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Review article

The development of word formation theory in the works of representatives of the Kazan linguistic school: history and modernity

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Abstract. The contribution of I.A. Baudouin de Courtenay and his followers A.I. Anastasiev, N.V. Krushevsky, V.A. Bogoroditsky to word formation theory has been described in sufficient detail, but the achievements of Kazan University representatives in the late 20th – early 21st centuries have not been fully studied yet. This substantiates the relevance of the present study. The aim of the study is to characterize the word formation theory development in Kazan University since the late 19th century. The material for the study was the scientific works by I.A. Baudouin de Courtenay and his followers (A.I. Anastasiev, N.V. Krushevsky, V.A. Bogoroditsky), as well as the works of Kazan University representatives in the second half of the 20th – early 21st centuries (V.M. Markov, G.A. Nikolaev, E.A. Balalykina, V.A. Kosova, etc.). The main methods used in the study were descriptive and induction method, analysis and comparison. Our review of the works by Kazan University scientists confirms and deepens earlier conclusions about word formation theory development at the university since the end of the XIX century until 2025. I.A. Baudouin de Courtenay and his followers referred word-formation to morphology, created the classical morpheme theory, investigated word structure and some Russian affixes, revealed the prerequisites for defining the concept of word-formation meaning and word-formation paradigm, and made many other important discoveries in the field of linguistics. Kazan University representatives of the second half of the XX – early XXI century relied to a great extent on the results of their predecessors. V.M. Markov and G.A. Nikolaev made a significant contribution to historical word formation in the Russian language; E.A. Balalykina, G.A. Nikolaev, and other linguists worked in the field of comparative word formation; G.A. Nikolaev, T.M. Nikolaeva, I.V. Erofeeva studied functional word formation; V.A. Kosova developed the structural-semantic aspect of word formation. The analysis of theoretical works shows the continuity in studying word formation at Kazan University.

Keywords: russian language, Kazan University, linguistics, I.A. Baudouin de Courtenay, A.I. Anastasiev, N.V. Krushevsky, V.A. Bogoroditsky

Contribution: Miftahova A.N., Makleeva E.A. — research concept, literature analysis, data analysis, writing and editing of the article.

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Introduction

The Kazan Linguistic School (KLS), formed in the 1870–1880s, plays an important role in the development of not only Russian but also world linguistics. The founder of the RLS, I.A. Baudouin de Courtenay, and his followers made a significant contribution to various branches of linguistics, including word formation (Baudouin de Courtenay, 1963; Baudouin de Courtenay, 2010; Anastasiev, 1884; Anastasiev, 1887; Krushevsky, 1883; Bogoroditskii, 1915; Bogoroditskii, 1935; Bogoroditskii, 1939). Professor G.A. Nikolaev notes that the works of Kazan scholars "open a new period in the history Russian word formation, the period of theoretical comprehension of the accumulated facts and development of word formation research methods. The views of Kazan scientists were based on a deeply and consistently dialectical approach to language considering language as a static and dynamic unity, which is constantly functioning and constantly developing" (Nikolaev, 2009: 4).

The contribution to word formation made by I.A. Baudouin de Courtenay and his followers A.I. Anastasiev, N.V. Krushevsky, V.A. Bogoroditsky is characterized in many monographs and articles of the second half of the XX – early XXI century (Berezin, 1998; Andramonova, 2002; Shchuklina, 2015; Nikolina, 2015). There are publications analyzing the scientific works of Kazan scientists in the second half of the XX century (Nikolaev, 1997; Nikolaev, 2012a, etc.).

For obvious reasons, the achievements of Kazan University representatives of the late XX – early XXI century are described still insufficiently. Meanwhile, much attention is paid to word formation studies at Kazan University, which raises the question of comprehension and systematization of Kazan researchers' works. This article analyzes not only the works by I.A. Baudouin de Courtenay and his followers, but also those scholars from Kazan University who continued his research in the second half of XX and XXI century, such as V.M. Markov (Markov, 1955; Markov, 1958; Markov, Nikolaev, 1976; Markov, 2001a),

G.A. Nikolaev (Nikolaev, 1970; Nikolaev, 2009; Nikolaev, 2010; Nikolaev, 2011; Nikolaev, 2012b), E.A. Balalykina (Balalykina, 2007), I.V. Erofeeva (Erofeeva, 2010), V.G. Fatkhutdinova (Fatkhutdinova, 2005), V.A. Kosova (Kosova, 2011; Kosova, 2014a; Kosova, 2014b), T.Yu. Shchuklina (Shchuklina, 2011; Shchuklina, 2014; Shchuklina, 2024) and some others.

The aim of the study is to describe the development of word formation theory at Kazan University since the end of the 19th century.

Methods and materials

The material for the review article was the scientific works by I.A. Baudouin de Courtenay and his followers (A.I. Anastasiev, N.V. Krushevsky, V.A. Bogoroditsky), as well as the works of Kazan University representatives of the second half of the XX – early XXI century (V.M. Markov, G.A. Nikolaev, E.A. Balalykina, V.A. Kosova, etc.). In total, about 30 scientific works were analyzed, and the authors of the article applied several methods.

The main method is the study of theoretical material, its subsequent systematization, and the comparison of new and previously obtained knowledge. In addition, descriptive method, method of induction, generalization and interpretation of the studied material were used.

This complex approach allowed not only to describe and systematize theoretical provisions and discoveries of individual scientists, but also to see the continuity in word formation studies in the Kazan Linguistic School, to trace how certain ideas evolved in the theory of word formation.

Discussion

In his preface to the first volume of I.A. Baudouin de Courtenay's Selected Works on General Linguistics, V.V. Vinogradov argues that it is difficult "to give even a simple list of Baudouin de Courtenay's progressive ideas not only in the field of all the humanities he touched ... but even in the field of 'pure linguistics', as he called it" (Baudouin de Courtenay, 1963: 3). The founder of KLS considered word formation as a doctrine of word-forming affixes and bases and formulated the idea of synchronic and diachronic approach to studying word formation phenomena. I.A. Baudouin de Courtenay created the classical morpheme theory and thought of words as "complexes of denominative, meaningful parts" (Baudouin de Courtenay, 2010: 34). He perceived a morpheme as "a complex of sound representations united by association with a group of representations from the sphere of either word structure (morphological representations) or their meaning (lexical and semasiological representations)" (Baudouin de Courtenay, 2010: 118–119).

"The introduction of the scientific foundations of the theory of Russian word formation into the practice of teaching was brilliantly realized

by A.I. Anastasiev, a student of I.A. Baudouin de Courtenay" (Shchuklina, 2015: 21). In his works, the researcher talks about the word structure and its historically changeable character (Anastasiev, 1884; Anastasiev, 1887).

Baudouin de Courtenay's ideas were developed in the works of N.V. Krushevsky who focused on studying affixes and concluded that "in whole hundreds of words, the same or similar morphological elements are repeated; this forms more or less numerous families of words related by root, suffix or prefix in the language" (Krushevsky, 1883: 108). The researcher distinguished between genetic and individual meaning and created the prerequisites for defining the concept of word-formation meaning; "the recognition of the binarity of the word-formation structure gave Krushevsky the opportunity not only to consider word-formation types, but also to come as close as possible to the allocation of the word-formation paradigm" (Nikolina, 2015: 65).

"The most complete and consistent achievements of the Kazan linguistic school in the synchronic-diachronic study of Russian word formation are presented by V.A. Bogoroditsky. His works contributed to further intensive research of Russian word formation from the point of view of both its modern state and historical development" (Shchuklina, 2015: 22). V.A. Bogoroditsky in his "Essays on Linguistics and the Russian Language" writes that "word formation is a science on the material side of words related to their own meaning, while word formation is a doctrine of the formal part of words by means of which words appear in a sentence in one or another syntactic role" (Bogoroditsky, 1939: 204). The scientist says that as a result of the classifying activity of the mind the names of groups of homogeneous objects and phenomena of the world are formed, which are fixed in the language with the help of suffixes, which, "joining the root, determine the belonging of the denoted object to one or another class of existences" (Bogoroditsky, 1935: 141). According to the researcher, "...words associated by similarity can represent different degrees of this similarity, which leads to the formation of the categories of declension, conjugation and word formation in general with their more private groups and types" (Bogoroditsky, 1915: 157). He describes the system of suffixal word-formation of a noun in the most detailed and complete way and distinguishes between mutation and modification categories (without using these terms).

The ideas of I.A. Baudouin de Courtenay and his followers significantly influenced Kazan linguists. While the scientific heritage of I.A. Baudouin de Courtenay, A.I. Anastasiev, N.V. Krushevsky, and V.A. Bogoroditsky has already been well enough studied, the contribution of Kazan researchers of the second half of the 20th – early 21st centuries has yet to be fully appreciated. Therefore, we pay more attention to the ideas of our contemporaries.

The theoretical foundations of historical word-formation of the Russian language were developed at Kazan University (V.M. Markov, G.A. Nikolaev).

V.M. Markov's historical-language methodology was formed according to his dialectical attitude to linguistic facts. He represented living language as "a dialectical unity of the static and dynamic..., the functioning of a fact and simultaneously its development" (Markov, Nikolaev, 1976: 5).

This principle analyzing linguistic facts in development and in the interaction of one-level and different-level facts became the starting point of his further research in the field of word formation.

The progressive ideas of word formation were reflected by V.M. Markov in his work "Forms of Names in the Language of the XV–XVI Century Trial Laws" (Markov, 1955). In his Ph. D. dissertation, the scientist urged to distinguish between word-formation analysis and word analysis and considered the connection and interaction of word-formation, conjugation and declension.

Under the supervision of Prof. V.M. Markov, one of the modern concepts of word formation theory was created, "the most promising in studying word formation phenomena" (Nikolaev, 1997: 7).

This concept contained "the requirement to consider the facts of word-formation in their close connection and interaction with form-formation. The parallelism of word- and form-formation is expressed in the identity of processes, the nature of the structure of words and their forms, in the same ways of word- and form-formation (morphemic and semantic), types of morphemes (phonomorphemes, homomorphemes, synomorphemes), in the presence of zero morphemes and discontinuous formants in both spheres. V.M. Markov's special merit in the theory of word formation is his substantiation of the presence of discontinuous confixal morphemes and two ways of word formation in the Russian language, morphological and semantic" (Nikolaev, 2012a: 284).

V.M. Markov paid attention to the concept of relatedness in word-formation analysis. He emphasized that one should "clearly distinguish between two possible approaches to the word; on the one hand, how, basing on what word-formation relations the word under study arose, and on the other hand, with what other word or words this word correlates in a certain historical period, in particular, in the modern language" (Markov, 1958: 2–3). This approach showed mutual and inverse relatedness in the correlative pair of. But it is important that "the way of formation of a word which appeared as a new lexical unit reveals a one-way relation in the presence of certain correlated lexical-grammatical groups" (Markov, 1958: 3).

It was V.M. Markov who developed the ideas of I.A. Baudouin de Courtenay and F.F. Fortunatov and substantiated the category of a zero word-forming morpheme. This notion was first mentioned in his work "Phenomena of suffixal synonymy in the language of judicials of the 15th-16th centuries" (Markov, 1956). G.A. Nikolaev notes: "V.M. Markov singles out the zero word-forming suffix in the corresponding words considering their synonymic

relationship with other derived words and proceeds from the indicative parallelism of the forms of word-formation and inflection" (Markov, 2001a: 264).

In his article "Phenomena of Zero Suffixation in Russian" (1961) (Markov, 2001b), the researcher considers the system of word-formation and inflection in parallel. He defines the notion of zero suffixation as "the indicative absence of a formal sign in the word having a clear correlation with the producing base in the system of related suffixal formations (ходъ — ходьба — хождение connected with the verb ходити 'to go', etc.)" (Markov, 2001b: 102).

Prof. G.A. Nikolaev developed the ideas of his teacher and concluded that zero morphemes indicate certain relations in the word-formation series or in the inflectional paradigm: "We single out zero morphemes because they formalize relations which in other cases are formalized by material morphemes" (Nikolaev, 2011: 12).

Prof. G.A. Nikolaev is the author of fundamental works devoted to word formation, one of the most important being the monograph "Russian historical word formation: theoretical issues" (Nikolaev, 2010). In the monograph, the researcher studies the issues of historical word formation, semasiology, and morphemics in the aspect of the dynamic processes and relations in developing word-formation system of the Russian language. G.A. Nikolaev points out that the monograph studies "the main factors of the Russian language word-formation system development". The factors include "the contradiction between language dynamics and statics, manifested in word-formation in the dynamics of word-formation processes and relations, i.e. in the change of derivational relations and bringing new relations in line with word-formation processes" (Nikolaev, 2009: 161). G.A. Nikolaev highlights the issues of word-formation synonymy, antonymy, and homonymy, their interrelation and mutual influence during language development. According to G.A. Nikolaev, "they are the result of certain word-formation processes, <...> as well as changes in word-formation relations in some word-formation types" (Nikolaev, 2010: 140). He also pays attention to the stylistic aspect and concludes that the division of "phenomena into stylistic categories is based not only on the specific producing bases and word-forming means, but also on the traditions of using word-forms. These traditions have a deep historical grounding and are connected, as a rule, with those needs that brought to life a certain word-forming type" (Nikolaev, 2010: 140).

The textbook "Lectures on Russian Word Formation"[1] includes lectures which Professor G.A. Nikolaev delivered at Kazan University. The manual contains of eight chapters, which the author calls lectures, and practical tasks in the main sections of the university course on word formation.

In general, G.A. Nikolaev's scientific heritage deserves a separate review.

[1] Nikolaev, G. A. (2009). Lectures of Russian word formation: textbook. Kazan: KFU Publ. (In Russ.).

The structural-semantic aspect of word formation is reflected in the works of V.A. Kosova, who studied word-formation categories.

The main results of V.A. Kosova's research are reflected in her monograph "Word-formation categories of the Russian language: problems of theory" (Kosova, 2014b) and in her doctoral thesis "Systemic significance of word-formation categories in the Russian language" (Kosova, 2014a). V.A. Kosova considers that the main result of this research is "the creation of a holistic view of the word-formation category through the comprehension of private linguistic regularities and facts, as well as the substantiation of its system-forming status in the word-formation and wider nominative-derivational system of the Russian language" (Kosova, 2014b: 200). Based on the analysis of word-formation categories, generalization, and critical rethinking of existing studies on this phenomenon, the author has built a model of noun word-formation system, described the onomaseological categories, their word-formation macro categories, categories and word-formation models.

V.A. Kosova opens her doctoral dissertation with a paragraph on the fundamental role of Kazan linguistic school in developing the theory of word-formation categories: "the analysis of the works by I.A. Baudouin de Courtenay, N.V. Krushevsky, V.A. Bogoroditsky showed that their functional-grammatical views formed the basis of the theory of word-formation categories of the XX–XXI centuries" (Kosova, 2014a: 44). In the monograph, the author focuses on the noun, and her thesis characterizes the verb word-formation category "state causation". The author considers one of the main results of her dissertation research "the original interpretation of word-formation suppletivism, based on a categorical and word-formation approach to determining the linguistic nature of this phenomenon. This approach allowed us to define the range of suppletive units of the nominative-derivational system of the Russian language in accordance with the true meaning of the term "suppletivism" as it was understood by the founders of the theory of suppletivism" (Kosova, 2014a: 448).

V.A. Kosova's ideas were reflected in the PhD theses of her students Sun Miao (2016), A.V. Trofimova (2018), E.A. Makleeva (2018), Li Siqi (2020), and R.R. Guzaerova (2021).

One of the main issues for the Kazan Linguistic School in the 20th century was the theory of word formation and, in particular, historical word formation. Word-formation problems have been studied in Kazan Federal University under the guidance of V.M. Markov and his followers G.A. Nikolaev, E.A. Balalykina, A.A. Aminova, and L.A. Andreeva.

A significant contribution to the theory of comparative-historical word formation was made by the Professor of Kazan University Emilia A. Balalykina. The monograph "Russian Adjective Word Formation on the Balto-Slavic Background" (Balalykina, 2007) contains the results of long-term studies. The author shows the closeness of related languages at the word-formation level

and comes to the conclusion that Slavic and Baltic languages can be grouped on the basis of similarities in the development of certain adjective word-formation types. Due to the comparative approach, E.A. Balalykina established the origin of certain adjectival morphemes, in a number of cases fundamentally inconsistent with the traditional views on this issue (Balalykina, 2007). She also studied word-formation enantiosemia.

The historical aspect of word formation was touched upon by the following scholars of Kazan University: I.V. Erofeeva (Erofeeva, 2010), G.A. Nikolaev (Nikolaev, 2012b), T.P. Troshkina (Troshkina, 2014).

This, Prof. I.V. Erofeeva has been researching the word-formation system of Old Russian for a long time and came to the conclusion that "the analysis of derivational processes and their realization in derived names give an idea of the specific conceptualization of the world, the peculiarities of the worldview in a certain historical epoch" (Erofeeva, 2010: 3).

The researcher notes that "word formation means, models and techniques are regularly used in human nominative activity. Since derivative words objectify information about the world, the derivational process represents the cognitive and interpretive activity of man. Both the content plan of the word-formation structure in the totality of word-formation categories and word-formation meanings and the expression plan, represented by the system of word-formation means, have onomasiological orientation" (Erofeeva, 2010: 3).

The scientists of Kazan University also paid attention to the comparative aspect of word formation (Aminova, 1993; Fatkhutdinova, 2005). Thus, V.G. Fatkhutdinova in her monograph "Complex units of word formation in Russian and Tatar languages" (Fatkhutdinova, 2005) on the material of typologically distant languages describes similarities and differences in the structural-semantic and nominative organization of complex units of word formation, namely the word-formation nest and its elements, word-formation pairs, paradigms, and chains.

T.Yu. Shchuklina studied the functional-communicative aspect of word formation. Her works contribute to the dynamic description of Russian word formation. The scientist is interested in the issue of word creation. The object of the study was innovations in children's speech (Shchuklina, 2011), individual neologisms in the texts of Yu. Petukhov, in his novel "Angel of Retribution" (Shchuklina, 2014), word-formation neologisms in advertisements (Shchuklina, 2024) and media language (Shchuklina, 2018).

Thus, children's word creation reflects the dynamic and cognitive-creative nature of the child's language activity. This is "a process of creative cognition focused on an active search for the figurative motivation of the word, its internal form, connections, patterns, relations of language elements" (Shchuklina, 2011: 119). The author concludes that almost all new children's words have symmetry of their formal and semantic structures.

T.Yu. Shchuklina notes the importance of studying the functional-communicative aspect of word formation, in particular, word creation in mass media, one of the main sources for new forms: "The study of active derivational processes in mass communication, a kind of catalyst for linguistic transformation, helps to establish the most important changes in Russian word-formation system and to trace the trends in usus development as a whole" (Shchuklina, 2018: 285).

In her article "Functional-pragmatic potential of Russian word formation", T.Y. Shchuklina outlines further ways of development of Russian word formation: "The study of non-trivial ways and methods of word formation, functional-pragmatic potential of word-forming means will allow to predict the future development of codified word formation to a certain extent" (Shchuklina, 2024: 322).

The neurolinguistic aspect of word formation is also promising (Gorobets, Gismatullina, 2017). Kazan Federal University conducts research of speech features of patients with neo-focal forms of encephalopathy (Galiullin, Gorobets, Lotfullina, 2015) and pays special attention to the word formation level. Analyzing a specific clinical case, scientists note the patient's deficit at the word-formation level as the results of neurolinguistic examination show. Patients' speech contains neologisms due to the deficit of visual-spatial gnosis and the inability to recognize the pronounced words. The researchers point out that "when the patient does a derivational test, he demonstrates a high (76%) percentage of inertness. Thus, forming several units with the same suffix, he does not switch when it is necessary to choose another word-forming means and "invents" a new one by consonance with similar variants" (Gorobets, Gismatullina, 2017: 71).

Researchers also pay attention to the functional side of word formation and its links with stylistics (I.V. Erofeeva, T.M. Nikolaeva, G.A. Nikolaev, N.G. Nikolaeva, etc.).

According to T.Yu. Shchuklina, "the history of linguistics has few scientific schools with so many fruitful ideas, such deep understanding of its prospects... The traditions of the Kazan linguistic school established by I.A. Baudouin de Courtenay and his followers live on" (Shchuklina, 2015: 24).

Conclusion

In any science, continuity and achievements of previous generations of scientists is undoubtedly important. Only a detailed study of the history of the issue can bring the most accurate and relevant results.

The conducted review of scientific works of the scientists from Kazan University confirmed and deepened earlier conclusions about the development of word formation in the university since the end of the XIX century until 2025. As the analysis of works over the last 20 years by Kazan researchers shows,

the interest in word formation is still high. However, it is necessary to consider the theoretical basis laid by I.A. Baudouin de Courtenay and his followers in order to carry out research at a high level. A new generation of Kazan linguists is successfully developing the ideas of the Kazan Linguistic School in their works devoted to the diverse study of the problems of word formation: historical, comparative historical, structural-semantic, comparative, functional-communicative, neuro-linguistic.

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Обзорная статья

Развитие теории словообразования в работах представителей Казанской лингвистической школы: история и современность

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Аннотация. Вклад в развитие словообразования И.А. Бодуэна де Куртенэ и его учеников охарактеризован достаточно подробно, однако достижения ученых Казанского университета конца XX – начала XXI в. изучены и описаны еще недостаточно полно. Цель исследования — описание развития теории словообразования в Казан-

ском университете с конца XIX в. до наших дней. Материалом исследования послужили научные труды И.А. Бодуэна де Куртенэ и его учеников (А.И. Анастасиева, Н.В. Крушевского, В.А. Богородицкого) и работы представителей Казанского университета второй половины XX – начала XXI в. (В.М. Маркова, Г.А. Николаева, Э.А. Балалыкиной, В.А. Косовой и др.). Среди основных методов исследования можно выделить обзор, описательный, индукцию, анализ и сопоставление. Проведенный обзор научных трудов ученых Казанского университета позволяет подтвердить и углубить сделанные ранее другими исследователями выводы о развитии словообразования в университете с конца XIX в. до 2025 г. Проведенный анализ теоретических работ позволяет говорить о преемственности в изучении словообразования в Казанском университете.

Ключевые слова: русский язык, Казанский университет, языкознание, И.А. Бодуэн де Куртенэ, А.И. Анастасиев, Н.В. Крушевский, В.А. Богородицкий

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