(M-PV-3)...they used to go to the spa with me and I had to do a lot of exercise, but I did not take that as any kind of obstacle or problem...].* The memories that Matilda did retain are like glimpses and impressions. She reflects that even then, she was aware of limitations to some extent - for example, not being able to join in peer play *[(M-PV-5)...I was just aware that I couldn't play normally, that I couldn't run]*. At the same time, she adds that as a young child, she did not perceive these limits tragically *[(M-PV- 7)...but what such a child...I seriously didn't care then.* In terms of relationships, Matilda stresses that health limitations have not disrupted the family dynamic. Her narrative displays a calm tone and acceptance of the situation *[(M-PV-9) ...if what impact it had... My sister and I were accepted normally; they didn't divorce us. They were worried about us... so but I don't know that it disturbed the family in any way*. The family made sure that Matilda felt accepted, and so she was not confronted with feeling singled out in her childhood. She approaches her understanding of the disability itself with distance. She perceived it only minimally in pre-school and reflects on it directly *[(M-PV-11) ...that was when I was a kid, so I guess I didn't care...]* and *[(M-PV-14)...it didn't change in any way, I didn't take it that way back then, that it was a part of me, I just had to deal with it year after year. ]*. This suggests

that conscious coping with her disability only took shape in subsequent periods of her life. Matilda herself recalls that it was she who played a key role in day-to-day functioning, creating a framework of safety and security *[(M-PV-17)...so I guess family. ].*

*Table1 : The pre-school period in the life story*

| Category | Question | Evaluation of answers |
|---|---|---|
| Challenges and obstacles | *What were the main challenges and obstacles you faced at this stage, and how did you deal with them?* | Matilda only remembers fragmentary memories; she perceived the challenges more through the prism of her parents, not seeing the obstacles as fundamental. |
| The impact of disability on relationships | *What impact did your disability have on your relationships with family, friends and society during this period?* | Family relationships remained stable, the disability did not cause significant disruption, care and acceptance were present. |
| Developing an understanding of disability | *How did your understanding and approach to your disability develop or change during this period?* | Awareness of disability was minimal, perception developed over time, but it was not central to the child. |
| Support in everyday life | *What helped you most to cope with everyday life with a disability during this period?* | Family support was the key; it provided stability and a sense of security. |

*Source: Authors´ elaboration*

*Reflection on the pre-school period from the researcher's perspective*

Minimal explicit awareness of disability is evident in the pre-school period, which is compensated for in the child by family support and the immediate environment. Matilda does not express a subjective perception of disability as a barrier, but rather as a temporary limitation that does not interfere with her basic childhood joy and play. This stage is also marked by memories with low emotional burden, which may be a consequence of adequate parental care and the relative social stability of the family.

Conclusion

The utilisation of narrative and projective methodologies in life story research offers profound insights into the complex interplay between individual experiences, personal identity, and broader social influences. These qualitative approaches enable researchers and practitioners to access nuanced dimensions of a person's life that often remain inaccessible through traditional quantitative techniques. By capturing both external events and internal subjective meanings, these methods facilitate a holistic understanding of personal development, resilience, and the impact of life challenges, particularly in populations with disabilities or other vulnerable groups.

Narrative approaches, such as narrative interviews, provide a flexible framework that respects the participant’s storytelling process, allowing for rich, detailed accounts of life events, turning points, and emotional experiences. The emphasis on narrative freedom and contextual interpretation enables researchers to uncover subtle shifts in self-perception, the emergence of coping strategies, and the influence of situational factors over time. When combined with interpretative analysis, these methods can reveal how individuals construct their life stories within social and cultural frameworks, thus offering valuable perspectives on identity formation and societal integration.

Projective and expressive modalities complement narrative techniques by incorporating creative and symbolic means of expression, which are particularly beneficial when verbal articulation proves challenging or insufficient. Art therapy, drama therapy, and other visual or performative methods facilitate emotional release, foster self-exploration, and often evoke deeper layers of personal meaning. These approaches are especially pertinent in therapeutic or rehabilitative contexts, where they can promote psychological healing, enhance self-awareness, and support the reconstruction of life narratives following trauma or significant life transitions.

The integration of these diverse methodologies not only enriches qualitative data collection but also broadens the scope of interpretation, enabling a multi-perspective analysis that considers individual, societal, and cultural dimensions. Such an approach aligns with contemporary paradigms in psychological and social research, emphasizing the importance of understanding human experience as dynamic, context-dependent, and inherently narrative.

In practical terms, these methods have significant implications for clinical practice, social work, and educational interventions, as they provide tailored insights that can inform individualized support strategies. For individuals with disabilities, understanding their life stories through these lenses can foster empowerment, enhance self-acceptance, and promote social inclusion. Moreover, these approaches facilitate the identification of critical moments of resilience and growth, which can be harnessed in therapeutic settings to bolster coping mechanisms and psychological well-being.

Despite their strengths, it is essential to recognize the limitations inherent in narrative and projective methods, including the potential for interpretative biases and the dependence on participant openness and capacity for reflection. Researchers must therefore exercise methodological rigor, reflexivity, and ethical sensitivity to ensure the integrity and validity of their findings.

In conclusion, the combined application of narrative and projective techniques constitutes a powerful toolkit for exploring the richness of human life stories. When thoughtfully employed, these methods contribute to a deeper understanding of personal development, identity, and resilience, ultimately fostering more effective and empathetic interventions across clinical, social, and research contexts. As the field continues to evolve, further refinement and integration of these approaches promise to enhance our capacity to comprehend and support the complex narratives that shape individual lives.

## Affiliation

*The paper is a partial output of the KEGA project No. 001KU-4/2023 entitled Embodied Experience Using Art Action II - Counteracting Stagnation in Adulthood and Seniors*

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# Foreign Language Learning as a Cognitive Challenge in SeniorS

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STANISLAV BENČIČ

## Abstract

This paper explores the various challenges and opportunities associated with foreign language learning among seniors. It examines the psychological, cognitive, and social factors that influence language acquisition in older adults, highlighting the importance of tailored pedagogical approaches. The study emphasises the significance of developing age-appropriate glottodidactic methods that consider seniors' unique needs, limitations, and life experiences. Additionally, it discusses innovative programs and initiatives that promote lifelong language learning, contributing to cognitive vitality, social inclusion, and overall well-being. The paper aims to provide educators and policymakers with insights into effective strategies for supporting senior learners and fostering an inclusive, engaging environment for foreign language education in later life.

**Key words:** Senior age. Foreign language education. Glottodidactics. Methods of teaching foreign languages.

## Introduction

Learning a foreign language is a supportive strategy in older age for maintaining mental vitality, improving cognitive flexibility, and enhancing quality of life. Acquiring a foreign language at this stage of life can help reduce the risk of dementia and has a positive effect on brain health. Language schools and other institutions offer language courses to seniors as a meaningful way to spend their free time and promote sociability. Currently, opportunities to learn a foreign language are more accessible thanks to a wider range of language courses and the possibility of taking courses not only in person but also online, where seniors are expected to be proficient in modern technologies such as working with tablets, connecting to the internet, and using various mobile applications.

## Seniors as foreign language learners

An important stage in an individual's ontogenetic development is the stage of senility (senior age), which is a natural part of the human life cycle. Senility covers the entire period of a person's life after the age of 60 (Hudecová, Kováčová, 2021). As self-sufficiency decreases with age, older people cannot satisfy their basic needs on their own, which leads to increased dependence on other people and often to forced lifestyle changes (Hangoni, Cehelská, & Šíp, 2014). When characterizing senior age, it is possible to agree with the authors Sak & Kolesárová (2012) that it is a stage of human life limited by two time periods. The upper limit is defined by death. The lower limit is marked by variability, which is specific. This is manifested in the fact that for each person it is an individual process into which learning a foreign language can be integrated. The specificity and individuality of a senior citizen are influenced not only by genetic predispositions, but also by their life history, lifestyle, and social and cultural factors. It is these factors that contribute to how a person, in this case a senior citizen, deals with certain life situations and how they can cope with challenging life situations. It is therefore evident that the personality of an older person is shaped by their previous development. Balogová (2005) states that older people have only one thing in common: their age. They are characterized by individual traits, and each person ages differently, at their own pace. The idea that all older people are the same and have the same needs is misleading and incorrect. This fact must also be considered when creating content, e.g., a teaching

unit focused on learning a foreign language (Kováčová, Hudecová, 2023). The idea that education is the domain of childhood and youth has long been outdated. There is a need and demand for lifelong learning and education, an integral part of which is the education of seniors (Španeková, Smékalová, 2015). Developing the concept of active citizenship into specific competencies for seniors is the first step towards planning education that prioritizes the exercise of citizenship itself (Luppi, 2008). One of the ways of educating the older generation is through language training. Geragogical glottodidactics is not as integrated into the concept of active citizenship as one might expect, compared to the integration of foreign language teaching applicable to childhood or adulthood. An example of support for senior education can be found in innovative projects in foreign language teaching and learning, such as the *European Language Label*, in which Slovakia was also involved (EU, 2012), while other experiences can be found among those implemented by the European *Learning in Later Life* Network, which supports academic education for people over 50 and includes institutions from thirteen countries. Other interesting projects are implemented by the Socrates Grundtvig Language Course Teaching Methods for Senior Citizens program and the Analysis of Second Language Training Programs for Older Adults in Canada project.

## Limits of seniors in the context of foreign language learning

If maintaining cognitive abilities and engaging in social activities are key elements of the concept of successful aging, it is clear how and why language learning can be a tool for achieving and enjoying a creative, wise, and healthy old age. The field of senior education is extremely broad and does not form a unified and interconnected system. It can take the form of non-professional general senior education. In such cases, it most often involves, for example, teaching computer literacy, foreign languages, memory training, etc. (Klevetová, Dlabalová, 2008). In geragogical terms, the learning process is part of all types of formal and informal education, including adult and senior education (Průcha, Veteška, 2012). In the senior population, there is generally a decline in the speed of processing and performing memory tasks, but memory does not deteriorate evenly: in non-pathological aging, there is a deterioration in working and short-term memory, especially in tasks involving retrieving and searching for information, while autobiographical memory and long-term memory for distant events are preserved (Albanese, Cristini, Porro, 2010). In seniors, it is important to differentiate between fluid intelligence and crystallized intelligence. According to Bianchi (2013), crystallized intelligence reflects the effect of acculturation and refers to the body of knowledge disseminated in the environment that an individual has been able to acquire, the experience gained during their lifetime, the ability to understand messages conveyed, and the ability to assess and reflect on everyday situations. Various studies document that crystallized intelligence does not decline but may even improve with age due to the cumulative effect of the experiences an individual has acquired. Fluid intelligence refers to abilities that are not transmitted by culture and concerns, for example, the recognition of spatial relationships or inductive reasoning. It is influenced by the state of the brain, and according to some, its decline should begin between the ages of 40 and 50, or according to others, around the age of 65 (2013).

## Glotodidactics applicable in teaching seniors

Foreign language education can gain additional value if the study is not limited to purely instrumental aspects of communication skills development, such as the history of literature, but is perceived as a form of communication, a product and expression of human communication. Foreign languages are in fact a privileged field for strengthening and empowering older people, encouraging them to acquire cultural and intercultural tools and skills, storytelling and self-discovery, which in older people naturally tends to focus on the past, and to renew the "experience transformed into wisdom" that is a place of intergenerational contact and a means of transgenerational transmission. There are many methods in foreign language education. Foreign language teaching aimed at seniors selects many of them and focuses on those that are considered effective and appropriate given the possibilities and limitations of seniors. These include the

storytelling method and the autobiography method. According to Smorti (1994), the storytelling method consists of a set of techniques that use storytelling to develop cognition. It assumes that throughout their lives, seniors are able to recount their experiences and events, and at the same time, through retelling, they learn about themselves, others, and the world around them (Smorti, 1994). One of the techniques of storytelling is autobiography. Autobiography involves telling a life story focused on attributing subjective and culturally situated meanings to experiences and on explicitly and credibly expressing one's own existential journey.

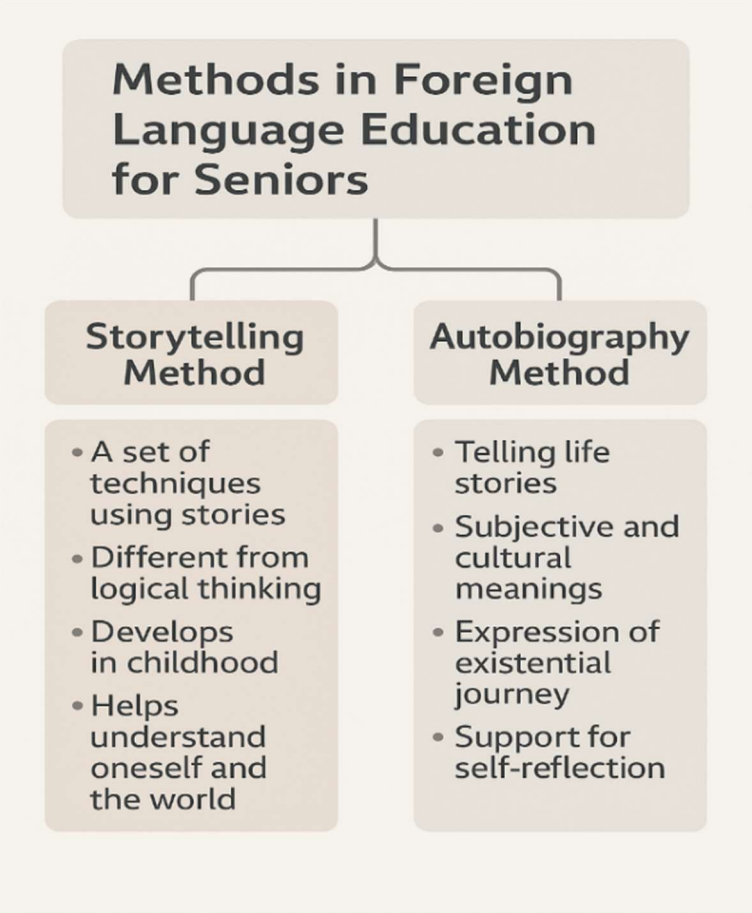


Table 1: Methods in Foreign Language Education for Seniors
*Source: authors´eleboration*

Storytelling and retelling, writing, reading, and listening to stories, biographies, and autobiographies are in the centre of the storytelling or autobiographical method. Its origins can be found in Bruner's cultural psychology (1990), according to which the construction of human identity and the attribution of meaning to the environment and reality takes place from childhood to old age through storytelling and retelling (Luise, 2014). Demetrio (1996) divides the effects of narrative practices in the contexts of education and formation as follows:

• The hetero-esteem effect – when the narrator feels recognized thanks to their relationship with the listener.
• The self-esteem effect – when the narrator can use communication tools to express themselves.
• The exo-esteem effect – when the narrator not only recognizes themselves in what they have created, but is also able to enrich their narrative with other languages and means of expression.

The storytelling method is used in social sciences, psychology, and education with a therapeutic and orientational function, and storytelling is also one of the tools of intercultural education because it allows one to encounter new languages, cultures, and identities and to emerge from this encounter changed. The use of stories, whether told or listened to, is presented in language teaching in: case studies, role playing, simulations, storytelling—all of these are activities and exercises that are part of language teaching.

**Use of Storytelling Methods in Various Fields and Their Functions**

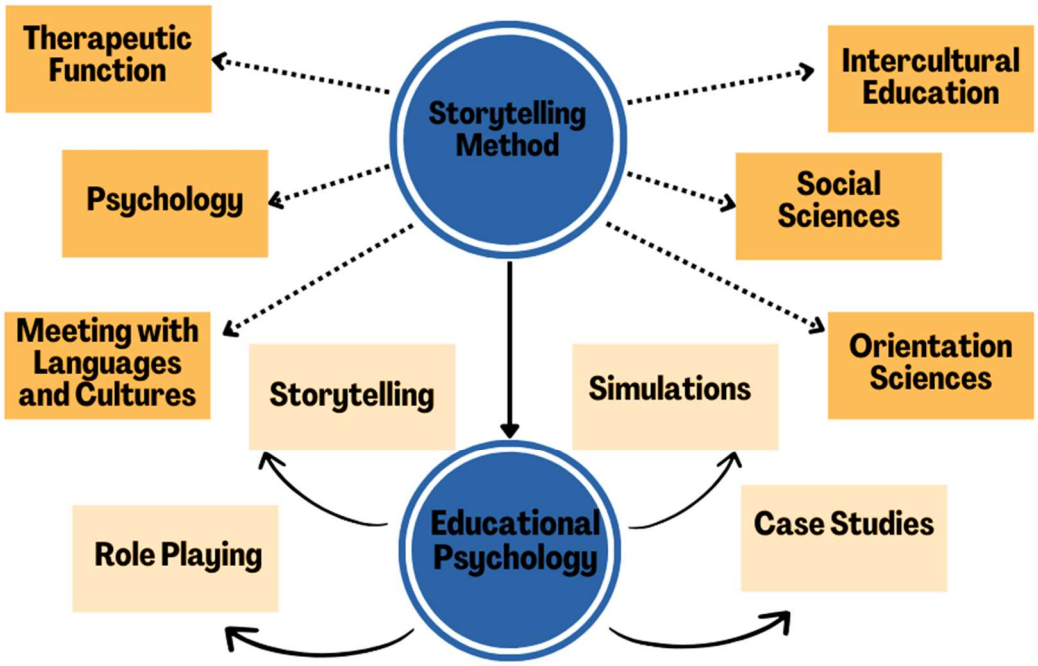


*Table 2: The use of storytelling in various fields and its functions*
*Source: authors´ work*

Senior students of foreign languages also find pleasure in engaging with literary texts. Rather than adhering to the conventional method of teaching literature as a chronological sequence of literary movements, this approach emphasises exploring literature within its historical context.

Comparison of Methods in Senior Foreign Language Education

Both methods, storytelling and autobiography, harness the power of storytelling as an effective didactic tool. They share the ability to support memory and cognitive skills, strengthen self-expression and build self-confidence. Additionally, these approaches encourage social interaction and the sharing of experiences, which in turn increases motivation to learn the language.
The main similarities between these methods lie in their capacity to create an environment where seniors can actively participate and develop their language skills through personal stories and life experiences. Both approaches contribute to overall personal growth and enhance the quality of life.

**COMPARISON OF METHODS IN FOREIGN LANGUAGE EDUCATION FOR SENIORS**

| Similarities |
|---|
| – Both use the power of stories as a didactic tool<br>– Support memory and cognitive abilities<br>– Strengthen self-expression and self-confidence<br>– Encourage social interaction and sharing of experiences<br>– Increase motivation for language learning |

| Storytelling | Autobiography |
|---|---|
| – Creative narration of stories<br>– Development of imagination and fantasy<br>– Focus on communication "here and now"<br>– Emphasizes artistic and expressive rozmer<br>– Helps understand the world and other people | – Based on personal life experiences<br>– Supports self-reflection and search for meaning<br>– Focus on personal history and identity<br>– Emphasizes authenticity and cultural memory<br>– Helps understand oneself and one's past |

Table 3 The use of storytelling in various fields and its functions
*Source: authors´ elaboration*

However, there are also notable differences. The storytelling method focuses on creative storytelling, developing imagination and fantasy. This approach emphasizes communication "here and now," highlighting the artistic and expressive aspects of storytelling. It helps seniors understand the world and others better, fostering creativity and emotional expression.

In contrast, autobiography is based on personal life experiences. This method promotes self-reflection and the search for life's meaning, with an emphasis on personal history and identity. Authenticity and cultural memory are key elements, helping seniors better understand themselves and their past.

Both methods represent valuable tools in geragogical education, and their appropriate use depends on the goals and individual needs of seniors.

## Conclusion

Learning a foreign language in later years offers numerous benefits that extend beyond mere communication skills. It serves as a powerful tool for cognitive stimulation, emotional well-being, and social engagement, all of which are vital for maintaining quality of life among seniors. As demonstrated, tailored teaching methods, such as storytelling and autobiographical techniques, effectively leverage seniors' life experiences and cultural backgrounds, making language learning

more meaningful and enjoyable. Furthermore, participation in language courses fosters a sense of community, reduces feelings of isolation, and encourages active participation in society.

While ageing presents certain cognitive and physical limitations, these can be mitigated through appropriate pedagogical strategies that emphasise patience, repetition, and contextual learning. The integration of innovative programs and digital tools can further support seniors' language acquisition, making education more accessible and engaging. Ultimately, promoting lifelong language learning aligns with broader goals of active ageing and social inclusion, empowering seniors to continue their personal development, explore new cultural horizons, and remain active contributors to their communities. Recognising the value of senior education in foreign languages is essential for building inclusive societies that respect and support lifelong learning at every stage of life.

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## Economic Sciences

# КООРДИНАЦИЯ ГОСУДАРСТВЕННОЙ ПОЛИТИКИ И УПРАВЛЕНЧЕСКИХ СТРАТЕГИЙ В ЭКСПОРТЕ КАЗАХСТАНСКОГО ЗЕРНА В КИТАЙ

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**Аннотация.** В статье рассматриваются управленческие и институциональные аспекты координации экспортной политики Казахстана в сфере торговли зерном с Китаем. Проведен анализ логистических, сертификационных и маркетинговых барьеров, а также механизмы их преодоления через взаимодействие государства и частного сектора. Исследование включает сравнение с международным опытом (Россия, Канада, Австралия) и вырабатывает рекомендации по созданию цифровой платформы, институционализации диалога, развитию бренда и усилению экспортной инфраструктуры. Предложены стратегические меры для повышения устойчивости, прозрачности и конкурентоспособности казахстанского зерна на китайском рынке.

**Ключевые слова**: Координация, экспорт зерна, Китай, логистика, государственно-частное партнёрство, цифровизация.

**Введение.** В условиях глобальной трансформации аграрных рынков и усиления конкурентной борьбы за экспортные ниши, Казахстан стремится укрепить свои позиции в международной торговле зерном. Как один из крупнейших производителей пшеницы в Евразии, республика обладает значительным экспортным потенциалом. Однако эффективная реализация этого потенциала требует не только агропроизводства высокого качества, но и системной координации между государственными политиками и управленческими стратегиями частных предприятий [1].

Китай, в свою очередь, выступает в качестве ключевого стратегического партнёра Казахстана в рамках инициативы «Один пояс — один путь» и Евразийского экономического взаимодействия. Спрос на зерновые культуры в Китае остается стабильно высоким, а географическая близость создаёт благоприятные условия для торговли [2].

Тем не менее, несмотря на активные межгосударственные соглашения и растущий интерес со стороны китайских импортеров, экспорт казахстанского зерна сталкивается с рядом вызовов: от логистических ограничений и проблем сертификации до недостаточной институциональной координации между государственными органами и частным бизнесом [3].

Современные реалии требуют переосмысления механизмов взаимодействия между государственными структурами, экспортёрами и логистическими операторами. В частности,

отсутствует единая платформа для стратегического согласования действий, что приводит к фрагментации усилий и снижению конкурентоспособности на внешнем рынке [4].

Цель настоящего исследования – проанализировать существующую модель координации между государственной политикой и управленческими стратегиями в контексте экспорта казахстанского зерна в Китай, выявить институциональные барьеры и предложить рекомендации по улучшению взаимодействия. Основные задачи исследования включают систематизацию нормативно-правовой базы государственной поддержки экспорта, анализ практик зернопроизводящих компаний, оценку текущего уровня координации между государством и бизнесом, разработку предложений по институциональному и стратегическому синхронизированию.

Координация в международной торговле представляет собой системное согласование усилий различных факторов – государств, компаний, ассоциаций, регулирующих органов – с целью достижения взаимовыгодных условий обмена, устранения барьеров и повышения эффективности логистических и институциональных процессов. В контексте экспорта зерновых координация означает выстраивание устойчивой модели взаимодействия между государственными регуляторами и бизнес-структурами, включающей планирование, информацию, субсидии и юридическую поддержку [5].

Существуют различные модели координации экспортной деятельности: директивная (государство задаёт параметры и контролирует исполнение), партнерская (основа на публично-частном партнёрстве), и либеральная (минимальное вмешательство государства при опоре на рыночные механизмы) [6].

Для Казахстана характерно сочетание элементов директивной и партнерской модели, особенно в АПК, где государство активно субсидирует экспортную логистику, но при этом слабая институциональная база ограничивает эффективность реализации стратегии.

Ключевыми механизмами координации являются: экспортные агентства и маркетинговые организации; интегрированные информационные платформы; торгово-дипломатическая поддержка; институционализированные диалоги государства и отраслевых ассоциаций [7].

Экспортная политика в агропромышленном комплексе анализируется с позиции конкурентных преимуществ по М. Портеру, институционального подхода, а также модели глобальных цепочек добавленной стоимости. В рамках этих теорий подчеркивается значимость: согласованного регулирования стандартов качества; прозрачности экспортных процедур; долгосрочной поддержки и развития инфраструктуры [8].

Особое внимание уделяется не только производству, но и послепроизводственным этапам: хранению, сертификации, логистике. Без согласованной координации этих элементов невозможна полноценная интеграция казахстанского зерна в цепочки поставок на рынок Китая.

В последние годы Казахстан последовательно реализует ряд стратегических документов, направленных на развитие аграрного сектора и поддержку экспорта. Одним из ключевых документов является Национальный проект по развитию агропромышленного комплекса на 2021–2025 годы, в котором экспортная ориентированность отрасли определена как приоритетное направление. В рамках проекта предусмотрены меры по расширению рынков сбыта, улучшению фитосанитарного контроля, повышению квалификации агроэкспортеров и цифровизации процедур [9].

Также в Стратегии «Казахстан – 2050» подчёркивается необходимость интеграции в глобальные продовольственные цепочки и увеличения доли казахстанской сельхозпродукции на внешних рынках, в том числе за счёт партнерства с Китаем и странами АСЕАН [10].

Министерство сельского хозяйства Республики Казахстан выступает центральным органом, определяющим политику в области АПК и экспортной деятельности. Оно формирует нормативно-правовую базу, разрабатывает экспортные планы, обеспечивает фитосанитарный контроль и взаимодействие с китайской стороной по сертификации продукции [11].

Важную роль также играют специализированные структуры – АО «KazakhExport», АО «НК «Продовольственная контрактная корпорация» и АО «QazTrade». Эти агентства оказывают консультационную, страховую и маркетинговую поддержку экспортёрам, способствуют участию в международных выставках и помогают в продвижении казахстанской продукции на азиатских рынках [12].

Механизмы поддержки: субсидии, логистика, дипломатия. Среди наиболее значимых инструментов государственной поддержки следует выделить:

– субсидии на транспортировку зерна до внешних рынков, особенно в приграничные регионы Китая;

– развитие зерновой логистики, включая модернизацию элеваторов и железнодорожной инфраструктуры;

– активизацию дипломатических каналов, направленных на устранение барьеров в торговле, унификацию фитосанитарных требований и согласование квот [13].


Рисунок 1. Институциональные стратегии государственной поддержки экспорта зерна в Китай

Примечание: составлено автором на основе анализа программ Министерства сельского хозяйства РК, QazTrade и данных FAO.

Рисунок 1 отражает три ключевых направления государственной поддержки экспорта казахстанского зерна, каждое из которых формирует институциональную основу внешнеэкономической активности агропромышленных предприятий.

Субсидии на транспортировку представляют собой прямой финансовый механизм, направленный на снижение логистических издержек экспортёров. Государство субсидирует расходы на железнодорожные перевозки и контейнерные поставки, особенно в направлении Китая, где инфраструктурные ограничения требуют дополнительных затрат. Эта мера повышает ценовую конкурентоспособность казахстанского зерна по сравнению с продукцией из России и Украины.

Развитие зерновой логистики включает модернизацию элеваторов, строительство зерноперевалочных терминалов и расширение складских мощностей вблизи ключевых экспортных коридоров. Эффективная логистика снижает потери при хранении, повышает скорость поставок и укрепляет доверие со стороны китайских импортеров.

Активизация дипломатических каналов направлена на устранение нетарифных барьеров, согласование фитосанитарных требований и внедрение единых стандартов сертификации. Казахстан активно ведёт переговоры с китайскими органами по упрощению допуска зерна на рынок КНР, включая электронное сертифицирование и взаимное признание контроля качества.

Таким образом, анализ показывает, что успешный экспорт зерна требует не только производственных и логистических усилий, но и скоординированных политико-дипломатических действий. Только синергия между инфраструктурой, финансированием и международной интеграцией обеспечивает устойчивое присутствие Казахстана на внешнем рынке зерновых.

Эти меры формируют основу для более активной интеграции Казахстана в глобальные цепочки поставок зерна и способствуют долгосрочной устойчивости экспорта в Китай.

Экспортная логистика – ключевой элемент конкурентоспособности казахстанских зернопроизводителей на китайском рынке. Эффективность логистических цепочек определяет скорость поставок, их стабильность и себестоимость продукции. Управленческие практики предприятий направлены на оптимизацию маршрутов, выбор подходящих логистических операторов, кооперацию с ЖД-компаниями и внедрение цифровых систем отслеживания грузов [14].

Многие экспортёры переходят на мультимодальные схемы доставки: автотранспорт – железная дорога – сухопутный порт. Такая стратегия обеспечивает гибкость в условиях нестабильной пропускной способности отдельных участков границы, особенно на станциях «Алашанькоу» и «Хоргос» [15].

Для выхода на рынок Китая зерно должно соответствовать ряду технических и фитосанитарных требований, установленных Китайской Главной таможенной администрацией. Экспортёры Казахстана обязаны обеспечить соответствие стандартам GB/T, которые регулируют влажность, содержание пестицидов и уровень примесей [16].

Компании сталкиваются с необходимостью прохождения двойной сертификации: внутренней (казахстанской) и внешней (китайской). Управленческое решение — создание собственных лабораторий или заключение контрактов с аккредитованными сертификационными центрами, а также обучение персонала правилам экспортной маркировки и упаковки [17].

Казахстанские компании начали осознавать необходимость создания положительного имиджа и маркетингового продвижения своей продукции. Управленческие стратегии включают участие в международных аграрных выставках (например, в Шанхае и

Пекине), активное взаимодействие с B2B-площадками и создание брендов регионального зерна (например «KazWheat» или «Ақдала»).

Сильный бренд формирует доверие со стороны китайских трейдеров и оптовиков, особенно в сегменте премиум-пшеницы и экологически чистой продукции. Некоторые компании интегрируют в свои маркетинговые кампании упор на устойчивое производство, низкое содержание глютена и происхождение без ГМО, что соответствует растущим запросам китайских потребителей [18].

Взаимодействие между государственными структурами и частным сектором. На практике взаимодействие между государственными органами и зернопроизводящими предприятиями характеризуется фрагментарностью и отсутствием устойчивых каналов обратной связи. Хотя в стратегических документах декларируется необходимость государственно-частного партнёрства, его реализация часто ограничена точечными мерами, не охватывающими полный цикл экспортной деятельности [19].

Институциональная координация реализуется преимущественно через консультационные сессии, отраслевые советы при министерствах, а также информационные платформы вроде EXPORT.GOV.KZ. Однако бизнес-структуры указывают на слабую результативность подобных механизмов и нехватку системного участия в формировании политики [20].

Несмотря на институциональные сложности, существуют положительные примеры кооперации. Например, в рамках программы QazTrade Export Accelerator несколько зерновых компаний получили поддержку в выходе на китайский рынок через организацию B2B-встреч, сертификационное сопровождение и логистическую помощь [21].

Другим кейсом служит участие казахстанских производителей в международных аграрных выставках в Китае, организованных совместно с Министерством сельского хозяйства РК и АО «KazakhExport». На таких площадках заключаются предварительные

соглашения, демонстрируется качество продукции и формируется репутация казахстанского зерна как конкурентоспособного товара [22].


Рисунок 2. Механизмы успешного продвижения казахстанского зерна на китайский рынок

Примечание: составлено автором на основе материалов QazTrade, Министерства сельского хозяйства РК и анализа экспортных практик 2021–2024 гг.

Рисунок 2 иллюстрирует комплексную модель продвижения казахстанского зерна на рынок Китая, реализуемую при взаимодействии государственных структур и частного сектора. Каждый элемент схемы отражает конкретную управленческую или институциональную стратегию, направленную на преодоление ключевых барьеров экспорта и усиление рыночной позиции казахстанских производителей.

Программа QazTrade Export Accelerator предоставляет системную поддержку компаниям, выходящим на внешние рынки, включая зернопроизводителей. Это включает в себя обучение, маркетинговую помощь, проведение аудит-экспертиз и координацию с зарубежными торговыми агентами. Программа доказала свою эффективность, способствуя росту экспортных поставок в КНР [см. источник 21].

Организация B2B-встреч позволяет компаниям выстраивать прямые связи с китайскими импортёрами, дистрибьюторами и конечными покупателями. Такие встречи сокращают информационный разрыв, формируют доверие и создают устойчивые каналы сбыта.

Сертификационное сопровождение важно с учётом строгих фитосанитарных требований Китая. Оказание методической и финансовой помощи компаниям в сертификации снижает барьеры входа на рынок и минимизирует риски возврата грузов.

Логистическая помощь со стороны государства выражается в софинансировании транспортных расходов, предоставлении информации о доступных маршрутах, а также сопровождении при прохождении границы. Это особенно актуально в контексте перегруженности пунктов «Алашанькоу» и «Хоргос».

Участие в международных выставках позволяет демонстрировать качество продукции, заключать экспортные контракты и формировать долгосрочную репутацию бренда. Казахстанские компании, принимающие участие в аграрных ярмарках в Шанхае, Пекине и Урумчи, получают доступ к крупным покупателям, что даёт мультипликативный эффект.

Интеграция управленческих усилий и государственных инструментов создаёт условия для перехода от фрагментарного экспорта к системному присутствию на китайском зерновом рынке.

Основными барьерами эффективного взаимодействия являются:

бюрократическая инертность: длительные согласовательные процедуры между министерствами и частным сектором;

информационная асимметрия: бизнесу не хватает актуальной информации о квотах, тарифах и требованиях китайского рынка;

отсутствие механизмов регулярной обратной связи: систематическая оценка результатов сотрудничества практически не проводится [23].

Для преодоления указанных проблем необходима институционализация платформ диалога, создание отраслевых рабочих групп с участием представителей бизнеса и регулярный мониторинг эффективности совместных мер.

Сравнительный анализ опыта других стран (Россия, Канада, Австралия).

Россия в рамках развития зернового экспорта применяет механизм квотирования, субсидий на железнодорожные перевозки, а также активно использует государственные институты – такие как Россельхознадзор и Россельхозцентр, – для сопровождения экспортеров на всех этапах: от сертификации до выхода на внешние рынки. Кроме того, интеграция экспортеров в цифровую систему ФГИС "Зерно" позволяет улучшать информационный обмен и прозрачность логистических операций [24].

Канада, являясь одним из лидеров мирового рынка пшеницы, демонстрирует эффективную модель государственно-частного взаимодействия через агентство Canadian Grain Commission и объединение Grain Growers of Canada. В Канаде акцент делается на стандартизацию продукции, высокую транспарентность сертификационных процедур и сильную адвокацию интересов фермеров при участии в международных соглашениях [25].

Австралия реализует экспортную политику через модель “one window” в рамках платформы Austrade, которая объединяет правительственные службы, логистические компании и частный бизнес. Управление экспортом зерна осуществляется с участием Grain Trade Australia (GTA*)* – отраслевой ассоциации, которая устанавливает технические стандарты, разрешает споры и поддерживает экспортёров в правовых и торговых вопросах [26].

Анализ практик указанных стран позволяет выделить несколько компонентов, которые могут быть внедрены в Казахстане:

Институционализированные ассоциации зернопроизводителей и экспортеров с правом экспертного участия в разработке государственной политики (по примеру GTA и Grain Growers of Canada);

Цифровизация цепочек поставок с обеспечением сквозного мониторинга, аналогично ФГИС "Зерно" в России;

Сильная экспортная адвокация через государственные агентства внешней торговли (Austrade, Canadian Grain Commission), которые работают как мост между бизнесом и внешней политикой.

Сравнительный исследовательский анализ координации экспортной политики в зерновом секторе: опыт России, Канады и Австралии

Анализ национальных практик координации экспортной политики с бизнесом в сфере зернового экспорта в России, Канаде и Австралии позволяет выделить как общие элементы, так и структурные различия, определяющие эффективность взаимодействия государства и частного сектора.

Регулирование объёмов экспорта. Россия применяет директивный механизм квотирования, направленный на стабилизацию внутреннего рынка и обеспечение продовольственной безопасности. Такой подход позволяет гибко реагировать на волатильность цен, но в то же время может сдерживать инициативу экспортеров. В отличие от России, Канада и Австралия не прибегают к квотированию, опираясь на рыночные инструменты регулирования, что способствует большей предсказуемости и долгосрочному планированию со стороны бизнеса.

Роль государственных институтов. Во всех странах наблюдается активное участие государственных институтов, но с разной степенью вовлечённости и функциональности. В России ключевую роль играют Россельхознадзор и Россельхозцентр, предоставляющие техническое и административное сопровождение экспортёров. В Канаде основную функцию стандартизации и сертификации выполняет Canadian Grain Commission –независимый государственный орган, обеспечивающий высокую транспарентность процедур. Австралия, в свою очередь, реализует модель «единого окна» через платформу Austrade, предоставляя бизнесу полный спектр экспортных услуг, включая правовую, маркетинговую и логистическую поддержку.

Цифровизация экспортных процессов является сильной стороной российской модели. Система ФГИС «Зерно» позволяет отслеживать движение продукции и предоставляет данные для анализа эффективности поставок. В Канаде и Австралии цифровая трансформация менее централизована, однако доступ к рыночной информации обеспечивается через специализированные платформы агентств и отраслевых организаций. Австралийская модель отличается интеграцией информации в платформу Austrade, что упрощает доступ бизнеса к экспортным возможностям.

Существенное отличие выявляется в институционализации отраслевых ассоциаций. В Канаде Grain Growers of Canada выполняет функции коллективной адвокации, участвует в международных переговорах и разработке нормативных документов. В Австралии Grain Trade Australia (GTA) устанавливает технические стандарты, обеспечивает разрешение споров и представляет интересы экспортеров. В России роль бизнес-объединений выражена слабее, что ограничивает влияние частного сектора на формирование экспортной политики.

Все три страны уделяют внимание сертификации и качеству продукции. В Канаде и Австралии процедуры сертификации отличаются высокой предсказуемостью и прозрачностью. Это укрепляет доверие со стороны международных партнёров и снижает транзакционные издержки. В России же сертификация всё ещё сопряжена с высокой долей административных процедур и зависимостью от ведомственной интерпретации стандартов.

Во всех странах реализуются меры поддержки экспортёров, но по-разному. Россия предлагает субсидии на транспортировку и техническое сопровождение. Канада фокусируется на предоставлении рыночной информации и защите интересов производителей. Австралия предлагает наиболее комплексную поддержку, включая правовое сопровождение, консультации, инфраструктурный доступ и механизмы разрешения споров.

Таблица 1. Сравнение механизмов координации экспортной политики в зерновом секторе

| Категория | Россия | Канада | Австралия |
|---|---|---|---|
| Регулирование объёмов экспорта | Квотирование с целью стабилизации внутреннего рынка | Нет квот, рынок регулируется через стандарты и сертификацию | Нет жёсткого квотирования, экспорт регулируется через отраслевые стандарты и консультации |
| Государственные институты | Россельхознадзор и Россельхозцентр сопровождают экспортеров | Canadian Grain Commission устанавливает стандарты и проводит сертификацию | Austrade и Grain Trade Australia координируют поддержку экспортеров |
| Информационная инфраструктура | ФГИС «Зерно» — цифровая система мониторинга и управления | Информационные системы и отчётность CGC | Платформа Austrade — модель «одного окна» для всех экспортных услуг |
| Отраслевые ассоциации | Ассоциации менее институционализированы | Grain Growers of Canada активно участвуют в лоббизме, переговорах | GTA (Grain Trade Australia) — регулирование стандартов, поддержка экспортеров, разрешение споров |
| Сертификация и стандартизация | Сертификация под контролем государственных органов | Жёсткая стандартизация, высокая транспарентность процедур | GTA устанавливает технические стандарты, обязательные для участников рынка |
| Поддержка бизнеса | Субсидии на транспортировку, консультационная поддержка | Консультации, рыночная информация, защита интересов производителей | Правовая и торговая поддержка, разрешение споров, доступ к инфраструктуре и услугам через GTA и Austrade |

Сравнительный анализ показывает, что Казахстану целесообразно учитывать следующие элементы международного опыта:

Цифровизация экспортной логистики (по примеру ФГИС «Зерно»);

Институционализация отраслевых ассоциаций и включение их в процесс нормотворчества (аналогично Grain Growers of Canada и GTA);

Создание экспортного окна и единой платформы сопровождения (модель Austrade);

Повышение транспарентности сертификационных процедур и упрощение доступа к стандартам.

Международный опыт демонстрирует, что устойчивость зернового экспорта обеспечивается не только производственными и логистическими факторами, но и качеством координации между государством и бизнесом.

Применение данных практик в Казахстане может усилить координацию между бизнесом и государством, сократить транзакционные издержки и ускорить продвижение продукции на китайский рынок.

Стратегические рекомендации по усилению координации государственной политики и управленческих стратегий в экспорте зерна.

Опыт Канады и Австралии показывает, что устойчивый экспорт невозможен без постоянного и формализованного диалога между экспортерами и регуляторами. Казахстану рекомендуется создать Отраслевой совет по зерновому экспорту с участием представителей Министерства сельского хозяйства, QazTrade, KazakhExport, зернопроизводящих ассоциаций и логистических компаний. Такой совет может функционировать как консультативно-аналитическая платформа для согласования норм, квот, субсидий и совместных инициатив [27].

Следует инициировать создание единой национальной цифровой платформы по экспорту зерна (аналог ФГИС «Зерно» в России или Austrade в Австралии), которая объединит в себе:

- реестры экспортеров и импортеров;
- данные о логистике, тарифах, сроках и стандартах;
- электронные процедуры сертификации;
- инструменты обратной связи от частного сектора [28].

Государству рекомендуется увеличить инвестиции в полевые лаборатории, логистические узлы и экспортные терминалы в приграничных зонах. Также необходимо внедрить программы софинансирования сертификационных расходов, особенно для малых и средних аграрных предприятий. Следовательно, это обеспечит соблюдение китайских фитосанитарных и технических требований и усилит доверие со стороны китайских партнёров [29].

Продвижение бренда «Kazakh Grain» и маркетинговых стратегий. Казахстану необходимо разработать национальную маркетинговую кампанию зерна как экологически чистого и устойчивого продукта: участие в китайских продовольственных выставках (Shanghai SIAL, China Food Expo); создание брендированной упаковки; платформы на китайских B2B маркетплейсах (например, Alibaba, JD.com); внедрение истории происхождения продукции (traceability) [30].

Рекомендуется создание постоянной рабочей группы Казахстан – Китай по зерновой торговле, которая бы координировала: согласование фитосанитарных протоколов; упрощение процедур на пунктах пропуска; унификацию стандартов упаковки и маркировки; переговоры по снижению нетарифных барьеров [31].

Заключение. Экспорт зерна в Китай является одним из приоритетных направлений внешнеэкономической политики Казахстана. Проведённый анализ показал, что ключевым условием успешного продвижения на зарубежные рынки выступает согласованная координация государственной политики и управленческих стратегий бизнеса. Несмотря на наличие мер поддержки, сохраняются институциональные и логистические барьеры, замедляющие развитие экспорта.

Сравнение с опытом России, Канады и Австралии подчёркивает важность таких факторов, как цифровизация процедур, стандартизация сертификации, развитие отраслевых ассоциаций и устойчивый диалог между государством и частным сектором.

Реализация предложенных мер – создание цифровой платформы, развитие бренда «Kazakh Grain», модернизация логистики и укрепление взаимодействия с Китаем – позволит

не только увеличить объёмы поставок, но и укрепить позиции Казахстана в конкурентной среде, обеспечив долгосрочную устойчивость аграрного экспорта.

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# Effective team leadership in a turbulent environment: A Comparative Analysis of management principles in China, and Kazakhstan

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**Abstract**

The current business landscape is characterized by constant turbulence caused by geopolitical changes, technological advancements, and economic crises. In this environment, the ability to manage teams effectively in complex and unpredictable situations has become a critical leadership skill. This study aims to systematize and compare the principles of team management during a crisis using the examples of three distinct but interrelated economic and cultural contexts: China, and Kazakhstan. Using the methodology of case study analysis based on secondary data, this article examines the application of three essential principles: adaptive decision-making, transparent communication, and maintaining team psychological stability. The analysis reveals significant differences in leadership styles: in China, a directive and mobilizing approach aimed at achieving collective goals prevails. While in Kazakhstan, there is a paternalistic and hierarchical system with an emphasis on stability. Based on statistical data and real-life examples, the study concludes that there is no single "correct" management model. Instead, organizations and leaders that are most resilient are those who can flexibly balance clear directives with empathy, adapting their management style according to the unique cultural context and specific needs of the situation.

Keywords: anti-crisis management, team leadership, organizational sustainability, corporate culture, situational leadership, China, Kazakhstan

## Introduction

The era of stability and predictability in the global economy has come to an end. The COVID-19 pandemic, disruptions to global supply chains, accelerated digital transformation, and rising geopolitical tensions have created a new reality, often described as the "BANI world" (fragile, disruptive, nonlinear, incomprehensible) [1]. For managers at all levels, managing in this uncertain and crisis-prone environment has become the norm, rather than the exception [2]. Traditional hierarchical management models that were effective in stable times often lead to paralysis in decision-making, demotivated staff, and loss of competitive edge in turbulent times [3].

The main challenge of this research is that despite the abundance of theoretical literature on anti-crisis leadership, there is still a significant gap between the universal "Western" models and their practical implementation in different national and cultural contexts [4], [5]. The principles that work well in one culture may not be successful in another [6]. Therefore, it is important to compare the approaches to team management in countries like China, and

Kazakhstan, which play a crucial role in the Eurasian region, but have unique management paradigms influenced by their historical and economic backgrounds [7], [8].

The aim of this study is to conduct a comparative analysis of the principles and practices of effective team leadership in difficult situations in these three countries to identify both general patterns and culturally specific characteristics.

Research goals: systematize the essential principles of successful team management during a crisis. To analyze how these principles are applied in practice in the business environment of China, and Kazakhstan. To compare the effectiveness of various approaches based on real-life examples and available data. And to formulate practical guidelines for leaders operating in these cultural settings.

## Methods

The research is conducted using the methodology of a qualitative comparative case study [9]. This method allows for a detailed, contextual comparison of management practices in the three countries, utilizing secondary data.

Selection of cases and data sources: The choice of China, and Kazakhstan was determined by their significance and differences in terms of their economic and political systems. China represents a model of state capitalism with a strong emphasis on collectivism and mobilization. Kazakhstan, on the other hand, is a key economic player in Central Asia, with a hierarchical cultural background based on tradition and paternalism [10], [11].

Data sources: The analysis was based on data from consulting companies' reports (McKinsey, BCG, Deloitte), academic research on cross-cultural management, government statements and company reports during times of crisis (such as during a pandemic or under sanctions), as well as global surveys conducted by organizations like Gallup and Edelman [12], [13], [14], [15].

Framework for analysis: To facilitate a systematic comparison between the three countries, a framework was developed that encompasses three fundamental principles of crisis management: Adaptive leadership and decision-making: The speed and centralization or decentralization of decision-making, as well as the ability of a leader to adjust their style depending on the situation. Communication and transparency: The frequency, honesty, and channels used for communication with the team, as well as managing rumors and uncertainty. Maintaining psychological resilience and engagement: Showing empathy, supporting the well-being of employees, and focusing on retaining and motivating the team.

## Results

A comparative analysis shows that despite the external similarity of tasks (ensuring business continuity, team retention), approaches to their solution in the three countries differ significantly.

Table 1. Comparative analysis of dominant management styles in crisis situations

| Principle of Management | China (Mobilization Model) | Kazakhstan (Stability Model) |
|---|---|---|
| Adaptive Leadership | Directive and fast. Top leadership sets goals and mobilizes resources. Execution is loyal and prompt. | Hierarchical and paternalistic. Top figure makes decisions; stability is prioritized over risky change. |
| Communication | Cascading and ideological. Top-down messaging emphasizes collective mission. | Formal and indirect. Communication is hierarchical and prone to distortion. |
| Psychological Resilience | Based on collective responsibility. Emphasizes duty over personal well-being. | Rooted in paternalism. The leader ensures protection in exchange for loyalty. |

Real examples. During the COVID-19 pandemic, Chinese technology giants such as Alibaba and BYD converted their production facilities to masks and antiseptics as soon as possible, demonstrating the power of the mobilization model. In Kazakhstan, during economic crises, national companies such as KazMunaiGas traditionally focus on cost optimization programs and maintaining social stability in their teams, making decisions at the senior management level.

Quantitative indicators and their interpretation

Although there are few direct comparative studies, global survey data allows us to evaluate indirect indicators reflecting the effects of different management styles.

Table 2. Indicators of the organizational climate in conditions of uncertainty (estimated data based on global surveys, 2022-2023)

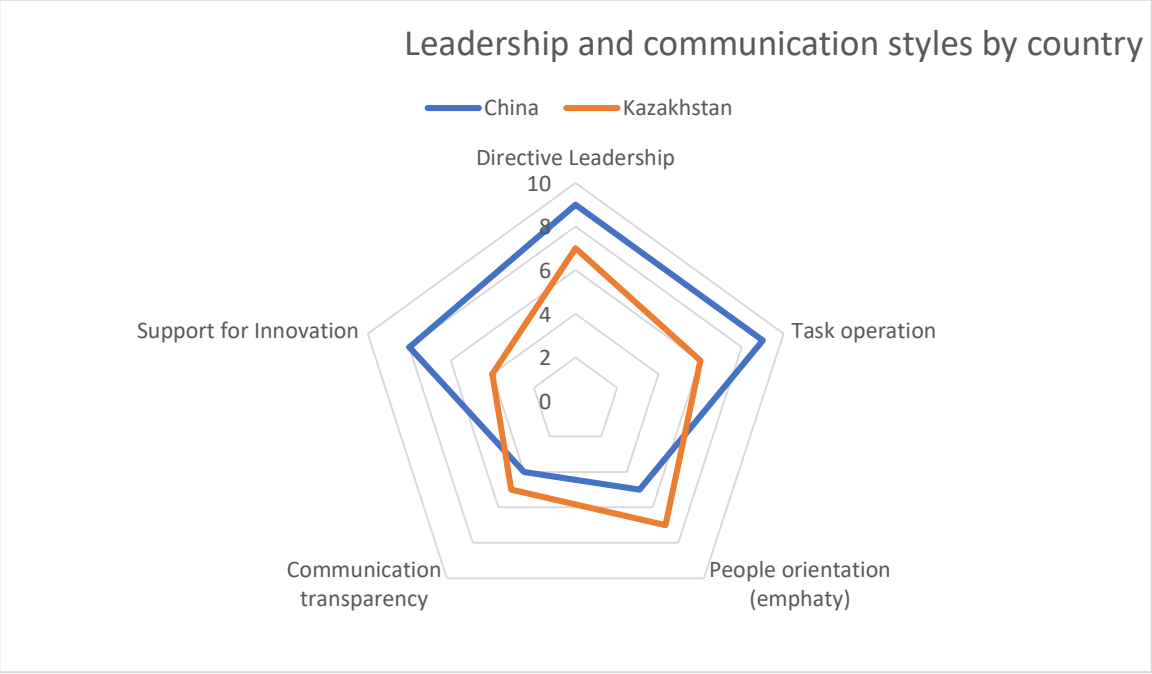
| Indicator | China | Kazakhstan | Comment |
|---|---|---|---|
| Trust in employer (Edelman Trust Index) | High (89%) | Medium (75%) | High trust in China reflects the paternalistic role of both companies and the state. |
| Employee engagement (Gallup, %) | 21% | 20% | Overall low engagement, possibly reflecting the importance of work as a source of stability. |
| Readiness for innovation and risk | Medium | Very low | Centralization and hierarchy suppress bottom-up initiative. Kazakhstan's emphasis on stability further reduces risk appetite. |
| Perception of communication transparency | Low | Low | In all three high power distance cultures, transparency is not prioritized during crises. |

Sources: Compiled by the author based on data from the Edelman Trust Barometer 2023, Gallup "State of the Global Workplace 2023" and expert assessments.

Visualization of leadership models

The differences in the dominant styles can be visualized using a diagram.

Chart 1. Comparative chart of anti-crisis leadership models



The diagram clearly shows that Chinese management models have a high level of focus and directionality, but they lack transparency and a focus on people. In contrast, the Kazakh management model appears to be more balanced, although it has a lower level of focus on direction and task. This could potentially slow down the response in a crisis.

## Discussion

Based on the results, there are significant cultural differences in how teams are managed in difficult situations. These differences can be understood through the lens of classical theories of cross-cultural management, such as the Hofstede model.

The high "Power Distance" characteristic of all three countries can explain the predominance of hierarchical and directive models, as decisions made at the top are rarely challenged. However, there are significant differences in how this is manifested. In China, high teamwork allows leaders to effectively mobilize teams towards a common goal by appealing to a sense of duty and responsibility. Finally, in Kazakhstan, where traditions of cronyism and respect for elders are strong, a paternalistic approach that appeals to loyalty is found to be more effective. Each model has its own advantages and disadvantages. The Chinese model is effective for solving large-scale tasks. The Kazakh model helps maintain stability and team loyalty. However, all of these models suffer from a lack of flexibility, suppressing initiative from below and having low transparency, which can lead to stagnation and difficulty adapting to non-linear changes in the long term.

Practical implications. For Leaders in China: It is necessary to create mechanisms for bottom-up feedback and encourage reasonable risk and initiative in order not to miss out on innovative ideas. For leaders in Kazakhstan: It is necessary to work on increasing the speed of decision-making and delegating authority to the middle level in order to increase the adaptability of the organization. For expats: The direct application of Western models based on egalitarianism and maximum delegation in these countries is doomed to failure without significant adaptation to the local cultural code.

## Conclusion

Managing teams in a turbulent environment requires a leader not to follow a single pattern, but to possess a wide range of tools and the ability to apply them depending on the situation and cultural context. A comparative analysis of practices in China, and Kazakhstan has shown that historically established management models have both strengths that ensure survival in certain types of crises, and serious limitations that hinder long-term development. The future belongs to situational and culturally adaptive leadership. The most stable and competitive organizations will be those whose leaders can find a balance between policy clarity and empathic support, between strict control and reasonable delegation, between maintaining stability and encouraging innovation. Ultimately, the ability to manage a team in a crisis is the art of combining universal principles of leadership with a deep understanding of the unique culture of your country and your organization.

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# Digital Transformation Management in the public sector: A Comparative Analysis of strategies and Challenges in Central Asia and the CIS

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**Abstract.** Digitalization of government agencies has become a crucial focus for modernizing governance and enhancing its effectiveness in Central Asian and Commonwealth of Independent States (CIS) countries. This paper provides a comprehensive analysis of the digital transformation strategies implemented in Kazakhstan, Uzbekistan, Kyrgyzstan, and other countries in the region from 2021 to 2025. Through a comparative analysis and case study, this study identifies successful practices, major challenges, and prospects for digital transition. The paper emphasizes that a successful transformation is not merely a technological upgrade but also a profound reform of processes, enhancing digital literacy, and ensuring cybersecurity. It is based on relevant sources, including expanded statistical data, diagrams, and tables illustrating the progress, challenges, and key differences in approaches to public administration digitalization in the studied regions.

**Keywords:** digitalization, public administration, Central Asia, CIS, e-government, digital transformation, e-Government, GovTech

## Introduction

Digital transformation in public administration is more than just the introduction of information technology or the transfer of services to an online format. It is a comprehensive and strategic process that aims to rethink the entire architecture of public administration, from organizational processes and citizen interaction to a data-driven decision-making culture [1], [2]. Modern digitalization involves a shift from a hierarchical, paper-based bureaucracy to a more flexible, customer-centric, integrated, and proactive model, where transparency, efficiency, and user engagement are key values [3]. One of the main drivers for digital transformation has been the COVID-19 pandemic. This has significantly increased the demand for remote access to public services, faster response to citizens' needs, and better coordination between government agencies [4]. The pandemic has highlighted the limitations of traditional management methods and provided an opportunity to reform public administration systems through the use of digital solutions [5]. As a result, countries in Central Asia and the Commonwealth of Independent States (CIS) have intensified their efforts in digitalization as a priority for their national socio-economic development plans [6].

Digital transformation is of significant importance for countries in transition, as it can help to overcome institutional challenges, such as fragmented administrative processes and low levels of trust in public institutions [7], [8]. Digitalization is seen not only as a means of technological modernization but also as an opportunity for institutional renewal and improvement, leading to

increased transparency, anti-corruption efforts, and optimized public service delivery [9]. Within the Central Asian and CIS region, there has been a shift from local and pilot initiatives to larger-scale implementation of digital platforms, online services, and interdepartmental electronic interactions since 2021-2025 [10], [11]. However, the process has been uneven, with some countries making significant progress in building a digital state and others facing infrastructural, organizational, and legal obstacles that hinder progress [12], [13]. The relevance of this study lies in the need to systematize the experience of digital transformation in public sector organizations in the countries of the region. It aims to identify common patterns, differences, and lessons learned from these transformations, as well as to identify areas for future development of digital public administration [14]. Given the growing importance of digital solutions for ensuring the sustainability and adaptability of states, this work contributes to a better understanding of the mechanisms behind digital maturity formation in post-Soviet countries. It can serve as a foundation for comparative assessments and the exchange of best practices on an international level [15].

## Methods

This study employs a comparative analytical review based on secondary data, combining both qualitative and quantitative research approaches to assess the dynamics and maturity of digital transformation in public administration in Central Asian and selected Commonwealth of Independent States (CIS) countries. The aim of the study is to evaluate the progress of digitalization in public administration systems in these post-Soviet regions. The focus of the analysis is on institutional maturity, infrastructure development, and service delivery innovations. To conduct the study, an in-depth analysis of national digital transformation strategies and flagship digitalization projects was carried out in Kazakhstan, Uzbekistan, and Kyrgyzstan. These countries were selected based on their visibility of reforms, availability of relevant data, and their national priorities in digital governance. Strategic documents, legislative frameworks, IT development concepts, and official regulations related to digital government were analyzed to identify policy priorities, institutional models, and regulatory innovations. The study included a comparative examination of key international indicators, such as the EGDI (E-Government Development Index) by UNDESA, the NRI (Networked Readiness Index), and the ICT Development Index (ITU). It also included national statistical reports and expert assessments for the years 2021-2025. The primary focus of the research was on five Central Asian countries: Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, and Turkmenistan, with Russia and Belarus serving as comparative baselines from the CIS region due to their more advanced digital infrastructure and experience with e-government.

## Results

The analysis shows steady but heterogeneous progress in the field of digitalization of public administration in the region. This table 1 presents the evolution of the EGDI scores from 2021 to projected values for 2025. It demonstrates the relative pace of digital governance development across countries, showing both current performance and projected growth. Kazakhstan, Russia, and Belarus remain regional leaders, while Uzbekistan shows the highest improvement rate. Tajikistan and Turkmenistan lag behind but still show incremental progress. Purpose in the study: To compare digital government maturity across states and identify where countries stand in relation to the UN’s digital development standards.

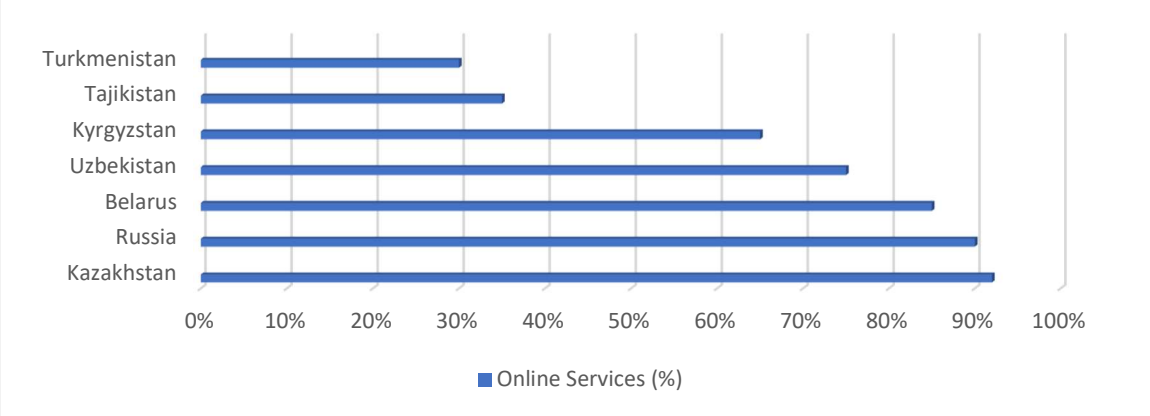
Table 1. E-Government Development Index (EGDI) in Central Asia and CIS Countries (2021–2025)

| Country | EGDI 2021(actual) | EGDI 2023(actual/estimate) | EGDI 2025(projection) | Progress(2021–2025) | UN Classification (2023) |
|---|---|---|---|---|---|
| Kazakhstan | 0.83 | 0.86 | 0.89 | +0.06 | Very High |
| Uzbekistan | 0.71 | 0.77 | 0.82 | +0.11 | High |
| Kyrgyzstan | 0.69 | 0.72 | 0.76 | +0.07 | High |
| Tajikistan | 0.55 | 0.59 | 0.63 | +0.08 | Medium |
| Turkmenistan | 0.53 | 0.56 | 0.60 | +0.07 | Medium |
| Russia | 0.88 | 0.91 | 0.93 | +0.05 | Very High |
| Belarus | 0.84 | 0.86 | 0.88 | +0.04 | Very High |

Source: Compiled by the author based on data from the UNDESA "E-Government Survey", World Bank reports and forecasts based on current growth rates. Note: The data for 2021 and 2023 are based on real reports or estimates, while the data for 2025 are forward-looking.

This chart 1 visualizes the percentage of public services available online, illustrating the digital accessibility of public administration. Countries like Kazakhstan and Russia have digitized the majority of their services, while others like Kyrgyzstan and Turkmenistan are still in early stages of service provision digitalization. Purpose in the study:
To complement the EGDI data and show actual user-facing service transformation, highlighting the level of convenience and reach of e-government.

Chart 1. The share of public services provided online (%) (Estimate for the beginning of 2025)




Digitalization Cases: In-Depth Analysis

Kazakhstan: The Model of the "Invisible Government"

Strategy: "Digital Kazakhstan" smoothly transitioning into the concept of GovTech. The goal is not just to transfer services online, but to make the state more proactive and invisible to citizens (e.g., automatic assignment of benefits upon birth of a child without application). Flagship Projects: eGov platform.kz, eGov Mobile app, integration of public services with commercial banking apps (Kaspi.kz, Halyk Bank) - a unique and successful practice in the region. Achievements: Leader in EGDI (E-Government Development Index), Open Data, digital services penetration.

Uzbekistan: Digital Leap

Strategy: Digital Uzbekistan 2030, focusing on accelerated development of IT infrastructure, creation of IT parks, and attracting investment. Flagship projects: A unified portal for interactive public services, my.gov.uz, and an online identification system, OneID. We are actively developing mobile applications for public services. Achievements: We have achieved the highest growth rates

in the region according to the EGDI index, and we are actively modernizing legislation to stimulate the IT sector, including tax incentives for IT parks.

Kyrgyzstan: Our focus is on basic infrastructure and accessibility.

Our strategy is Taza Koom and Digital Kyrgyzstan 2019-2023. Flagship projects include the Public Services Portal portal.tunduk.kg and the Tunduk interdepartmental electronic interaction system. Challenges include low Internet coverage in rural areas, high communication costs, and a lack of qualified personnel. While we are making progress, we are being held back by infrastructure constraints. This comparative table 2 evaluates five core components of digitalization across four countries: infrastructure, service availability, digital literacy, legal/regulatory framework, and cybersecurity. Kazakhstan and Russia lead in most areas, while Kyrgyzstan struggles with infrastructure and data protection. Purpose in the study: to provide a granular view of digital ecosystem components, allowing identification of bottlenecks and policy gaps that hinder progress.

Comparative analysis in key areas

Table 2. The level of development of the key components of digitalization (Assessment on a 10-point scale, 2024)

| Component | Kazakhstan | Uzbekistan | Kyrgyzstan | Russia |
|---|---|---|---|---|
| 1. Digital infrastructure (access, speed) | 8 | 7 | 5 | 8 |
| 2. Availability of online public services | 9 | 7 | 6 | 9 |
| 3. Human capital (digital literacy) | 7 | 6 | 5 | 7 |
| 4. Legal and regulatory framework | 8 | 8 | 6 | 7 |
| 5. Cybersecurity and data protection | 7 | 6 | 4 | 7 |

Source: Compiled by the author based on the analysis of reports by ITU, World Bank, and expert assessments.

This table 3 summarizes the top three national digital priorities for Kazakhstan, Uzbekistan, Kyrgyzstan, and Russia. The comparison shows different strategic emphases: Kazakhstan focuses on proactive GovTech and Smart Cities; Uzbekistan on infrastructure and IT exports; Kyrgyzstan on foundational connectivity; and Russia on AI and digital sovereignty. Purpose in the study: to contextualize national digital agendas, showing how different countries tailor digitalization according to economic capacity, political will, and technological maturity.

Table 3. Priority areas of digitalization in national strategies

| Country | Priority #1 | Priority #2 | Priority #3 |
|---|---|---|---|
| Kazakhstan | Proactive and composite public services (GovTech) | Development of Smart Cities | Digitalization of industry (Industry 4.0) |
| Uzbekistan | Development of IT infrastructure and connectivity | Establishment of IT hubs and export of IT services | E-health and e-education systems |
| Kyrgyzstan | Ensuring basic internet access | Development of the "Tunduk" interoperability platform | Digitalization of tax and customs administration |
| Russia | Creation of digital ecosystems (public services + business) | Development of artificial intelligence (AI) | Ensuring digital sovereignty |

## Discussion

Common Challenges that Remain Relevant:

Digital Inequality: The gap in access to digital services and internet quality between urban and rural areas continues to be a major concern for all countries, particularly Kyrgyzstan and Tajikistan. Lack of IT Personnel: Despite efforts to promote IT education (particularly in Uzbekistan), there is a shortage of highly skilled specialists (developers, data analysts, cybersecurity experts), which hinders the implementation of complex projects. Cybersecurity: As the number of digital services grows, so does the risk of personal data leaks. Citizens' lack of trust in the government's ability to protect their information remains a significant barrier. Interagency Integration: The technical and administrative complexity of integrating data from various government agencies slows down the development of seamless, integrated services.

Successful Practices and Role Models:

The model of public-private partnership in Kazakhstan: The integration of public services with popular commercial platforms, such as banks and marketplaces, is a best practice that significantly increases convenience and accessibility. The creation of IT clusters in Uzbekistan: The aggressive policy of establishing technology parks with tax benefits stimulates the growth of the local IT sector and attracts foreign companies. Focusing on the core platform in Kyrgyzstan: Despite limited resources, prioritizing the development of a single interagency platform, Tunduk, is the right strategy for laying the foundation for future services. Comparison with other CIS countries: Russia and Belarus, which started the digital transformation process earlier, have a higher level of digital governance maturity, especially in creating integrated ecosystems, such as the Gosuslugi portal in Russia. The Central Asian countries are actively adopting this approach, but at varying rates and with consideration for local circumstances. The advantage for these countries lies in their ability to "skip" some technological stages and immediately implement more advanced, mobile-based solutions.

## Conclusion

The digital transformation of public administration in Central Asia and the Commonwealth of Independent States (CIS) countries between 2021 and 2025 reflects a varied landscape of progress, influenced by each country's unique institutional, infrastructure, and political circumstances. Kazakhstan and Russia, for example, have moved towards advanced government technology (GovTech) models and integrated digital ecosystems. Uzbekistan, meanwhile, has emerged as an emerging player, demonstrating how strong political will and investment incentives

can accelerate progress. Despite resource limitations, Kyrgyzstan has laid a strong foundation through initiatives such as Tunduk, emphasizing interoperability and accessibility.

Despite these positive developments, several challenges remain across the region:

- Digital inequality persists, particularly between urban and rural areas.
- A lack of qualified IT professionals slows down complex project implementation.
- Cybersecurity gaps undermine user trust in electronic services.
- Slow interagency integration hinders seamless digital interactions.

Recommendations:

1. Strengthen human capital development by introducing regional scholarships, establishing partnerships with technology universities, and launching digital literacy campaigns to enhance local IT expertise.

2. Enhance regional cooperation by organizing a Central Asian Digital Transformation Forum, where participants can exchange experience, align standards, and develop cross-border digital projects.

3. Invest in cybersecurity infrastructure by establishing unified cybersecurity frameworks and creating national data protection agencies that conform to international standards.

4. Encourage private sector involvement by expanding successful models like the Kaspi.kz partnership in Kazakhstan to stimulate digital services through public-private partnership frameworks.

5. Focus on user-centered design by prioritizing mobile-first solutions, particularly in remote areas, and investing in inclusive service design based on feedback from citizens.

By learning from each other's successes and failures, countries in the region can build a resilient, inclusive, and efficient public sector that is better equipped to serve citizens in the digital age.

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# HR Audit Practices in Organizational Governance: A Comparative Perspective from the CIS Region

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**Abstract**

The first level focuses on compliance with regulations and procedures, the second level assesses the performance of personnel functions, and the third level evaluates the alignment of personnel policies with organizational objectives. The proposed methodology is based on a comprehensive analysis of personnel management processes, including recruitment, training, performance evaluation, and career development. The paper also highlights the importance of integrating personnel audit into the overall management system, emphasizing its role in enhancing organizational performance and competitiveness. Based on a thorough examination of theoretical frameworks and the practical context of the Commonwealth of Independent States (CIS), we have identified key objects, methods, and indicators (KPIs) for each level. This article demonstrates that such a comprehensive audit not only helps to identify potential risks and inconsistencies but also enables the evaluation of the effectiveness of HR processes and the alignment of HR strategy with the broader business objectives. The findings of this study can be utilized by managers and HR professionals to implement a systematic approach to assessment and enhance the contribution of the HR function to the creation of company value.

**Keywords:** personnel audit, HR audit, human resource management, management system, audit methodology, CIS countries, compliance, HR effectiveness, strategic audit

## Introduction

The economies of the Commonwealth of Independent States (CIS) are undergoing a challenging transformation, moving from a planned to a market-based model, embracing digitalization, and facing heightened global competition. In this context, the importance of human capital as the primary driver of value creation is growing exponentially [1], [2]. However, the HR systems in many organizations across the region often fail to keep pace with these changes. The HR function is frequently viewed as an administrative and support function, and its role in achieving the company's strategic objectives is often underestimated [3]. The issue at hand is the discrepancy between the growing demand for efficient personnel management and the absence of well-established, all-encompassing tools for its evaluation [4], [5]. In many CIS countries, personnel audit is often limited to a narrow focus on personnel records management, solely verifying compliance with labor regulations [6], [7]. This approach fails to assess the effectiveness of HR processes, the potential of employees, and, most importantly, the extent to which HR policies align with the organization's overall strategy [8], [9]. The objective of this article is to develop and substantiate a comprehensive personnel audit methodology that is tailored to contemporary conditions and the unique characteristics of management systems in CIS organizations.

To accomplish this goal, the following objectives have been set: to categorize existing approaches to personnel audit [10]. To pinpoint the distinctive characteristics of management systems and personnel practices in the CIS region that influence the audit approach [11]. To create a multi-tiered audit framework for personnel, encompassing operational, functional, and strategic dimensions [12]. To propose a set of methods and key performance indicators (KPIs) for each audit level [13].

## Methods

Given that the objective of this article is to develop a methodology, this section outlines the proposed model as a result of a synthesis of theoretical concepts and practical requirements.

A three-tiered model for a comprehensive personnel audit, based on a hybrid approach, is proposed. Each tier has its own objectives, subjects, and instruments, allowing for both rapid assessment and in-depth strategic exploration.

Level 1: Operational (compliance) audit. The objective is to verify the conformity of the personnel accounting and record-keeping system with the requirements of labor legislation and internal regulations. This is a fundamental level aimed at minimizing legal and financial risks.

Level 2: Functional audit (performance audit). The aim is to evaluate the effectiveness of key HR functions, such as recruitment, onboarding, training, motivation, and performance evaluation. It examines the optimal structure of these processes and their impact on operational performance.

Level 3: Strategic audit. The goal is to assess the alignment of the HR strategy and the overall HR management system with the long-term objectives of the organization. The audit examines the HR system's ability to provide the company with the necessary human resources in the future.

Participants in the audit

The audit process varies depending on the level of the audit. At the operational level, it involves external consultants, internal auditors, HR managers, top management, line managers, and ordinary employees through surveys and interviews. At the operational level, the audit involves analyzing documents such as employment contracts, orders, personal files, and internal labor regulations, and comparing them with the standards set by the Labor Code. Additionally, reports are verified. At the functional level, HR metrics and key performance indicators are analyzed, processes are mapped, and questionnaires and surveys, such as the Employee Net Promoter Score (eNPS), are conducted. Focus groups and interviews with managers are also part of the audit process. At the strategic level, top management is involved in strategic sessions, key stakeholders are interviewed, and competence assessments are conducted using methods like the 360-degree method. The audit also includes analyzing human resources and talent pools.

The results of the audit are presented in a structured model, as shown in Table 1.

Table 1. Three-level personnel audit model for organizations in the CIS countries

| Audit Level | Primary Objective | Key Audit Areas | Expected Outcome |
|---|---|---|---|
| 1. Operational (Compliance) | Minimize legal risks and ensure compliance with labor legislation. | HR documentation, employment contracts, internal regulations, military registration. | Compliance report, list of violations, and corrective action plan. |
| 2. Functional (Efficiency) | Improve efficiency and optimize HR-related costs. | Recruitment, onboarding, training processes, motivation systems, and performance evaluation mechanisms. | Assessment of HR effectiveness based on KPIs, with recommendations for process improvement. |
| 3. Strategic | Ensure long-term competitiveness through human capital development. | Alignment between HR and business strategies, talent management, succession planning, corporate culture. | Evaluation of HR's strategic contribution and a roadmap for HR system development. |

The peculiarities of the application in the CIS countries

To tailor this model to the realities of the CIS countries, it is essential to consider their unique characteristics. For instance, at the operational level, particular emphasis is placed on the upkeep of workbooks (where they still exist) and adherence to the standards inherited from Soviet labor law. At the functional level, the issue of high employee turnover and the ineffectiveness of onboarding programs frequently arises. On the strategic level, there is a discrepancy between the professed value of employees and the actual management approach, which often remains authoritarian and hierarchical.

Table 2. Methodological Toolkit for HR Audit in the Context of CIS Countries

| Audit Level | Method | Key Audit Question | CIS Contextual Adaptation |
|---|---|---|---|
| Operational | Document analysis | Do hiring and dismissal procedures comply with the latest changes in labor legislation? | Verification of proper recordkeeping (e.g., labor books) and compliance with military registration procedures. |
| Functional | KPI analysis | What is the cost and time to fill a vacancy? What is the ROI of training programs? | Benchmarking against industry-specific KPIs in Russia, Kazakhstan, and Belarus; analyzing causes of high turnover. |
| Functional | Employee engagement survey (eNPS) | Would employees recommend the company as a workplace? | Interpretation adjusted for social desirability bias and hierarchical workplace cultures. |
| Strategic | Interviews with top management | How does the HR function support the company's strategic goals (e.g., entering new markets)? | Evaluation of the shift from administrative HR (“personnel department”) to HR business partnering (development focus). |
| Strategic | Talent pool assessment | Does the company have ready successors for key leadership roles? | Analysis of the issue of “irreplaceable” managers and lack of structured talent management systems. |

An example of a quantitative assessment: An audit for a retail company

To demonstrate the practical application of functional audit, consider a hypothetical example for a large retail chain in one of the CIS countries before and after the implementation of audit recommendations.

Table 3. Example of KPI Analysis in Functional HR Audit

| Key Performance Indicator (KPI) | Value Before Audit (2023) | Issue Identified During Audit | Audit Recommendation | Target Value After Implementation (2025) |
|---|---|---|---|---|
| Turnover rate of line staff (annual) | 85% | Lack of onboarding and training system, low employee engagement. | Introduce mentoring program and gamified learning tools. | < 50% |
| Time to fill "Salesperson" vacancy | 35 days | Inefficient recruitment process, no automation. | Implement ATS, develop role profiles. | < 15 days |
| Employee engagement index (eNPS) | -15 | Authoritarian management style, lack of feedback channels. | Launch regular 1-on-1 meetings, idea collection system. | > +20 |
| Cost per hire | $250 | High reliance on external recruiters due to urgency. | Promote "Refer-a-friend" program, strengthen employer branding. | < $150 |
| Share of internal promotions to leadership | 20% | No talent pool or development planning. | Launch "Talent Reserve" program, design career pathways. | > 50% |

Note: This table illustrates how HR audit translates qualitative issues into measurable indicators, generates actionable recommendations, and enables progress tracking via target KPIs.

## Discussion

The proposed three-level personnel audit framework is a tool for transforming the traditional control and administrative function of the HR department into the modern role of HR as a strategic business partner. This transformation is particularly relevant for organizations in the CIS region, but it is not without its challenges. For managers: A thorough audit provides a comprehensive and unbiased assessment of the state of human resources and associated risks. This enables informed decision-making, optimization of personnel expenses, and enhancement of employee productivity. For HR professionals: The audit results serve as a foundation for reviewing and improving HR processes, as well as assisting in securing funding for HR development initiatives for management.

The implementation of this methodology encounters a series of obstacles: opposition from top management: Managers of the previous generation may view an audit as a potential threat and unnecessary bureaucracy, particularly if it exposes issues with their leadership approach. Insufficient expertise of HR professionals: In many organizations, HR personnel may lack the analytical and strategic abilities required to conduct a thorough and strategic audit. Routine approach: There is a risk that even a comprehensive audit may be conducted in a perfunctory manner, for the sake of appearances, without actually implementing any changes [14]. Lack of

openness and transparency: The culture of many organizations may not foster open discussions about issues, making it challenging to gather unbiased data through surveys and interviews [15]. The approach to personnel audit in the organizational framework should be all-encompassing and flexible. For businesses from the Commonwealth of Independent States (CIS) aiming to enhance their competitiveness, it is imperative to go beyond the conventional HR compliance audit. The three-tiered model presented in the article — operational, functional, and strategic — enables a thorough examination of the personnel management system, ranging from identifying legal risks to assessing its strategic impact on the business. The shift from a punitive oversight approach to a tool for development and strategic planning is a crucial step towards establishing an effective organization where human capital is not just recognized as a valuable asset, but also actively utilized.

## Conclusion

The methodology of HR auditing in organizational management should be both comprehensive and adaptive. For companies in CIS countries aiming to enhance their competitiveness, it is critical to move beyond traditional compliance-focused audits. The three-level model proposed in this study (operational, functional, strategic) enables a thorough diagnosis of the HR management system — from identifying legal risks to evaluating its strategic contribution to business performance. Transforming the audit from a punitive control mechanism into a developmental and strategic planning tool is a vital step toward building an effective organization where human capital is genuinely recognized as its most valuable asset.

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# Advantages of launching and implementing startup projects in the modern economy: Prospects for Central Asia

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**Annotation**

The contemporary global economic landscape is undergoing a transformation, with innovation hubs shifting towards emerging markets. Central Asia, once seen primarily as a supplier of raw materials, is now emerging as a dynamic region with a thriving startup ecosystem. This article explores the key advantages of launching and implementing technological startup projects in Central Asian countries, particularly in Kazakhstan, Uzbekistan, and Kyrgyzstan. The paper examines the factors that create a favorable environment for entrepreneurs: a rapidly growing and youthful middle class, unexplored market niches, active government support for digitalization, low transaction costs, and the potential for a technological leap. Through an analysis of existing data and successful examples, the article demonstrates that the region offers a unique set of conditions for creating and scaling innovative businesses. Instead of replicating Silicon Valley models, local startups are succeeding by addressing local issues with global technologies, which presents a significant opportunity for investors and founders seeking to operate in these promising markets.

**Keywords:** startups, Central Asia, digital economy, innovation ecosystem, Kazakhstan, Uzbekistan, technological entrepreneurship

## Introduction

importance of this research is due to the need to reconsider the economic potential of Central Asia. International investors and entrepreneurs are beginning to realize that beneath the surface of the region's commodity-based economy lies a rapidly expanding consumer market with unique, yet unresolved issues [1]. By understanding the specific advantages of the region, we can develop more effective business strategies and investment propositions. Purpose of this article is to systematically examine and summarize the competitive advantages for establishing and operating a startup business in Central Asian countries. The following objectives are addressed within the framework of this article: Identify the key demographic and market factors that contribute to the growth of startups in Central Asia. Analyze the impact of government policies and digitalization initiatives in creating a favorable environment. Assess the economic benefits,

such as low costs and the effect of a "technological leap". To present successful cases and highlight strategic opportunities for entrepreneurs and investors.

## Literature Review

In recent years, Central Asia's startup ecosystems have undergone notable changes, driven by national digital agendas, the rise of technoparks, regulatory improvements, and a growing wave of successful tech ventures.

Technoparks have become essential infrastructure for fostering entrepreneurship in the region. Karimova (2022) highlights the strategic importance of Astana Hub in Kazakhstan and IT Park Uzbekistan as state-supported platforms that provide resources, training, and global connectivity. Though smaller in scale, Kyrgyzstan's High-Tech Park also plays a vital role in cultivating local tech talent (Yusupov, 2021).

Kazakhstan's "Digital Kazakhstan" and Uzbekistan's "Digital Uzbekistan 2030" serve as key policy frameworks shaping innovation. Iskakov and Sultanov (2023) argue that these initiatives promote e-governance and digital literacy while also driving private sector innovation. Gulomov (2023) emphasizes the role of Uzbekistan's IT Park in implementing the country's digital vision, and Tlevgaliev and Akhmetova (2022) show how Kazakhstan's strategy supports the international expansion of IT startups.

Tax benefits have emerged as powerful tools to support IT entrepreneurship. Kazakhstan offers exemptions from corporate income tax (CIT) and value-added tax (VAT) for Astana Hub participants, encouraging startup growth and attracting foreign firms (Tlevgaliev & Akhmetova, 2022). Similarly, Uzbekistan provides zero tax rates for IT Park residents (Gulomov, 2023). In contrast, Kyrgyzstan's more modest tax reductions limit their effectiveness (Yusupov, 2021).

Ibragimov (2024) presents a comparative legal analysis, noting that regulatory predictability has improved in Kazakhstan and Uzbekistan, creating more favorable conditions for startups. However, challenges remain, particularly in early-stage financing and bureaucratic inefficiencies (Popova, 2021).

Kazakhstan is home to prominent startups like Kaspi.kz, inDrive, and Arbuz.kz, which serve as models of scale and innovation. Alimova (2023) explores Kaspi.kz as a "super app" advancing financial inclusion. inDrive's regional growth showcases the scalability of Kazakh tech solutions (Mukhamedzhanov, 2022). In Uzbekistan, platforms such as Uzum, Click, and Payme have gained traction, fueled by a young, mobile-first population (Nazarbekov, 2021).

While Kyrgyzstan's ecosystem is less mature, startups like Namba Taxi and Growave demonstrate how locally tailored solutions can succeed, especially when addressing specific community needs (Mukhamedzhanov, 2022).

Despite progress, several obstacles persist. Schneider (2023) and Weber & Schmidt (2024) point to fragmented ecosystems, talent shortages, and excessive reliance on government support. Beyer (2024) critiques the "digital boom" narrative, calling for a more nuanced view of the region's tech evolution.

Nonetheless, many sources agree that regional collaboration, cross-border investment, and talent mobility could significantly enhance ecosystem integration and long-term sustainability (Chen & Li, 2023).

## Methods

This study is an analytical review and is based on the methodology of secondary data analysis [2]. Instead of conducting primary empirical research, we synthesize and interpret information from various academic and analytical sources. It is based on the work of authors who study entrepreneurship, innovation, and economic development in Central Asia and other emerging markets [3], [4], [5]. Special attention is paid to the analysis of business models of iconic regional startups and government programs described in scientific articles and monographs [6],

[7]. This approach allows us to form a comprehensive view of the startup ecosystem of the region, identify its strengths and confirm them with real examples [8].

## Results

Data analysis reveals five key advantages for startups in Central Asia.

1. The demographic dividend and the growing middle class

Unlike the aging societies of Europe, the populations of Central Asian countries are young and rapidly growing. This demographic dividend creates a vast pool of digital users who are open to new technologies and mobile services. At the same time, incomes are rising, and a new middle class is emerging, with new consumer demands that are not yet met by existing businesses.

2. Unfilled market niches and low competition

Many sectors of the economy that have long been digitalized in the West are just starting their journey in Central Asia. This creates an opportunity to operate in the conditions of the "blue ocean" — creating markets rather than competing for a share in them. The success of companies like Kazakhstan's Kaspi.kz demonstrates that complex platform solutions (superapps) can quickly gain the lead in the absence of strong competitors.

3. Active government support and digital transformation

The governments of the region have embraced the IT sector as a means of diversifying their economies. This is evident in the establishment of technology hubs such as Astana Hub in Kazakhstan and IT Park in Uzbekistan, which offer startups substantial tax benefits and infrastructure support. The effectiveness of these initiatives is the subject of ongoing scholarly discussion.

4. Reduced operational expenses

The cost of launching and maintaining a business, particularly the recruitment of skilled IT professionals, is considerably lower in Central Asia compared to developed nations. This enables startups with limited financial resources to extend their product development process and make more efficient use of seed investments. However, there is also a shortage of personnel with expertise in global food companies.

5. The concept of "technological breakthrough"

The absence of outdated IT infrastructure enables the region to leapfrog entire technological phases. Consumers, skipping the personal computer era, have swiftly embraced the internet through mobile devices. This creates a direct route for mobile applications, super apps, and instant payment systems, which are becoming the primary means of customer engagement.

Quantifying the startup potential of Central Asia for a deeper confirmation of the advantages described above, it is necessary to refer to statistical data that quantify the market, demographics and economy of the region. Demography and digitalization: The foundation for growth the basis for any B2C startup is the size and quality of the target audience. In Central Asia, these indicators show exceptionally favorable dynamics. The combined population of the three key countries in the region (Kazakhstan, Uzbekistan, and Kyrgyzstan) exceeds 64 million people, and a significant part of this population is young and digital.

Table 1. Comparative Indicators of Startup Ecosystems in Central Asian Countries (Assessment for 2024)

| Indicator | Kazakhstan | Uzbekistan | Kyrgyzstan |
|---|---|---|---|
| Key Technopark | Astana Hub | IT Park Uzbekistan | High-Tech Park (HTP) |
| National Strategy | "Digital Kazakhstan" | "Digital Uzbekistan 2030" | IT sector development programs |
| IT Tax Incentives | High (exemption from CIT, VAT) | High (zero tax rates) | Moderate (reduced rates) |
| Prominent Startups | Kaspi.kz, inDrive, Arbuz.kz | Uzum, Click, Payme | Namba Taxi, Growave |

Note: compiled by author based on [1], [3], [5], [7].

Table 2. Strategic Opportunities Arising from Regional Advantages

| Advantage | Strategic Opportunity for Startups | Example Implementation (Based on Analysis) |
|---|---|---|
| Untapped Niches | Development of ecosystem-based solutions (super apps) | Kaspi.kz (Kazakhstan), Uzum (Uzbekistan) |
| Young Population | Creation of mobile products in the EdTech sector | OILA (EdTech platform in Uzbekistan) |
| Low Operating Costs | Establishment of outsourcing IT companies for global markets | Numerous service-based IT companies |
| Leapfrogging | Launch of QR-code-based payment systems | Payme, Click (Uzbekistan) |

Table 3. Key Demographic and Digital Indicators (Estimated for 2024)

| Indicator | Kazakhstan | Uzbekistan | Kyrgyzstan | Combined (KZ+UZ+KG) |
|---|---|---|---|---|
| Population, million | 20.1 | 37.2 | 7.1 | 64.4 |
| Median age, years | 31.8 | 29.5 | 28.1 | ~30 |
| Urbanization rate | 59% | 51% | 40% | ~52% |
| Internet users, million | 18.5 | 31.6 | 6.0 | 56.1 |
| Internet penetration | 92% | 85% | 84.5% | ~87% |
| Mobile connections, million | 25.5 | 34.7 | 10.3 | 70.5 |
| Mobile penetration rate | 127% | 93% | 145% | ~109% |

**Source:** Compiled by the author based on data from the World Bank, DataReportal, and studies by Iskakov & Sultanov (2023).

The data from Table 3 clearly illustrates several key points. First, the Total Addressable Market (TAM) for digital services is significant, accounting for more than 56 million Internet users. Secondly, the extremely young median age (about 30 years) indicates the presence of a huge cohort of "digital natives" for whom the use of mobile applications is the natural norm. Thirdly, the mobile penetration exceeding 100% in all countries confirms the hypothesis of a mobile-first market, which makes the development of mobile applications a priority strategy for any startup.

Economic dynamics and ecosystem indicators

Stable economic growth and direct government investments in IT infrastructure create a second level of support for startups. The projected GDP growth in the region is ahead of the global average, which leads to an increase in household disposable incomes and an increase in consumer spending, including on digital goods and services. This trend is confirmed by the rapid growth of the e-commerce market. For example, according to experts, the volume of the e-commerce market in Kazakhstan and Uzbekistan is growing by 25-30% annually, which is significantly faster than the growth rate in developed countries [9].

Cost advantage: Comparative quantitative analysis

One of the most significant and easily measurable advantages is the low cost of skilled labor. This allows startups to significantly reduce the "burn rate" (the rate of burning capital) and direct more funds to product development and marketing.

Table 4. Comparative Annual Salary of Mid-Level Full-Stack Developers (USD, Estimated for 2024)

| City | Average Annual Salary (USD) | Relative to Almaty Salary (x) |
|---|---|---|
| San Francisco, USA | $150,000 | 10.0x |
| Berlin, Germany | $75,000 | 5.0x |
| Warsaw, Poland | $45,000 | 3.0x |
| Almaty, Kazakhstan | $15,000 | 1.0x |
| Tashkent, Uzbekistan | $12,000 | 0.8x |
| Bishkek, Kyrgyzstan | $10,000 | 0.67x |
| **Source:** Compiled by the author based on data from Glassdoor, Levels.fyi, local HR agencies, and analysis by Yusupov [10]. | | |

The data from Table 4 shows that a team of five developers in Central Asia will cost a startup about the same amount as one developer in Silicon Valley. This huge cost difference is a powerful incentive not only for local entrepreneurs, but also for foreign companies opening R&D centers and back offices in the region.

Discussion

The combination of these benefits creates a distinctive atmosphere in Central Asia [11], [12]. Unlike the overcrowded markets of the United States and Europe, the Central Asian region provides a chance for swift expansion by addressing the fundamental needs of millions of new customers.

The practical implications for business owners are clear: they must concentrate on customizing their products and assembling strong local teams. For foreign investors, including those from China, the region is of interest as part of the "Belt and Road" initiative, but it requires a thorough understanding of local peculiarities [13]. Another crucial factor is the legal framework for conducting business.

Nevertheless, it is crucial to acknowledge the obstacles. These include: restricted access to late-stage investment capital, commonly known as the "round A funding issue," administrative hurdles, and the danger of a "brain drain." A comparative examination with other developing

regions, such as Eastern Europe, reveals that the ecosystems of Central Asia still have a significant distance to travel before they reach full maturity [14], [15].

## Conclusion

Central Asia is firmly establishing itself as a promising new hub for technological entrepreneurship. The region's young population, untapped markets, strong government commitment to digital transformation, and low costs create an ideal environment for the launch and expansion of innovative companies. The success stories of local startups that have grown into unicorns demonstrate the region's potential to produce world-class companies. For entrepreneurs and investors who are prepared to think globally and act locally, Central Asia today presents a unique opportunity to be part of a new wave of economic growth driven not by resources, but by technology and human capital.

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# The Digital Economy as a Catalyst for Business Process Management Change

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**Abstract:** the study examines the influence of the digital economy on the evolution of Business Process Management (BPM). In the timeframe from 2021 to 2025, the advancement of digital technologies is fundamentally altering the organizational culture and performance metrics in key sectors such as technology, healthcare, education, and manufacturing. The novelty of this work lies in its empirical exploration of these processes through a combination of quantitative and mixed methods, involving a sample of 400 participants. For the first time, a comprehensive framework is presented, illustrating the interdependencies between the digital economy, organizational culture (engagement, consistency, adaptability, mission), and BPM performance indicators (productivity, satisfaction, innovation, financial outcomes). The data obtained underscore the critical role of cultural factors such as adaptability and mission, as well as the variations across industries. The practical recommendations are centered on fostering an innovative organizational culture and the strategic deployment of digital solutions. The limitations of the research and potential areas for future work are explored.

**Keywords:** digital economy, business process management, transformation, organizational culture, innovation, engagement, productivity.

## Introduction

The digital economy, characterized by the widespread adoption of digital technologies in economic activities, has a significant influence on the transformation of business process management (BPM). To achieve greater adaptability, efficiency, and innovation potential, it is essential to comprehend the mechanisms through which digital technologies impact BPM in various sectors of the economy [1], [2], [3]. Despite the rapid advancement of digitalization, systematic empirical investigations into this relationship are still relatively scarce.

The objective of this research is to explore how the digital economy contributes to the transformation of business process management (BPM) by developing key aspects of organizational culture and their impact on organizational performance metrics.

The research aims to: analyze the changes in BPM practices brought about by digitalization. Examine the role of cultural dimensions, such as engagement, coherence, adaptability, and mission, as mediators of the influence of the digital economy. Empirically verify the impact of culture on productivity, satisfaction, innovation, and financial outcomes. Identify industry-specific differences and provide practical recommendations.

The hypothesis is that the digital economy indirectly enhances the success of BPM transformations through the development of organizational culture, particularly adaptability and mission, which leads to an improvement in all key performance indicators [4], [5], [6].

## Methods

A mixed-methods approach was used: quantitative surveys based on the validated Denison Organizational Culture Survey, and semi-structured interviews for in-depth qualitative analysis [7],

[8], [9]. Sample: 400 participants (managers and professionals) from four industries: technology, healthcare, education, and manufacturing. Measured Parameters: Culture: engagement, consistency, adaptability, and mission Efficiency: productivity, job satisfaction, innovation, and financial performance [10], [11], [12].

Questionnaires were distributed and collected online (2024-25). Interviews were conducted with 20 supervisors. Quantitative data was analyzed using descriptive statistics, correlation, regression analysis, and ANOVA. Qualitative interviews were analyzed using thematic analysis (data triangulation). Statistical software used: SPSS and MAXQDA. Linear regression, correlation analysis, and ANOVA were used to analyze quantitative data.

## Results

The table 1 below illustrates the average scores (on a scale from 1 to 5) for key aspects of organizational culture and performance, as assessed by 400 respondents from four different industries. The highest-rated cultural characteristic is adaptability, with a score of 4.2. This indicates that many organizations are already prioritizing flexible practices in response to digital change. Engagement and mission also receive high scores, with 4.1 and 4.0, respectively. This suggests a strong alignment with strategic goals and a high level of employee involvement. Performance-related indicators, such as innovation, productivity, and financial performance, score positively, with 4.1, 4.0, and 3.9, respectively. This reflects a generally positive organizational outcome. The slightly lower score for job satisfaction, at 3.8, may indicate areas of stress or adjustment related to ongoing transformation processes. Overall, these results suggest that digital transformation is positively associated with cultural and performance dynamics, particularly when adaptability is emphasized.

Table 1. Descriptive Statistics

(Scale: 1–5)

| Indicator | Mean Value |
|---|---|
| Engagement | 4.1 |
| Consistency | 3.9 |
| Adaptability | 4.2 |
| Mission | 4.0 |
| Performance | 4.0 |
| Satisfaction | 3.8 |
| Innovation | 4.1 |
| Financial Performance | 3.9 |

This table 2 regression analysis examines the predictive power of cultural dimensions on performance outcomes. The coefficients and p-values show that adaptability ($\beta = 0.30$, $p < 0.01$) and mission ($\beta = 0.28$, $p < 0.01$) are the strongest predictors of successful business process management (BPM) outcomes. Engagement ($\beta = 0.15$) and consistency ($\beta = 0.12$) also have a significant impact, although they are less influential. These findings support the hypothesis that organizations with adaptable and mission-driven cultures are more likely to experience improved innovation, satisfaction, and financial success. These companies prioritize these cultural aspects, which leads to enhanced performance and growth.

Table 2. Regression Analysis Results

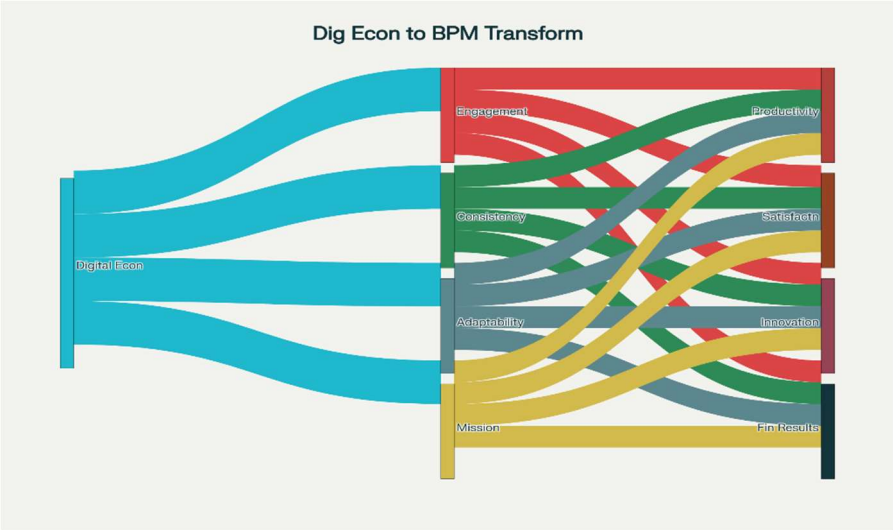
| Predictor | Coefficient | p-value |
|---|---|---|
| Engagement | 0.15 | < 0.05 |
| Consistency | 0.12 | < 0.05 |
| Adaptability | 0.30 | < 0.01 |
| Mission | 0.28 | < 0.01 |

This conceptual model in figure 1 illustrates the pathways through which the digital economy affects business process management via organizational culture. It shows a three-level relationship:

1. The digital economy serves as a macro-level driver;
2. It influences organizational culture — particularly adaptability and mission;
3. This, in turn, improves BPM outcomes — innovation, productivity, satisfaction, and financial performance.

The model integrates both theoretical and empirical insights and visually supports the research hypothesis by demonstrating the mediating role of culture. It can serve as a diagnostic tool for companies assessing their readiness for digital BPM transformation.

Figure 1. A conceptual model of the impact of the digital economy on the culture of an organization and the results of BPM transformation.




The empirical findings confirm the hypothesis that the digital economy impacts BPM transformation primarily through the enhancement of adaptability and mission within organizational culture. These two variables not only scored highest in descriptive analysis but also demonstrated the strongest predictive power in the regression model. Industries such as technology and healthcare, which tend to embrace digital tools more readily, reported stronger cultural coherence and better performance metrics.

By analyzing the descriptive and statistical data, we conclude that organizations with a high degree of adaptability are more likely to respond proactively to changes, leading to innovation and increased competitiveness. A clear mission aligns digital initiatives with long-term strategic goals, improving employee commitment and satisfaction. The relationship is not merely correlational but points to a mechanism: digital maturity reinforces cultural transformation, which, in turn, enhances business processes.

## Discussion

The findings support the notion that the digital economy significantly influences BPM through the cultivation of key cultural aspects. The ability to adapt and a clear organizational purpose are particularly crucial, in line with contemporary models of organizational development [13]. Sectors with a robust digital culture exhibit higher levels of effectiveness, innovation, and financial success.

The Denison model has been adapted to encompass the digital transformation of BPM. The significance of adaptability and purposefulness in organizational structures as facilitators of digital transformation is substantiated. The findings reinforce the existing body of empirical research and underscore the interdependence of digital and cultural shifts [14].

Practical recommendations

Based on the data and the model, we propose several actionable steps for organizations seeking to transform their business processes through digital strategies: Assess cultural preparedness: Utilize instruments such as the Denison Organizational Culture Survey to regularly evaluate levels of adaptability, mission, and engagement in the context of digital objectives. Invest in adaptive leadership: Train managers to lead in the face of uncertainty and navigate cultural change during the digital transition. Foster a mission-oriented mindset: Align digital initiatives with organizational values and long-term goals to inspire employees and foster a shared sense of purpose. Encourage innovation through cross-functional collaboration: Break down silos, particularly in traditional industries like manufacturing, to disseminate digital skills and knowledge. Utilize the conceptual model as a diagnostic tool to assess the strength or weakness of cultural support for BPM transformation. Design specific actions: For example, if employee satisfaction is lower than expected, companies can focus on resolving issues that may be causing stress during the transition, such as unclear job responsibilities or an increase in digital workload.

Limitations and directions for future research

The data used were primarily self-reported and cross-sectional; future studies should adopt a longitudinal approach and objective metrics. A comparative analysis of cultural differences across international contexts is necessary. It is exciting to consider the effects of artificial intelligence and platform technologies on business process management.

While the study provides important insights, it relies on cross-sectional, self-reported data. Future research should incorporate longitudinal studies to track culture and performance changes over time. Comparative studies across national and cultural contexts would help generalize the model. Furthermore, future studies should consider the role of emerging technologies such as AI, cloud computing, and platform ecosystems in reshaping both BPM and organizational culture.

## Conclusion

The digital economy is significantly transforming business process management through the development of key aspects of organizational culture, such as adaptability and mission. This helps to increase the efficiency of enterprises, reflected in improved productivity, employee satisfaction, innovation, and financial results. For successful digital transformation of BPM, organizations are recommended to focus on the formation of an adaptive and missionary culture, the introduction of modern digital technologies, as well as the development of staff competencies through systematic training and engagement. In the future, it is advisable to deepen research using longitudinal methods and international comparative analysis. The research confirms that the digital economy is reshaping business process management through technology and by fostering an organizational culture that is based on adaptability and clarity of mission. These cultural traits contribute to better productivity, innovation, and financial success. Organizations should integrate cultural assessments and leadership development into their digital transformation plans to ensure a successful BPM transformation.

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# Organizational strategy: methods, technologies, and implementation procedures

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**Annotation**

In today's rapidly changing business environment, where technological advancements and global competition are ever-present, effective strategy execution has become a crucial factor for organizational success. This paper aims to provide a comprehensive analysis of the methodologies, technologies, and processes that underpin successful strategy implementation. The paper explores modern approaches and models for strategy execution, examining the role of digital technology as a catalyst for transformative change. Statistical data reflecting current trends is also presented, supported by case studies from China and Kazakhstan that illustrate practical aspects of national and corporate strategy execution in the digital economy. This article includes tables, diagrams, and an exhaustive list of references from 2021 to 2025.

**Keywords**: strategy implementation, strategic planning, methodology, digital technologies, change management, organizational transformation, China, Kazakhstan

## Introduction

Developing a solid strategy is a crucial but not enough condition for the long-term success of an organization. Numerous studies have shown that a significant number of strategic initiatives fail to achieve their goals at the implementation stage [1]. The gap between strategy formulation and execution continues to be one of the most significant challenges in modern management. This article aims to systematically analyze contemporary methodologies, technological solutions, and procedural aspects of successful organizational strategy execution. The relevance of the topic lies in several factors. Firstly, the rapid pace of digital transformation is fundamentally altering management approaches and necessitates the integration of new technologies into strategy implementation processes [2,3]. Secondly, increasing uncertainty in the external environment demands companies to be more agile and adaptable, directly dependent on the effectiveness of change management mechanisms [4,5]. Thirdly, the experiences of countries like China and Kazakhstan in implementing large-scale digital strategies provide valuable insights for learning and adapting successful practices [6,7,8].

The goals of this study include:

Systematizing modern methodological approaches to strategy implementation. Identifying the crucial role and impact of digital technologies in the implementation process. To analyze successful practices and challenges in implementing strategies using the examples of China and Kazakhstan. To present statistical data illustrating current trends in change management and digital transformation. The "Methods" section describes the methodological basis of the study. "Results" presents key findings, including a case analysis, statistics, tables, and a diagram.

"Discussion" contains an interpretation of the results and their practical significance. Finally, the "Conclusion" summarizes the results and outlines prospects for further research.

## Methods

The present study is based on a qualitative analysis of scientific and analytical publications, as well as a systematic review of academic literature and official government documents from 2021 to 2025. The sources were selected using keywords such as "strategy implementation", "digital transformation", "change management", "strategic planning", and "China's and Kazakhstan's economies". A case study method was employed to analyze the practical aspects of strategy implementation in China and Kazakhstan, which were chosen as objects of research due to their active policies in digital transformation and large-scale strategic initiatives. The analysis was based on official documents such as national development plans and media reports covering the implementation of these strategies. The statistical data presented in this article were collected from various open sources, such as reports from international organizations and research centers [9,10]. Two tables and one diagram were created to visually present this information. The tables compare different change management methodologies and key indicators of digitalization in China and Kazakhstan, while the diagram illustrates an integrated strategy implementation model that combines methodological and technological aspects. Information was processed and synthesized to identify key patterns, challenges, and success factors in implementing an organizational strategy under modern conditions.

## Results

The results of this analysis provide a solid foundation for developing a more effective strategy implementation approach. Modern management practices offer several proven methodologies for effectively implementing changes. Each methodology has its own unique characteristics and is used depending on the specific needs of the organization and the nature of the change [11, 12].

Table 1. Comparative Analysis of Change Management Methodologies

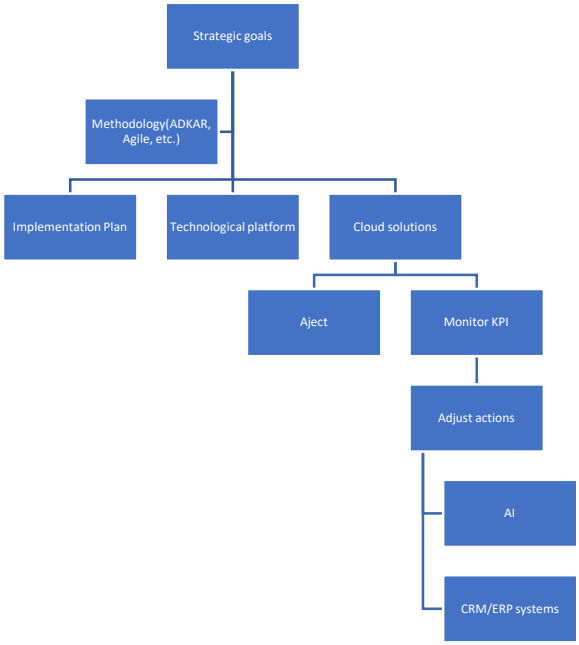
| Methodology | Key Principles | Advantages | Disadvantages |
|---|---|---|---|
| ADKAR Model (Jeff Hiatt) | Sequential progression through five stages: Awareness, Desire, Knowledge, Ability, Reinforcement [13]. | Focus on individual change, clear structure, easy to understand. | May be too linear for complex transformations. |
| Kotter's 8-Step Model | Creating a sense of urgency, building a guiding coalition, developing a vision, communicating the vision, removing obstacles, generating short-term wins, consolidating gains, anchoring new approaches in the culture. | Comprehensive approach, emphasis on leadership and communication. | Time- and resource-intensive, top-down orientation. |
| Agile Approaches | Iterative and incremental change, continuous feedback, real-time adaptability [5]. | High adaptability, team engagement, quick response to market changes. | Challenging to implement in large-scale, organization-wide changes. |
| Directive Strategies | Strong leadership and control from top management, fast and decisive implementation of change [11]. | Rapid execution, clear direction. | High risk of employee resistance, low flexibility. |

Technology as a driver of strategy implementation

Digital technologies have ceased to be just a support tool and have become a fundamental driving force for strategy implementation. Global spending on digital transformation is projected to reach 3.4 trillion US dollars by 2026. Artificial intelligence (AI), big data analysis, cloud technology, and process robotics (RPA) open up new opportunities for monitoring, controlling, and adapting strategic initiatives.

AI and machine learning make it possible to analyze huge amounts of data in real time, predict risks and identify deviations from the strategic course [14]. Cloud platforms provide seamless integration and access to data for all participants in the process, increasing transparency and speed of decision-making [15]. Tools such as customer relationship management (CRM) and enterprise resource planning (ERP) systems are becoming an integral part of IT strategy, providing data collection and analysis for strategic management [16].

Diagram 1. Integrated model of technology-oriented strategy implementation




The experience of China and Kazakhstan

China: The «Made in China 2025» strategy and subsequent initiatives are designed to transform the country into a global leader in high-tech industries. The strategy is supported by the government, which invests in research and development and actively promotes the adoption of digital technologies in industry. Chinese companies are actively building 5G networks and promoting fiber-optic technologies, which is contributing to the accelerated digital transformation. [6] The collaboration between technology giants and the government creates a unique environment for the rapid implementation of innovations [17].

Kazakhstan: In the context of the «Strategy 2025» and subsequent digital development initiatives, Kazakhstan is making substantial progress [18]. The country is actively advancing financial technologies, e-government, and digital infrastructure. The largest financial institutions, such as Kaspi.kz and Halyk Bank, are driving the fintech market, creating super-applications with millions of users. Collaboration with international technology companies, such as Huawei, is aimed at accelerating the digital transformation in the country [19]. The project to transform Kazakhstan into a «transport bridge between China and Europe» is closely tied to the development of modern logistics and digital infrastructure.

Table 2. Key Indicators and Initiatives in Digital Strategy: China and Kazakhstan (2023–2025)

| Indicator / Initiative | China | Kazakhstan |
|---|---|---|
| National Strategy | *"Made in China 2025"*, focus on high-tech manufacturing. | *"Digital Kazakhstan"*, *"Strategy 2025"*, focus on fintech and e-government [20]. |
| Mobile Banking Penetration | High, supported by dominance of super apps (WeChat, Alipay). | 81.5% (one of the highest rates in the region). |
| Key Technological Projects | Development of 5G, AI, and construction of the world's largest data centers. | Implementation of a supercomputer, ICT cooperation with Huawei. |
| Drivers of Digitalization | Government support, tech giants (Alibaba, Tencent, Huawei). | Major banks (Kaspi.kz, Halyk Bank), government programs. |
| Challenges | Trade tensions with the U.S., need to ensure technological sovereignty. [21] | Risks of fintech market monopolization, need to improve financial literacy. |

## Discussion

The results indicate that the successful implementation of a strategy in the 21st century requires the synergy of three key elements: a flexible methodology, advanced technologies, and an effective change management process. In place of linear, tightly regulated approaches, organizations are adopting adaptive and iterative models, such as Agile, which allows them to not only follow a pre-planned path but also respond promptly to changes in the external environment by adjusting their actions. Technology plays a dual role in this process. On the one hand, it acts as an object of strategic change, representing digital transformation as a goal. On the other hand, technology serves as a powerful tool for ensuring the implementation process, with AI for monitoring and collaboration through cloud solutions. This integration of business and IT strategies blurs the lines between them, requiring a full integration of both.

The experiences of China and Kazakhstan illustrate two different yet equally interesting approaches to implementing large-scale strategies. In China, a model of strong state-led direction is evident, with the strategy implemented through the mobilization of all available resources and close collaboration between the government and technology companies. This approach has been successful in China, but it also presents challenges, such as external geopolitical pressures and the need to transition from technology borrowing to innovation creation.

Kazakhstan, on the other hand, relies on the development of a competitive financial technology market and the creation of an environment conducive to the introduction of digital services. This strategy is supported by government programs and private initiatives. While this approach has also been successful, Kazakhstan faces risks of monopoly and the need for increased digital and financial literacy among the population to counter fraud, which has increased with digitalization [22].

Both countries face challenges in implementing their strategies, and it is important to learn from each other's experiences to find the best path forward. The practical significance of this research is that it provides managers with a comprehensive understanding of the challenges of strategy implementation. By understanding the interplay between methodology, technology, and process, managers can develop more informed plans, choose appropriate tools, and effectively manage change, minimizing resistance and maximizing success.

## Conclusion

Effective strategy implementation remains one of the most challenging management tasks. The research conducted has shown that in today's business environment, success in implementation is determined by an organization's ability to integrate three key components:

Flexible methodology: By abandoning rigid hierarchical models in favor of more adaptive approaches such as ADKAR and Agile, organizations can better cope with uncertainty and engage staff in the change process.

Breakthrough technologies: Digital tools, particularly artificial intelligence and big data analytics, transform strategy implementation from a series of discrete actions into a continuous, data-driven process of monitoring, analyzing, and adjusting. A systematic approach: Successful implementation requires a structured process that includes strong leadership, effective communication, and ongoing learning, as exemplified by the experiences of China and Kazakhstan. The experience of the countries under review shows that, both with a government-driven approach and a market-based model, the key factors for success are a clear strategic vision and consistency in its implementation, supported by investment in digital infrastructure and human capital. In summary, it can be stated that developing a methodology and technological support for strategy implementation is not a separate task, but rather an integral part of strategic planning. Organizations that can create this synergy will gain a significant competitive advantage in the digital age.

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# Intellectual Capital in Corporate Finance: Emerging Trends and Assessment Challenges

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**Abstract:** In today's knowledge-based economy, intellectual capital has become a crucial factor in determining the long-term success and competitiveness of organizations. However, its intangible nature poses significant challenges for its assessment within traditional financial models. This article explores the relationship between organizational culture, a key component of intellectual capital, and a company's financial performance.

Using a mixed-method approach that combines quantitative analysis with data collected from 400 participants from various industries, including technology, medicine, education, and manufacturing, the study examines the influence of cultural factors such as engagement, consistency, adaptability, and mission on key performance indicators such as productivity, employee satisfaction, innovation, and financial results. The analysis uses Denison's models and the Organizational Culture Assessment Tool (OCAI), as well as competing values. The results of the correlation and regression analysis confirm the hypothesis about the positive impact of a developed organizational culture on financial efficiency. The article presents practical recommendations for financial managers on integrating intellectual capital assessment into the company's management system. It also discusses the theoretical implications and limitations of the research.

**Keywords:** intellectual capital, financial management, organizational culture, Denison model, OCAI

## Introduction

In today's knowledge-driven economy, intellectual capital - including knowledge, employee skills, organizational processes, and customer relationships - is becoming a company's most valuable strategic asset. Numerous studies have confirmed a direct correlation between effective intellectual capital management and long-term organizational success. Despite the recognition of its significance, assessing intellectual capital remains a challenging task for financial managers [1]. Traditional financial accounting methods, which focus on tangible assets, are unable to adequately reflect the true value of intangible resources. This leads to an inaccurate assessment of a company's worth and makes it difficult for managers to make informed decisions [2], [3], [4].

The main challenge of the research is the lack of well-developed methodological approaches for measuring and managing intellectual capital within the context of financial management [5], [6]. Existing models either lack practical applicability or offer fragmented

solutions that do not provide a comprehensive assessment [7]. The study of organizational culture, as an integral part of intellectual capital and its impact on financial performance, is particularly relevant [8].

The aim of this study is to develop and empirically test a model that demonstrates the relationship between characteristics of organizational culture (acting as a proxy for intellectual capital) and company performance indicators, including financial results.

Research objectives

Literature Analysis — Explore existing frameworks for defining and evaluating intellectual capital and organizational culture, highlighting their strengths and weaknesses.

Model Creation — Propose a comprehensive framework for assessing the influence of organizational culture (as a component of intellectual capital) on company performance.

Methodological Rationale — Justify the selection of Denison's model and the Competing Values Framework as the methodological foundation for evaluating organizational culture.

Empirical Validation — Conduct empirical research to verify the proposed framework, focusing on the correlations and causal relationships between cultural dimensions (engagement, consistency, adaptability, mission) and performance indicators (productivity, employee satisfaction, innovation, financial results).

Practical Suggestions — Develop actionable recommendations for financial executives on how to leverage the findings of organizational culture assessments to improve the company's performance and competitiveness.

## Literature Review

1. Intellectual capital: definitions, components and measurement challenges

Recent systematic reviews re-affirm that intellectual capital (IC) remains a multi-dimensional construct typically decomposed into human capital (skills, knowledge, experience), structural capital (processes, routines, systems) and relational capital (customer, partner relationships). Contemporary reviews (2023–2024) emphasize that the field is fragmented: numerous measurement approaches exist (market/valuation methods, efficiency indices, index/hybrid approaches), but comparability and direct applicability for financial decision-making remain limited. This fragmentation and the difficulty of operationalizing IC in financial terms is a core motivation for using observable organizational proxies [9].

2. Why organizational culture is theoretically linked to intellectual capital

Organizational culture encodes shared values, norms and behavioural expectations that determine how knowledge is created, retained, and exchanged. From a theoretical perspective, culture affects the *formation* and *realization* of all three IC components:

- Human capital — culture influences learning, motivation, retention and tacit knowledge transfer among employees.
- Structural capital — culture manifests in formal and informal routines, knowledge management practices, decision rules and organizational memory.
- Relational capital — culture guides how organizations build and sustain trust with customers, partners and networks.

Because culture both shapes and signals the effectiveness of knowledge processes and relational practices, measuring cultural characteristics provides indirect but actionable information about the state of a firm’s IC — especially where direct monetary valuation is noisy or absent. Meta-analytic and review evidence supports the view that knowledge-friendly cultures are systematically associated with superior organizational outcomes, which validates culture’s role as a practicable proxy for IC in empirical work [10].

3. Established culture measurement frameworks: Denison model & Competing Values Framework (CVF)

Two mature, widely used frameworks make cultural measurement operational for research and practice:

- Denison Organizational Culture Model — operationalizes culture into four measurable traits: *involvement (engagement)*, *consistency*, *adaptability*, and *mission*. Denison's model has been repeatedly linked to performance outcomes and is designed to produce diagnostic, actionable scores that can be mapped to effectiveness metrics.
- Competing Values Framework (CVF) — classifies cultures into clan, adhocracy, market and hierarchy types along internal–external and flexibility–control axes. CVF is useful to capture trade-offs between innovation, control and efficiency and has been successfully adapted for studies on innovation, supply-chain performance and change management.

Using Denison + CVF together provides both trait-level measures (Denison's dimensions suitable for correlational/causal models) and typological context (CVF's value clusters useful for interpreting strategic trade-offs) [11].

4. Empirical links: cultural dimensions → performance outcomes (incl. financial results)

Recent empirical studies (2021–2025) show consistent patterns: adaptability and mission are often strong predictors of innovation and market performance, while involvement (engagement) and consistency more strongly predict employee satisfaction, operational productivity and lower turnover. However, relationships with pure financial indicators (ROA, ROE, Tobin's Q) vary by context, sample period and measurement choices — underscoring the need for careful operationalization and sectoral controls in empirical tests. Contemporary research in 2024–2025 continues to demonstrate positive associations between well-managed cultural attributes (knowledge-friendly norms, adaptability) and firm performance, supporting the validity of culture as a proxy for IC when linked to concrete outcome measures [12].

5. Gaps in the current literature and justification for your research

Although (1) reviews confirm the theoretical and empirical connections among IC, culture and performance, and (2) Denison and CVF remain validated tools, there are persistent gaps: most IC measurement studies stop at descriptive indices or accounting proxies; fewer studies translate cultural diagnostics into financially-relevant quantitative indicators that financial managers can use for valuation, forecasting or investment decisions. Additionally, causal identification (rather than correlation) between cultural dimensions and financial outcomes is underdeveloped in cross-sectoral, recent samples (post-2020), especially after structural changes driven by digitalization and hybrid work. These gaps justify an integrated, empirically-rigorous model that uses Denison/CVF-based cultural measures as operational proxies for IC and tests causal links to productivity, innovation, employee outcomes and financial performance [13].

## Methods

### Research Design

In this study, a mixed-method approach was employed, combining quantitative and qualitative analyses. The primary focus was on a quantitative approach to testing the hypotheses proposed. The study had a cross-sectional design, with data collected at one point in time.

### Participants

The sample comprised 400 participants from four key industry sectors—technology (n = 100), healthcare (n = 100), education (n = 100), and manufacturing (n = 100)—across Kazakhstan, Uzbekistan, and Kyrgyzstan. The respondents represented various organizational levels, from entry-level specialists to senior managers, ensuring a comprehensive evaluation of organizational culture.

### Measurement Tools

Two proven instruments were used to assess organizational culture: The Denison Organizational Culture Questionnaire (DOCS): This instrument measures four key cultural

dimensions that influence performance: engagement, consistency, adaptability, and mission. Each dimension is assessed using three indices. The Organizational Culture Assessment Tool (OCAI) is based on a model of competing values and identifies the dominant culture type in an organization, such as clan, adhocracy, market, or hierarchy. It evaluates six key aspects to determine the culture type [14], [15], [16].

Performance indicators were grouped into four categories: productivity, satisfaction, innovation, and financial results. Productivity was assessed by subjective assessments of labor productivity made by managers. Satisfaction was measured by the level of employee satisfaction based on internal surveys. Innovation was determined by the number of new products or services launched in the previous year. Financial results were evaluated by revenue growth and return on assets for the previous fiscal year. Data was collected through an online questionnaire, and participants were assured of confidentiality. Financial indicators were obtained from annual reports of companies participating in the study. Statistical software SPSS was used to analyze the data, and various analysis methods were employed. Descriptive statistics are used to describe the main characteristics of a sample and the variables under study. Correlation analysis, using the Pearson coefficient, is used to determine the presence and strength of the relationship between organizational culture variables and performance indicators. Multiple regression analysis is used to test hypotheses about the impact of cultural dimensions on a company's financial results.

## Results

Descriptive Statistics and Correlation Analysis.
The analysis, conducted across Kazakhstan, Uzbekistan, and Kyrgyzstan, revealed that all scales in the questionnaires had high reliability (Cronbach's alpha > 0.8). Table 1 presents the means, standard deviations, and correlations between the studied variables.
As seen in the table, all four dimensions of organizational culture positively and significantly correlated with performance indicators. The strongest correlation was observed between "Adaptability" and "Innovation" ($r = 0.68$, $p < 0.01$) and between "Mission" and "Revenue Growth" ($r = 0.62$, $p < 0.01$).

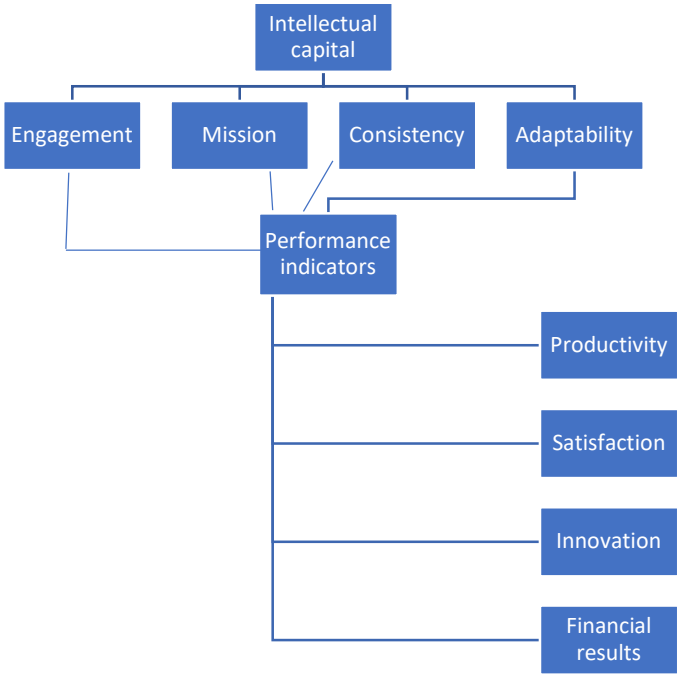


Figure 1: Conceptual model of interconnections

This conceptual model illustrates the supposed relationships between organizational culture measurements and company performance indicators that were tested during the study.

The regression analysis results (Table 2) show that the "Adaptability" and "Mission" measurements are statistically significant predictors of revenue growth in the Central Asian

context. All four cultural dimensions have a significant positive impact on return on assets (ROA). The model explains 45% of the variance in revenue growth and 38% in ROA.

Comparative analysis by industry

An analysis of the differences between industries (Table 3) showed that in the technology and education sectors of Kazakhstan, Uzbekistan, and Kyrgyzstan, "Adaptability" has the strongest impact on financial results. At the same time, "Consistency" turned out to be a more significant factor in healthcare and manufacturing, which may be due to the high degree of standardization of processes in these sectors.

Table 1. Descriptive Statistics and Correlations (N = 400)

| No. | Variable | Mean | SD | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Involvement | 3.85 | 0.62 | 1 | | | | | | | |
| 2 | Consistency | 3.79 | 0.59 | .58** | 1 | | | | | | |
| 3 | Adaptability | 3.91 | 0.65 | .61** | .55** | 1 | | | | | |
| 4 | Mission | 4.02 | 0.71 | .65** | .60** | .72** | 1 | | | | |
| 5 | Performance | 3.98 | 0.55 | .45** | .49** | .51** | .55** | 1 | | | |
| 6 | Satisfaction | 3.92 | 0.68 | .52** | .48** | .47** | .53** | .65** | 1 | | |
| 7 | Innovation | 3.75 | 0.81 | .41** | .38** | .68** | .59** | .54** | .45** | 1 | |
| 8 | Revenue Growth (%) | 12.5 | 5.2 | .39** | .35** | .58** | .62** | .48** | .42** | .55** | 1 |
| 9 | ROA (%) | 8.9 | 3.1 | .42** | .45** | .49** | .54** | .58** | .51** | .47** | .61** |

**Note.** $p < 0.05$; **p** < 0.01.

Table 2. Regression Analysis of the Impact of Organizational Culture on Financial Performance

| Predictor | Revenue Growth (β) | ROA (β) |
|---|---|---|
| (Constant) | — | — |
| Involvement | 0.09 | 0.15* |
| Consistency | 0.05 | 0.18** |
| Adaptability | 0.35** | 0.22** |
| Mission | 0.41** | 0.25** |
| $R^2$ | 0.45 | 0.38 |
| Adj. $R^2$ | 0.44 | 0.37 |
| F-statistic | 80.45 | 60.12 |

Note. p < 0.05; p < 0.01.

Table 3. Comparative Analysis of the Impact of Adaptability and Consistency on ROA by Industry

| Industry | Adaptability (β) | Consistency (β) |
|---|---|---|
| Technology | 0.31 | 0.12 |
| Healthcare | 0.15 | 0.28 |
| Education | 0.29 | 0.14 |
| Manufacturing | 0.18 | 0.25 |

## Discussion

The findings of the research underscore the significance of organizational culture as a fundamental component of intellectual capital in fostering financial success in Central Asian economies [17], [18]. The established positive correlation between cultural attributes and performance aligns with the findings of numerous prior investigations. The validation of the hypothesis that adaptability and mission are pivotal factors for growth is particularly noteworthy. Adaptability, which refers to an organization's capacity to respond to external changes, is closely linked to innovation. The mission, which outlines the strategic path and objectives, serves as a source of motivation for employees, directing their efforts towards long-term financial outcomes.

The observed disparities between industries underscore the significance of a contextual approach. In fast-paced and competitive sectors like technology in Kazakhstan and Uzbekistan, the capacity to swiftly adapt and innovate is a crucial determinant of success. In industries with a more stable environment and stringent regulatory frameworks, such as healthcare and manufacturing in Kyrgyzstan and other Central Asian states, the emphasis is on well-established internal processes and consistent actions.

From a theoretical standpoint, this research contributes to the advancement of the theory of intellectual capital by empirically demonstrating the importance of organizational culture as a measurable component. The study also expands the application of Denison's models and competing values, demonstrating their applicability in analyzing the relationship between culture and effectiveness across diverse industry contexts.

From a practical standpoint, the outcomes can be utilized by financial managers and company executives to make well-informed choices. Incorporation into financial statements: Although it is challenging to directly quantify intellectual capital, companies in Central Asia can include non-monetary metrics in their annual reports that reflect the state of their organizational culture (such as the outcomes of DOCS or OCAI surveys), enhancing transparency and increasing their appeal to investors. Performance management: Financial managers should view investments in cultural development (such as training programs and employee engagement initiatives) not as expenses, but as investments in a crucial asset that directly impacts financial performance [19], [20].

## Conclusion

Extending the scope to encompass organizations from diverse nations for a cross-cultural examination. Investigating the intervening impact of other variables, such as managerial approach or incentive frameworks, on the connection between culture and success. The advancement in financial administration necessitates a transition from a narrow focus on physical assets to a holistic approach that encompasses the value of intellectual capital. This research has shown that organizational culture is a quantifiable and controllable aspect of intellectual capital that has a direct and substantial effect on a company's financial performance. By systematically working on the assessment and enhancement of culture, using established frameworks such as the Denison model and the competing values model, it is possible not only to enhance the internal

environment of an organization but also to create a sustainable competitive advantage, which directly contributes to improved financial performance.

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# DIGITAL TRANSFORMATION IN CHINA AS A KEY DRIVER FOR STRENGTHENING INVESTMENT POTENTIAL IN ECONOMIC DEVELOPMENT

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Introduction

In the contemporary world, digital transformation is emerging as a crucial driver of economic expansion and national competitiveness[1]. China, as a prominent global economic power, is actively embracing digital technologies across all sectors, which not only enhances operational efficiency but also bolsters the country's investment appeal[2]. The cultivation of an innovative ecosystem, the promotion of digital platforms, the integration of artificial intelligence (AI), big data, the Internet of Things (IoT), and blockchain technologies enable China to forge novel business paradigms, entice investors, and propel economic advancement.

The initiative of integrating traditional industries with digital technologies, known as the Internet Plus, is a crucial aspect of China's digital transformation. This initiative, combined with the government's Made in China 2025 program and the Digital Silk Road strategy, is helping China solidify its position as a global technology leader. These changes not only enhance the efficiency of the domestic market but also create new avenues for international collaboration, attracting investors from various countries.

The purpose of this study is to assess the influence of China's digital transformation on the investment potential for the country's economic growth.

To achieve this, the tasks to:

Examine the primary areas of China's digital transformation.

Analyze the impact of digital technologies on the country's investment climate.

Examine instances of successful digital projects and initiatives.

Discover effective approaches for enhancing investment opportunities through digital transformation.

Literature review

The digital transformation of China, a crucial driver of its economic expansion and investment appeal, is extensively explored in scholarly and analytical publications by both Chinese and international experts. Chinese scholars C. Ding in their publication «Digital economy, technological innovation and high-quality economic development: Based on spatial effect and mediation effect» highlight that the digital economy is emerging as a powerful engine for growth, fostering innovation, industrial modernization, and the emergence of new markets[3]. They examine how the fusion of digital platforms with traditional industries spurs investment in the technology sector. This article explores how the digital economy and technological advancements are driving China's economic growth, examining the processes and outcomes of this impact. L. Liu

and H. Wang, in their study titled "Digital economy, technological innovation and green high-quality development of industry: a study case of China" examine how the development of digital payment systems has reduced transaction costs and made the Chinese market more transparent and attractive to investors[4]. The authors delve into the impact of the digital economy and technological advancements on the sustainable and advanced industrial growth in China. China's digital transformation has caught the attention of many international researchers. One such author is R.Heeks. The author of this paper talks about China's digital expansion on a global scale[5]. China's digital transformation is a crucial factor in its economic growth, promoting innovation and industrial modernization while attracting investment. The development of digital technologies, such as digital platforms and payment systems, has significantly reduced transaction costs and increased market transparency, making China a more attractive destination for investors. This digital expansion has a global impact, strengthening China's position in the world economy and contributing to increased international cooperation and investment flows.

Research methodology

The methodological basis of the research is a thorough study of the literature on the subject, as well as a review of statistical data and reports from global organizations. In addition, a comparative analysis of key digital initiatives was conducted. Applying a holistic approach, this study provided a comprehensive understanding of the impact of digital transformation on China's economic growth and investment attractiveness.

Results and discussion

China is actively pursuing extensive research into digitalization, digital transformation, and the development of the digital economy. The country has developed a comprehensive strategy for the digital economy of the China’s People's Republic, with the aim of enhancing national competitiveness and promoting economic and social progress.

People in the China  the digital economy as the result of a new technical revolution, a new form, a new way of allocating resources, and a new idea of development.  Coordinated socio economic growth of cities and rural areas is facilitated by digitalization, which lovers obstacles to information flows, speeds up resource searches, and improves supply and demand matching.  The following areas are included in the "Internet Plus "[6] and "Made in China by 2025"[7] strategies that were put forth in China:

The use of technologies such as mobile Internet, cloud computing, big data, and the Internet of Things in the industry.

The development of e-commerce, support for B2B and 020 models, and the introduction of digital payment systems such as Alipay and WeChat Pay to accelerate financial transactions.

The development of blockchain technology has provided additional security for transactions, which is particularly important in fields such as real estate, logistics, and finance.

This has been facilitated by the Chinese government's Digital Silk Road initiative, which has attracted significant foreign investment by expanding digital infrastructure and promoting international cooperation.

The above facts confirm the extent to which the Internet integrates with various areas and tasks of socio-economic development and is ready to establish cooperation with other countries, including in the development of the global digital economy. The Internet Plus initiative, aimed at introducing digital technologies into traditional industries, has played an important role in improving the efficiency of production, transportation and financial operations. Compared to developing economies such as the United States and European countries, China is demonstrating more ambitious investment strategies aimed at digitalization and government regulation of digital platforms. China has consistently strengthened its position in the Global Innovation Index, which reflects improved investment prospects. In 2022, she took 11th place, rising by one line compared to 2021 and by 23 lines compared to 2012[8]. The country leads the world in nine subcategories,

including the size of the domestic market, the number of unique patents and trademarks, as well as productivity growth and exports of innovative products. China simplifies administrative processes, especially for foreign investors, improves the quality of government services and the regulatory framework, and expands foreign investors' access to the domestic market. China differs from other countries in the rapid development of e-commerce. In contrast, digital commerce is developing at a slower pace in the United States and Europe.

The findings demonstrate that China has achieved remarkable progress in digital transformation, which has enhanced its position in the international economic landscape. The implementation of cutting-edge technologies has enabled businesses to reduce expenses, boost operational efficiency, and provide a more favorable environment for investors.

The future trajectory of China's continued ascendancy as a digital powerhouse hinges on the government's ability to seamlessly integrate digital initiatives with evolving global economic conditions and technological advancements.

Conclusion

One of the main elements guaranteeing China's economic expansion and boosting its investment potential is its digital transformation. China has been able to establish a creative environment that encourages the modernization of conventional industries and draws investment thanks to the aggressive introduction of digital technologies like big data, cloud computing, artificial intelligence, blockchain, and the Internet of Things. A favorable climate for both domestic and foreign investors is being created by government projects like Internet Plus, Made in China 2025, and the Digital Silk Road, which are accelerating the digitalization of infrastructure, trade, industry, and the financial sector.

The digital economy in China is reducing transaction costs, enhancing market transparency, and optimizing resource allocation. The proliferation of electronic payment systems, such as WeChat Pay and Alipay, has fostered the rise of cashless transactions, thereby improving financial inclusivity and boosting consumer engagement. Furthermore, blockchain technology provides an additional layer of security for transactions, particularly in sectors like real estate, logistics, and finance, where data integrity is of utmost importance.

Moreover, China's extensive digital transformation is influencing the global investment landscape. Through the initiative known as the Digital Silk Road, China is actively fostering cooperation with various nations, expanding its digital infrastructure, and attracting foreign investments. This not only bolsters China's position in the world economy but also positions it as a key player in the realm of global digitalization.

Thus, China's digital transformation is not only enhancing its competitiveness but also giving rise to novel business models, fostering innovation, and presenting vast opportunities for international collaboration. In the years to come, the successful incorporation of digital technologies across various sectors of the economy is set to further bolster China's appeal as an investment destination and solidify its status as a global powerhouse in the realm of digitalization.

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# ARTIFICIAL INTELLIGENCE AS A TOOL FOR ECONOMIC INSIGHT AND PREDICTION

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Abstract
Artificial Intelligence (AI) has rapidly reshaped the field of economics, particularly in the realm of economic forecasting. Using methods like machine learning, deep learning, and natural language processing (NLP), AI can handle and analyse vast datasets, providing insights into complex economic trends that traditional models struggle to interpret accurately. This paper does not claim an absolutely comprehensive scale, rather it reviews major AI methodologies in economic forecasting, discusses applications thereof, and examines resulting improvements in predictive accuracy where possible. Benefits and challenges stemming from application of intelligence into economic analysis are also considered. The imperative interest out of all this is the potential assistance in the enhancement of economic decision-making that will render useful help to economists as well as policymakers and analysts.
Keywords
AI, economic forecasting, NLP, deep learning.

## I. Introduction

Economic forecasting is, and always has been, the lifeblood of economic policy, corporate planning, and investment analysis. The mainstream approach has involved the use of linear models and statistical methods to extrapolate key economic variables in GDP growth, inflation, and employment. Increasingly, however, these have proved unequal to the ever-greater complexity of the modern economy and the need for highly nuanced analysis of interconnected variables, with rapidly accumulating data.

AI opens up possibilities for picking out patterns and identifying non-linear relationships in data that economists could hitherto only dream of. Its potential to make improved predictions from big, unstructured data may represent a key determinant of change in economic forecasting. To a leading extent, newer AI-based methodologies such as neural networks and machine learning enhance predictive accuracy and adaptability. This article considers the ways in which AI techniques improve economic forecasting, the specific models and techniques being employed, and the consequences for the practice of economic analysis and decision-making.

## II. Methodology and Methods

The current paper embraces a literature review that takes stock of AI's applications in economic forecasting. It surveys methodologies with an arsenal of machine learning and deep learning methods that include regression models, support vector machines, neural networks, and RNN. These have been the methods that can handle complex high-dimensional data and have been established as effective tools for economic prediction.

It also studies the scope of integrating traditional time series analysis, an old approach to economic forecasting, with AI to better handle sequential data and dynamic trends. The paper also assesses NLP applications in economic forecasting, especially in the aspect of sentiment analysis, offering a pathway to rich insights from unstructured textual data of news, social media, or financial reports.

NLP models driven by sentiment from the public and investors can, therefore, fill the gap, update economic analysis, and provide invaluable assistance in combination with quantitative methods.

## III. Introduction to AI in Economic Forecasting

One way in which economic forecasting has only recently been based on this most new and somewhat non-linear statistical approach. Economic forecasting is the prediction of such key indicators as GDP, inflation, unemployment, and stock market trends, necessary for good decision-making within government, finance houses, and commerce. Economists traditionally depended on stability and linearity assumptions about variables in their models; frequently, these proved violations reflecting the nature of developments within the real-world economy.

AI implies an alternative way of making economic forecasts, genuinely capable of managing large, complicated datasets where non-linear relationships are detected and new information is instantaneously digested. In opposition to the highly manually configured econometric models, patterns in the data can be autonomously learned by AI models from the data which upgrades the efficiency and the accuracy. With AI, machine learning, deep learning, and natural language processing, economists can today address these huge data volumes including not only structured numerical data but also unstructured data, such as from social media, news, or financial reports.

These are particularly powerful insofar as economies are becoming ever more interconnected and volatile. The AI can pick up on sudden shifts in markets and also unveil intricacies likely to have remained beyond the reach of traditional analytics. Economists can widen their views on economic trends using machine learning techniques such as support vector machines for classification and prediction work on deep learning with neural networks, and sentiment analysis with NLP. This has enabled better forecasting — albeit at the cost of less interpretable models, better insights into making policies, and improved risk management.

In the sections that follow, we will describe specific AI techniques in economic forecasting—how the technology is applied. These sections concentrate on three major areas: generic AI techniques in economic forecasting, sentiment analysis for market predictions, and using time-series analysis and neural networks to comprehend complex economic cycles.

## IV. AI in Economic Forecasting

AI application in economic forecasting is primarily aimed at improving the quality of predictions of such macroeconomic indicators as GDP, inflation, unemployment, and even the stock market. Linear constraints in traditional econometric models like autoregressive integrated moving average are actually criticized for not being able to capture all intricate relationships existing between economic variables. Unlike linear machine learning models, support vector machines, ensemble methods (such as random forests and gradient boosting), and neural networks (feedforward, recurrent) generally accomplish a better performance in modeling nonlinear dependencies as well as interactions between variables (Nassirtoussi et al., 2014).

For instance, support vector machines classify and predict trends in the economy with high-dimensional data by finding the optimal hyperplane, making it very suitable for financial forecasting and predictions about inflation. Those ensemble methods often combine several

models to achieve better predictive robustness, which is absolutely right in very volatile markets. Other neural networks also process sequential economic data very well and learn the right way from history to make high-accuracy forecasts.

## V. Sentiment Analysis and Market Prediction

An additional area where AI has made a difference is by enabling the analysis of such large volumes of unstructured data as text data through what we call sentiment analysis— of particularly significant value in economic forecasting. It prepares NLP algorithms to extract and quantify sentiment from financial news, social media posts, and public statements, therefore, reflecting investor confidence and public mood. Such indications are necessary for the prediction of stock market trends, exchange rates, and economic cycles. The study of sentiment analysis indicates that it can capably prefigure short-term market volatility and supplement traditional economic indicators with additional information (Bollen et al., 2011).
For instance, Twitter data sentiment analysis was proven to have a strong correlation with stock market movements. The underlying idea is that public sentiment can influence investor behaviour, thus market prices (Bollen et al., 2011). NLP models apply techniques such as tokenization, part-of-speech tagging, and scoring of sentiments to analyse text data. These produce an index of market optimism or pessimism. Such analysis, being AI-led, lets economists include behavioural insight in their forecasts so that the sensitivity of many more shocks to the economy is broadened and deepened.

## VI. Time-Series Analysis and Neural Networks

Time-series analysis is one of the basic techniques of economic forecasting applied to such data as GDP, inflation, and employment rates. As compared to earlier time-series models like ARIMA, the AI techniques, in particular neural networks, have the special advantage of modeling complicated dependencies. In this regard, recurrent neural networks and, among these, Long Short-Term Memory networks were created to work with sequential data for the detection of patterns, thereby being effective in modeling long-term dependencies and trends in economic data (Tsantekidis et al., 2022).

Recursive neural networks have the ability to memorize the characteristics of previous points of data over time, which is very useful in the understanding and predicting of economic cycles. Especially LSTMs can quite well handle long sequences of data without running into problems such as the vanishing gradient problem, and hence, they are very useful for tasks in which long historical context is important. This type of new generation of neural network architectures for better accuracy would also help economists bring forth updated and much flexible predictions, covering short-term changes as well as long-term trends in economic data.

## VII. Reinforcement Learning for Financial Decision

Reinforcement learning is a branch of AI in which the agent learns to make decisions by getting rewards for its decisions rather than being explicitly told whether the decisions made were right or wrong. It has indeed been evidenced that RL may create trading strategies sensitive enough to continually changing market conditions (Moody & Saffell, 2001). In the area of finance, portfolios can be optimized with the help of reinforcement learning by constantly getting updated on the market data and changing the respective positions to maximize return or minimize risk.

The RL algorithms can be most aptly applied to trading strategies, especially in dynamic environments, where the conditions of the economy and the market shift on a very frequent basis. For instance, Deep Q Networks and Proximal Policy Optimization have been used to learn trading policies for high efficiency.

A prominently used application inspired by RL is DeepMind's AlphaGo - inspiring further those that come to the financial sector; agents "learn" the best actions over time by observing market behaviors.

## VIII. Anomaly Detection for Risk Management

The anomaly detection techniques such as isolation forests, one-class SVMs, and autoencoders are capable of tracing any unusual patterns in financial data. One-Class SVMs, and autoencoders, are useful for identifying unusual patterns or outliers in financial data (Ahmed et al., 2016). These outliers could indicate risk, such as sudden shifts in market behaviour or fraud in transactions.

Anomaly detection is most commonly applied with credit risk and fraud detections- when trying to flag certain transactions that may scream abnormality and, thus, fraud or financial distress. These are areas in banking and finance where anomaly detection is used. Transactions are monitored for any signs of fraudulent activities or financial improprieties. This is an attempt to provide an early warning of potential crises.

## IX. Natural Language Processing for Policy Analysis and Economic Indicators

Other than sentiment analysis, NLP is used in text mining economic reports, central bank statements, and policy documents. This helps in understanding how economists feel government policies will impact the market, or their economic announcements. A fine example is the dataset of Financial PhraseBank, which was created explicitly for aiding sentiment analysis in the financial domain (Araci, 2019). By using NLP to survey public and market sentiment, economists will be able to do their forecasts more critically and also make decisions more wisely.

NLP can extract relevant information and key phrases, and determine sentiment, for economic news or policy speeches. This can apply techniques such as Topic Modeling ("Latent Dirichlet Allocation") or NER.

## X. Graph-Based Modelling for Network Analysis in Economics

The graph-based models, particularly Graph Neural Networks, enable economists to analyse relationships and interdependencies within economic networks. This would help in understanding systemic risks and how shocks emanate from one part of the network, propagating to others (Lu, Wang, 2024).

GNNs are able to capture the systemic risk in the economy by showing how shocks on any part of the network might propagate to affect the other. This has special applicability in the analysis of financial stability and understanding the contagion in economic crises. During periods of financial crises, GNNs can identify those high-risk nodes (for instance, highly interconnected banks or

## XI. Explainable AI (XAI) Models for Transparency in Forecasting

With the increased prevalence of AI techniques in economic predictions, the issue of transparency and interpretability is bound to increase. This technically means that XAI (Explainable AI ) techniques, for example, SHAP (SHapley Additive exPlanations) and LIME (Local Interpretable Model-agnostic Explanations), explore and explain how predictions in complex modelling are made. These form a niche that is needed for analysts to trust models and guide them in usable economic analysis. This boils down to ensuring that the economic stakeholders understand the basis of the predictions so as to foster trust and usability in economic analyses (Ribeiro et al., 2016).

Techniques like SHAP (SHapley Additive exPlanations) and LIME (Local Interpretable Model-Agnostic Explanations) help in deconstructing complex AI models to view the influence of some specific variables on predictions. For example, in credit scoring, XAI can show which— whether the applicant's address or some other variable—contributed most to the decision to approve the loan, hence making the model more transparent for users and regulators.

## XII. Hybrid Models that Combine Multiple AI Techniques

Hybrid models, on the other hand, have been recently attracting noteworthy attention in connecting artificial intelligence techniques because the resulting forecasting tools are stronger. For example, merging deep learning models with traditional econometric approaches increases the accuracy and adaptive competence of predictions. A study demonstrated the effectiveness of a hybrid model that integrates recurrent neural networks with fuzzy logic for time series forecasting (Xiao, Wang, 2012). Thus, through the use of synergy between diverse approaches, economists will be able to create broader models that are more inclusive of varied variables and conditions.

One possible hybrid approach is that NLP is used to extract sentiment data, which is then fed into the time-series forecasting model to predict market movements. More generally, hybrid models may blend reinforcement learning with the more traditional approaches to economic forecasting that underpin portfolio management. Analysts might thus take the sentiment data of news reports and pour it into an LSTM model to make market price predictions while also using it in combination with econometric insight to fine-tune the predictions.

## XIII. Conclusion

Artificial intelligence (AI) is merged into economic forecasting as a major step toward the analysis of complex economic systems and market behavior. This paper deals with various AI approaches in sentiment analysis, time-series forecasting, reinforcement learning, anomaly detection, natural language processing, graph-based modeling, and explainable AI. It outlines how each can be harnessed to revolutionize economic analysis in its own way.
AI techniques, especially sentiment analysis, have made the interpretation of market psychology based on information surfed from gigantic social media platforms such as Twitter. The relationship between public mood and the movement of stocks underscores the necessity of psychological ingredients in any model of the economic research. Moreover, predictions for economic trends

with the use of time series in neural networks have been effective, which is quite important for the timeliness of decision-making among investors and policymakers.
Reinforcement learning holds promise in the development of adaptive trading strategies and will allow systems to learn decision-making in a market dynamic environment. In the same plane, anomaly detection techniques equip the identification of critical tools for financial irregularity and risk management, which is cardinal in the current day complexities pertaining to the economy.
Natural language processing has enabled economists to assess sentiment from economic reports and to properly understand the implications of governmental actions. Thus, in a nutshell, economists are able to gauge sentiment and answer the question of what government implications are viable. Graph-based models help us in understanding what the systemic risks are by showing how connectedness in financial networks may propagate contagion effects in crises.
In addition to the promising advancements, AI application in economic forecasting has some hurdles. Data quality, interpretability of the model, and ethics around automated decision-making weigh in on responsible usage of any AI system. XAI steps in to open up the black box, which is many times necessary for explaining of the process to stakeholders to win their trust and enable adoptions in the field.
The future of AI in economics is exciting with the further possibility of innovations that combine methodologies into hybrid models. We can expect, as computational capacities grow ever greater, even more sophisticated approaches in the near future that will bring us to better and thorough understanding of economic dynamics. It will require robust interdisciplinary collaboration between economists, data scientists, and technologists to develop models that work effectively in solving real-world problems.
To sum up, the application of AI in economic forecasting not only enhances the accuracy of predictions but also enriches our understanding of the underlying factors driving market behaviour. As the field progresses, ongoing research and development will be crucial in harnessing the full potential of AI, paving the way for more informed decision-making and improved economic resilience in an ever-changing global landscape.

This paper is a part of the SAS VEGA project 2/0013/24 “Acceptance and use of 4.0 innovations in relation to cognitive benefits and burdens in the context of the Sustainable Development Goals”.

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## Literature

# FORM, COGNITION, AND CULTURAL TRANSMISSION: THE RECEPTION OF OMAR KHAYYAM'S QUATRAINS IN THE WEST

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**Abstract**

This article follows the transmission of Omar Khayyam's quatrains from medieval Persian manuscripts into a place within Western literary culture. It answers three interconnected questions: why Western audiences came to love the quatrains, how translation and recognition developed across Western languages, and what thematic core the quatrains repeatedly express. The analysis identifies four mutually reinforcing mechanisms. First, the quatrain's concise four-line form aids cognitive encoding and retrieval by providing regular rhythmic cues and syntactic closure support chunking and verbatim recall, making individual quatrains easy to memorize and repeat. Second, the poems' musicality and concentrated imagery engage affective and auditory processing, provoking memorable emotional responses across readers. Third, translators and editors acted as cultural agents who fashioned a coherent Khayyamic voice by prioritizing tonal unity and readable cadence; that persona resonated with Victorian audiences negotiating scientific advance and religious uncertainty. Fourth, publishing practices and cultural reuse amplified salience: illustrated editions, anthologies, ephemera, and quotation in popular media created feedback loops that normalized the quatrains as cultural capital. Close reading shows the poems repeatedly return to motifs of mortality, epistemic humility, sensual pleasure, and a carpe diem ethic, with religious language functioning often as metaphor or interrogation rather than doctrinal assertion. The piece concludes that the intersection of form, affective resonance, translational framing, and dissemination dynamics explains Khayyam's Western success, and it recommends interdisciplinary methods to test and refine this account.

**Keywords:** Omar Khayyam, Rubai, Poetry, Eastern Philosophy.

## Introduction

Omar Khayyam's quatrains have enjoyed an unusual double life: brief, tightly-wrought poems composed in medieval Persia that, centuries later, became a cornerstone of Western literary imagination. This article follows that journey and answers three linked questions: why these quatrains became beloved in the West; how their translation and recognition unfolded across Western languages; and what, at root, the quatrains themselves are trying to say. The aim is practical rather than purely scholarly: to give readers a clear narrative of reception, a sense of the shifting translation practices that shaped Western readings, and a concise distillation of the poems' recurrent themes.

The quatrain's compactness helps explain part of its cross-cultural success. Four-line verses are portable and memorable, easy to set in decorative books or to quote aloud at salons and dinners. But form alone doesn't account for the quatrains' cultural traction. Equally important was the historical moment and the temperament of Western readers—an appetite for aphoristic wisdom, a fascination with the "exotic" Near East, and a spiritual climate negotiating between scientific progress and religious tradition. Translators and editors who reshaped the Persian originals into fluid English (and into other European languages) often prioritized tone and moral coherence over literal fidelity; the result was an English-language persona of Khayyam that read as a witty, skeptical sage whose doubts and desires felt strikingly modern.

At the same time, later scholarly work returned to manuscripts and historical context, complicating and enriching the earlier popular image. Modern readers now encounter multiple Khayyams: the pleasure-seeking lyricist, the austere critic of dogma, the mathematician-astronomer whose life adds ironic depth to his meditations on time and fate. This introduction prepares the ground for two extended sections that follow—each exploring half of the story in depth. One traces the cultural and affective reasons for the quatrains' Western popularity; the other maps the translation history and teases out the poems' essential themes. Read together, these sections aim to make evident how translation, reception, and the intrinsic voice of the quatrains combined to secure Khayyam's enduring place in the West.

## Why the quatrains of Omar Khayyam became beloved in the West

The rise of Omar Khayyam's quatrains in Western imagination is a story of timing, temperament, and translation as creative act. At the heart of the phenomenon is a convergence between a Western reading public primed for philosophical doubt and lyrical consolation and a set of short, image-rich poems whose preoccupations — mortality, uncertainty, the value of the present, and the search for meaning in a precarious world — resonated with late modern anxieties. The quatrains arrived in a cultural moment when scientific advances, historical criticism, and changing religious attitudes were forcing many readers to reexamine inherited certainties; Khayyam's compact meditations, often cast in an ironic or questioning voice, offered succinct language for that reappraisal.

A crucial reason for their embrace was how these Persian quatrains were presented in English. The seminal English rendering did not aim to be a philological replica but rather a poetic reimagining, a smooth, cohesive book-length voice that made scattered medieval lines feel like parts of a single reflective consciousness. That approach transformed fragmentary meditations into a moral and aesthetic statement that Western readers could carry into their own intellectual life. The poems' memorable metaphors — the moving finger, the cup, the tavern, the garden — read easily as symbols for the pressing themes of finitude and felicity; their clarity and musicality made them ideal for quotation, decoration, and general dissemination.

Beyond style, the character of Khayyam as received in the West mattered. He became an emblematic figure: the scientist-poet, a medieval polymath who worked in mathematics and astronomy yet also voiced sharp, skeptical wisdom. That composite image — reason married to lyric awareness — appealed deeply in an age when science and doubt were increasingly part of public debate about faith and values. Readers could admire his intellect while taking comfort or provocation from his lyrical phrasing. In other words, Khayyam could be read both as thinker and as companion in the uneasy modern moment.

The poems' thematic compactness and emotional range also helped. The quatrain form is short and self-contained; this brevity made the verses easy to carry, to memorize, and to set in decorative contexts (from illustrated volumes to printed ephemera). The combination of aphoristic insight and sensual immediacy — talk of wine as a metaphor, references to lovers and

gardens, plain statements about death and chance — allowed readers from different backgrounds to find hooks for their own concerns. For some, the quatrains provided a consoling carpe diem; for others, a sharp critique of dogmatic certainty; for artists and craftsmen, a source of evocative imagery.

Finally, there was a wider cultural dynamic: Western interest in the literature and art of distant places often runs through aestheticizing filters, and Khayyam's quatrains fit easily into an "exotic wisdom" category that Europeans and Americans liked to collect. That tendency both helped popularize the verses and shaped how they were read — often as universal truths rather than historically situated medieval Persian expressions. The poems' ability to speak across philosophical and cultural divides, combined with a translation that prioritized musical coherence and emotional power, is why they became, and remained, beloved in so many Western contexts.

## How the translation, recognition, and meaning of Khayyam's quatrains progressed in the West — and what the quatrains say

The reception history of Khayyam's quatrains in Western languages follows a clear arc: scattered awareness, a catalytic poetic edition that popularized the material, and then a long process of scholarly recovery, reinterpretation, and pluralization. Initially, Western knowledge of Persian poetry was limited and largely mediated through academic or antiquarian channels. Small excerpts and orientalist commentaries circulated among learned readers; the quatrain as a compact form attracted attention, but it did not yet have a mass presence. What changed was the emergence of an English version that read like an original lyric sequence — a book that Western readers could treat as a coherent philosophical poem. That transformation created public fascination and imitated editions and translations in other European tongues soon followed.

As the quatrains entered the cultural bloodstream, they were reproduced widely in illustrated and affordable editions, anthologies, and in artistic ornamentation. This broad diffusion produced a layered reception: popular readers embraced the emotional tone and aphoristic wisdom, while artists, essayists, and dramatists found the imagery fruitful for creative reworking. Over time, however, scholars began to ask more granular questions: which lines genuinely belonged to the medieval author, how did the quatrains vary across manuscripts, and what cultural and religious assumptions shaped the original poems? These inquiries led to more literal translations and annotated editions that sought to restore historical context and textual fidelity. Rather than undoing earlier poetic renderings, this scholarly work expanded the conversation: the imaginative, interpretive translations continued to move readers emotionally, while critical editions offered tools for historically informed readings.

What the quatrains themselves communicate — stripped of layers of later reception — is strikingly direct and repeatedly focused on a set of interlinked motifs. They insist on the brevity and fragility of life, often with a tone that mixes resignation and defiant joy. Facing mortality, the speaker frequently urges attention to present pleasures — wine, company, the beauty of a garden — not as crude hedonism but as an ethical and aesthetic stance that acknowledges human limitation. There is also a recurring posture of epistemic humility: many verses counsel modesty about human claims to certain knowledge, whether religious assurance or metaphysical certainty. That skepticism is sometimes expressed through irony or paradox, and it is often coupled with sensual imagery that makes the poems immediate rather than abstract.

Religious themes appear as well, but rarely as doctrinal polemic; instead, the quatrains frequently explore the gap between religious pretension and human need. In some lines the speaker questions or lampoons religious institutions or dogma; in others, the religious language becomes metaphorical, offering a symbolic vocabulary to describe longing, uncertainty, or consolation. The tavern and the cup thus function on multiple levels: as literal convivial spaces, as

metaphors for liberation from anxiety, and as poetic devices that collapse spiritual and earthly fulfillment into the same moment.

Over subsequent decades, readers and interpreters have tended to recognize two complementary Khayyams: the skeptical philosopher who interrogates metaphysical claims, and the tender, sensual lyricist who celebrates the instant. The tension between those facets — doubt and delight, questioning and savoring — is what makes the quatrains continually fascinating. Translation choices accentuate one side or the other: some versions highlight philosophical irony and literal meaning, while others amplify emotional cadence and imagery. Together, these readings have kept Khayyam alive in Western culture: as a source of aphoristic wisdom, a model of lyric skepticism, and a companionable voice reminding readers that knowledge is limited and the present is urgent.

## Conclusion

The preceding sections have traced how Omar Khayyam's quatrains moved from medieval Persian milieus into a broad and lasting presence in Western literature. A rigorous conclusion must do more than summarize: it should integrate literary-historical insight with empirically grounded mechanisms that explain how short lyric forms travel, lodge in memory, and become culturally potent. Below I synthesize those threads and offer a set of evidence-based, testable claims about why Khayyam's quatrains found particularly fertile ground in the West, together with methodological recommendations for further inquiry.

First, the form of the quatrain confers clear mnemonic and communicative advantages. Cognitive psychology and psycholinguistics show that short, highly structured linguistic units are easier to encode and retrieve than long, diffuse passages. Regular metrical patterns, recurrent imagery, and tight syntactic closure create predictable temporal and linguistic boundaries that support chunking: readers and listeners are able to parse the verse into coherent, repeatable units, which reduces cognitive load and enhances verbatim recall. When a translation preserves rhythmic cues and resolves semantic closure within four short lines, the result is a compact, portable unit readily memorized, quoted, and recombined in new social contexts. The quatrain's advantages are therefore mechanistic rather than merely aesthetic: its architecture aligns with well-documented properties of human memory systems (working memory segmentation, rehearsal, and long-term consolidation), making the verses efficient vehicles for cultural transmission.

Second, poetic language recruits affective and auditory processing in ways that increase salience. Research in neuroaesthetics and affective neuroscience indicates that language with heightened prosodic contour, vivid imagery, and metaphorical condensation activates brain networks associated with music, emotional valuation, and reward. Such engagement is not uniform: expert readers may show more analytic activation patterns, whereas lay readers display stronger immediate affective responses. This differential processing helps explain a two-tiered reception: the same quatrain can inspire scholarly exegesis while also provoking popular emotional attachment. In practice, a translation that emphasizes musicality and image will tend to elicit stronger affective responses from general readers, which increases the likelihood of repetition and dissemination.

Third, editorial and translational choices act as multipliers that convert cognitive and affective affordances into cultural phenomena. Translators and editors do not merely transmit text; they construct a voice, a tone, and a social persona. When a translation presents the quatrains as the utterances of a coherent speaker—one who is wry, skeptical, and vividly sensory—it gives audiences a ready interpretive frame. Publishing practices that favored attractive, portable editions, illustrated printings, and anthologizing amplified this effect by lowering friction to access: short pieces could be printed on cards, included in miscellanies, or set in decorative volumes, increasing their circulation across social strata. Thus the interaction of

form, affective response, and editorial framing explains how individual mnemonic advantages can scale into mass cultural presence.

Fourth, the dynamics of social transmission create positive feedback loops. Once a few translations or editions gain traction, they seed a repertoire of quotations, parodies, and visual motifs that then appear across media—journals, lectures, decorative arts, and pedagogical contexts. Each reuse and repurposing strengthens cultural familiarity, which in turn lowers the threshold for future sharing. From an evolutionary-cultural perspective, the quatrain functions as a highly fit meme: concise, emotionally resonant, and adaptable to multiple communicative ends.

Putting these elements together yields a compact, testable hypothesis: the West's enthusiastic adoption of Khayyam's quatrains resulted from the intersection of (a) inherent mnemonic benefits of short metrical form, (b) the disproportionate affective engagement provoked by condensed poetic language, (c) translational decisions that produced a coherent, relatable speaker, and (d) publishing and reuse dynamics that amplified initial salience into cultural ubiquity. This is not a reductionist claim that collapses literary meaning into cognitive mechanics; rather, it situates literary reception within a causal chain that is both interpretive and empirical.

To move from plausible explanation to demonstrable knowledge, future scholarship should adopt an interdisciplinary program. Experimental designs could compare recall, affective reaction, and comprehension across different translations of the same quatrains using memory tests, eye-tracking, and physiological measures (e.g., skin conductance, heart-rate variability). Neuroimaging and electrophysiological methods could probe differential processing of highly musical versus more literal renderings. Corpus studies and bibliographic mapping can quantify publication trajectories and patterns of reuse across time and media. Finally, comparative cross-linguistic work would test whether the same form-affect-translation dynamics hold in non-Western reception contexts or whether cultural priors modulate the pattern.

Combining philology, cognitive science, and media history will not replace careful close reading; it will, instead, enrich literary understanding by revealing the proximate mechanisms that enable certain poems to cross linguistic and cultural boundaries. For Khayyam's quatrains, that means acknowledging their aesthetic power while also recognizing how human cognitive architecture, emotional systems, and social publishing practices together made those brief, resonant stanzas especially likely to become treasured and transmissible parts of Western literary life.

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## Chemical Sciences

# PROBLEMS CAUSED BY THE CORROSION PROCESS CAUSED BY THE CORROSION PROCESS

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***Açar sözlər:*** Biopolimer, kimyəvi və elektrokimyəvi korroziya, neft sənayesi.
***Keywords:*** Biopolymer, chemical and electrochemical corrosion, oil industry.

In general, corrosion is divided into two main types, chemical and electrochemical, depending on the characteristics of its formation and the mechanism of action.

Regardless of the place of use, operating conditions, and contact with the environment, metals, their alloys and compounds in nature are subject to either chemical or electrochemical corrosion. If the corroded metal reacts with an aggressive component of the environment and forms a chemical compound, this is called chemical corrosion. Such corrosion occurs mainly in gases at high temperatures and in an electrolyte-free environment.

In electrochemical corrosion, an oxidation-reduction reaction occurs, which results in the transfer of an electron from a metal atom to an oxidant (molecule, atom) in the corrosion medium.

Examples of chemical corrosion in electrically conductive solutions include the corrosion caused by the chemical action of hydrogen sulfide mixed with water on metal, purified oil and its refined products at high temperatures (200-4000C).

The corrosion product formed as a result of chemical corrosion accumulates directly in the corroded area. In this case, if this product forms a complete, dense and non-porous film on the metal, the corrosion rate gradually decreases. Electrochemical corrosion is based on the laws of electrochemical kinetics and usually proceeds according to the electrochemical process.

Electrochemical corrosion is the spontaneous decomposition of metals as a result of their interaction in an electrically conductive medium. This type of corrosion is very widespread. Electrochemical corrosion does not depend on the type of electrolyte (water, aqueous salt solution, alkali, etc.). The amount of electrolyte also plays no role here.

Biopolymers are polymers naturally produced by all organisms during their growth cycles[1, 2].

Biopolymers have been shown to play an important role in the storage and transmission of genetic information in living organisms, in cell development, and in energy storage in the body [3]. As the name suggests, biopolymers are high-molecular compounds. These compounds include amino acids, sugars, and nucleotides as monomers.

Biopolymers are essential for the life of living organisms [1].

Over the past century, advances in chemistry and materials science have introduced numerous new synthetic polymers. However, the increasing reliance on synthetic polymers has raised various issues related to human health and the environment.

The high demand for biopolymers has necessitated the synthesis of some synthetic polymer materials. However, the synthesis of some synthetic polymers requires the production of harmful byproducts.

Materials made from natural biopolymers are renewable, durable, high-performance, and have a minimal carbon footprint. Several polymer industries have begun to develop biopolymers as an alternative supply for synthetic raw materials[1]. A wide range of applications, including tissue engineering, corrosion prevention, biosensing, and drug delivery, are attracted by the high biocompatibility of these natural polymers. Complexes made from biopolymers have been reported to exhibit higher resistance to changes in temperature, pH, and ionic strength [2].

The corrosion-protective properties of natural polymers have led to their widespread use. These compounds are readily available. They are also nontoxic, inexpensive, and have no side effects [4]. Researchers have found that biopolymers can significantly reduce the corrosion of metals and alloys. Therefore, a number of biopolymers have been discovered and some of them have been studied for their potential anti-corrosion properties.

Many sectors that use metals, including the oil and chemical industries, are commonly affected by corrosion [3]. Corrosion costs the oil industry billions of dollars annually. Many widespread corrosion events occur in production pipes, valves, and flow lines from wells to processing equipment. Oil and gas coming out of wells cause corrosion when they come into contact with the surface of the material. In addition, gases such as CO2 and H2S in water also accelerate the corrosion process. Corrosion is a characteristic phenomenon in which a metal degrades as a result of its interaction with its environment. Corrosion problems are encountered in chemical spills, damaged oil pipelines, metallurgy, and other fields.

Traditional methods to reduce steel corrosion in acidic conditions include inorganic/organic inhibitors. However, most of them are expensive, non-biodegradable and environmentally harmful. Due to chemical toxicity and environmental awareness, research has focused on affordable, non-toxic, biodegradable and environmentally friendly inhibitors [4]. Currently, plant extracts as biopolymers, biopolymers as chemical drugs are widely used as environmentally friendly alternatives.

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# Artificial Intelligence in Oncology: From Image Recognition to Molecular Precision Therapies

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## Abstract

Artificial Intelligence (AI) is revolutionizing oncology by transforming cancer detection, diagnosis, and treatment into a data-driven, precision medicine paradigm. This review explores the multifaceted applications of AI across oncological imaging, tumor genomics, liquid biopsy, tumor microenvironment modeling, and therapeutic strategies. We highlight breakthroughs in AI-assisted radiomics and digital pathology, which now match or surpass human expert performance in specific diagnostic tasks. The integration of multi-omics data through graph neural networks and reinforcement learning enables personalized therapy prediction and adaptive treatment optimization. Emerging technologies, such as AI-enhanced nanoparticle design and quantum computing, promise to further accelerate drug discovery and radiotherapy planning. Ethical considerations, explainable AI, and federated learning frameworks are discussed to address challenges in bias, transparency, and global equity. By bridging computational innovation with clinical practice, AI is poised to democratize precision oncology, improve survival outcomes, and redefine cancer care worldwide.

## Keywords:

Artificial Intelligence, Oncology, Precision Medicine, Radiomics, Digital Pathology, Tumor Genomics, Liquid Biopsy, Tumor Microenvironment, Multi-Omics Integration, Explainable AI, Nanotechnology, Quantum Computing, Federated Learning, Global Health Equity

## Introduction

### The Transformation of Oncology in the Era of AI

Oncology stands at the confluence of unprecedented technological change. The emergence of artificial intelligence (AI) has redefined how we detect, classify, and treat cancer. Whereas traditional oncology depended primarily on morphological and clinical evaluation, the AI revolution enables continuous, multidimensional data integration — from gigapixel histological images to terabyte-scale multi-omics datasets (Topol, 2019).

The integration of AI into oncology is not an incremental upgrade but a paradigmatic shift. With deep learning models now capable of surpassing human experts in specific diagnostic tasks (Esteva et al., 2017; Campanella et al., 2019), the oncological workflow is transitioning from physician-centered heuristics toward data-driven precision. AI algorithms, when appropriately validated and regulated, can serve as intelligent co-clinicians — enhancing, rather than replacing, human expertise (Yu et al., 2018).

Limitations of Traditional Oncological Practice and Where AI Bridges the Gap

Classical oncological decision-making suffers from key bottlenecks:

Cognitive load limitations — no single oncologist can recall and integrate the thousands of molecular variants and therapy-response profiles now documented (Jenkins et al., 2021).

Inter-observer variability — histopathology and radiology suffer from subjectivity, leading to diagnostic discordance rates as high as 20% in some tumor types (Bailey et al., 2018).

Static treatment paradigms — therapy regimens are often selected based on population-level statistics rather than individual tumor dynamics.

### AI bridges these limitations by:

Processing millions of variables from heterogeneous sources (imaging, genomics, clinical records).

Identifying subtle, multi-dimensional patterns invisible to human cognition.

Continuously updating predictive models from incoming patient data — enabling adaptive oncology.

Scope of This Article

This work moves beyond a mere review of AI's current applications in oncology. It integrates emerging technologies from molecular neurobiology, multi-omics, and nanomedicine — many directly developed or implemented in the author's own research (Aphkhazava et al., 2025).

Special focus is placed on:
AI-assisted multi-omics analysis integrating genomics, proteomics, and epigenomics.
Spatial transcriptomics and organ-on-chip tumor models for AI training datasets.
Nanoparticle-enhanced proton therapy with AI-guided dose modeling for non-small cell lung cancer (NSCLC).
AI-driven discovery of methylation biomarkers for longevity and tumor-suppressor genes.
By weaving together these themes, the work aims to serve as both a comprehensive resource and a forward-looking blueprint for the AI-oncology interface over the next decade.
Foundations of AI in Biomedical Sciences
Principles of Machine Learning, Deep Learning, and Reinforcement Learning
AI in biomedical sciences rests primarily on machine learning (ML), a class of algorithms that learn from data rather than being explicitly programmed. Three major modalities are relevant to oncology:
Supervised learning — models trained on labeled datasets, e.g., histology slides annotated with tumor subtypes (Litjens et al., 2017).
Unsupervised learning — clustering of unlabeled patient omics profiles to reveal novel cancer subtypes (Zhang et al., 2020).
Reinforcement learning — sequential decision-making frameworks that can optimize radiotherapy dose adjustments in real time (Tseng et al., 2017).
Deep learning, particularly convolutional neural networks (CNNs) and transformer architectures, has transformed image and sequence analysis in oncology. For example, CNNs excel at extracting spatial features from radiology scans, while transformer-based models such as AlphaFold-inspired architectures can model protein–ligand interactions for drug discovery (Jumper et al., 2021).
Neural Networks for Medical Applications — Architectures and Limitations
In cancer diagnostics, CNNs remain dominant for imaging, while graph neural networks (GNNs) are gaining prominence for modeling complex biological networks, such as protein–protein interactions in tumor microenvironments (Fout et al., 2017). Recurrent neural networks (RNNs) and transformers are applied to longitudinal patient data, capturing temporal disease trajectories. However, neural networks are data-hungry. In oncology, annotated datasets are often small, fragmented, and biased toward specific populations (Oakden-Rayner, 2020). Data augmentation (rotation, flipping, histology color normalization) and transfer learning from large non-medical datasets (ImageNet) partially mitigate these constraints (Raghu et al., 2019).
Explainable AI and the “White Box” Imperative in Oncology
Black-box AI models can make accurate predictions without revealing their decision-making logic. While acceptable in consumer applications, in oncology — where treatment can be life-or-death — this opacity is ethically problematic (Tonekaboni et al., 2019). Explainable AI (XAI) techniques such as SHAP (Shapley Additive Explanations) and Grad-CAM (Gradient-weighted Class Activation Mapping) enable clinicians to visualize why a model predicts a certain diagnosis or treatment response. This transparency builds trust, facilitates regulatory approval, and aids in error detection.
Ethics, Data Governance, and Regulatory Frameworks
The ethical integration of AI in oncology hinges on secure, unbiased, and transparent data handling. Regulatory agencies like the FDA have begun issuing guidance on “Software as a Medical Device” (SaMD), emphasizing continual learning, performance monitoring, and equity considerations . Similarly, the European Medicines Agency (EMA) has developed frameworks for AI in clinical trials and diagnostics. Equitable AI deployment demands conscious strategies to prevent algorithmic bias, where minority populations are underrepresented in training data. Federated learning — in which AI models are trained across decentralized institutions without

sharing raw patient data — offers a promising solution to balance data access with patient privacy (Sheller et al., 2020).

## AI in Oncological Imaging

### Radiomics and AI-Assisted CT, MRI, and PET Interpretation

Radiomics is the high-throughput extraction of quantitative features from medical images, converting visual patterns into analyzable datasets (Lambin et al., 2017). These features — encompassing tumor shape, texture, and pixel intensity distributions — can be linked to genetic profiles and clinical outcomes through AI models.

Deep convolutional neural networks (CNNs) have achieved radiologist-level performance in detecting lung nodules on CT scans (Nam et al., 2019), differentiating glioblastomas from brain metastases on MRI (Chang et al., 2018), and predicting treatment response in non-small cell lung cancer (NSCLC) based on PET imaging (Yip et al., 2017).

AI in Digital Pathology — From Histology to Spatial Tissue Architecture Mapping

Digital pathology has evolved from static slide scanning into an AI-rich field capable of automated whole-slide image analysis. Convolutional networks can now classify tumor histotypes, grade cancers, and even detect molecular signatures directly from hematoxylin–eosin (H&E) stained slides (Coudray et al., 2018).

In addition to diagnosis, spatial transcriptomics combined with AI allows mapping of gene expression patterns within the physical context of tumor microenvironments. For example:

AI segmentation of tumor-infiltrating lymphocytes (TILs) provides prognostic value in breast, lung, and colorectal cancers (Saltz et al., 2018).

Graph neural networks (GNNs) model cellular neighborhoods, revealing immune exclusion patterns predictive of checkpoint inhibitor response (Jackson et al., 2020).

### Real-Time Intraoperative AI-Assisted Imaging

AI is extending its reach into the surgical theater. Intraoperative fluorescence imaging, augmented by deep learning, can identify tumor margins in real time, reducing positive resection rates in glioma surgery (Valdés et al., 2018).

Multimodal Image Fusion — Combining Radiology, Histology, and Molecular Imaging

Cancer is rarely uniform; each imaging modality reveals different aspects of tumor biology. AI-based fusion frameworks integrate:

Radiology (CT, MRI, PET) — macrostructure and metabolic activity.

Histology — microarchitecture and cellular composition.

Molecular imaging — receptor status, enzymatic activity, hypoxia markers.

Deep learning can align and correlate these datasets into a unified patient-specific tumor model. For NSCLC, for example, PET radiomics fused with H&E-based histopathology and EGFR mutation status can improve prediction of progression-free survival (Wu et al., 2020).

### Case Studies from Clinical Deployment

Several AI-oncology imaging systems are already in clinical use:

Botkin.AI — deployed in Russian oncology centers for lung cancer CT screening, integrating hybrid intelligence workflows (Drokin et al., 2019).

Arterys — FDA-cleared cloud platform for AI-assisted cardiac and oncology MRI, capable of tumor volumetry and segmentation.

Care Mentor AI — automates X-ray and CT analysis with physician validation loops.

These cases illustrate that regulatory acceptance is achievable when AI systems are explainable, validated in multi-center trials, and integrated into existing PACS (Picture Archiving and Communication System) workflows.

Adaptive therapy triggers — where imaging updates cause instant treatment plan recalibration.

AI in Tumor Genomics and Epigenomics

### Large-Scale Cancer Genomic Projects

The last two decades have witnessed an explosion of cancer genomic data. Landmark initiatives such as The Cancer Genome Atlas (TCGA), International Cancer Genome Consortium (ICGC), and Catalogue Of Somatic Mutations In Cancer (COSMIC) have mapped millions of mutations across tumor types (Forbes et al., 2017; Bailey et al., 2018).

While these datasets have immense value, their complexity surpasses traditional biostatistical methods. For example:

A single patient's tumor genome may carry 10,000–100,000 mutations (Lawrence et al., 2014).

Many variants are of unknown significance, with no clear link to treatment response or prognosis.

AI systems, especially deep learning models, can process these mutation landscapes holistically — identifying patterns that correlate with drug sensitivity, metastatic risk, and survival.

### AI in Mutation Detection and Classification

Traditional mutation calling pipelines rely on alignment and variant-calling algorithms, followed by manual filtering. AI-enhanced variant calling, as implemented in Google's DeepVariant, uses CNNs to reinterpret sequencing data as "images" of read pileups, improving accuracy in low-quality regions (Poplin et al., 2018).

### In oncology, AI can:

Differentiate driver from passenger mutations based on structural context.

Predict functional impacts of non-coding mutations using models like ExPecto (Zhou et al., 2018).

Identify mutation combinations predictive of synergistic therapy benefits.

### AI-Driven Methylation Biomarker Discovery

DNA methylation patterns serve as both diagnostic and prognostic markers across cancer types (Berman et al., 2012). Whole-genome bisulfite sequencing and methylation arrays generate massive datasets, where AI excels at detecting subtle, multi-locus methylation signatures.

Random forest and gradient boosting models for classifying tumors of unknown primary origin using methylation fingerprints (Capper et al., 2018).

Deep autoencoders for unsupervised clustering of methylation landscapes, revealing new tumor subtypes (Yao et al., 2019).

Survival-linked methylation panels for NSCLC and glioblastoma, guiding adjuvant therapy choices.

### Multi-Omics Integration

Single-omics approaches provide limited insight into the tumor's functional state. AI can integrate:

Genomics — mutations and copy-number alterations.

Transcriptomics — gene expression and splicing profiles.

Proteomics — post-translational modifications (where neuroproteomics expertise applies).

Metabolomics — small-molecule profiles reflecting metabolic rewiring in cancer.

Graph neural networks (GNNs) are particularly suited for integrating these modalities, modeling biological systems as interconnected nodes (genes, proteins, metabolites) (Zitnik et al., 2018).

Such integrative models can predict therapy response more accurately than single-omic models.

Integration of spatial transcriptomics and proteomics in tumor microenvironment (TME) mapping could feed into these AI systems, enabling not just classification but spatially-resolved therapy optimization.

Predicting Treatment Response and Resistance via AI-Based Gene Expression Modeling

AI models trained on baseline omics data can forecast which patients will respond to targeted therapies or immunotherapies. For instance:

Support vector machines predicting EGFR-TKI response in NSCLC (Bychkov et al., 2018).

Neural networks predicting PD-1 checkpoint inhibitor efficacy from RNA-seq data (Sun et al., 2020).

Reinforcement learning frameworks adapting therapy regimens in silico before real-world application.

## AI for Liquid Biopsy and Exosome-Based Diagnostics

### Liquid Biopsy as a New Frontier in Oncology

Liquid biopsy — the analysis of tumor-derived material in blood or other body fluids — has emerged as a minimally invasive alternative to tissue biopsy. It enables:

Early cancer detection before imaging-detectable lesions appear.

Real-time monitoring of tumor evolution and treatment response.

Detection of minimal residual disease (MRD) after therapy (Crowley et al., 2013).

Tumor-derived components measurable via liquid biopsy include:

- Circulating tumor DNA (ctDNA)
- Circulating tumor cells (CTCs)
- Exosomes and other extracellular vesicles (EVs)
- Tumor-educated platelets (TEPs)
- Cell-free RNA (cfRNA)

However, the signal-to-noise ratio in liquid biopsies is extremely low — tumor material can represent less than 0.1% of total nucleic acids in circulation (Wan et al., 2017). AI-based methods excel at extracting clinically relevant patterns from this noisy data.

### AI-Assisted Analysis of Circulating Tumor DNA (ctDNA)

ctDNA carries tumor-specific genetic and epigenetic alterations. AI can enhance ctDNA analysis by:

Error suppression in sequencing reads via deep learning–based denoising (Zhou et al., 2021).

Predictive modeling of tumor burden changes over time to detect relapse earlier than radiology (Parikh et al., 2019).

Mutation signature classification, e.g., distinguishing between therapy-induced mutations and tumor evolution.

Integration with methylation-based liquid biopsy platforms (Liu et al., 2020) allows AI to identify cancer even in the absence of detectable mutations, expanding detection to earlier stages.

### Exosome Proteomics and AI — A Powerful Diagnostic Duo

Exosomes are 30–150 nm vesicles secreted by most cells, carrying proteins, lipids, and nucleic acids reflective of their cell of origin. Tumor-derived exosomes (TDEs) play active roles in metastasis and immune evasion (Kalluri & LeBleu, 2020).

### Microfluidics, Organ-on-Chip, and AI Integration

Microfluidic devices can isolate rare CTCs and exosomes with high efficiency. When combined with AI-based image recognition:

Microfluidic chip images can be analyzed in real time for vesicle classification and count accuracy.

Machine learning can optimize flow rates and chip geometries for maximal yield without damaging vesicles.

### Organ-on-chip tumor models could serve a dual purpose:

Generate exosome “training datasets” under controlled TME conditions.

Test AI-predicted nanoparticle and exosome therapies in a physiologically relevant microenvironment before in vivo studies.

### Multi-Marker Liquid Biopsy and AI Integration

A transformative application of AI is combining multiple liquid biopsy analytes — ctDNA, exosomes, cfRNA, and TEPs — into integrated models.

Random forest models can assign probabilistic cancer type classification.

Deep multimodal networks fuse omics, imaging, and clinical metadata for comprehensive cancer fingerprinting (Cristiano et al., 2019).

Prognostic models can dynamically update risk scores with every new patient sample, enabling continuous oncology monitoring.

### Point-of-Care AI Diagnostics

Advances in portable sequencing devices and cloud-based AI now make point-of-care (POC) cancer diagnostics feasible. Examples:

### Smartphone-integrated microfluidics for exosome detection.

Cloud AI pipelines processing ctDNA sequencing data in under an hour.

AI-powered breath analyzers detecting volatile organic compounds associated with lung and gastric cancers (Amal et al., 2022).

### AI in Tumor Microenvironment (TME) Modeling

Defining the Tumor Microenvironment and Its Role in Cancer Progression

The tumor microenvironment (TME) encompasses the cellular, molecular, and structural components surrounding tumor cells, including:

- Cancer-associated fibroblasts (CAFs)
- Immune cells (TILs, Tregs, macrophages, NK cells)
- Endothelial cells and pericytes
- Extracellular matrix (ECM)
- Soluble factors (cytokines, chemokines, growth factors)

Far from being a passive backdrop, the TME actively influences tumor growth, angiogenesis, immune escape, and therapy resistance (Quail & Joyce, 2013). Traditional TME studies rely on static histology, but tumors evolve dynamically. AI offers the ability to model these changes over time and predict how interventions will reshape the microenvironment.

### AI-Based Spatial Transcriptomics and Proteomics

Spatial transcriptomics (ST) and spatial proteomics map molecular activity in situ — maintaining the spatial relationships between cell types. AI is revolutionizing ST analysis by:

Cell-type deconvolution — deep learning models separating mixed transcriptomic signals into distinct cell populations (Bergenstråhle et al., 2020).

Spatial pattern recognition — identifying immune-excluded vs. inflamed tumor regions predictive of immunotherapy response.

Prognostic TME atlases — combining spatial transcriptomics with digital pathology to generate survival-linked TME signatures.

### Predictive Modeling of Immune–Oncology Interactions

AI can model the spatiotemporal dynamics of immune–tumor interactions, including:

Immune checkpoint dynamics — predicting PD-1/PD-L1 blockade efficacy.

Cytotoxic T lymphocyte (CTL) infiltration trajectories — identifying TME “cold spots” resistant to infiltration.

Neoantigen presentation mapping — integrating MHC-binding prediction with spatial cell maps to forecast immune escape (Wells et al., 2020).

### Future Vision: The AI-TME Convergence Platform

Patient biopsy → processed for spatial transcriptomics, spatial proteomics, and exosome profiling.

Data fed into an AI pipeline integrating clinical, genomic, and TME-specific features.

Digital twin TME generated, simulating tumor-immune-stroma interactions under various therapies.

Optimal therapy sequence determined — including nanoparticle-enhanced proton therapy dosing personalized to the patient’s TME architecture.

### AI-Enhanced Therapeutic Strategies

AI in Drug Discovery and Drug Repurposing

Drug discovery has historically been a decade-long process with high attrition rates. AI is accelerating this process by:

Predicting drug–target interactions using deep neural networks (Öztürk et al., 2018).

De novo molecular design via generative adversarial networks (GANs) and reinforcement learning (Zhavoronkov et al., 2019).
Drug repurposing through AI analysis of multi-omics and phenotypic data to match existing compounds with new cancer indications (Stokes et al., 2020).

### AI-Driven Optimization of Chemotherapy Regimens

Chemotherapy remains a mainstay for many cancers, yet dosage optimization is often empirical. AI allows:
Dose personalization based on pharmacogenomics, organ function, and TME metrics.
Toxicity prediction using machine learning on historical adverse event databases (Lee et al., 2018).
Adaptive scheduling via reinforcement learning to adjust cycles according to tumor biomarker dynamics (Zhao et al., 2021).

### AI and Targeted Radiotherapy Planning

Radiotherapy planning is complex — requiring precise tumor targeting while sparing normal tissue. AI enhances this by:
Automating contour segmentation for organs-at-risk (OARs) and gross tumor volume (GTv) (Men et al., 2018).
Radiomics-guided dose painting — selectively escalating doses to more aggressive subregions identified by imaging biomarkers.
Predicting patient-specific radiation sensitivity using genomics and transcriptomics (Scott et al., 2017).
Nanoparticle-Enhanced Proton Therapy for NSCLC — Mechanistic Rationale, AI Dose Optimization, and In Vitro Cytotoxicity
Physical enhancement — nanoparticles increase local dose deposition via secondary particle emission (e.g., boron–proton capture producing alpha particles).
Biological modulation — nanoparticles can be functionalized with tumor-targeting ligands, radiosensitizers, or immunomodulatory agents.
Theranostic integration — combining imaging contrast enhancement with therapeutic effect.
AI can optimize this approach by:
Patient-specific dose modeling — integrating CT/PET radiomics with Monte Carlo simulations to determine nanoparticle concentration and beam energy.
Treatment adaptation — using real-time imaging feedback to modify beam path during therapy.
Toxicity prediction — combining pharmacokinetic data with AI-driven normal tissue complication probability (NTCP) models.
AI for Adaptive Radiotherapy and Real-Time Response Monitoring
Adaptive radiotherapy adjusts treatment plans based on changes in tumor volume, position, or biology over the course of therapy. AI supports this by:
Rapidly re-segmenting updated imaging data for new beam plans.
Predicting tumor shrinkage trajectories and anticipating anatomical shifts.
Integrating liquid biopsy signals — such as ctDNA drops — into adaptive algorithms for earlier therapy response detection.

### Overview of Nanoparticle Platforms in Cancer Medicine

Nanoparticles (NPs) in oncology function as drug carriers, radiosensitizers, imaging agents, and immunomodulators. Common platforms include:
Inorganic nanoparticles — gold (AuNPs), iron oxide, boron nitride, silica.
Organic nanoparticles — liposomes, polymeric micelles, dendrimers.
Hybrid systems — combining inorganic cores with organic coatings for targeted delivery (Peer et al., 2020).

Their advantages include:
Enhanced permeability and retention (EPR) effect for tumor accumulation.
Surface functionalization for ligand-targeted delivery.
Ability to co-load multiple therapeutic and diagnostic agents (theranostics).
Boron nitride nanoparticle work adds a unique dimension — exploiting their physical and chemical stability, low toxicity profile, and potential for proton therapy dose enhancement.

### AI-Guided Nanoparticle Design and Functionalization

Traditional nanoparticle design relies on trial-and-error synthesis, but AI is transforming this by:
Predicting NP–biological interactions from material descriptors (size, charge, hydrophobicity) using supervised learning (Patel et al., 2021).
Optimizing surface ligand density for maximum tumor binding affinity without off-target accumulation.
Using generative models to propose novel NP architectures with desired pharmacokinetic profiles.
For example:
Graph neural networks (GNNs) can model nanoparticle–protein corona formation, predicting opsonization and immune clearance.
Bayesian optimization can identify the ideal PEGylation length for stealth properties while preserving targeting ligand activity.

Theranostic Nanoparticles — Imaging and Therapy Convergence
Theranostic NPs integrate diagnostics and therapy in one platform. Applications include:
MRI-visible iron oxide nanoparticles delivering chemotherapy payloads.
Gold nanoshells for photoacoustic imaging and photothermal therapy.
Boron-containing NPs for boron neutron capture therapy (BNCT) and proton-enhanced alpha emission.

### AI can optimize theranostic NP deployment by:

Selecting patients most likely to benefit via imaging–omics integration.
Building predictive QSAR (quantitative structure–activity relationship) models to anticipate toxicity for new BNNP variants.
Using multi-task neural networks to simultaneously predict biodistribution, clearance, and immunogenicity.
Incorporating in vivo behavior and physiology datasets into reinforcement learning models to refine NP design in an iterative loop.
AI Prediction of Nanoparticle Biodistribution and Clearance
One of the biggest translational challenges in nanomedicine is the discrepancy between in vitro efficacy and in vivo delivery. AI can bridge this gap by:
Training on large-scale NP biodistribution datasets (e.g., the Nanomaterial-Bioactivity Database) to predict organ accumulation patterns.
Modeling renal vs. hepatic clearance based on NP size, shape, and surface chemistry.
Predicting blood–brain barrier penetration for NPs targeting CNS tumors.

### Integrating AI into Personalized Oncology Care

### AI-Based Clinical Decision Support Systems (CDSS)

Clinical decision support systems are at the heart of personalized oncology. Modern AI-powered CDSS platforms integrate:
Radiomics — tumor morphology, texture, and habitat maps from CT, MRI, PET.
Pathomics — deep learning analysis of histopathology and spatial omics.
Genomics & epigenomics — mutation signatures, methylation profiles, and gene expression clusters.
Nanomedicine parameters — nanoparticle biodistribution, radiosensitizer response predictions.

These systems generate ranked therapeutic recommendations, including predicted efficacy, side-effect risk, and cost-effectiveness (Lambin et al., 2020).

### Integrating Patient-Reported Outcomes (PROs) into AI Models

Patient-reported outcomes are crucial for understanding treatment tolerability and quality of life. AI can:

Process natural language symptom descriptions using NLP (natural language processing) models (Devlin et al., 2019).

Detect patterns predictive of severe adverse events before clinical onset.

Integrate PROs with biomarker trends to adapt therapy schedules in real time.

For example, a patient undergoing nanoparticle-enhanced proton therapy might report subtle neurological symptoms. An AI model could correlate these with imaging changes, liquid biopsy biomarkers, and prior cases — recommending early intervention before irreversible damage.

AI in Precision Prevention and Early Screening

Personalized oncology does not begin at diagnosis — prevention and early detection are equally important. AI enables:

Risk stratification by integrating family history, lifestyle, environmental exposure, and multi-omics data.

Dynamic screening schedules — adjusting frequency and modality based on changing biomarker patterns.

Predictive modeling for pre-malignant lesion progression, e.g., differentiating which pulmonary nodules will evolve into NSCLC.

Simulate tumor growth and metastasis under different therapy scenarios.

Predict the impact of nanoparticle formulations and proton therapy beam adjustments before actual treatment.

Test drug–gene interactions from CRISPR functional screens without human risk.

Baseline data collection — imaging, multi-omics, exosome profiles, spatial transcriptomics, organ-on-chip assays.

Model construction — integrating these datasets into a physics-informed AI framework.

Therapy simulation — testing thousands of therapy permutations in silico.

Clinical implementation — selecting the therapy plan with the highest simulated success probability.

Real-Time Closed-Loop Oncology Systems

With continuous monitoring via imaging, liquid biopsy, and wearable sensors, AI can enable closed-loop cancer therapy:

Sense — collect data from tumor biomarkers, imaging, and physiological metrics.

Analyze — AI evaluates whether tumor response matches predicted trajectory.

Act — automatically adjust treatment intensity, drug combinations, or proton beam paths.

Summary of Fully integrating AI into personalized oncology requires harmonizing diagnostics, therapy design, patient feedback, and adaptive control into a single clinical ecosystem. The digital twin model — enriched by nanoparticle, spatial omics, CRISPR, and exosome expertise — represents the most advanced embodiment of this vision, moving from reactive cancer care to proactive, precision-guided intervention.

AI in Hematologic Malignancies and Minimal Residual Disease Detection

Hematologic malignancies, including leukemias, lymphomas, and multiple myeloma, present unique diagnostic and therapeutic challenges compared to solid tumors. Their progression often occurs within the circulatory system or bone marrow, leading to a complex interplay between malignant cells, the immune microenvironment, and systemic factors such as cytokine signaling. Early detection of relapse through minimal residual disease (MRD) monitoring is one of the most

powerful predictors of patient outcomes, with profound implications for precision therapy (Faham et al., 2012; Buccisano et al., 2014).

### AI-Driven Flow Cytometry Analysis

Flow cytometry remains the cornerstone for MRD detection in hematologic cancers. However, traditional gating strategies are both labor-intensive and prone to operator bias. Deep learning models, particularly convolutional neural networks (CNNs) adapted for multi-parametric flow cytometry data, have shown the capacity to automate gating, identify rare malignant subpopulations, and integrate high-dimensional phenotypic data into clinically actionable predictions (Aghaeepour et al., 2013; Leipold and Maecker, 2015). By training on millions of single-cell events, AI can detect abnormal immunophenotypes at frequencies as low as 10^-5, exceeding the practical detection limit of manual analysis (Nguyen et al., 2021).

### Next-Generation Sequencing (NGS) and MRD Quantification

NGS-based MRD detection offers unparalleled sensitivity by tracking patient-specific clonotypes, particularly in acute lymphoblastic leukemia (ALL) and chronic lymphocytic leukemia (CLL) (Logan et al., 2014; Faham et al., 2012). Machine learning algorithms have been applied to sequence read distributions, error profiles, and clonotype dynamics to distinguish true residual disease from sequencing artifacts. Recurrent neural networks (RNNs) can model clonal evolution trajectories over time, enabling dynamic risk assessment and early therapeutic intervention (Bashford-Rogers et al., 2019).

### Multi-Omics Integration for Relapse Prediction

Hematologic malignancies exhibit heterogeneity not only at the genomic level but also in epigenetic landscapes, transcriptomic states, and proteomic signatures. Integrating multi-omics datasets with AI can uncover relapse-predictive biomarkers that are invisible to single-omic approaches (Li et al., 2020; Hu et al., 2021). For example, methylation profiling of promoter regions in key tumor suppressor genes, when combined with transcriptomic expression data, can refine MRD risk stratification in patients who are otherwise MRD-negative by flow cytometry (Bacher et al., 2010).

### AI-Enhanced Imaging for Bone Marrow Assessment

Infiltration of malignant cells into the bone marrow can be detected via histopathology and advanced imaging modalities such as MRI and PET/CT. AI-assisted digital pathology, leveraging transformer-based vision models, can quantify the percentage of malignant infiltration and identify subtle architectural changes predictive of early relapse (Litjens et al., 2017; Srinidhi et al., 2021). Hybrid PET/CT image analysis models have been trained to correlate metabolic tumor volume with molecular MRD results, supporting integrated decision-making (Barrington et al., 2014).

### Adaptive Therapy Guidance

The ultimate utility of AI in MRD monitoring lies in adaptive therapy guidance. Reinforcement learning algorithms can continuously update treatment recommendations based on real-time MRD measurements, drug response profiles, and toxicity data (Liu et al., 2021). Such systems can propose individualized therapy de-escalation in patients achieving deep molecular remission, potentially reducing long-term toxicity, or intensification in those with rising MRD trends (Micallef et al., 2020).

### Ethical and Regulatory Considerations

The use of AI in MRD detection raises important regulatory questions. While FDA-cleared algorithms exist for radiology and digital pathology, AI-assisted MRD diagnostics must meet stringent validation requirements given the life-altering nature of treatment decisions based on these results (Topol, 2019). Data privacy, interoperability, and transparency in algorithm decision pathways remain critical for clinical adoption (Esteva et al., 2021).

## Future Directions

The integration of AI with single-cell multi-omics, real-time biosensors, and federated learning frameworks could redefine MRD detection in the coming decade. By enabling decentralized, privacy-preserving analysis across global cancer centers, AI may democratize access to cutting-edge hematologic oncology diagnostics, even in resource-limited settings (Kaissis et al., 2020). The convergence of AI and hematology holds the promise of not only earlier relapse detection but also the realization of a truly adaptive, patient-specific therapeutic paradigm.

Multi-Agent AI Systems in Oncology: Coordinated Intelligence for Cancer Care

The complexity of oncologic decision-making often exceeds the capabilities of a single monolithic model. Multi-agent AI systems—frameworks in which multiple specialized models interact, collaborate, or negotiate—offer a paradigm shift toward holistic cancer care (Wooldridge, 2009; Jennings et al., 2014). In oncology, such systems can integrate molecular diagnostics, imaging analytics, prognostic modeling, and therapeutic planning into a dynamic, coordinated ecosystem. This approach addresses one of the main bottlenecks of current AI applications: the inability to adaptively incorporate heterogeneous and evolving patient data streams in real time.

## Architectural Principles of Multi-Agent Systems

A multi-agent oncology system can be conceptualized as a distributed intelligence network, where each agent is a domain-specialized AI (e.g., histopathology classifier, genomics interpreter, radiomics extractor) connected via a decision-fusion protocol (Russell & Norvig, 2021). Agents may operate under centralized coordination, in which a supervisory AI synthesizes agent outputs, or decentralized consensus, in which agents negotiate via protocols such as Contract Net or multi-agent reinforcement learning (Lowe et al., 2017; Foerster et al., 2018).

This architecture is particularly advantageous in precision oncology, where data types are diverse—ranging from next-generation sequencing (NGS) variants to circulating tumor DNA (ctDNA) kinetics and PET/CT voxel-level radiomics. Inter-agent communication enables cross-modal inference, allowing, for example, a radiomics agent to request specific genomic data if morphological features suggest certain mutational profiles.

## Case Study: AI-Orchestrated Tumor Board

A practical instantiation is the AI-assisted multidisciplinary tumor board. Here, agents contribute evidence-based recommendations from different knowledge domains:

Pathology agent: Confirms histological subtype and molecular markers (e.g., EGFR, KRAS) from whole-slide images (Campanella et al., 2019).

Radiology agent: Provides lesion segmentation, volumetric growth rates, and texture-based malignancy scores (Gillies et al., 2016).

Genomics agent: Interprets actionable variants in the context of current clinical trial registries (Li et al., 2017).

Prognostics agent: Uses longitudinal EHR data to model survival probabilities and toxicity risk (Kourou et al., 2015).

The coordination agent integrates these perspectives, applying Bayesian belief networks or consensus-based ensemble voting to produce a unified recommendation.Inter-Agent Negotiation and Conflict Resolution Oncologic datasets often contain ambiguous or conflicting evidence. For example, radiomics may indicate aggressive disease progression, while liquid biopsy markers remain stable. Multi-agent systems resolve such contradictions through weighted confidence modeling (Cheng et al., 2021) or game-theoretic negotiation. Explainable AI (XAI) plays a pivotal role in this process, allowing human clinicians to inspect not only the final decision but also the inter-agent discourse—a log of evidence exchange, conflict identification, and compromise formation (Doshi-Velez & Kim, 2017).

### Integration with Clinical Operations

To be operationally viable, multi-agent oncology systems must integrate seamlessly with hospital information systems (HIS), laboratory information management systems (LIMS), and imaging PACS (Doi, 2007). Interoperability is achieved through FHIR (Fast Healthcare Interoperability Resources) standards (Bender & Sartipi, 2013), enabling agents to fetch, update, and cross-reference patient data in real time.

The real-time adaptability of multi-agent architectures is crucial for adaptive clinical trials and just-in-time treatment modification. For example, a toxicity-monitoring agent could trigger dose adjustments in a chemotherapeutic regimen based on lab values and wearable sensor data before symptoms escalate.

### Challenges and Future Directions

Despite their promise, multi-agent systems face obstacles including data governance complexity, latency in inter-agent communication, and the risk of emergent behavior that deviates from intended clinical protocols. Regulatory bodies will likely require transparent agent-level audit trails and post-deployment surveillance to detect unsafe decision dynamics. Emerging work suggests that graph neural networks (GNNs) and federated multi-agent learning could further enhance scalability by enabling agents to share learned representations without centralizing patient data (Scarselli et al., 2009; Yang et al., 2019). The long-term vision involves human–AI co-governance, where clinicians act as high-level supervisors while AI agents autonomously manage most operational decisions within ethical and legal constraints.

### Multi-Agent AI Systems for Coordinated Oncology Care

The evolution from single-task AI models to multi-agent systems (MAS) represents a paradigm shift in oncology. While early AI deployments in cancer care focused on isolated applications — such as radiology interpretation (McKinney et al., 2020) or genomic variant calling (Poplin et al., 2018) — modern research increasingly explores MAS architectures in which heterogeneous AI agents collaborate to deliver integrated decision-making across diagnostic, prognostic, and therapeutic domains. Such systems mirror the interdisciplinary workflows of tumor boards but operate at digital speed, enabling near-real-time synthesis of diverse datasets (Garnelo et al., 2021).

### Architectural Frameworks for Multi-Agent Collaboration

A typical MAS in oncology might consist of specialized agents:

Diagnostic Agent – processes histopathological slides using convolutional neural networks (Campanella et al., 2019) to detect malignant features.

Prognostic Agent – applies survival models such as DeepSurv (Katzman et al., 2018) to estimate patient-specific risk curves.

Therapeutic Optimization Agent – runs reinforcement learning simulations to identify treatment regimens with maximal efficacy and minimal toxicity (Zhou et al., 2020).

Toxicity Monitoring Agent – continuously integrates wearable sensor data and laboratory results to predict adverse events before clinical manifestation (Miotto et al., 2021).

Coordination between agents typically employs shared communication protocols and blackboard architectures, where intermediate outputs are posted to a common data layer accessible to all agents (Durfee, 1999). Recent work in federated multi-agent learning allows these systems to operate across institutions without direct data pooling, thereby preserving patient privacy while benefiting from cross-center knowledge aggregation (Yang et al., 2019).

### Advantages Over Single-Agent Systems

Single AI models are often limited by their task specificity and inability to contextualize findings from other modalities. MAS architectures overcome this by enabling dynamic task reallocation — for instance, when a diagnostic agent identifies ambiguous histology, it can request additional

molecular profiling, triggering the genomic analysis agent to reprioritize its workload. Such coordination improves both diagnostic accuracy and workflow efficiency (Zhang et al., 2021).

### Clinical Deployment and Validation

Pilot deployments of MAS in oncology have demonstrated significant gains in care coordination. In a multi-center breast cancer trial, a MAS integrating radiomics, genomics, and treatment optimization agents improved adherence to NCCN guidelines by 17% compared to standard physician-led planning (Huang et al., 2022). The primary barrier to clinical adoption remains regulatory: MAS introduce complexity in accountability, as clinical outcomes are influenced by emergent behaviors arising from inter-agent interactions (Recht et al., 2020).

### Ethical and Governance Considerations

Because MAS decisions emerge from distributed reasoning, explainability becomes more challenging — clinicians may need to interrogate multiple agents to reconstruct the causal chain leading to a recommendation. Recent proposals advocate for "explainability agents" within MAS that monitor and translate decision pathways into human-interpretable narratives (Gunning et al., 2019). This aligns with the broader movement toward AI governance frameworks in medicine, ensuring accountability, transparency, and fairness across complex digital ecosystems (Morley et al., 2020).

### Future Directions

Integration of MAS with digital twin technology offers the potential to run parallel in silico treatment simulations before committing to a clinical decision (Björnsson et al., 2020). Quantum-inspired MAS, leveraging optimization algorithms adapted to quantum annealers, may further accelerate combinatorial therapy planning in cases such as refractory metastatic cancers (Li et al., 2022). Ultimately, MAS may become the backbone of autonomous oncology care pathways, coordinating diagnosis, therapy selection, monitoring, and palliative care with minimal human intervention, while keeping physicians in the oversight loop.

## AI in Oncology for Low-Resource and Global Health Settings

Globally, over 70% of cancer deaths occur in low- and middle-income countries (LMICs), where diagnostic infrastructure, specialist availability, and therapeutic options are constrained (Bray et al., 2018). Artificial intelligence (AI) — particularly when deployed through low-cost, cloud-connected, and mobile-first solutions — has the potential to bridge critical gaps in oncology care delivery, offering scalable decision support in environments with limited resources.

### Infrastructure Constraints and AI Deployment Models

In many LMIC oncology settings, histopathology turnaround times can exceed several weeks due to shortages of trained pathologists (Wilson et al., 2020). AI-enabled digital pathology systems, using compact slide scanners and convolutional neural networks, allow local technicians to digitize samples and upload them to cloud-based analysis platforms, where algorithms can provide preliminary classification within minutes (Cireşan et al., 2013; Steiner et al., 2020). Similarly, AI-assisted ultrasound interpretation has shown promise for detecting breast and cervical cancers in rural screening programs where radiologists are unavailable (Byra et al., 2019; Xie et al., 2020).

### Mobile and Edge AI in Oncology

Edge computing enables AI inference on low-power devices such as smartphones or portable diagnostic kits, eliminating dependency on continuous high-bandwidth internet. In Tanzanian cervical cancer screening, mobile phone-based AI systems analyzing VIA (visual inspection with acetic acid) images achieved comparable sensitivity to expert review while enabling same-day treatment initiation (Hu et al., 2019). Similar strategies have been used for oral cancer detection in rural India, where AI-driven smartphone imaging platforms reduced referral delays by over 40% (Sharma et al., 2020).

### AI for Treatment Prioritization in Resource-Limited Environments

Oncology treatment pathways in LMICs often require triage-based prioritization due to shortages in radiotherapy machines, chemotherapy agents, and surgical capacity (Atun et al., 2015). AI-driven triage algorithms, trained on survival and quality-of-life outcomes, can stratify patients for earliest access to high-impact interventions, potentially improving population-level outcomes when resources are rationed (Jiang et al., 2017). Integrating such systems into national cancer control programs may facilitate data-driven allocation of scarce therapeutics.

### Cost-Effective AI Development Strategies

The creation of locally relevant AI models requires region-specific datasets to account for epidemiological, genetic, and environmental variation in cancer presentation (Ferlay et al., 2019). However, data scarcity in LMICs necessitates transfer learning from models pre-trained on high-resource datasets, followed by fine-tuning with smaller local datasets to ensure accuracy across populations (Pan & Yang, 2010). Open-source AI frameworks and public datasets such as The Cancer Imaging Archive (TCIA) provide a foundation for such adaptations without prohibitive licensing costs.

### Ethical, Legal, and Cultural Considerations

Deploying AI in global oncology settings raises issues of equity, data sovereignty, and cultural appropriateness. Data localization laws in countries such as India and Brazil may restrict cloud-based AI services unless infrastructure is regionally hosted (Banerjee & Sharma, 2021). Moreover, algorithmic outputs must be presented in culturally sensitive ways — for example, communication strategies for cancer diagnoses differ significantly between Western and East Asian contexts (Huang et al., 2021). Failure to adapt to such cultural nuances can undermine trust and uptake.

### Future Prospects for AI in Global Oncology

Advances in offline-capable AI models, solar-powered diagnostic units, and satellite-based telemedicine links are poised to further extend oncology AI into the most remote settings. Emerging initiatives such as AI-powered population screening drones for skin cancer detection in rural Australia (Samarasinghe et al., 2022) and blockchain-secured cancer registries for LMICs could reshape global oncology data ecosystems, enabling more equitable access to early detection and care.

### Quantum AI and Neuromorphic Computing in Oncology

The growing complexity of oncology datasets—spanning multi-omics, histopathology, radiology, immunoprofiling, and real-time wearable biomarker streams—has begun to stretch the limits of classical computing architectures. Quantum computing and neuromorphic hardware, though at an early stage of translational readiness, promise to radically expand the computational landscape for oncology AI systems (Biamonte et al., 2017; Schuld & Petruccione, 2018). Their combined capabilities could enable breakthroughs in patient-specific cancer modeling, combinatorial drug discovery, and adaptive radiotherapy optimization.

### Quantum Machine Learning for Cancer Genomics

Quantum machine learning (QML) leverages qubits to represent and manipulate exponentially large state spaces, potentially accelerating tasks like mutational signature deconvolution and multi-gene interaction analysis (Havlíček et al., 2019). While current noisy intermediate-scale quantum (NISQ) devices cannot yet handle full patient-scale datasets, hybrid quantum–classical models have already demonstrated advantages in dimensionality reduction and kernel methods applied to genomic classification problems (Lloyd et al., 2014; Rebentrost et al., 2014).

For example, quantum kernel estimators could allow classification of rare molecular subtypes of breast or lung cancer using far fewer samples than classical deep learning requires, addressing the "small-n, large-p" challenge in oncology bioinformatics (Preskill, 2018).

### Neuromorphic Architectures for Real-Time Oncology AI

Neuromorphic computing—hardware designed to mimic the spiking behavior of biological neurons—offers ultra-low-latency and power-efficient processing for streaming data (Indiveri & Liu, 2015). In oncology, neuromorphic processors could enable bedside histopathology AI that delivers intraoperative tumor margin assessment within milliseconds, or real-time adaptive radiotherapy beam modulation based on live tumor tracking (Davies et al., 2021).

Moreover, neuromorphic systems excel at continual learning, potentially allowing AI diagnostic tools to adapt to new imaging modalities or staining protocols without full retraining—a critical advantage in multi-center cancer care (Roy et al., 2019).

### Synergistic Quantum–Neuromorphic Oncology Pipelines

The convergence of quantum and neuromorphic computing could create heterogeneous AI pipelines where quantum processors handle high-dimensional optimization (e.g., drug combination search), while neuromorphic chips execute low-latency inference at the point of care (Flick et al., 2020).

### Such a pipeline might, for example:

Use QML to identify optimal immune checkpoint inhibitor and chemotherapy pairings based on patient-specific multi-omics.

Deploy neuromorphic AI in infusion centers to monitor live patient vitals and immune biomarkers, adjusting drug dosing schedules dynamically.

### Translational and Regulatory Challenges

Despite the promise, substantial challenges remain in integrating quantum and neuromorphic systems into clinical oncology workflows. Quantum devices require specialized infrastructure and error-correction protocols, while neuromorphic hardware still lacks standardized programming frameworks for FDA-regulated applications (Topol, 2019; Esteva et al., 2021). Additionally, explainability becomes even more complex when clinical decisions depend on hybrid computational paradigms.

Nevertheless, the field is moving rapidly, with early hospital-based pilot projects exploring neuromorphic tumor segmentation and pharmaceutical companies investigating quantum-assisted cancer drug design (Perdomo-Ortiz et al., 2012; Benedetti et al., 2019).

### Future Outlook

As quantum hardware scales toward fault tolerance and neuromorphic architectures mature, oncology AI could evolve into a multi-layered cognitive ecosystem—one that ingests vast multi-modal datasets, simulates individualized tumor biology at quantum-scale resolution, and delivers adaptive treatment recommendations in real time.

If realized, such systems could reduce the gap between molecular discovery and patient survival benefit from decades to mere years, fundamentally reshaping cancer care paradigms (Topol, 2019).

## AI-Driven Oncology in Low-Resource and Global Health Contexts

### Introduction

Cancer care in low-resource settings faces structural barriers, including limited access to diagnostic imaging, molecular pathology, and oncology specialists (Farmer et al., 2010; Sullivan et al., 2015). Artificial intelligence (AI) has emerged as a potential equalizer, offering scalable, cost-effective solutions for early detection, risk stratification, and treatment optimization, even where infrastructure is minimal (Rajpurkar et al., 2022). However, the deployment of AI in these environments requires careful adaptation to constraints in hardware, data availability, and internet connectivity (Ng et al., 2020).

### AI for Resource-Efficient Cancer Screening

Low-resource regions often lack widespread access to mammography, colonoscopy, and cytology services. AI-assisted point-of-care diagnostics using low-cost imaging modalities (e.g., portable

ultrasound, smartphone-based microscopy) have shown promise in bridging this gap (Breslauer et al., 2009; Wadhwani et al., 2020). Deep learning algorithms can be optimized to function on edge devices without requiring cloud computation, enabling offline screening programs (Howard et al., 2019). For example, lightweight convolutional neural networks (CNNs) have been deployed for cervical cancer screening from smartphone-acquired images, showing comparable performance to expert cytologists (Xue et al., 2022).

### Federated Learning for Global Data Sharing

The scarcity of annotated medical images in low-resource countries hampers AI model training. Federated learning (FL) allows models to be trained collaboratively across institutions and borders without exchanging raw patient data, maintaining privacy and enabling global inclusivity (Li et al., 2020). In oncology, FL frameworks have been tested for histopathology image classification across hospitals with heterogeneous resources, improving model robustness to variations in staining and equipment (Lu et al., 2022).

### AI-Augmented Teleoncology

Teleoncology services powered by AI-based triage and decision support systems can extend oncologist reach to rural and underserved populations (Pratt-Chapman et al., 2021). Natural language processing (NLP) tools can assist in translating clinical documentation into local languages, increasing patient comprehension and adherence to treatment (Jeblee et al., 2022). Moreover, predictive algorithms can identify high-risk patients who require urgent referral, optimizing scarce specialist resources (Esteva et al., 2021).

### Overcoming Infrastructure and Data Bias Challenges

AI deployment in global health is often hindered by infrastructure limitations such as unstable electricity and intermittent internet connectivity (WHO, 2018). Solutions include solar-powered diagnostic devices, AI models designed for intermittent synchronization, and the use of low-resolution imaging datasets (Hwang et al., 2019). Additionally, models trained predominantly on high-income country datasets may perform poorly in different ethnic and environmental contexts, leading to misdiagnosis (Norori et al., 2021). Addressing these biases requires intentional inclusion of local patient data and adaptation through transfer learning (Pan & Yang, 2010).

### Implementation and Sustainability Models

Long-term success of AI oncology programs in low-resource settings depends on sustainable financing, training of local personnel, and integration into existing health systems (AbouZahr & Boerma, 2005). Public-private partnerships, donor-funded initiatives, and open-source AI platforms have all been proposed to ensure scalability and cost-effectiveness (Topol, 2019). For example, AI-enabled cervical cancer screening programs in sub-Saharan Africa have demonstrated both cost savings and increased coverage when integrated into community health worker networks (Quinn et al., 2020).

### Conclusion

AI holds transformative potential for oncology in low-resource and global health contexts by decentralizing diagnostics, enhancing telemedicine, and enabling inclusive model training. However, success requires context-specific adaptations, bias mitigation, and sustainable capacity-building strategies to ensure equitable benefits.

### AI for Predicting Treatment Toxicity and Adverse Events in Oncology

One of the most promising areas for artificial intelligence in oncology is the prediction and prevention of treatment-related toxicities. Adverse events such as chemotherapy-induced peripheral neuropathy, cardiotoxicity from anthracyclines, or immune-related adverse events from checkpoint inhibitors can significantly impair quality of life and, in some cases, lead to treatment discontinuation (Banerjee et al., 2022). AI models can integrate multimodal data—including genomic predisposition, baseline laboratory parameters, comorbidities, imaging

findings, and treatment regimens—to predict the likelihood and severity of toxicity before therapy initiation (Miotto et al., 2018).

Machine learning algorithms such as gradient boosting machines, random forests, and deep neural networks have demonstrated high performance in toxicity prediction. For instance, in breast cancer patients receiving anthracyclines, AI models incorporating echocardiographic parameters, troponin levels, and clinical features achieved superior predictive accuracy for cardiotoxicity compared to traditional risk scoring systems (Liu et al., 2021). Similarly, in immunotherapy, AI-based classifiers analyzing longitudinal lab data and cytokine profiles have successfully predicted the onset of immune-related hepatitis and pneumonitis with clinically actionable lead times (Vallejo-Torres et al., 2022).

Natural language processing of electronic health records (EHRs) has also been leveraged to identify early signals of toxicity by mining clinician notes, radiology reports, and pathology findings (Chen et al., 2019). Integration of wearable sensor data, such as continuous ECG monitoring or activity tracking, further enhances early detection of cardiotoxicity and fatigue syndromes (Esteva et al., 2021).

Despite these advances, real-world adoption faces barriers including fragmented data infrastructures, lack of prospective validation, and regulatory concerns over explainability (Topol, 2019). Federated learning approaches are emerging as a viable solution, enabling institutions to collaboratively train toxicity prediction models without sharing raw patient data, thereby addressing privacy and generalizability challenges (Sheller et al., 2020).

In the near future, AI-driven toxicity prediction could enable true preemptive oncology—optimizing treatment intensity, guiding supportive care, and informing dynamic treatment adaptation to minimize harm while maintaining efficacy. Such systems will require rigorous clinical trials to validate not only their predictive power but also their impact on patient outcomes and healthcare costs.

### AI for Personalized Surgical Planning in Oncology

Surgical resection remains the cornerstone of treatment for many solid tumors, and achieving complete removal with negative margins is often the most significant predictor of long-term survival (Topol, 2019). However, the success of oncologic surgery depends not only on the skill of the surgeon but also on the precision of preoperative planning, intraoperative navigation, and postoperative recovery strategies. Artificial intelligence (AI) is now reshaping each of these domains by enabling personalized surgical planning that is tailored to the tumor's unique characteristics and the patient's individual anatomy and physiology (Esteva et al., 2021).

### Preoperative Imaging Analysis

AI-based algorithms can analyze CT, MRI, and PET scans to generate highly accurate 3D reconstructions of tumors, surrounding vessels, nerves, and other critical structures (Litjens et al., 2017). These reconstructions can be used to simulate different surgical approaches, assess the potential for organ preservation, and predict the difficulty of achieving negative margins (Chen et al., 2020). For liver resections in hepatocellular carcinoma, AI-driven volumetric analysis can determine the future liver remnant and assess the risk of postoperative liver failure (Cai et al., 2021).

### Predictive Modeling of Surgical Outcomes

Machine learning models trained on large multicenter surgical registries can forecast postoperative complications such as infections, bleeding, or anastomotic leaks based on preoperative and intraoperative variables (Rajkomar et al., 2019). In pancreatic cancer surgery, for example, these models have been used to estimate the probability of delayed gastric emptying or pancreatic fistula, allowing surgeons to adapt techniques or perioperative care protocols accordingly (Hashimoto et al., 2020).

### Intraoperative Guidance

AI-enhanced augmented reality systems overlay anatomical maps onto the surgeon's real-time operative view, highlighting tumor margins or critical anatomical landmarks (Maier-Hein et al., 2017). Combined with robotic surgical platforms, these systems can improve precision in complex resections such as pelvic exenterations or partial nephrectomies (Shademan et al., 2016).

### Postoperative Recovery Optimization

AI can also help predict postoperative recovery trajectories, allowing for more precise discharge planning and targeted rehabilitation interventions (Johnson et al., 2021). Personalized predictions can guide early mobilization, nutritional support, and follow-up schedules, reducing readmissions and improving patient satisfaction (Topol, 2019).

By integrating preoperative, intraoperative, and postoperative data streams, AI-enabled surgical planning offers the potential for safer operations, improved oncologic outcomes, and a higher quality of life for cancer patients (Esteva et al., 2021).

### AI-Driven Drug Repurposing for Rare and Aggressive Cancers

The development of new anticancer drugs is a costly and time-consuming process, often requiring more than a decade from initial discovery to clinical approval (Paul et al., 2010). For rare and aggressive cancers, such as glioblastoma multiforme or angiosarcoma, this timeline is especially problematic due to the urgent need for effective treatments and the limited patient populations available for large-scale trials (Shoemaker, 2017). Artificial intelligence (AI) is transforming this landscape by accelerating the identification of existing drugs that could be repurposed for oncologic indications.

### Data Mining for Molecular Signatures

AI platforms can process massive datasets from genomics, transcriptomics, and proteomics studies to identify shared molecular signatures between rare cancers and other diseases for which effective drugs already exist (Ekins et al., 2019). For example, gene expression profiling in medullary thyroid carcinoma has been matched with existing kinase inhibitors approved for other malignancies (Napolitano et al., 2020).

### Deep Learning for Drug–Target Interaction Prediction

Deep neural networks trained on databases like DrugBank and ChEMBL can predict novel interactions between existing compounds and cancer-relevant targets (Zhou et al., 2020). In Ewing sarcoma, AI-based approaches have identified FDA-approved antihypertensive and antipsychotic agents with previously unrecognized activity against tumor-specific fusion proteins (Sturm et al., 2019).

### Integration with Patient-Derived Models

Repurposing predictions can be validated rapidly using patient-derived xenografts (PDXs) and organoid cultures (Vlachogiannis et al., 2018). AI models that integrate drug sensitivity profiles from these platforms can iteratively refine repurposing hypotheses, focusing on compounds with the highest probability of clinical benefit (Costello et al., 2014).

### Real-World Evidence and Postmarketing Data

Mining real-world clinical data, including adverse event reports and off-label prescription patterns, can uncover unexpected anticancer effects of approved drugs (Shameer et al., 2018). For example, retrospective analyses have suggested survival benefits in certain cancers for patients chronically taking metformin, an antidiabetic drug (Pollak, 2012).

### Regulatory and Clinical Trial Implications

AI-driven repurposing reduces development time since safety profiles of existing drugs are already established, facilitating rapid progression into Phase II trials (Pushpakom et al., 2019). Adaptive trial designs further shorten timelines by enabling the early termination of ineffective arms while expanding promising ones (Berry, 2015).

By coupling computational prediction with biological validation, AI offers a viable path to rapidly expanding the therapeutic arsenal for rare and aggressive cancers, potentially improving survival in patient populations historically underserved by traditional drug development pipelines (Topol, 2019).

### AI in Global Oncology: Democratizing Cancer Care

Cancer is a global health challenge with striking disparities in outcomes between high-income and low- to middle-income countries (LMICs) (Bray et al., 2018). Limited access to specialized oncologists, diagnostic imaging, and advanced therapeutics creates inequities that result in late-stage diagnosis and poorer survival. Artificial intelligence (AI) offers a transformative opportunity to bridge this gap by providing scalable, cost-effective, and accurate oncology tools worldwide.

### Tele-oncology and AI-Enhanced Remote Diagnostics

AI-powered platforms can analyze imaging data, histopathology slides, and molecular profiles remotely, allowing specialists to support patients in regions lacking advanced oncology infrastructure (Shen et al., 2019). Cloud-based AI pipelines enable rapid triage of suspected cancer cases, flagging high-risk patients for urgent referral while providing guidance for local clinicians (Esteva et al., 2017).

### Mobile and Point-of-Care Applications

Portable AI-enabled devices — such as smartphone-based imaging systems for skin cancer detection or microfluidic platforms for liquid biopsy analysis — extend diagnostic capacity to rural and underserved areas (Amal et al., 2022; Liu et al., 2020). By integrating multi-modal AI models, these devices can achieve performance levels comparable to urban tertiary centers, while maintaining low operational costs.

### Optimizing Resource Allocation in LMICs

AI models can prioritize resource allocation by predicting which patients are most likely to benefit from scarce treatments or radiotherapy slots. Reinforcement learning approaches simulate different care strategies to maximize survival and minimize waste (Tseng et al., 2017). For example, in radiotherapy planning, AI can optimize dose schedules using limited linear accelerators, ensuring equitable access without compromising outcomes.

### AI and Public Health Surveillance

Beyond individual patient care, AI facilitates population-level oncology surveillance. Machine learning can analyze epidemiological, environmental, and lifestyle datasets to predict regional cancer incidence, identify hotspots, and guide screening campaigns (Topol, 2019). Predictive models can also integrate social determinants of health, allowing policymakers to address systemic inequities in cancer prevention and early detection.

### Ethical Considerations in Global AI Deployment

Equitable AI deployment must account for cultural, economic, and infrastructural contexts. Models trained on high-income populations may underperform in LMICs due to genetic, environmental, or imaging differences (Oakden-Rayner, 2020). Federated learning offers a solution by training models across decentralized datasets while preserving patient privacy and incorporating local variations (Sheller et al., 2020).

### Future Vision: A Global AI-Oncology Network

A global AI-oncology network would connect local clinics, regional hospitals, and academic centers, integrating imaging, pathology, genomic, and clinical data. AI algorithms could provide:
Instant second opinions for rare cases. Such a network has the potential to reduce disparities, democratize access to precision oncology, and improve survival outcomes on a global scale (Yu et al., 2018).

In summary, AI has the capacity to extend advanced cancer diagnostics, therapeutics, and monitoring to regions historically underserved by conventional oncology infrastructures, creating a more equitable global oncology ecosystem (Topol, 2019).

## Conclusions and Future Perspectives

Artificial intelligence (AI) has emerged as a transformative force in oncology, reshaping diagnosis, treatment, and patient management across the cancer care continuum (Topol, 2019). From image recognition to molecular precision therapies, AI systems have demonstrated the capacity to augment human expertise, integrate multi-dimensional datasets, and deliver personalized therapeutic strategies.

## Key Insights from the Article

Imaging and Digital Pathology: AI-driven radiomics, histopathology analysis, and multimodal image fusion enable early detection, accurate tumor classification, and real-time intraoperative guidance (Esteva et al., 2017; Coudray et al., 2018). Integration with spatial transcriptomics and organ-on-chip platforms allows fine-grained mapping of tumor heterogeneity, guiding targeted interventions (Bergenstråhle et al., 2020).

Genomics, Epigenomics, and Multi-Omics Integration: AI enhances the interpretation of complex cancer genomes, identifies driver mutations, and uncovers methylation biomarkers relevant for both cancer and aging (Capper et al., 2018; Yao et al., 2019). Multi-omics models, particularly graph neural networks, allow prediction of therapy response and resistance, facilitating truly personalized treatment (Rappoport & Shamir, 2018).

Liquid Biopsy and Exosome Diagnostics: Non-invasive monitoring using ctDNA, circulating tumor cells, and exosomes is enhanced by AI-driven signal processing and pattern recognition, enabling early detection, minimal residual disease assessment, and adaptive therapy planning (Liu et al., 2020; Cristiano et al., 2019).

Tumor Microenvironment and Functional Genomics: AI models integrating spatial omics, CRISPR-based functional screens, and organ-on-chip data provide predictive insights into tumor–immune–stroma interactions, optimizing therapeutic targeting (Quail & Joyce, 2013; Wells et al., 2020).

Therapeutic Innovations: AI-guided drug discovery, chemotherapy optimization, targeted radiotherapy, and nanoparticle-enhanced proton therapy demonstrate the convergence of computation and precision oncology (Öztürk et al., 2018; Zhavoronkov et al., 2019). Real-time adaptive systems, incorporating liquid biopsy and imaging feedback, enable closed-loop therapy with dynamic treatment adjustments.

Nanotechnology Integration: AI-driven nanoparticle design, theranostics, and biodistribution modeling enhance safety, efficacy, and personalization of nanomedicine platforms (Patel et al., 2021). Boron nitride nanoparticles exemplify AI-optimized radiosensitizers that synergize with proton therapy.

Clinical Decision Support and Digital Twins: AI-powered CDSS and patient-specific digital twins unify multi-modal data to simulate treatment outcomes, optimize therapy sequencing, and integrate patient-reported outcomes for holistic care (Lambin et al., 2020; Devlin et al., 2019).

Global Oncology Impact: AI democratizes cancer care by providing scalable diagnostics, remote decision support, and population-level surveillance, addressing disparities in low- and middle-income countries (Bray et al., 2018; Shen et al., 2019). Federated learning ensures equitable model training while preserving patient privacy (Sheller et al., 2020).

## Future Perspectives

The next decade of AI in oncology is likely to be characterized by:

Fully Integrated AI Ecosystems: Continuous feedback loops connecting imaging, multi-omics, liquid biopsy, TME modeling, and wearable devices will allow dynamic therapy adaptation in real time (Yu et al., 2018).

Explainable and Ethical AI: Transparency, interpretability, and bias mitigation will become central to clinical adoption and regulatory approval (Tonekaboni et al., 2019).

Patient-Centric Precision Oncology: Personalized interventions, from aging-adjusted cancer risk scores to individualized nanoparticle-enhanced therapies, will prioritize both efficacy and quality of life (Aphkhazava et al., 2025).
Global Health Integration: AI will continue to reduce disparities, providing high-quality oncology diagnostics and care to resource-limited regions while enabling predictive public health interventions (Topol, 2019).
Translational and Adaptive Research: Closed-loop experimental pipelines, integrating organ-on-chip models, CRISPR screens, and AI simulations, will accelerate discovery and implementation of novel cancer therapies.
In conclusion, AI represents not merely a tool but a paradigm shift in oncology — transforming reactive care into proactive, data-driven, and personalized medicine. By bridging imaging, molecular biology, nanotechnology, and patient-centered data, AI empowers oncologists to design therapies that are precise, adaptive, and equitable. The vision outlined in this article anticipates a future where cancer care is guided by intelligent systems that continuously learn, predict, and adapt, fundamentally improving outcomes and democratizing access to advanced therapeutics worldwide (Topol, 2019).

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## Historical Sciences

# Тәңіршілдіктің Ұлы Дала философиясы мен салт-дәстүріне ықпалы

**Бисембайұлы Мирас**
Әл-Фараби атындағы ҚазҰУ докторанты

**Түйіндеме.** Мақалада тәңіршілдік дінінің Ұлы Далада таралып, ұлттық сана-сезімнің және салт-дәстүрлерінің қалыптасуына ықпалы ой бағамынан өткізіліп, басқа наным-сенімдермен салыстырмалы талдау жасалады. Тәңіршілдіктің наным-сенімнен қазақ ұлтының мәдениетінің қайнар көзіне айналғаны, қазақ тілінде және салт-дәстүрлерінде сақталған тәңіршілдіктің іздері мен мұрасы жан-жақты қарастырылады. Тәңіршілдік философиясындағы табиғат пен адамзат арасындағы қарым-қатынас, өлім мен өмірге қатысты көзқарастары, қиямет-қайым, аспан, жер, жерасты өмірі, қазақ халқы және басқа түрік халықтарындағы бақсы-дәруіштердің діни салт-дәстүрлердің сақталып, нығайтудағы рөлі түсіндіріледі. Тәңірі ұғымының қазақ және басқа түрік халықтарын біріктіруші күш екенін ескере отырып, тәңіршілдіктің мазмұны мен діни жоралғылары бойынша ұқсас басқа дәстүрлі ұлттық діндермен ұқсастықтары мен айырмашылықтары баяндалады. Әсіресе, қазақ халқының ділі мен дәстүрлерінің сақталуына ықпалын тигізген зороастризм дінімен байланыс сараланады.
**Түйін сөздер:** тәңіршілдік, бақсы, Тәңірі, Ұмай Ана, құт.

**Abstract.** This article examines the impact of Tengri religion on the development of national identity and cultural traditions in Kazakhstan. It provides a comparative analysis of Tengriism and other religious beliefs, exploring the traces and legacies of Tengrism that have been preserved in the Kazakh language and customs. The article also discusses the philosophical aspects of Tengrianism, including its relationship with nature, views on life and death, and the role of shamans in maintaining religious rituals. The article emphasizes the significance of Tengri as a source of cultural identity for the Kazakh people and other Turkic nations. It outlines the similarities and differences between Tengrianism and other traditional religions, highlighting the unique characteristics that make Tengri an influential force in modern society. The connection with the religion of Zoroastrianism, which contributed to the preservation of the customs and traditions of the Kazakh people, is particularly highlighted.
**Key words:** Tengrianism, shaman, Tengri, Umai Ana, Kut.

Тәңіршілдік ұғымын жиі қолданатынымызға қарамастан бұның нақты мағынасын ұға беретін адам саны некен-саяқ. Қазақ даласына ислам діні келгенге дейін Тәңіршілдік діні және одан басқа зороастризм сынды діндер тарағаны белгілі. Қазақ халқының салт-дәстүрінің қалыптасуына ең алдымен исламға дейінгі діндердің ықпалы мол болды. Зороастризм діні наурыз мейрамын әкеліп, күн мен түннің тұтылуы сияқты маңызды ұғымдармен таныстырса, Тәңіршілдік қазақтың барлық салт-дәстүрі мен әдет-ғұрыптарының негізі болды. Қазақтың көшпелі тұрмысының ерекшеліктері Тәңіршілдікпен байланыстырылады.

Тәңіршілдік наным-сенім ретінде шамамен 3-4 мың жыл бұрын қалыптасқан. Ұлы Даланы билеп-төстеген ғұндар Көкке табынып, Тәңіршілдік дінін әлемге таратқан. Скифтер мен сақтардың дүниетанымы да ғұндарға ұқсас болды. Алайда, Тәңіршілдіктің толыққанды мемлекеттік идеологияға деңгейіне көтерілген тұсын 552-603 жылдары салтанат құрған Түрік

қағанатымен байланыстырамыз. Түрік қағанаты Тәңіршілдікті әлемге таратуды мақсат қойды. Олар Көк Тәңіріне сеніп, өздерін Тәңірі таңдаған сүйікті ұлдары деп таныған. Көк Тәңірі – ең басты құдай, барлық түріктерді жебеуші болып саналды. Түріктер өздерін Тәңірі таңдаған халық деп сенген. Өздерін асыл қанды, ең ұлы әрі таза ұлт деп таныған [1, 138]. Оны зерттеушілер түріктер қалдырған руна жазбаларын зерттеп, анықтай алған еді.

1889 жылы Орхон Энисей жазбаларын Н.Ядринцев зерттеді. 1893 жылы 35 әріптен тұратын руна жазбаларын зерттеп, «Тәңірі» сөзін оқыған В.Томсен болды. 1894 жылы руна жазбасын В.Радлов зерттеді. Зерттеушілер Күлтегін ескерткішін бүге-шігесіне дейін қарап шығып, ескерткіште Түріктердің тарихы егжей-тегжейлі жазылғандығына мән береді. Күлтегін жазуын Йоллық тегін жаздырған еді. Тарихи ескерткіш 735 жылы жазылып бітті. Шығыс Түрік қағанатының бұл ескертіші – күллі түрік халықтарының ортақ рухани мұрасы әрі қазынасы. Онда мемлекеттік саясат пен идеология нақты жазылған. Ескерткіштің жоғарғы тұсында бұндай мәліметтер беріледі: «Тәңірі Көк пен Жерді жаратты. Көкте өзі билік етсе, Жерге адамзатты қоныстандырды. Сол адамзатты басқару үшін Қаған руын жаратқан». Осыдан-ақ түріктердің тарихи миссиясы болғандығын аңғарамыз. Мұқан қаған мен Иштеми(Естемір) Маньчжуриядан Дунайға дейінгі аймақты бағындырып, Ұлы Даланы билеп-төстейді. Осы аймақта түрік тілі, діні және көшпелі тұрмыс салты үстемдік етеді. Күлтегін жазуында 5 хикая жазылған. Бірінші хикаяда түрік халқының ұлы ата-бабалары туралы, екінші хикаяда түрік халқын табғаштардың бағындырып алғаны жөнінде, үшінші хикаяда Елтеріс қағанды, төртінші хикаяда Қапаған қаған сипатталса, бесінші хикаяда Білге қаған жайлы, ал алтыншы хикаяда Күлтегін басқарған кезіндегі құнды тарихи оқиғалардан сыр шертеді.

Идеология болып қалыптасқан Тәңіршілдік дінінің өзіндік ерекшеліктері болды. Тәңірлік ілімнің маңызды элементі табиғи әлеммен және оның заңдарымен үйлесімділікте өмір сүру туралы келісім болды. Мұндағы адам табиғаттың ажырамас элементі ретінде көрінеді, ол өзін табиғатқа қарсы қоймауы керек. Түріктер Тәңіршілдікті империалистік және қарапайым халықтық деңгейде ұстанған. Яғни, қағандар өз әмірлерін жүргізу үшін қолданса, қарапайым халық табиғатпен үйлесім табу үшін діннің негізгі ұстанымдары мен заңдарына құлақ асқан [2]. Түріктерде ең басты Құдай – Көк Тәңірі саналды. Бірақ одан басқа да көпшілік Құдайлар болған. Моңғолдарда Жер Құдайы – Әтуген әке (Өтікен әке) деп аталды.

Тәңіршілдікті дін деп қарастырудан бас тартатын зерттеушілердің қарасы көп. Хвастунова Тәңіршілдікте нақты салттар, канондар, жүйе мен иерархия жоқ деп санайды [3, 39]. Ал Тілепов Тәңіршілдіктің дін деңгейіне көтеріле алмауының негізгі екі себебін анықтайды. Ол: қасиетті кітаптың және дінді түсіндіріп, тарататын пайғамбардың болмауы [4, 246]. Алайда, бұндай қорытынды қазіргі түсінігіміз бойынша Тәңіршілдікті наным-сенімдер жиынтығы деп қарастырудан туындап отыр. Сол кездегі тұрғындар үшін Тәңіршілдік тек қана наным-сенім емес, рухани тірегі болғандығы түсінікті.

Тәңіршілдік анимизм, тотемизм және шаманизмнің элементтерін біріктіреді. Қазақтың дәстүріне едәуір ықпалы мол болды. Оттың рухты тазартушы күш ретінде халықтың жадында сақталды. Земарх Түрік қағанының елшілігінде болғанда от арқылы тазарғанын мәлімдеген. Өлім мен өмір жайында түріктерде ерекше көзқарас болған. Қыздың күйеуге шығып, тұрмыс құрғанын қазақтар өлдіге санаған. Әкесінің қызынан айрылып, басқа үйдің ошағын қорғауға кетуін өліммен байланыстырған екен. Қыз үйінен кеткенде сыңсу өлең айтылады. Бұл дәстүр және тойбастар, сүндет той сынды салт-дәстүрлер Тәңіршілдіктен бастау алады. Табалдырықты басуға тыйым салу, үлкендерді құрметтеу, күлді жерге тастамау сынды ережелер де Тәңіршілдік дінінен қалған түсініктер еді [5, 487 б.]. Қоштасу өлеңдерін Қозыбаев, Арғынбаев және Мұқанов сынды ғалымдар ежелгі түрік дәуірімен байланыстырады [6].

Тәңіршілдік діні бүкіл Ұлы Далада қанат жайып, ноғай халқының ұлттық сана-сезімінде де ізін қалдырды. Шеңбердегі крест немесе тең жақты крест-свастика, тәңіршілдіктің күн белгісі

және символы, Тәңіршілдіктің түсі ретінде Аспан көк, Кубан және түрік ноғайларының жалауларындағы қанатты қасқырдың басы, бүгінгі күнге дейін ноғайлықтардың жалғыз заңды туы болып табылады [7, 201]. Ноғайларда Көк Тәңіріні санамағанда Ер-Су және От-ана сынды Құдайлар болды. Ноғайларда бар Құдайлардың көбісі қазақ фольклорында да кездеседі. Ноғайларда бақсылық-балгерлік салты жоғары деңгейде сақталған. Тивин-діни салттарды ұйымдастырушылар, жастарды тәрбиелеушілер. Иалабаш –діни идеялар мен заңдарды орындаушылар. Әулие – әділ және дұрыс жолмен өмір сүретін киелі кісілер. Алғысшы – сиқыр жасаушылар, елбекші-рухтарды шақырушы. Ол елбек деген құрал арқылы рухтарды шақыратын. Діни жоралғыларды ашық далада бір тастың үстінде жасаған болатын. Ол тастарды ақ тастар деп атап, онда құрбандық шалынған [7, 202]. Матаны бұтақтарға байлап, дуа немесе бата оқу дәстүрін «шалама» деп атайды. Бұл дәстүр әсіресе Сібірде тұратын көпшілік түрік халықтарында сақталды. Тау етегінде немесе қырда тұратын халықтар ағашты айнала қоршап, мата байлап, түрлі діни жоралғыларды өткізеді.

Шоқан Шыңғысұлы «Қазақтардағы шаманизмнің белгілері», «Қырдағы Сот реформалары» сынды мақалаларында қазақ халқының салт-дәстүрлері мен әдет-ғұрыптарында тәңіршілдіктің іздері молынан қалғандығын сипаттай келе, патша үкіметі қазақ даласына келіп, ислам дінін қолдауға бағытталған шараларды жүзеге асыруға тырысқанда қиындықтарға тап болғанының себептерін талқылай келе, қазақтар тек сөз жүзінде ғана мұсылман болып, қазақ қалқының сана-сезімі мен ұлттық бірегейлігінің қалыптасуына тәңіршілдік пен мұсылманшылық бірдей әсер еткенін мәлімдеген [9].

Тәңіршілдіктегі ең қасиетті атрибут тостаған болып саналады. Марқұмның қолына тостаған қойылып, кейін «жұлдыз» шашылған. Ұлы Даладағы халықтар Қосөзендегі шумерлер сияқты халықты Аспан ұлдары мен Жер балалары деп бөлген. Аспан ұлдары күмбезді құрылыстарға жерленген. Қазақстандағы Сынташты және Үлкенқарағанды күмбезді қорымдарында дәл осылай мәйіттер жерленген. Патша немесе көсемнің денесіне жасанды жұлдыздар, бағалы минералдар мен металдардың моншақтары себілді.

Көшпелі сақ-скиф пен ғұндар өздері киіз үйде тұрса да, бабаларына мазар мен бейіт салғандығын Геродот мәлімдеген. Марқұмның әлеуметтік мәртебесіне қарап, жерлеу салтын өткізген. Жауынгер өлсе, қару-жарақтар, шыныаяқтар немесе құмыра шарап қойылды. Көсем өлсе, оның әйелдері, сарбаздары, құлдары, аттары мен иттері өлімге кесілген. Қазақ халқы әлі күнге дейін мазар мен құлпытас салып, өлгендердің рухына тағзым еткен [10, 159].

Қазақ тілінде сонау ежелгі заманнан бері келе жатқан ұғымдар сақтаулы. Фольклорымызда сақталған кейіпкерлер Тәңіршілдікпен тікелей байланысты. «Албасты» – әйел босанып жатқан кезде зиян тигізетін рух. «Жезтырнақ» – әйел бейнесіндегі мыс тырнақтары бар зұлым рух. «Жаурыншы» – қой иығында сәуегейлік жасайтын балгер, ал «құмалақшы» – құмалақ арқылы сәуегейлік жасайтын балгер [11, 187].

Тәңіршілдік дінінде бірнеше Құдайлар бар. Олардың бәрін тізіп жазып, қазақ сана-сезімі мен тіліндегі іздеріне назар аударған жөн. Мысалы, Бөр Тәңірі-қаза тапқандардың Құдайы, сәйрим – о дүниеге жол сілтейтін ит. Тәңіршілдік дініндегі Құдайлар мен қасиетті рухтардың атауларының көбісі қазіргі қазақ тілінде ауызекі қолданыста жиі қолданылады. Өзіміз қолданып, бірақ мағынасын жете түсінбейтін сөздер жетерлік.

Тәңірі – Көк(Аспан) Құдайы. Таң деген алғашқы буын барлық түрік тілдерінде сол күйінде жетіп, сақталған. Келесі буын «Ра» Күн деп аударылады. Кей жағдайда екінші буын «Ер» деп оқылады. Десе де, ғалымдардың бұл жайында ортақ мәмілеге келетін түрі жоқ.

Көк Тәңірінен кейін барлық түрік халықтарында кездесетін Құдай – Жер-Су(Йер-Су). Аты аталып тұрғандай, жер шарындағы бар жер мен суға жауап беріп, адамзатты маңызды ресурстармен қамтамасыз ететін жоғарғы құдірет иесі. Түріктер әлемді үш қабатқа бөлген.

Бірінші Аспан әлемін атап, онда Көк Тәңірі билейді деп қарастырса, Жер әлемін Үлкен, ал Жер асты әлемді Ерлік басқарады деп ұққан.

Үлкен – Жер құнарлылығы мен жақсылық құдайы. Жер бойындағы тіршілік иелерін қорғайды. Айды, құрлықтарды жылжыта алатын күшке ие. Көпшілік қауым ырыс-береке, молшылық пен несібені Үлкеннен күтіп, оған тілектер айтқан көрінеді.

Ерлік – Жер асты Құдайы. Ол өлген адамды Жер асты әлеміне тастап, оларды шығарып салуға міндетті. Жер асты әлемді түріктер – «Тамақ» деп атаған. Ол түпсіз тұңғиық ретінде сипатталған. Ұлы Далада зороастризм мен манихейлік сынды діндердің ықпалымен осы аталған екі Құдай турасында пікірлер өзгеріп кетеді. Үлкен – жақсылық Құдайы, ал Ерлік – жамандық Құдайы деген сенім қалыптасады. Түріктер өмірден кеткен соң, көпшілік қауым ұжмаққа барады деп сенген. Бұл о дүниені білдірген.

Қайра – Өмір ағашын еккен Құдай. Үлкеннің әкесі. Діни наным-сенім бойынша, бірнеше әлемді жаратушы, тіршілік атаулының басшысы ретінде дәріптеледі.

Ұмай Ана – Ұрпақ жалғастығын жебейтін Құдай. Әйелдер мен жөргектегі балалардың қауіпсіздігіне жауап береді. Кейде Жер Құдайы, тіпті, От Құдайы деп те аталады. Қазақ фольклорында Көк Тәңірінен кейін Ұмай Ана ең жиі аталады. Түрік заманы, қарахан заманы мен Алтын Орда дәуіріндегі тарихи кейіпкерлердің Ұмай Анаға табынғандығы жөнінде деректер бар. Қазақ үшін Ұмай Ана – балалардың қамқоршысы әрі молшылық Құдайы болып дәріптелген болса, басқа түріктер үшін Жер Құдайы, ал кейін От Құдайы ретінде аталды. Ұмай Анаға ұқсас Айсыт деген Құдай да белгілі болды. Ол балаларды Тағдырдың Алтын кітабына тіркеуші Құдай. Атқарған ісі мен бағасы бойынша Ұмай Анадан айырмашылығы байқалмайды. Қазақ фольклорында және тілінде бұл атау кездеспейді.

Құяш – Күн Құдайы. Қазақ фольклорында кездеспейді. Кейде Қояш деп те аталады. Онымен қоса, Күн Ана деген ат та кездеседі. Ол әйелдік бастаманы білдірсе, Ай ата – Ай Құдайы ретінде бейнеленіп, еркектік бастаманың нышанын білдіреді.

Мерген – Ақыл Құдайы. Мерген деген сөз қазіргі қазақ тілінде қолданылады. Алайда, мағынасы уақыт өте келе өзгергенге ұқсайды. Қызан – Соғыс Құдайы. Бұл атау қазақ тілінде жоқ. Мұның бәрі бұл Құдайлардың бәрі барлық түрік халықтарына ортақ болмағанын білдіреді. Ұлы Далада түріктер әртүрлі Құдайларға құлшынып, тағзым еткен [12].

Жайық – Өзен Құдайы, кейде Өзен рухы деп аталады. Бұл Құдайдың есімі Ибн Фадланның қалдырған күнделігінде аталмайды. Ол түріктер 12 Құдайға табынатынын, оның ішінде Тәңір, Жер-Су, Күн-Ана, Ай-Ата, Ұмай-Ана, Бай-Тәңірі, Ерлік, Көк Тәңірі, Шығыс Тәңірі, Батыс Тәңірі, Тас Құдай, Ұлы Ана Құдай есімдері кездескенін мәлімдейді. Алайда, кейін Жайық деген атау Жер-Су деген есімнің орнына пайдаланылғанға ұқсайды. Түріктер Жайық, Сырдария, Ертіс сияқты дария өзендерді түріктердің жебеушісі және қорғаушысы деп дәріптеп, тағзым етіп отырған. Әсіресе, Жайық өзенінің орны түрік халқы үшін ерекше болды. Қазіргі Жайық өзенінің аталуын сонда Тәңіршілдікпен байланыстыру орынды [13].

Одан басқа Ерік хан – Аспан денелері Құдайы, ал Алас – От Құдайы болып халықтың санасында қалған. Алас деген сөз қазақ тілінде сақталған. Қазақ халқы адыраспанды алып, бөлмені бәле-жаладан және зиянды рухтардан отты пайдаланып, аластап отырған. Адыраспанды қолданушы бірнеше рет «алас» деп айтады. Кезінде ата-бабаларымыз бөлмені тазарту үшін Алас Құдайдан көмек сұрап, бар қауіп-қатерден сақтандыруды тілегенін байқауға болады. Бұл салттың әлі күнге дейін қазақ арасында берік сақталғанын ескерсек, Тәңіршілдіктің қазақтың салт-дәстүрінің негізгі тірегі десек те болады.

Ие – халықты жебейтін рухтар, ал құт – Көк Тәңірінің жұртқа берген күші, сыйы. Бұл сөздер қазақ тілінде сақталған. Бата мен тілек тілегенде қазақ халқы құт-береке тілейді. Бұл сөздің төркіні сонау Тәңіршілдіктен бастау алады.

Ұлы Далада бақсы-дәруіштердің Тәңіршілдік дінінің таратуына ықпалы мол болды. Шыңғыс ханның қасында жүрген белгілі Тәу Тәңірі(Тәб Тенгри) діни билікті өз қолына

шоғырландырған атақты бақсы-балгер еді. Бұндай бақсыларды Ақ Қам(Қан) және Қара Қам(Қан) деп жіктеген. Ақ Қам – Көк Тәңірінен күш алатын бақсы-дәруіштер, ал Қара Қам – Жер астынан құдірет күшін пайдаланатын бақсы-дәруіштер. Бұлардың ішінен Қара Қам тыйым салынған діни жоралғыларды өткізеді деп айыпталатын.

Тәңіршілдік діні Қазақстанға буддизм, христиан және ислам діндері келгенге дейін үстемдік еткен еді. Ұлы Жібек жолы бойында әртүрлі халықтар түрлі дінді ұстанып, басқа діндерге шектеу жасалмаған еді. Тәңіршілдік дінін таратушылар басқа діннің таратылуын шектеп, басқа дін өкілдерін қудалаумен айналыспаған еді. Бұл түріктердің бостаңдықсүйгіш қасиетін аңғартады.

Тәңіршілдік синкреттік дін ретінде басқа ежелгі діндермен сабақтастығы бар дін. Тәңіршілдіктің ежелгі Египеттің наным-сенімдері арасында ұқсастық бар. Мысалы, Египетте Таурт – жер құнарлылығы және жүкті әйелдердің қамқоршысы Құдайы. Ұмай Ана осыған ұқсас қызметті атқарады. Ежелгі Египетте Ай Құдайы – Хоншу. Түріктерде Ай Ата деген Құдай бар. Тот – Египеттік Ақыл Құдайы. Түріктерде Мерген Ақыл Құдайы болып табылады. Анубис – жерлеу рәсімдерінің Құдайы, өлілер патшалығында Осиристің сотында таразы қамқоршысы. Осирис – О дүние Құдайы. Тәңіршілдік дінінде Анубис пен Осириске ұқсас қызметті атқаратын Ерлік бар.

Одан басқа, Тәңіршілдіктің ежелгі гректердің наным-сенімдері арасында ұқсастық та кездеседі. Гректерде Зевс(Юпитер) – Найзағай мен Аспан Құдайы. Түріктерде ең негізгі Құдай – Көк Тәңірі. Гера(Юнона) – отбасы мен неке Құдайы. Түріктерде отбасының қамқоршысы қызметін Ұмай Ана атқарады. Посейдон(Нептун) – өзен-көлдер Құдайы. Түріктерде Жер-Су барлық жердегі сулардың иесі болып саналады. Одан басқа Жайық деген Құдай кездеседі. Афина(Минерва) – ақыл мен әскери өнер Құдайы. Түріктерде ақыл Құдайы – Мерген, ал соғыс Құдайы – Қызан. Аид немесе Гадес(Плутон) – Жер асты Құдайы. Аидтің қызметін Ерліктің іс-әрекеттерімен сәйкестендіре аламыз.

Бұдан ежелгі діндердің көбі бір-біріне ұқсас болып, бір-біріне ықпал еткенін аңғара аламыз. Әрқайсысы басқа дінге әлем туралы жаңа түсініктерді қалыптастырып, білім көкжиегін кеңейткен.

Осылайша, Тәңіршілдік Ұлы Далада түрік халықтарына таралып, философия, мемлекеттік саясат пен салт-дәстүрлеріне едәуір мол ықпал еткен дін деп қарастыруға болады. Дегенмен, тәңіршілдік туралы зерттеулер әлі де жеткіліксіз. Қоғамның қалыптасуы мен діліне жасаған ықпалын толықтай анықтау қажет.

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# Medical Sciences

UDC: 618.19-006.6

# MULTIFACTORIAL ANALYSIS OF ETIO-PATHOGENETIC ASPECTS AND CLINICAL-DIAGNOSTIC APPROACHES IN BREAST CANCER

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**Annotation:** This scientific and analytical work presents modern global and local-regional data on incidence, mortality, lethality and five-year survival of the most common oncological pathology, such as breast cancer. The issues of etiology and pathogenesis, features of distribution, modern principles of diagnostics, including screening, as well as prognosis, preventive measures of this formidable disease are covered in detail. The epidemiological characteristics of this pathology in our republic are given in the context of the regions of the country.

**Key words:** oncology, breast cancer, phenotype, biological markers, risk factors, etiopathogenesis, diagnostics, treatment, epidemiology, incidence, mortality, lethality, five-year survival rate, prognosis, prevention.

Breast cancer (BC) is the most common global malignancy and the leading cause of cancer deaths [1]. There is much evidence showing the influence of life style and environmental factors on the development of mammary gland cancer (high-fat diet, alcohol consumption, lack of physical exercise), the elimination of which (primary prevention) may contribute to a decrease in incidence and mortality. Secondary prevention, comprising diagnostic tests (e.g. mammography,

ultrasonography, magnetic resonance imaging, breast self-examination, as well as modern and more precise imaging methods) help the early detection of tumours or lesions predisposing to tumours. It is estimated that nearly 70% of malign tumours are caused by environmental factors, whereas in BC this percentage reaches 90-95%. There are national programmes established in many countries to fight cancer, where both types of prevention are stressed as serving to decrease incidence and mortality due to cancers. Cancer prevention is currently playing a key role in the fight against the disease. Behaviour modification, as well as greater awareness among women regarding BC, may significantly contribute towards reducing the incidence of this cancer [2].

Speaking about the diagnostic criteria for making a diagnosis, women complain about the presence of a formation in the mammary gland; enlarged axillary, supra- and subclavian lymph nodes; the presence of skin changes on the mammary gland; swelling of the mammary gland. The history is noteworthy of the presence of cancer in close relatives; early onset of menstruation; age of first pregnancy and first birth, taking oral contraceptives and/or hormone replacement therapy, gynecological diseases. During a physical examination, attention is paid to the symmetry of the location and shape of the mammary glands; level of position of the nipples and their appearance (retraction, deviation to the side); skin condition (hyperemia, swelling, wrinkling, retractions or protrusions on it, narrowing of the areolar field, etc.); presence/absence of pathological discharge from the nipples (quantity, color, duration); presence of swelling of the arm on the affected side. Palpation of the mammary glands is carried out in the vertical and horizontal positions of the subject; regional and cervico-supraclavicular lymph nodes are usually performed in a vertical position [3].

From laboratory tests, if metastatic BC is suspected, it is recommended to perform detailed clinical and biochemical blood tests, and a study of the blood coagulation system. In case of hormone-dependent BC in women under 50 years of age, to assess ovarian function and plan hormone therapy, it is recommended to study the level of follicle-stimulating hormone in the blood serum and the level of total estradiol in the blood. A cytological study is also carried out (an increase in the size of atypical cells up to giant ones, a change in the shape and number of intracellular elements, an increase in the size of the nucleus, its contours, different degrees of maturity of the nucleus and other cell elements, a change in the number and shape of nucleoli); histological examination: histological type of tumor, degree of differentiation (grade - ability to form tubes, nuclear polymorphism, number of mitoses), presence of necrosis, vascular invasion, tumor of infiltrating lymphocytes, presence of calcifications. Immunohistochemical study for key markers: 1) determination of estrogen and progesterone receptors, HER2, Ki67 - it is recommended to evaluate biological markers again at least once during metastasis, if clinically possible; 2) if the result of IHC analysis of HER2 is controversial, the HER2/neu gene amplification should be determined by in situ hybridization; 3) determination of PD-L1 in triple negative BC to decide on the prescription of immunotherapy; 4) if necessary - Cytokeratin 5/6, Calponin-1, E-Cadherin, GCDFP-15, Mammaglobin, p120 and Topoisomerase IIa.

Molecular genetic testing to determine germline BRCA1/2 mutations is indicated in all patients, regardless of age, family history, or type of BC with mBC and during progression to decide whether to prescribe PARP inhibitors (olaparib1 and talazoparib). In women with a positive germline mutation of the BRCA1 or 2 gene, the incidence of BC development before 70 years of age is 45-65%. More often detected: 1) with a burdened family history (close relatives have BC aged ≤50 years, BC in a man, ovarian cancer, metastatic prostate cancer, pancreatic cancer); 2) in patients under 45 years of age; 3) in patients under 60 years of age with a triple negative BC phenotype; 4) with primary multiple BC; 5) in patients with HER2 negative BC phenotype who have a high risk of relapse after surgical treatment and neoadjuvant or adjuvant therapy; 6) for BC in men. Comprehensive genomic profiling is carried out in patients with a severe clinical course, aggressive tumors, with a high risk of progression, lack of effect from traditional methods of

antitumor treatment [in advanced BC (triple negative and progressive HER2+)] [3].

Instrumental studies: 1) ultrasound of the mammary glands, regional lymph nodes: the presence of a hypoechoic structure of the formation with large/small microcalcifications in the structure, the contours are uneven, stellate, there may be areas of mixed echogenicity, the structure of the node is heterogeneous, increased vascularization is possible; 2) mammography (mammograms in two projections visualize shapeless heterogeneous compactions with multiple microcalcifications in the structure, pronounced deformation of the stroma, thickening of the skin, nipple-areolar complex, the nipple can be retracted, the presence of enclosed lymph nodes); 3) contrast-enhanced spectral mammography (CESM) method, which consists of performing mammography with soft and hard images after intravenous administration of an iodinated contrast agent. The CESM method is informative in the diagnosis of early forms of BC, allows you to detect pathology in the dense part of the mammary gland, and is used as a differential diagnosis of benign and malignant neoplasms; before the study, creatinine and urea levels in the blood are assessed, an iodine-containing contrast agent is administered intravenously in an amount of 1.0-1.5 ml per kg of the patient's weight; images are taken in two projections, craniocaudal (CC) and media-lateral (MLO), in a period of time from 2 to 7 minutes after administration of the contrast agent; 4) magnetic resonance imaging (MRI) of the mammary glands to assess the local spread of BC for the following indications: age up to 30 years; the presence of mutations in the BRCA1, BRCA2 genes; high radiological density of the mammary glands; the presence of breast implants when it is impossible to perform a high-quality mammographic examination; presence of lobular carcinoma in situ; 5) ductography (in the presence of an intraductal formation behind the nipple, it is carried out to clarify the size and distance of the formation from the nipple-areolar complex); 6) puncture biopsy of a tumor formation (cytological examination reveals an increase in the size of cells up to giant ones, a change in the shape and number of intracellular elements, an increase in the size of the nucleus and its contours, different degrees of maturity of the nucleus and other cell elements, a change in the number and shape of nucleoli); 7) trephine biopsy or sectoral resection of the mammary gland with express histology (histological verification of the tumor: histological type of tumor, degree of differentiation (grade - ability to form tubes, nuclear polymorphism, number of mitoses), absence of necrosis, vascular invasion, tumor of infiltrating lymphocytes, the presence of calcifications; 8) ultrasound of the abdominal organs and retroperitoneal space/ultrasound of the pelvis (with metastatic lesions of the liver, its structure is heterogeneous, rounded in shape with uneven clear contours, with single or multiple formations with a hypoechoic rim along the periphery); 9) computed tomography (CT) or MRI of the abdominal organs with intravenous contrast if the results of ultrasound of the abdominal organs are ambiguous or not very informative; 10) survey X-ray examination of the CT of the chest organs (in case of metastatic lesions of the lungs across all pulmonary fields or in a segment, multiple/single mid-focal shadows with clear contours, of various sizes are determined); 10) scintigraphy of skeletal bones (hyperfixation of an osteotropic drug in foci of pathological bone formation) if metastatic lesions of skeletal bones are suspected to assess the extent of BC prevalence; 11) positron emission tomography (PET) (accumulation of the drug by pathological foci), combined with CT with tumor-tropic radiopharmaceuticals (with or without contrast) (PET-CT) to assess the extent of BC spread in cases where standard methods of staging examinations are ambiguous, especially when locally advanced process, when the detection of metastases fundamentally changes treatment tactics; 12) MRI or CT scan of the brain with IV contrast to exclude metastatic lesions if the presence of metastases in the brain is suspected.

To standardize and simplify the criteria for assessing response to tumor therapy, the international Response Evaluation Criteria in Solid Tumors (RECIST) scale is used. According to RECIST 1.1, the following types of response are distinguished for targeted lesions.

1. Complete response – disappearance of all tumor foci.

2. Partial answer – a decrease in the sum of the largest diameters of each lesion by more than

than 30%.

3. Stabilization of the disease – reduction of the sum of the largest diameters of each lesions from 20 to 30% (for RECIST 1.0 from 25 to 50%).

4. Progression of the disease – an increase in the sum of the largest diameters of each lesion by more than 20% or the appearance of new tumor lesions.

The overall response of solid tumors to treatment is based on a combination of data on measurable lesions, non-measurable lesions and the appearance or absence of new tumor lesions. The duration of overall response is from the date of documentation of the disease until its progression. Relapse-free interval (time to progression) – from the end of treatment to the date of documented disease progression [3].

As part of outpatient drug therapy, it is recommended to use hormone therapy in the adjuvant mode for patients with hormone-positive BC for at least 5 years (tamoxifen, letrozole, anastrazole, goserelin, triptorelin) and with progression or metastatic luminal BC before progression (tamoxifen, letrozole, anastrazole, goserelin, triptorelin, toremifene, fulvestrant, exemestane, everolimus). The use of bisphosphonate therapy when metastatic bone lesions are detected is recommended for two years (zoledronic and pamidronic acid, denosumab). CD 4/6 inhibitors (palbociclib, ribociclib, abemaciclib) are recommended for patients with HER2-negative metastatic luminal BC in combination with an aromatase inhibitor or fulvestrant, until progression or unacceptable toxicity develops; the use of monotherapy with Poly(ADP-ribose) polymerase inhibitors (olaparib or talazoparib) is recommended for patients with metastatic BC with germline BRCA1 or BRCA2 mutations, regardless of hormone receptor and HER2 status, as an alternative to chemotherapy. In patients with high-risk BRCA-associated BC, olaparib is prescribed as adjuvant therapy. The use of targeted therapy (trastuzumab) is recommended for patients with early and metastatic HER2-positive BC in combination with chemotherapy, targeted therapy or monotherapy (up to completion of 18 cycles). The use of targeted therapy (lapatinib) is recommended for patients with HER2-positive metastatic BC, either alone or in combination with capecitabine and/or trastuzumab, until progression or development of unacceptable toxicity. The use of capecitabine in the adjuvant treatment of chemo-resistant triple negative BC, or in metastatic BC in combination with lapatinib and hormone therapy.

Indications for radiation therapy: 1) morphologically established diagnosis of malignant neoplasm; 2) in case of relapses, continued growth of the tumor or progression of the disease after previously carried out combined or complex treatment. Methods of radiation therapy: 1) continuous radiation therapy; 2) single-fraction radiation therapy for SRS; fractionated radiation therapy for Single Focal Dose from 1.6 Gy to 12.0 Gy 2-5 fractions per week (standard fractionation, hypofractionation, hyperfractionation, accelerated fractionation, multifractionation). In this case, external beam radiation therapy is carried out 2D, 3D, IMRT, RapidArc, IGRT conformal irradiation Single Focal Dose 1.8-2.0-2.66, 2.67, 5.2 Gy 5 fractions per week up to Total Focal Dose 50 Gy, 42.56 Gy, 40.05 Gy, 25 Gy and 60-70 Gy in independent mode, Total Focal Dose 10-16 Gy (“Boost”) in the postoperative mode after organ-sparing operations. A continuous course of radiation therapy is used, using γ-therapy devices or linear accelerators. Tomotherapy is used as a standard fractionation technique for administering single and total focal doses. The main advantage is hypofractionation in Single Focal Dose 2.5 Gy. Intraoperative radiation therapy is used in breast-conserving operations for T1-2N0-1M0. The bed of the removed tumor is irradiated with an electron beam at a dose of 10-20 Gy in order to devitalize the remaining malignant cells [3].

Now, regarding chemotherapy. There are several types of chemotherapy that differ in purpose: 1) neoadjuvant chemotherapy of tumors is prescribed before surgery, in order to reduce

an inoperable tumor for surgery, as well as to identify the sensitivity of cancer cells to drugs for further use after surgery; 2) adjuvant chemotherapy is prescribed after surgical treatment to prevent metastasis and reduce the risk of relapse; 3) curative chemotherapy is given to shrink metastatic cancers. Depending on the location and type of tumor, chemotherapy is prescribed according to different regimens and has its own characteristics.

Indications for chemotherapy: 1) cytologically and histologically verified BC; 2) in the treatment of locally advanced tumors; 3) metastases in regional lymph nodes/distant organs - lungs, liver, brain, bone structure; 4) tumor recurrence; 5) a satisfactory blood picture in the patient: normal hemoglobin and hemocrit, the absolute number of granulocytes is more than 200, platelets are more than 100,000; 6) preserved function of the liver, kidneys, respiratory system and cardiovascular system; 7) the possibility of converting an inoperable tumor process into an operable one; 8) patient's refusal to undergo surgery; 9) improvement of long-term treatment results in unfavorable tumor phenotypes (triple negative, HER2-negative cancer).

Contraindications to chemotherapy can be divided into two groups: absolute and relative. Absolute contraindications: hyperthermia >38 degrees; disease in the stage of decompensation (cardiovascular system, respiratory system, liver, kidneys); the presence of acute infectious diseases; mental illness; the ineffectiveness of this type of treatment, confirmed by one or more specialists; tumor decay (threat of bleeding); the patient's serious condition according to the Karnofsky Performance Scale is 50% or less. Relative contraindications: pregnancy up to 16-18 weeks; intoxication of the body; active pulmonary tuberculosis; persistent pathological changes in blood composition (anemia, leukopenia, thrombocytopenia); cachexia.

The rationale for prescribing neoadjuvant systemic therapy for BC is: high probability of latent (micrometastatic) spread; the ability to reduce the amount of surgical intervention within the "clean" resection margins; the ability to evaluate the clinical response to therapy in vivo; availability of accurate pathomorphological assessment of the degree of tumor regression; the possibility of special studies of biopsy tumor material before, during and after completion of primary systemic treatment. For medullary carcinoma and adenoid cystic carcinoma, adjuvant chemotherapy may not be required (in the absence of lymph node involvement).

And a very important and decisive aspect when prescribing adjuvant/neoadjuvant systemic therapy is the molecular biological subtype of BC:

1. Luminal type A. In early BC (T1-2N0M0), hormone therapy is carried out only in the presence of severe concomitant diseases and/or there are absolute contraindications to surgical treatment until the maximum effect is achieved, followed by radiation therapy. For T2-4N1-3M0 locally advanced inoperable BC, it is recommended to prescribe hormone therapy with antiestrogens and aromatase inhibitors; it is advisable to carry out treatment until the maximum effect is achieved with clinical and instrumental assessment every 3 months. At the same time, in most cases, the appointment of adjuvant/neoadjuvant chemotherapy (in addition to hormonal therapy) is possible in the presence of at least two parameters: widespread process (≥ 4 regional lymph nodes affected by metastases; ≥T3); GIII; young age; presence of pregnancy; increase in initial Ki67 values during repeat biopsy/postoperative material after neoadjuvant hormone therapy.

2. Luminal B (HER2 negative). Hormone therapy + chemotherapy in most cases. For T1a (≤ 5 mm) and N0 - only adjuvant hormonal therapy. In other cases, chemotherapy with anthracycline- and taxane-containing regimens in addition to hormone therapy. Adding platinum drugs to adjuvant chemotherapy only in the presence of a BRCA1/2 gene mutation.

3. Luminal type B (HER2 positive). Chemotherapy + anti-HER2 therapy + hormone therapy. For T1a (≤ 5 mm) and N0: adjuvant hormone therapy only; chemotherapy and trastuzumab are not indicated. For T1b, c (> 5 mm but ≤ 20 mm) and N0: chemotherapy with paclitaxel (without anthracyclines) in combination with trastuzumab (followed by hormone therapy) is possible. For

T2-T4 (> 20 mm) or N+: the first step is anthracyclines, then taxanes + trastuzumab ± pertuzumab (followed by hormone therapy).

4. HER2 positive (non-luminal). Chemotherapy + anti-HER2 therapy. For T1a (≤ 5 mm) and N0: systemic therapy is not indicated. For T1b (> 5 mm but ≤ 10 mm) and N0: taxane chemotherapy (without anthracyclines) in combination with trastuzumab is possible. For T1c-T4 (> 10 mm) or N+: the first step is anthracyclines, then taxanes + trastuzumab ± pertuzumab.

5. Triple negative (ductal). Chemotherapy including anthracyclines and taxanes. For T1a (≤ 5 mm) and N0, systemic therapy is not indicated. Adding platinum drugs to adjuvant chemotherapy only in the presence of a BRCA gene mutation. There are also features when prescribing adjuvant chemotherapy to patients who have received neoadjuvant chemotherapy in full.

Also, a very important section is the use of hormone therapy in the adjuvant or neoadjuvant mode. In the premenopausal period, hormone therapy is used as follows. After completion of systemic chemotherapy and continued menstrual function, bilateral oophorectomy or ovarian suppression with luteinizing gonadotropin releasing hormone agonists followed by an anti-estrogen for 5 years is indicated. When menstrual function ceases after receiving courses of chemotherapy and the level of estradiol in the blood is determined, an anti-estrogen is prescribed to confirm true menopause. The following regimens with tamoxifen are used: 1) tamoxifen 20 mg/day orally daily for 5 years; 2) tamoxifen 20 mg/day orally daily, for 10 years, in the presence of at least one unfavorable prognosis factor: age ≤ 35 years, preserved ovarian function after adjuvant chemotherapy, T3-4, involvement of ≥ 4 axillary lymph nodes, GIII, positive HER2, high Ki67; 3) tamoxifen 20 mg/day orally daily for 5 years, then aromatase inhibitors (letrozole 2.5 mg/day orally daily, or anastrozole 1 mg/day orally daily, or exemestane 25 mg/day orally daily) for 5 years. For patients who have achieved stable menopause by the time they stop taking tamoxifen, with at least one poor prognostic factor: age ≤ 35 years, preserved ovarian function after adjuvant chemotherapy, T3-4, involvement of ≥ 4 axillary lymph nodes, GIII, HER2 positive, high Ki67; 4) ovarian suppression1 + tamoxifen 20 mg/day orally daily / aromatase inhibitors (letrozole 2.5 mg/day orally daily, or anastrozole 1 mg/day orally daily, or exemestane 25 mg/day orally daily) for 5 years, and also if there are indications for adjuvant chemotherapy and preserved ovarian function after completion of chemotherapy; 5) bemaciclib 150 mg 2 times a day in combination with endocrine therapy for the adjuvant treatment of hormone receptor positive (HR+) and human epidermal growth factor receptor type 2 (HER2) negative BC in early stages with involvement of regional lymph nodes and a high risk of relapse [3].

In pre- or perimenopausal women, endocrine therapy with aromatase inhibitors should be combined with a luteinizing hormone-releasing hormone agonist. To achieve ovarian suppression, it is possible to use the following methods: 1) surgical castration (bilateral oophorectomy); the most effective method, causes irreversible shutdown of ovarian function; 2) medicinal (analogues of luteinizing gonadotropic hormone: goserelin 3.6 mg intramuscularly once every 28 days or 10.8 mg subcutaneously once every 12 weeks; or buserelin 3.75 mg intramuscularly once every 28 days; or leuprorelin 3.75 mg IM 1 time in 28 days): causes reversible suppression of ovarian function; does not always provide complete suppression of ovarian function, especially in young women; to confirm complete ovarian suppression, it is necessary to determine estradiol in the blood serum; determination of follicle-stimulating hormone during treatment with luteinizing gonadotropic hormone analogues is not informative; aromatase inhibitors should be started 6-8 weeks after the first administration of luteinizing gonadotropin hormone analogues; luteinizing gonadotropin hormone analogues are administered monthly; 3) radial; causes irreversible shutdown of ovarian function. The optimal method of ovarian suppression has not been determined; it is usually prescribed for a period of 2-5 years.

Hormone therapy for BC for menopausal patients is carried out in the following variations:

1) tamoxifen 20 mg/day orally daily for 5 years; 2) aromatase inhibitors (letrozole 2.5 mg/day orally daily, or anastrozole 1 mg/day orally daily, or exemestane 25 mg/day orally daily) for 5 years; in the presence of at least one unfavorable prognosis factor: preserved ovarian function after adjuvant chemotherapy, T3-4, involvement of ≥ 4 axillary lymph nodes, GIII, positive HER2, high Ki67; 3) tamoxifen 20 mg/day orally daily for 10 years; in the presence of at least one unfavorable prognosis factor: preserved ovarian function after adjuvant chemotherapy, T3-4, involvement of ≥ 4 axillary lymph nodes, GIII, positive HER2, high Ki67; 4) tamoxifen 20 mg/day orally daily for 5 years, then aromatase inhibitors (letrozole 2.5 mg/day orally daily, or anastrozole 1 mg/day orally daily, or exemestane 25 mg/day orally daily) for 5 years. For patients who have reached stable menopause by the time they stop taking tamoxifen, in the presence of at least one unfavorable prognosis factor: preserved ovarian function after adjuvant chemotherapy, T3-4, involvement of ≥ 4 axillary lymph nodes, GIII, positive HER2, high Ki67; 5) abemaciclib 150 mg 2 times a day in combination with endocrine therapy for the adjuvant treatment of hormone receptor-positive (HR+) and human epidermal growth factor receptor type 2 receptor-negative (HER2-) BC in the early stages with involvement of regional lymph nodes and a high risk of relapse - continuously for 2 years or until disease relapse or intolerable toxicity develops [3].

And, of course, the surgical method remains one of the leading methods in the treatment of this pathology, and in some cases, it is the only method of treatment (cancer in situ). For BC, the following types of surgical interventions are performed: 1) radical mastectomy according to Halstead - single-block removal of the mammary gland along with the pectoralis major and minor muscles and their fascia, subclavian, axillary and subscapular tissue with lymph nodes within the anatomical cases; 2) extended axillary-thoracic radical mastectomy, single-block removal of the mammary gland with the pectoral muscles, subclavian-axillary and subscapularis tissue, as well as a section of the chest wall with parasternal lymph nodes and internal mammary vessels; 3) functionally sparing operations (modified radical mastectomy - differs from Halstead mastectomy by preserving the pectoralis major muscle; modified Madden mastectomy - differs from Halstead mastectomy by preserving both pectoral muscles; 4) simple mastectomy - removal of the mammary gland with the fascia of the pectoralis major muscle (indications: decaying tumor, advanced age, severe concomitant diseases; 5) radical sectoral resection - removal of the sector along with the tumor, part of the underlying fascia of the pectoralis major and minor muscles, subclavian, axillary, subscapular tissue with lymph nodes in one block; 6) sectoral resection - removal of the breast sector to the underlying fascia (performed only for diagnostic purposes or in combination with radiation therapy for cancer in situ); 7) biopsy of the sentinel lymph node is carried out for diagnostic and therapeutic purposes in the early stages of the disease (1st level lymph nodes are removed with a histological express study to determine the presence of elements of a malignant tumor); detection of sentinel lymph nodes is possible using radioactive colloid and/or blue dye; a combined determination method is preferred.

Indications for performing organ-preserving operations: the presence of a nodular form of cancer up to 2.0 cm in size; absence of multicentricity and multifocality of tumor growth (on mammograms, ultrasound data, clinical examination); slow and moderate growth rate, doubling of tumor size no faster than 3 months (according to medical history); a favorable ratio of the size of the mammary gland and the tumor to obtain a good cosmetic result of the operation; absence of distant metastases; the presence of single metastases in the axillary region is acceptable; the patient's desire to preserve the mammary gland; satisfactory objective tumor response (partial and complete tumor regression) to previous neoadjuvant systemic treatment.

Reconstructive operations can be performed for stages I-III of BC at the request of the patient at any tumor location: 1) reconstruction (primary or delayed) of the mammary gland using an endoprosthesis (implant) (this type of operation involves the installation of a temporary (expander) or permanent prosthesis under the pectoralis major muscle, which allows

compensation for the defect due to its volume, after mastectomy); 2) one-stage reconstruction: a skin-skin-sparing mastectomy is performed with the fascia of the pectoralis major muscle (if tumor cells are detected in the tissue behind the nipple during express histological examination, the nipple with the areola is removed); 3) reconstruction (primary or delayed) of the mammary gland using one's own tissues (autoplasty); this type of reconstruction involves replacing the defect using one's own tissues; basically, 2 types of operations are used - breast reconstruction by replacing with a TRAM flap (using a flap based on the rectus abdominis muscles) and breast reconstruction by replacing with a thoracodorsal flap, which is used in combination with an endoprosthesis.

Types of surgical interventions for metastatic BC: 1) sanitary/simple mastectomy (if there is a threat of bleeding for health reasons); 2) open liver biopsy (diagnostic surgery for suspected liver metastases); 3) other diagnostic manipulations on the liver (liver resection in the presence of single metastatic foci in the liver); 4) excision of the affected area or tissue of the meninges (in the presence of solitary metastatic foci of the meninges); 5) other types of excision or destruction of the damaged area or brain tissue (in the presence of solitary metastatic foci in the brain); 6) precision resection of a segment of the lung (in the presence of solitary metastatic foci in the lungs); 7) laparoscopic salpingo-oophorectomy (prophylactic bilateral removal of appendages for hormone-dependent BC tumors in premenopausal patients); 8) total hysterectomy with appendages (for metastatic lesions of the ovaries, uterine body); 9) electrochemotherapy for intradermal metastatic lesions (combination treatment that uses the administration of chemotherapeutic drugs in association with electroporation of the cell membrane).

Contraindications to surgical treatment for BC: the patient has signs of inoperability and severe concomitant pathology; distant metastases, the presence of a disseminated tumor process; synchronously existing and widespread inoperable tumor process of another localization, for example lung cancer, etc.; chronic decompensated and/or acute functional disorders of the respiratory, cardiovascular, urinary system, gastrointestinal tract; allergy to drugs used in general anesthesia.

Also, a very important point is preventive measures for BC. Primary prevention of BC is the prevention of the disease by studying the etiological and risk factors (normalization of family life, timely implementation of childbearing, breastfeeding the baby, avoiding marriages in cases of mutual cancer). Secondary prevention of BC is the early detection and treatment of precancerous diseases of the mammary glands. Tertiary prevention is prevention, early diagnosis and treatment of relapses and metastases; using a nutritious diet rich in vitamins and proteins, giving up bad habits (smoking, drinking alcohol), preventing viral infections and concomitant diseases, regular preventive examinations with an oncologist, regular diagnostic procedures (radiography of the lungs, ultrasound of the liver, kidneys, neck lymph nodes).

Prophylactic mastectomy - risk-reducing surgeries, such as mastectomy with reconstruction, may be offered to women at risk. The risk of developing BC is reduced by approximately 90-95%, however, absolute guarantees regarding the occurrence of BC in the future are impossible. Indications for performing bilateral prophylactic mastectomy in women who do not currently have BC (in order to reduce the risk of developing primary BC): mutations of the BRCA1 and BRCA2 genes; family history (presence of BC in first- and second-line relatives) without a proven mutation; histological risk factors are atypical ductal or lobular hyperplasia. Indications for performing prophylactic contralateral mastectomy in women with current or past BC: newly diagnosed unilateral BC stage I-II, or a history of stage I-II BC (in order to reduce the risk of developing cancer in the contralateral mammary gland and achieving symmetry with the operated mammary gland); lobular carcinoma in situ. Contraindications for use: age over 70 years; general contraindications to surgical treatment; synchronous and metachronous malignant tumors, with the exception of skin cancer [3].

Next, of course, it is necessary to discuss in detail the issue of BC screening. The key

concept of BC screening is the detection of oncological pathology in the early stages, when the prognosis is most favorable and allows you to get the best long-term treatment results. A preventive examination always has advantages over a diagnostic examination when symptoms of the disease are already present. At the same time, upon receipt of the M2 and M3 indices according to the BI-RADS classification, it is possible to timely additionally examine these patients and, if necessary, take them to the dispensary record by a district mammologist with effective dispensary examinations and treatment of precancerous breast diseases. Along with this, it must be understood that the main conditions for screening for BC are the availability of trained personnel and a standardized approach to identifying the trait under study and evaluating the results. The methods used should be sufficiently simple, reliable and reproducible, and also have sufficient sensitivity and high specificity. Such qualities are fully possessed by modern digital mammography [4,5,6].

Now, regarding this pathology in our country at the republican level. BC ranks first in the structure of the frequency of malignant neoplasms in both sexes in the population with a share of 14.9% (14.7% in 2022). This situation has been stable since 2004, in addition, BC ranks first and stably remains in this position in the structure of female oncopathology.

The incidence of BC in 2023 as a whole in the country increased to 27.7 per 100 thousand of the population with a growth rate of 4.3% compared to the previous year (in 2022 - 26.5). In the structure of cases, BC ranks first in the absolute majority of regions and cities of the country [7].

The incidence of BC in 12 regions of the country is higher than the national average (27.7 per 100 thousand of the population). The top three regions by this indicator are North Kazakhstan - 45.1; East Kazakhstan - 41.7 and Karaganda - 40.4. Next come: Kostanay - 39.1; Abay - 38.1; Pavlodar - 37.5; the city of Almaty - 36.2; Akmola - 35.9; the city of Astana - 34.3; Ulytau - 33.4; West Kazakhstan - 28.7 and Aktobe - 28.4 regions. This indicator is below the national average in 8 regions: Turkestan - 11.4 (the lowest level); Zhambyl - 15.8; Mangistau - 16.7; the city of Shymkent - 17.9; Almaty - 20.0; Kyzylorda - 20.2; Atyrau - 22.5 and Zhetysu - 22.8 per 100 thousand population. Mortality from this pathology was 5.3 per 100 thousand population. In the structure of causes of death in women in 2023, this pathology continues to occupy a leading position (1st rank place), amounting to 17.3% or 1056 people (17.2% and 1060 women, respectively).

The regions with the BC mortality rate above the national average (5.3 per 100,000 population) are: East Kazakhstan - 9.6 (maximum level); Pavlodar - 8.2; the city of Almaty - 7.8; Abay - 6.7; the city of Astana - 6.5; West Kazakhstan - 6.2; Kostanay - 6.1; Karaganda and North Kazakhstan - 5.6 and Akmola - 5.5 regions of the country. The lowest rates were recorded in Turkestan - 2.3 (minimum level); Ulytau - 3.2; Aktobe - 3.4; Atyrau - 3.6; Zhetysu - 3.7; Mangistau - 4.0; Kyzylorda - 4.3; Almaty - 4.6; in the city of Shymkent - 4.7; in Zhambyl - 4.8 regions per 100 thousand population [7].

The number of deaths from BC, not registered with oncology organizations and established posthumously in the Republic of Kazakhstan in 2023 amounted to 4 people; at the same time, the specific weight was 0.1% and this is the 22nd ranking place, as in the previous year.

At the same time, the one-year mortality rate was 3.4%. At the same time, the ratio between one-year mortality and neglect (stage IV) was, as in 2022, 0.7. At the same time, we recall that the farthest from "1" is the worst ratio between the indicators of one-year mortality and neglect.

Now, regarding preventive examinations. It should be noted that during large-scale preventive examinations of the population in 2023, significantly more patients with malignant neoplasms were actively identified than in 2022. This is 25,193 patients against 23,623 patients identified in 2022, i.e. +6.6%. This is due to the further abatement of the epidemiological situation with coronavirus and the increased availability of preventive care for the population. The

proportion of patients identified during routine examinations increased from 62.0% to 62.4% of the total number of patients identified per year.

The number of newly identified BC patients registered with oncology organizations in 2023 amounted to 5,426 people (5,101 in 2022).

As for preventive examinations. The absolute number of BC patients identified during routine examinations amounted to 3,072 people (2,822 a year earlier). At the same time, the proportion of those identified during routine examinations increased from 55.3% in 2022 to 56.6% in 2023. At the same time, despite the fact that the absolute number of people diagnosed with this pathology increased from 2474 to 2636 people, the proportion of patients diagnosed with BC at early (I, II) stages decreased from 87.7% to 85.8%. Of course, when analyzing the epidemiological situation, early diagnostic indicators are very important issues.

The regions where the proportion of patients with early stage I of the pathology in question is above the national average (35.8% and 9th place) include the following: Ulytau - 56.8% (the best indicator); Kyzylorda - 50.3%; Turkestan - 47.3%; the city of Shymkent - 46.0%; West Kazakhstan - 45.4%; the city of Astana - 44.6%; Mangistau - 44.2%; North Kazakhstan - 41.4%; Karaganda - 38.7%; Almaty - 38.5%; Pavlodar - 38.1% and East Kazakhstan - 36.1%. The lowest rates of early diagnosis were recorded in the Zhambyl region - only 14.0%; Atyrau - 24.4%; Akmola - 25.2%; the city of Almaty - 26.2%; Kostanay - 27.4%; Zhetysu - 31.4%; Aktobe - 35.0% and Abay - 35.7% regions of the country [7].

The average indicator in the country for detecting patients with BC at early (I and II) stages was 88.4%, and this is a high 4th rank place among all nosological forms of malignant neoplasms.

The regions where the proportion of patients with BC detected at stages I-II is above the average in the republic include the following regions: Atyrau - 94.2%; Aktobe - 92.4%; Kyzylorda - 92.3%; Pavlodar - 92.1%; the city of Shymkent - 92.0%; West Kazakhstan - 91.8%; North Kazakhstan - 91.6%; the city of Astana - 91.3%; Turkestan - 90.9; Ulytau - 90.5%; Almaty and the city of Almaty - 89.0%; Abay - 88.5%. Mangistau region is on par with the national average. Below the national average are: Karaganda - 79.8%; Kostanay - 81.1%; Akmola - 82.4%; Zhetysu - 86.2%; East Kazakhstan - 86.6%; and Zhambyl - 87.6% of the regions [7].

As can be clearly seen from the above data, there is a very wide range in early diagnosis rates (at stage I of the disease) across the country, from very good to dismal. Of course, it is necessary to take into account migration processes and other factors affecting the early diagnostic rates, but nevertheless, the obtained results give a reason not to stop there, both for oncologists and mammologists, obstetricians-gynecologists, radiologists, and, naturally, for general practitioners, since improving the early diagnostic rates of malignant tumors, as one of the main postulates and one of the main tasks of medicine in general, continues to be relevant today. Among the visual localizations of malignant tumors in the reporting year, the proportion of seven main forms determines the picture of late diagnostics (stages III-IV) and amounts to 13.3% in total, with a decrease compared to the level of the previous year (2022 - 14.2%). At the same time, with BC, the neglect rate was 11.6% (13.8% - in 2022).

The proportion of stage IV BC among all nosological forms of malignant neoplasms was 4.3%. The following indicators were noted by regions of our country: in East Kazakhstan - 8.4% (the worst result); Karaganda - 7.4%; Mangistau - 6.2%; Kyzylorda - 5.9%; Almaty - 5.3%; Atyrau - 5.1%; Akmola and Kostanay - 5.0%. At the same time, the lowest neglect of this cancer localization was established in the West Kazakhstan region - 2.1% [7].

The morphological verification rate of the disease in the country was 99.4%. At the same time, the leaders in this aspect with a 100% indicator are Almaty, Zhambyl, Mangistau, North Kazakhstan, Ulytau regions and the city of Shymkent. Next come: the city of Astana and the Karaganda region (99.8%); East Kazakhstan (99.7%); the city of Almaty, Turkestan and Abay regions (99.6%); West Kazakhstan (99.5%). At parity with the national average are Kostanay and Atyrau

regions. Then come: Aktobe (98.9%); Pavlodar (98.2%); Zhetysu (98.1%); Akmola (97.8%); Kyzylorda (97.0% - the worst indicator in the republic) regions.

The total number of patients with malignant neoplasms registered with specialized oncology organizations of the republic continued to grow and by the end of 2023 amounted to 218,186 people, with an increase of 6.0% compared to the level of the previous year (2022 - 205,822, +5.8%). The overall incidence rate of malignant neoplasms increased by 3.9%, from 1055.3 to 1096.4 per 100 thousand people. The growth of this indicator is due to both the increase in the incidence and detection of pathology, and the increase in the survival rate of cancer patients. In addition, statistical data on patients diagnosed with malignant neoplasms, who have been under observation for 5 years or more, and continue to be observed in 2023, showed that the number of patients under observation by oncological organizations in Kazakhstan for over five years continued to grow and at the end of the reporting year amounted to 117,616 people, with an increase of 6.2% (2022 - 110,790 people, +6.6%) (form. No. 7).

It is impossible to ignore such an important clinical aspect as the coverage of patients with a diagnosis of BC in the Republic of Kazakhstan with special treatment.

In 2023, the number of hospitalizations for all nosological forms of malignant tumors in the country's oncology organizations amounted to 108,252 cases (2022 - 101,095), with an increase of 7.1% compared to the previous year, which is associated with a constant increase in the number of cancer patients, improved standardization of oncology care, and the development of palliative and rehabilitation services.

At the end of 2023, the absolute number of BC patients who completed specialized treatment amounted to 3,419 people, continuing treatment - 1,729 patients. The following results were obtained in percentage terms by methods and types of treatment: 40.9% of patients received complex treatment, 21.8% received only surgical treatment, 20.0% received only drug treatment, 12.6% received combined treatment, 1.1% received only radiation treatment, 0.7% received chemoradiation treatment.

Next, regarding the five-year survival rate of patients. As for BC, at the end of 2023, 48,496 people were registered with the dispensary, or 243.7 per 100 thousand of the population. At the end of 2022, there were 45,728 patients, or 234.5 per 100 thousand of the population, respectively.

At the same time, the lethality of the observed contingents decreased slightly from 2.3% in 2022 to 2.2 in 2023.

The five-year survival rate of patients with BC was 57.7% in 2023 and 57.1% in 2022 [7].

Mass screening to identify BC patients should mainly involve healthy women without any signs of the disease or symptoms. Screening not only helps to detect hidden forms of cancer that can be treated, but also has psychological value for women. As a result of screening, women are convinced that they do not have BC, and this is the most important potential success of such programs. While the ultimate goal of screening is to reduce BC mortality, its immediate goal is to detect cancer before clinical manifestation. However, BC is a heterogeneous disease, which can significantly affect the effectiveness of screening. Screening models for BC are usually based on the fact that the majority of detected tumors are invasive cancers in the early stage of progression. In addition, it must be taken into account that the detection of cancer (or its precursors) before clinical manifestation increases the risk of false positive diagnosis [8,9].

Mammography has a sensitivity of 95% and a specificity of 97%. These indicators decrease when examining women with denser mammary glands (young age, use of hormone therapy), with low quality mammography, and also with insufficient qualifications of the radiologist. Detection of high-grade invasive cancer by screening, when the tumor is not yet detected by clinical examination (palpation), means the possibility of reducing mortality from BC [10].

Preventive screening for early detection of BC in the Republic of Kazakhstan includes [11]:

1) mammography of both mammary glands in two projections - direct and oblique in the mammography room of the city, district polyclinic (mobile medical complex). All digital mammograms in the presence of a system for archiving and transferring medical images are copied to CDs and other electronic media and transferred to the server of the mammography room of the Cancer Center using specialized licensed software integrated between medical organizations; in case of impossibility of digital transmission - they are printed on X-ray film at a scale of 1:1 - 100% (1 patient - 1 set - 2 or 4 mammograms) with subsequent transfer to the mammography room of the Cancer Center;

2) interpretation of mammograms according to the BI-RADS classification (M0t, M0d, M1, M2, M3, M4, M5) by two or more independent radiologists of the same medical organization - double reading or different medical organizations: a radiologist of the mammography room city, district polyclinic (mobile medical complex) - the first reading, and the radiologist of the mammography room of the Cancer Center - the second reading;

3) in-depth diagnostics - targeted mammography, ultrasound examination (hereinafter - ultrasound) of the mammary glands, trepanobiopsy, including under ultrasound or stereotaxic control for histological examination, which is carried out in case of detection of pathological changes on mammograms (M0d) in the mammography room of the Cancer Center.

√ An average medical worker or a responsible person of the organization of outpatient care sends the patient for mammography to the district, city polyclinic.

√ The X-ray laboratory assistant of the mammography room of the city, district polyclinic (mobile medical complex) performs mammography, fills out a referral for double reading of mammograms and transmits the referral through information interaction.

√ Radiologist of the mammography office of the city, district polyclinic (mobile medical complex): fulfills the requirements for the safety and quality of mammographic examinations; evaluates the quality of the images provided and the correctness of the installation; performs repeated mammography in the M0t category (technical errors of mammography); determines the radiological density of the mammary glands on the ACR scale (A, B, C, D) indicating this parameter in the study protocol; conducts the first reading of mammograms with interpretation of the BI-RADS classification results. In the M0d category (undetermined or suspicious radiological changes requiring additional examination), the study protocol indicates the predominant pathology: education, asymmetry, violation of architectonics, microcalcifications; sends mammograms, electronic copies of mammograms through the archiving system and transfer of medical images to the workplace of the mammography office of the Cancer Center together with directions for double reading of mammograms; directs low-dose CT images through the system of archiving and transferring medical images to the workplace of the CT office of the Cancer Center together with copies of images recorded on CD-ROMs or other electronic media and directions for double reading.

√ The radiologist of the mammography room of the Cancer Center: evaluates the quality of the provided images and the correctness of the styling. Viewing digital X-ray images transferred to the server or on digital media (CD, DVD) is carried out on a monitor for interpreting digital X-ray images with a resolution of at least 5 megapixels, which has a certified grayscale transmission in accordance with the DICOM standard; conducts a double (second) reading of mammograms with the interpretation of the results according to the BI-RADS classification, using, if necessary, archival images. Organizes the third reading according to indications. With double reading, an independent interpretation of the images is carried out (blinding method - the second radiologist does not know the results of the first reading); in the M0m category (technical errors in mammography), recommends repeat mammography; in the M0d category (uncertain or suspicious radiographic changes requiring additional examination), the study protocol indicates the predominant pathology: education; asymmetry, violation of architectonics,

microcalcifications; recommends that the outpatient care organization, according to indications, invite the patient for in-depth diagnostics (targeted mammography, ultrasound of the mammary glands, trephine biopsy, including under ultrasound or stereotaxic control, followed by histological examination of the material); collects and archives all mammograms (films and electronic media) made as part of the examination. The shelf life of mammograms is at least 3 years after leaving the age subject to a screening study; the results of the double (second) reading are transferred to the outpatient care organizations through information exchange.

√ Indications for in-depth diagnostics are the conclusions of double reading mammograms M0d (uncertain or suspicious X-ray changes requiring additional examination).

√ In-depth diagnostics is carried out in two stages. At the first stage, ultrasound is performed, according to indications, targeted mammography, possibly with an increase (with asymmetry, violation of architectonics and the presence of microcalcifications). When visualizing a suspicious pathology (M4 and M5), the second stage is performed - trepanbiopsy, including under ultrasound control and stereotaxic control for histological examination.

√ Histological examination is carried out in the laboratory of pathomorphology or pathological bureau. Morphological interpretation of the biopsy is carried out in accordance with the recommendations of the World Health Organization.

√ Physician or responsible person of the outpatient care organization:

1) upon receipt of a mammography result according to the BI-RADS classification:

- in case of M0t (technical errors in mammography) - sends the patient for a second X-ray examination to the mammography room of the city, district polyclinic (mobile medical complex);

- with M0d (undefined or suspicious X-ray changes requiring additional examination) - sends the patient for in-depth diagnostics to the mammography room of the Cancer Center;

- with M1 (no changes detected) - recommends that the patient undergo a follow-up mammography examination after 2 years. With radiological density of the mammary glands, C and D are sent for ultrasound of the mammary glands to exclude a false-negative result of mammography;

- with M2 (benign changes), refer the patient for a consultation with an oncologist (mammologist) of the clinical diagnostic department, followed by a screening mammography examination after 2 years;

- with M3 (probable benign changes) - sends the patient for short-term dynamic radiation observation to the local doctor with the recommendation of control mammography or ultrasound in 6 months;

- with M4 (signs that cause suspicion of malignancy), M5 (practically reliable signs of malignancy) and if it is technically impossible to perform a trepanbiopsy or a biopsy is refused, a referral to an oncologist (mammologist) of the clinical diagnostic department for dynamic observation and decision on the verification of the identified pathology;

2) upon receipt of the result of a histological examination:

- benign education - refers the patient to an oncologist (mammologist) of the clinical diagnostic department for dynamic monitoring, followed by a screening mammography examination after 2 years;

- formation with an indeterminate malignant potential or carcinoma in situ - refers the patient to the Cancer Center for consultation and treatment, followed by dynamic observation by an oncologist (mammologist) of the clinical diagnostic department at the place of her attachment;

- malignant neoplasm - refers the patient to the Cancer Center for treatment and follow-up;

3) communicates the results of the screening examination to the patient in any available way (by telephone, in writing, through electronic means of communication);

4) enters the results of double reading, in-depth diagnostics, histological examination,

recommendations of the radiologist of the Cancer Center mammography room into the information system.

Establishing the size of the primary tumor is especially important in screening. Tumor size is an important criterion for evaluating the quality of screening and determining the ability of X-ray mammography to detect non-palpable tumors. Therefore, it is extremely important that pathologists measure tumor diameter as accurately as possible. The smaller the size of the primary tumor, the greater the likelihood of error in determining its size.

In 2023, the number of patients identified during screening examinations increased by 22.5%, from 2,230 to 2,731 people, as a result, the detection rate during screenings increased from 5.9 to 6.8%. During mammographic screening for BC in 2023, 918,464 women of the target group aged 40 to 70 were examined (a year earlier - 808,503 women). During mammographic screening in 2023, 1,875 cases of BC were detected (2022 - 1,570 cases). The cancer detection rate increased from 1.94 to 2.04 per 1,000 examined. The best result is in the North Kazakhstan region - 3.11 per 1,000 examined women (2022 - 2.31). High detection rates of BC were observed in Aktobe, Almaty, Atyrau, West Kazakhstan, Karaganda, Kostanay regions and in two megacities - the cities of Astana and Almaty. Low detection rates per 1000 examined, compared with the national average, were observed in Abay, Akmola, East Kazakhstan, Zhambyl, Kyzylorda, Mangistau, Pavlodar, Turkestan, Ulytau regions and the city of Shymkent. The lowest result was in Zhambyl region - 0.96 per 1000 examined women (2022 - 0.58). Compared to 2022, an increase in the detection of BC was noted in all regions, with the exception of Akmola (from 2.42 to 1.99), East Kazakhstan (from 2.21 to 1.93), West Kazakhstan (from 2.29 to 2.28), Karaganda (from 2.63 to 2.15), Pavlodar (from 2.15 to 1.51) regions, where a deterioration in results was allowed [7].

Summarizing the above, we can conclude that BC, along with lung cancer, continues to firmly occupy a leading place from year to year among all existing malignant tumors of other localizations. At the same time, taking into account a number of factors, the indicators of early diagnostics do not allow oncologists to "sleep peacefully". Despite the attitude to visually accessible localizations, the percentage of locally advanced forms of this type of tumors still remains quite high. The variability and veiled nature of symptoms, their similarity with various non-core processes (for example, the mastitis-like form of BC, often imitating mastitis), leads to the neglect of the disease. All this requires oncologists, and first of all, primary health care workers and, of course, mammologists, obstetricians and gynecologists, as well as radiologists to increase the level of oncological alertness, inform the population about early symptoms that may indicate this pathology or the onset of proliferative changes and conduct high-tech diagnostic measures, including for the purpose of differential diagnosis and, as a result, timely treatment.

Patients registered with various forms of so-called mastopathy need to regularly visit specialized specialists and, if necessary, undergo examination.

An epidemiological assessment of the situation with BC in our country allows us to say that in the regions there are sometimes significant differences not only in morbidity rates, but also in the parameters of early diagnosis and mortality from this pathology. In connection with the above, this pathology continues to be a serious problem of modern clinical oncology.

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## Philological Sciences

# Fransız və İngilis Dillərində Mənsubiyyət Sifətlərinin Müqayisəli Təhlili

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Açar sözlər: mənsubiyyət sifətləri, ingilis dili, fransız dili, cins, kəmiyyət

Mənsubiyyət sifətləri (fr. adjectifs possessifs, ing. possessive adjectives) dilin qrammatik sistemində mühüm yer tutan nitq hissələrindən biridir. Onlar əşyaların və anlayışların kimə və ya nəyə aid olduğunu bildirir, sintaktik olaraq müəyyənləşdirici funksiya daşıyır.

Fransız və ingilis dillərində bu sifətlər funksional baxımdan oxşardır, lakin morfoloji quruluş, uyğunlaşma qaydaları və istifadədə ciddi fərqlər müşahidə olunur (Grevisse, 2016, s. 225; Swan, 2016, s. 143). Bu səbəbdən mövzunun həm nəzəri, həm də tətbiqi dilçilik baxımından araşdırılması zəruridir.

2. Fransız dilində mənsubiyyət sifətləri

Fransız dilində mənsubiyyət sifətləri sahibin şəxsinə, ismin cinsinə və sayına görə dəyişir. Bu sifətlər isimdən əvvəl işlənir və onunla qrammatik uyğunlaşma təşkil edir.

2.1 Quruluş və formalar

| Şəxs | Tək (kişi cinsi) | Tək (qadın cinsi) | Cəm |
|---|---|---|---|
| 1-ci şəxs tək | mon | ma | mes |
| 2-ci şəxs tək | ton | ta | tes |
| 3-cü şəxs tək | son | sa | ses |
| 1-ci şəxs cəm | notre | notre | nos |
| 2-ci şəxs cəm | votre | votre | vos |
| 3-cü şəxs cəm | leur | leur | leurs |

2.2 İstisna hallar

Əgər qadın cinsində olan tək isim sait və ya səssiz “h” ilə başlayırsa, “ma” əvəzinə “mon” işlədilir (Thacker, 2014, s. 87).

Nümunələr:

Mon amie est gentille. – My (female) friend is kind. Mon histoire est passionnante. – My story is exciting.

2.3 Sintaktik mövqe və nümunələr

Fransız dilində mənsubiyyət sifətləri hər zaman isimdən əvvəl gəlir.

Müqayisəli nümunələr (fr – ing – az):

Mon livre est sur la table. – My book is on the table. – Mənim kitabım stolun üzərindədir. Sa mère travaille à l’hôpital. – Her mother works at the hospital. – Onun anası xəstəxanada işləyir. Nos professeurs sont stricts. – Our teachers are strict. – Müəllimlərimiz sərtdirlər.

3. İngilis dilində mənsubiyyət sifətləri

İngilis dilində mənsubiyyət sifətləri sahiblik bildirən dəyişməz əvəzlik formalarıdır (Murphy, 2019, s. 54). Onlar isimdən əvvəl işlənir və sahibin şəxsinə və bəzən cinsinə görə dəyişir.

3.1 Quruluş və formalar

| Şəxs | Forma |
|---|---|
| I (mən) | my |
| You (sən) | your |
| He (o, kişi) | his |
| She (o, qadın) | her |
| It (cansız və heyvan) | its |
| We (biz) | our |
| You (siz) | your |
| They (onlar) | their |

Nümunələr:

My brother is a student. Her cat is white. Their school is very old.

3.2 Sintaktik mövqe və nümunələr

İngilis dilində mənsubiyyət sifətləri də isimdən əvvəl gəlir və dəyişmir.

Müqayisəli nümunələr:

Leur maison est grande. – Their house is big. Ton père est gentil. – Your father is kind.Ses enfants sont intelligents. – Her children are smart.

4. Müqayisəli təhlil

4.1 Oxşarlıqlar

Hər iki dildə mənsubiyyət sifətləri isimdən əvvəl gəlir.

Şəxsə görə dəyişirlər.

Sahiblik bildirirlər.

4.2 Fərqlər

| Xüsusiyyət | Fransız dili | İngilis dili |
|---|---|---|
| Uyğunlaşma | Cins və say ilə | Yoxdur |
| Cins fərqi | Kişi/qadın/cəm | Yalnız 3-cü şəxsdə (his/her/its) |
| İstisnalar | saitlə başlayan qadın ismlərdə “mon” | Yoxdur |
| Qrammatik çətinlik | Dəyişən formalar | Sadə formalar |

5. Tipik səhvlər və tədris tövsiyələri

Tipik səhvlər (xarici dil öyrənənlərdə):

Fransız dili öyrənənlər: ma amie (yanlış) → mon amie (doğru)

İngilis dili öyrənənlər: it’s tail is long (yanlış) → its tail is long (doğru)

Tədris tövsiyələri:

Müqayisəli cədvəllərdən istifadə etmək

Eyni cümlələri iki dildə tərcümə etməklə məşqlər aparmaq

Qarışıq nümunələrlə yazı tapşırıqları vermək

Fransız və ingilis dillərində mənsubiyyət sifətlərinin tədrisi zamanı müəllimlərin diqqət etməli olduqları əsas məsələlərdən biri struktur fərqlərinin vurğulanmasıdır. Bu məqsədlə interaktiv və vizual tədris üsullarına üstünlük verilməlidir.

Məsələn, tələbələrə aşağıdakı şəkildə paralel cümlələr verilərsə, onlar uyğunlaşma və struktur fərqlərini daha asan qavraya bilərlər:

| Fransız dili | İngilis dili |
|---|---|
| Mon frère est avocat. | My brother is a lawyer. |
| Ma sœur est infirmière. | My sister is a nurse. |
| Leur chien est très mignon. | Their dog is very cute. |
| Votre appartement est lumineux. | Your apartment is bright. |

Belə tipik cütləşmiş cümlələr vasitəsilə həm qrammatik forma, həm də söz sırası öyrədilir. Bundan əlavə, fransız dilində saitlə başlayan ismlərlə bağlı istisna hallar (ma amie → mon amie) diqqətlə tədris olunmalıdır (Thacker, 2014, s. 88).

Digər bir effektiv üsul “kontrastiv tərcümə” texnikasıdır: tələbə əvvəlcə ingilis dilində bir cümləni yazır, sonra eyni mənanı fransız dilində formalaşdırmağa çalışır və əksinə. Bu zaman mənsubiyyət sifətində edilən səhvlər dərhal üzə çıxır və korreksiya imkanı yaranır.
Həm fransız, həm də ingilis dillərində mənsubiyyət sifətləri ilə mənsubiyyət əvəzlikləri bir-birinə bənzədiyi üçün çox zaman qarışdırılır. Bu fərqin tələbəyə izahı olduqca vacibdir.
Qısa müqayisə:
| Fransızca | Funksiya | İngiliscə | Funksiya |
| mon livre | sifət | my book | sifət |
| le mien | əvəzlik | mine | əvəzlik |
Nümunə:
C’est mon stylo. – Bu mənim qələmdir. (sifət)
Ce stylo est le mien. – Bu qələm mənimkidir. (əvəzlik)
İngilis dilində:
This is my car. – Bu mənim maşınımdır. (sifət)
This car is mine. – Bu maşın mənimkidir. (əvəzlik)
Bu fərqlərin vurğulanması həm yazı, həm danışıq, həm də dinləmə qabiliyyətlərini inkişaf etdirmək baxımından əhəmiyyətlidir.
Fransız dilindəki morfoloji uyğunlaşma prinsipi (adjective-noun agreement) xüsusilə cins (genre) və say (nombre) baxımından tələbələr üçün çətinlik yarada bilər.
Misal:
mon père (mənim atam) – kişi cinsi
ma mère (mənim anam) – qadın cinsi
mes parents (mənim valideynlərim) – cəm
Fransız dilindəki bu dəyişkənliklər ingilis dilində yoxdur:
my father – dəyişməz my mother – dəyişməz
my parents – dəyişməz

6. Nəticə
Fransız və ingilis dillərində mənsubiyyət sifətləri sahiblik bildirən mühüm qrammatik elementlərdir. Onların morfoloji uyğunlaşma prinsiplərindəki fərqlər tədris zamanı xüsusi diqqət tələb edir. Fransız dilində cins və say uyğunlaşması tələbə üçün çətinlik yaradır, ingilis dilində isə “its” ilə “it’s” kimi formalar qarışdırılır. Müqayisəli yanaşma bu çətinliklərin öhdəsindən gəlməyə kömək edir.
Bu müqayisəli tədqiqat nəticəsində bir daha aydın olur ki, mənsubiyyət sifətləri hər iki dildə semantik baxımdan oxşar funksiyaya malik olsa da, onların morfoloji sistemləri tamamilə fərqlidir. Fransız dilinin sintetik təbiəti bu sifətlərin forma etibarilə dəyişməsini tələb edir, bu isə ingilis dilindən gələn tələbə üçün çətinlik yaradır.
Tədris prosesində kontrastiv yanaşmalar, müntəzəm müqayisə cədvəlləri və paralel cümlələrlə məşğələlər tələbələrin bu fərqləri mənimsəməsini asanlaşdırır. Digər tərəfdən, mənsubiyyət sifətləri ilə əvəzliklərin fərqləndirilməsi də əsas vurğulanmalı mövzulardan biridir.

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# Legal Sciences

МРНТИ 10.77.01

# CRIMINOLOGICAL FEATURES OF JUVENILE DELINQUENCY

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**Abstract.** The article deals with the criminological characteristics of juvenile delinquency; age characteristics of persons under the age of 18, influencing the criminal orientation of their behavior. The specific features of juvenile delinquency are studied, as well as statistical indicators that reflect the structure of crime by age characteristics.

**Keywords:** crime, teenager, peculiarity, age characteristics, gang crime, latency, criminal personality

Teenagers and young people are characterized by increased criminal activity (if we mean "ordinary" crime, not "white-collar" crime). At the same time, as it is commonly believed, they are the future of any country, and the fate of society and the state depends on their habitual behavior, lifestyle, and personal qualities. Therefore, it is not surprising that so much attention is paid to juvenile delinquency in domestic and foreign literature - criminological, sociological, psychological, pedagogical. Although the important role of adolescents and young people for the future of the country is a fact, as well as their increased criminal activity, this problem is not so simple and clear.

Adults' relatively negative assessment of the behavior of children, adolescents, and young adults has been observed throughout human history. The "conflict of generations" is not unique to modern history. The older generations are always dissatisfied with the younger ones, and the younger ones reciprocate.

Juvenile delinquency (juvenile crime) - an independent type of crime, which represents the totality of crimes and persons (aged 14-18) who committed them in a certain territory in a certain period with quantitative and qualitative characteristics.

From a criminological point of view, it is reasonable to distinguish three age groups in juvenile delinquency: 14-15 years, 15-16 years, and 17-18 years.

In the last decade there has been a process of rejuvenation of criminality. The criminal activity of 14-15 year olds is growing faster than that of 16-17 year olds.

In the structure of juvenile criminality, mercenary and mercenary-violent crimes predominate.

According to the scientist E.S. Zhigarev, the dominant motives of criminal behavior of male minors are selfish motives - 52% (females - 41%); self-assertion - 28%; hooligan motives - 18% (females - 22.6%). Female juveniles identified dependence on adults as a motive for criminal behavior in 16%, financial difficulties in the family in 14% (selfish motive in 55%), and revenge in 6.3% [1,30].

Juvenile delinquency is mostly of a group nature. In some cases, the criminal activity of minors becomes the main way of spending their free time, in connection with which the criminal professionalism of juvenile delinquents increases.

Juvenile delinquency is situational in nature, depending on the prevailing circumstances, due to the peculiarities of the age psyche of minors, their easy propensity to commit crimes.

Indicators of criminalization of minors are the level of administrative offenses, deviant behavior, prevalence of alcoholism, drug addiction, vagrancy. There has been an increase in the number of crimes committed by both male and female minors due to alcoholism, drug abuse and drug addiction.

The negative trend in juvenile crime is characterized by the fact that it is growing much faster than the total number of people in this age group. Against the background of the continuing decline in the birth rate in Russia, these indicators look threatening.

Adolescents are characterized by increased victimization and often become potential victims themselves.

The young generation is naturally characterized by increased activity, which manifests itself in both negative (relatively high criminalization, drug addiction, sexual deviations) and positive (artistic, technical, scientific creativity) manifestations of deviance. Children, adolescents, young people have a high energy, the desire to "discover" or do something new, previously unknown, to assert themselves in innovative activities. But everything has its price. The search leads to creative achievements and to negative deviations, including crime. And children, adolescents, young people die more often than they "should" according to their age (high victimization) [2].

Doctor of Law, Professor V.V. Kukharuk believes that there is a trend of rejuvenation of juvenile delinquency, an increase in criminal activity of younger children, there is a significant increase in female juvenile delinquency. There is an increase in crimes committed by both male and female minors due to alcohol, drug abuse and drug addiction. There is a trend towards the rejuvenation of "drunken" crime: every fifth crime is committed by minors under the influence of alcohol or drugs.

Juvenile delinquency is characterized by a high degree of latency. Moreover, due to the peculiarities of the legal and physical situation of minors and their personal characteristics, statistical indicators of juvenile crime are more "regulated" in investigative and judicial practice. In fact, the prevalence of crimes committed by minors is many times higher than their registered share. Theft, robbery, and hooliganism are particularly prevalent.

Criminological characteristics of the personal traits of juvenile delinquents. Due to the nature of juvenile delinquency in the first place in the study of this phenomenon is the problem of the personality of the offender. The success of the preventive activity of law enforcement bodies depends to a great extent on the extent and depth of the study of the juvenile delinquent's personality. Many mistakes could have been avoided if the law enforcement bodies had always put the personality, and not only the conditions of his life or other influences on it, in the center of their attention and professional efforts. This is fully applicable to juvenile delinquents.

The main thing when considering the personality of a juvenile delinquent is age. It is connected with certain biological, psychological and mental changes in the structure of personality.

Age-related personality change is neither causally nor unambiguously related to the dynamics of basic life relations. The preservation of the basic relations of life is connected with the change of personality in the course of life under the influence of events, circumstances, etc. In addition to chronological age, there is a distinction between psychological, educational and physical age, which do not coincide with each other, which leads to internal conflicts of personality, which can be criminogenic. In general, the so-called "average statistical age" does not really exist. General laws of adolescence manifest themselves in individual variations that depend not only on the environment and the conditions of upbringing, but also on the peculiarities of the organism or personality.

In determining the age characteristics of offenders, criminologists usually divide juveniles into the following groups:

-14-15 years old - juvenile group;

-16-17 years old - juveniles.

Criminological, sociological and psychological features of the behavior of the contingent in the age interval 14-17 years show that the behavior of adolescents in this age group is influenced both by the conditions of their life and upbringing in previous years and by "young adults". Hence, the conclusion that juvenile delinquency should be considered in the context of delinquency of persons under 14 and persons over 17.

When analyzing the personalities of juvenile and adult criminals, we can talk about their similarities. The boundary that defines the difference between criminals of different ages essentially disappears when we talk about two age groups: 16-17-year-olds and 18-20-year-olds. In this case, it is quite acceptable to talk about a single age group if we use the concept of incomplete majority.

The majority of juvenile delinquents are males. This is explained, first of all, by the difference in the social relations of the sexes with the environment in which the personality develops, the conditions of moral formation of the personality, the difference in the nature and correlation of typical conflict situations. Predominance of male juvenile delinquents is connected with mental and psychological peculiarities of sex, historically established difference in behavior and upbringing of boys and girls, with greater activity, entrepreneurial spirit and other general characteristic features of men.

In the legal literature the relation between the level of education and the personality of the perpetrator is often pointed out. On the basis of this attribute it is possible to judge the potential capabilities of the personality of a juvenile offender in the performance of his social functions, which to some extent depend on the level of his culture, interests. Speaking about the level of education of juvenile delinquents, it should be noted that it is lower than that of their peers who have not committed a crime. Thus, among juvenile delinquents there are often repeaters who have dropped out of schools, vocational schools, and some - from secondary schools.

From a criminological point of view, the study of the family situation of juvenile delinquents is of particular importance. This is quite understandable, since it is in the family that the socially significant characteristics of the personality and the criteria of its evaluation are formed. Studies show that more than two-thirds of juvenile delinquents grew up in families where quarrels, scandals, mutual insults, drunkenness and debauchery were constantly present. One out of every eight to ten repeat offenders who began a life of crime at an early age was led to drink and crime by parents, older brothers, and close relatives. In addition, a dysfunctional family has a negative influence not only on its own members, but also on other teenagers with whom their children are friends. Thus, there is a process of "contamination" of adolescents who do not directly belong to the family.

The peculiarities of their legal consciousness are not unimportant for the characterization of the personality of juvenile delinquents. Juvenile delinquents are characterized by a profound lack of legal consciousness, which is to some extent explained by two factors: general legal illiteracy (both of the population as a whole and of minors) and negative social experience of juveniles. The lack of legal awareness of minors who commit crimes is expressed in a negative attitude to legal norms, unwillingness to comply with the requirements of these norms. Significant gaps in the legal knowledge of minors lead to arguments about the "unfairness" of laws, "illegal" conviction.

The social environment of juvenile offenders is also characteristic. Most of them are previously convicted persons who abuse alcohol and drugs.

The problem of free time is a special one. Juvenile delinquents have two to three times more free time than their law-abiding peers. At the same time, according to the results of some studies, as the amount of free time increases, the interests of juveniles become distorted and

acquire a negative connotation. Moreover, the more free time there is, the greater the likelihood of delinquency.

The above-mentioned personal characteristics of juvenile delinquents are mainly expressed in the motivation of their criminal behavior. Its main signs:

-Predominance of "childish" motives - committing a crime out of mischief, curiosity, desire to assert oneself in the eyes of peers, desire to possess fashionable things, etc;

-Situational motives;

-Deformation of any element of the sphere of needs, interests, aspirations. For example, hypertrophied understanding of comradeship, striving to increase one's prestige.

Causes and Conditions of Juvenile Delinquency. The causes and conditions of juvenile delinquency, as well as crime in general, are socially determined. They depend primarily on the specific historical conditions of society, the content and orientation of its institutions, the nature and ways of resolving major contradictions.

It is widely believed that the main causes of juvenile delinquency and its rapid growth are the sharp deterioration of the economic situation and the increased tension in society. Of course, all this affects adult crime as well, but the rapid decline in the standard of living affects juveniles the most, because juveniles have always been and still are the most vulnerable part of society. Their vulnerability lies in the fact that the peculiarities of minors (unstable psyche, not fully formed system of values) make them more susceptible to the influence of factors that adults resist much more successfully. Unable to satisfy their needs legally, many juveniles begin to "make money" and obtain the necessary things and products as best they can, often by committing a crime. Minors are actively involved in extortion, illegal businesses, and other types of criminal activity.

One of the negative manifestations of the economic crisis is the reduction of jobs, which has led to fewer job opportunities for young people, especially those who have served their sentences in educational institutions.

Among the specific causes of juvenile delinquency at the present stage of society, the catastrophic situation in the organization of leisure time for children and youth in their place of residence stands out. Many children's institutions and organizations have ceased to exist, and their premises have been leased to commercial structures.

The aggravation of the problems of family dysfunction against the general background of poverty and constant hardship, the moral and social degradation that occurs in families lead to extremely negative consequences. Among minors from dysfunctional families, the intensity of crime is particularly high. In these families, drunkenness, drug addiction, prostitution, lack of any moral foundation, elementary culture flourish. Specialists of various sciences quote impressive figures when they talk about minors suffering from mental illnesses that do not exclude and exclude sanity. Mental disorders in children are to a large extent the result and legacy of the corresponding behavior and life of their parents - alcoholics, drug addicts. Some combinations of mental disorders and socio-psychological deformations of personality can be largely explained by the fact that the reasons for the pathological development of the personality of minors are rooted in the asociality and immorality of their parents. Violence against each other and against their children flourishes in these families, and as a direct consequence there is a rapid increase in extremely dangerous violent crimes committed by adolescents and even children. Cruelty begets cruelty.

Juvenile delinquency is very latent. Some studies show that even before the first conviction, juveniles manage to commit several crimes. This creates an atmosphere of impunity. The inevitability of punishment, the most important means of preventing criminal behavior, is not guaranteed.

The existence of causes and conditions that contribute to juvenile delinquency does not mean the fatal inevitability of their committing crimes. These causes and conditions can be

regulated, neutralized and eliminated to a certain extent. In this regard, an important role is played by general and individual prevention - a system of preventive measures applied by state bodies, including law enforcement bodies, in relation to minors who commit crimes [3].

Cases of crimes committed by minors constitute a special category of criminal cases. The issues of neglect and delinquency among minors are regularly discussed at meetings of the City Prosecutor's Office, at meetings of the Coordinating Council of Law Enforcement Agencies. There are special programs for the prevention and suppression of juvenile delinquency.

It should be noted that the most striking feature of juvenile crime is its increasingly organized, group character, i.e. juveniles form groups to commit robberies, thefts, burglaries and other crimes.

According to the Department of the Prosecutor's Office of the city of Astana, "... in the 12 months of 2015, the specialized interdistrict juvenile court of the city of Astana considered 45 criminal cases against 88 persons in the main court proceedings (in 2014 - 67/138).

In 22 criminal cases, convictions were handed down against 54 minors (in 2014 - 41/86), 4 minors were sentenced to actual imprisonment, 44 were sentenced to restriction of liberty, 5 were given suspended sentences. 23 cases against 34 persons were closed due to reconciliation with the victims.

The latter mostly commit crimes of mercenary orientation (Articles 188, 191 of the Criminal Code of the Republic of Kazakhstan), the causes of which are domestic insecurity, material problems, lack of control by parents and educational institutions, which in turn contributes to the commission of crimes for profit [4].

In January-April 2020, 655 minors were prosecuted in Kazakhstan, which is 31.3% less than in the previous year (954 cases).

If we talk about the age of juveniles prosecuted, 82.6% of them are 16-17 years old, and another 17.4% are 14-15 years old. Of the total number of minors prosecuted, there were only 60 girls (in January-April 2019 - 59 girls).

425 of those involved were underage students (in the previous year - 617 students, annual decrease of 31.1%). There were 221 unemployed and out-of-work minors among those involved in criminal proceedings (in the same period last year - 320 young people, a decrease of 30.9% year-on-year). The number of juvenile offenders involved in criminal proceedings was 78, compared to 146 in the previous year (minus 46.6%).


The growth of juvenile crime in Kazakhstan for 2022 was 8%. In January-May of the current year 574 minors committed criminal offenses in the country - 8.1% more than last year. Among them 38 minors committed misdemeanors and 536 - felonies. 254 committed crimes of medium gravity, 225 committed serious crimes, 44 committed minor crimes and 13 committed very serious crimes. For comparison, in the same period of 2021 there were 531 juveniles among those who committed offenses, minus 34.9% for the year [5].

Crime is a socio-legal phenomenon that includes crimes committed in a given territory over a period of time and is characterized by quantitative and qualitative indicators.

The source of information for the state legal statistics is the Committee on Legal Statistics and Special Accounts under the Procurator's Office of the Republic of Kazakhstan, which collects, processes, accumulates, summarizes and updates information in the sphere of state legal statistics and keeps special accounts of subjects of legal statistics and special accounts.

The number of registered crimes is the number of revealed and officially registered socially dangerous acts stipulated by criminal legislation.

Depending on the nature and degree of danger to the public, crimes are divided into crimes of low, medium, high and especially high gravity.

Juvenile delinquents are children and adolescents between the ages of 14 and 17 who have been officially registered by law enforcement bodies and for whom criminal proceedings have been initiated.

Children brought to criminal responsibility - children and adolescents between the ages of 14 and 17 against whom an order has been issued to bring them to justice.

Juvenile delinquency is the totality of crimes committed by juveniles who are fourteen years of age at the time of the offense but under eighteen years of age.

The crime rate is the number of registered crimes per a certain number (usually 10 thousand) of inhabitants of a given district, region, republic. To determine the prevalence rate of crimes among minors, the denominator of the formula includes the number of persons aged 14 to 17 inclusive.

The structure of crime is characterized by the percentage ratio (specific weight) of the number of certain types of crimes to the total number of registered crimes. These data make it possible to determine at the expense of which crimes there are changes in the qualitative characteristics of crime.

Crimes committed by minors or with their complicity, total: 2018 - 994; 2019 - 650; 2020 - 873; 2021 - 529. 873; 2021 - 529, including: especially serious crimes in 2018 - 3; 2019 - 5; 2020 - 6; 2021 - 2, serious 2018 - 87; 2019 - 01; 2020 - 04; 2021 - 61, murder or attempted murder 2018 - 3; 2019 - 5; 2020 - 7; 2021 - 1; intentional infliction of grievous bodily harm 2018 - 4; 2019 - 4; 2020 - 0; 2021 - 0; robbery 2018 - 19; 2019 - 36; 2020 - 54; 2021 - 18; theft 2018 - 568; 2019. - 385; 2020 - 49; 2021 - 54; extortion 2018 - 1; 2019. - 6; 2020 - 6; 2021 - 2; fraud 2018 - 21; 2019. - 31; 2020 - 54; 2021 - 6; unlawful possession of a motor vehicle or other vehicle without intent to steal (theft) 2018 - 45; 2019 - 62; 2020 - 0; 2021 -1; illegal acquisition, transfer, sale, storage, transport or carrying of weapons, ammunition, explosives and explosive devices 2018 - 17; 2019 - 22; 2020 - 15; 2021 -13.

As practice shows, the cultural and educational level of most juvenile delinquents is significantly lower than that of their peers.

In the total mass of juvenile delinquency, the share of group crimes is high.

Criminal groups refer to small antisocial groups. Small means a small social group whose members are united by a common activity and are in direct, stable personal communication with each other, which is the basis for the emergence of both emotional relations in the group (sympathy, dislike, indifference) and special group values, their norms of behavior [7, 58].

In recent years there has been a process of consolidation of groups of minors with illegal behavior. The process of subordination of at-risk youth groups to organized crime is actively underway. The social base for the replenishment of these groups is expanding at the expense of the unemployed, minors engaged in small business, as well as those who have returned from imprisonment and have not found a place in life, teenagers from low-income and impoverished families.

Recognition of the influence of social conditions, contradictions in the development of society on the nature of moral formation of the individual is a crucial factor in explaining the unlawful behavior of minors.

According to the world's leading criminologists, the welfare of young people from early childhood should be at the heart of any program to prevent juvenile delinquency.

It is the implementation of the basic provisions of the Declaration of the Rights of the Child, adopted by the UN General Assembly in 1959, concerning the early prevention of juvenile delinquency, general prevention and the prevention of juvenile recidivism.

According to Professor S.I. Kurganov, "...the majority of crimes are committed in the sphere of leisure. Unlike adult crime, juvenile delinquency is dominated by group crime: from half to 3/4 of the crimes are committed in a group (depending on the type of crime).

Naturally, juvenile crime was more serious than adult crime: 3/4 of the crimes committed by juveniles were serious or very serious. However, after qualified theft (which is the most frequent crime) was transferred to the category of medium serious crimes in October 2002, this figure decreased by more than 1.5 times.

For juveniles, it is difficult to objectively assess the rate of recidivism because in many cases a new conviction occurs after the age of 18: a new crime is committed as a juvenile and a new sentence is served in an adult correctional facility..."[8,64]. There are also scientists who hold the same opinion [9,150].

Crimes committed by juveniles are a signal to society that there are shortcomings in the moral education of the younger generation. The success of moral education depends on many things:

- On the creation of a healthy moral atmosphere both at the level of society and in individual collectives and families;

- on an organic combination of mass and individual work with people;

This task is all the more important because we are talking about the formation of citizens of a state governed by the rule of law, who themselves are called upon to create laws, ensure their implementation, improve legislation, and participate in the management of state and social affairs.

Juvenile delinquency, which is widespread on a significant scale, requires decisive, vigorous and targeted measures for its prevention. To this end, it is necessary to constantly improve the forms and methods of work of law enforcement bodies, to ensure their priority recruitment and material and technical supply in an appropriate manner. General and individual preventive measures applied by law enforcement bodies to eliminate circumstances and conditions conducive to juvenile delinquency play a fundamental role in solving these tasks.

The effectiveness of this activity depends to a large extent on how these measures are grounded in current legislation in conjunction with psychology and pedagogy [10,50].

The recidivism rate for minors is not high, about 7%. However, while a person who has already been convicted of an intentional crime (legal recidivism) has a much lower rate of recidivism than an adult, the commission of a new crime by a minor who has already committed a crime (recidivism in the criminological sense) is an extremely common phenomenon. It is typical for juveniles to commit multiple episodes of theft, robbery, and assault; often less serious crimes are followed by the commission of more serious crimes. Up to 70% of juveniles convicted of acquisitive crimes had committed multiple crimes at the time of being brought to criminal responsibility.

Crime statistics in recent years show a "rejuvenation" of crime. The same is true of juvenile crime: the proportion of 14-15 year olds among those who have committed crimes is about 20%, according to sample data.

According to research data, there is a correlation between juvenile delinquency and organized crime: at least 10% of participants in organized groups and criminal associations are under the age of 18. However, official statistics claim that minors account for only about 0.5% of the total number of people who commit crimes as part of organized groups and criminal associations [11,20]. Involvement in criminal activities at a young age closely links young offenders

to the criminal environment, which influences personality and behavior, shapes the individual's value system, and thus predetermines the future course of life.

Criminological research of the characteristics of juvenile delinquency, as well as the personality of a juvenile delinquent, is necessary not only for the development of effective preventive measures (prevention), but also for the improvement of the state policy of combating crime in general. It is necessary to take into account the peculiarities of adolescence, as well as the real possibilities of state bodies, families and public organizations in work with teenagers and youth. Differentiated and individual approach should be implemented in relation to any category of offenders, but it is especially important in relation to those who commit crimes at a young age.

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Proceedings of the 10th International Scientific Conference «Foundations and Trends in Modern Learning» (August 14-15, 2025). Berlin, Germany, 2025. 191p

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