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Theoretical and methodological approaches to studying the phenomenon of identity: problems and prospects

The study of the phenomenon of identity is one of the key problems of modern social and humanitarian sciences. In the context of globalization, migration, and multiculturalism, the issues of formation, preservation, and transformation of identity are of particular relevance. This article is devoted to the analysis of methodological approaches to the study of the phenomenon of identity, and to identifying the problems and prospects associated with their application in various disciplinary areas. The purpose of the study is to determine effective methodological approaches used to study various aspects of identity (personal, cultural, national), and assess their scientific and practical significance. The main attention is paid to the analysis of key areas: socio-philosophical, sociological, psychological, and anthropological approaches to the phenomenon of identity. The article provides an overview of modern methodological strategies and tools, such as discourse analysis, and phenomenological method. The problems of operationalization of the concept of identity, as well as the difficulties of an interdisciplinary approach in studying this phenomenon, are considered. The results of the study showed that each methodological strategy has its limitations and advantages, depending on the context of the studied aspect of identity. Conclusions are made about the need to develop integrative approaches. The value of the work lies in the in-depth analysis of methodological problems associated with the study of identity, as well as in the proposal of new approaches that can be used in future studies. The practical significance of the work lies in the possible application of its results in socio-political and cultural studies to understand identification processes in the context of modern globalization.

Keywords: identity, theoretical and methodological approaches, interdisciplinary approach, cultural identity, social identity, national identity, personal identity, globalization, multiculturalism.

Introduction

In recent decades, the phenomenon of identity has become one of the key topics in various scientific disciplines, including sociology, philosophy, psychology, cultural studies, and political science. In the context of globalization, cultural hybridization, migration processes, and the increasing role of digital technologies, the study of identity is becoming especially relevant. Modern societal changes raise questions regarding the preservation, transformation, and redefinition of individual and collective identity, which require deep theoretical and methodological understanding.

The study of this topic is due to the need to systematize and analyze existing scientific approaches to the study of identity, and find ways to solve methodological problems associated with the diversity and multi-layered nature of this concept. Despite the abundance of research in this area, the methodological base remains fragmented, which complicates the development of universal tools for the analysis of identity, manifested in various forms.

The relevance of this topic is that the study of identity is crucial for understanding processes occurring at the individual level (self-determination and formation of self-identity) and at the social level (national, ethnic, and cultural identity). In the context of growing intercultural contacts and conflicts, studying identity can help to better understand social and cultural dynamics and predict their consequences.

The object of the study is the phenomenon of identity as a complex social and cultural phenomenon.

The research subject is theoretical and methodological approaches to the study of identity used in modern humanities and social sciences.

The study aims to analyze existing theoretical and methodological approaches to the study of identity, identify ways of their application, and develop promising methods of interdisciplinary analysis of this phenomenon.

To achieve this goal, it is necessary to solve the following tasks:

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- to analyze existing theoretical approaches to the study of identity in sociology, philosophy, and cultural studies;
- to identify methodological problems that arise in the study of identity;
- to propose an integrative, interdisciplinary methodology for a comprehensive study of the phenomenon of identity.

Methodology and research methods

Studying the phenomenon of identity uses theoretical and methodological approaches based on analytical consideration and comparative analysis of various concepts and theories existing in modern scientific literature. This approach involves a thorough study and synthesis of scientific works by domestic and foreign authors covering issues of identity, its structure, formation, and change in modern socio-cultural conditions. The main approaches considered in the study include social constructivism, which considers identity as a result of social and cultural processes. Existentialism emphasizes individual identity and self-determination. Post constructivism explores the diversity of identities and the influence of power and social institutions on their formation.

The study hypothesizes that traditional methodological approaches to the study of identity (sociological and philosophical) are insufficient for analyzing the multilayered nature of identity in the modern context of globalization and digital communication. A comprehensive interdisciplinary approach will allow us better to understand the mechanisms of formation and transformation of identity. These questions and methods will help us get a holistic view of the phenomenon of identity and open up new perspectives for its study.

Results and discussion

The study of identity is a multifaceted endeavor that spans a variety of theoretical and methodological approaches. These approaches are rooted in various philosophical, psychological, and sociocultural frameworks, and each offers unique insights into the nature and formation of identity. The complexity of identity is reflected in the various methodologies used to study it, from philosophical analysis to discourse and narrative approaches. Some key theoretical and methodological approaches to the study of identity are presented in the table below.

Table 1

Theoretical and methodological approaches to the study of the phenomenon of identity

Approaches	Description of approaches
Philosophical	Philosophical approaches to the study of identity view it as a concept associated with the search for meaning, selfhood, and human essence.
Social and psychological	Identity is formed through interaction between an individual and the surrounding social environment.
Cognitive	Identity is associated with the perception and understanding of oneself through the prism of social roles and categories.
Postmodernist	Identity is not fixed. It is fragmented and constructed in different social contexts.
Cultural	Identity is defined through belonging to a particular culture and cultural practices.
Sociological	Identity is formed under the influence of social structures, institutions, and group norms.

1. **Philosophical approaches.** Freud-Marxism, Post-Structuralism, Multiculturalism, and Philosophical Hermeneutics: These philosophical systems examine identity through different lenses. Freud-Marxism, for example, combines psychoanalytic and Marxist theories to understand identity formation, while post-structuralism, as introduced by Judith Butler, views identity as a fluid and performative construction. Multiculturalism and philosophical hermeneutics focus on the cultural and interpretive aspects of identity [1; 217].

2. **Psychological and sociocultural approaches.** Psychoanalytic and Symbolic Interactionism: These approaches examine the internal and social processes of identity formation. The psychoanalytic approach emphasizes mechanisms such as identification and introjection, while symbolic interactionism focuses on the role of language and social interactions in identity formation.

3. **Sociocultural and cognitive approaches:** These approaches view identity as influenced by cultural, motivational, and cognitive factors. They examine how social categorization, comparison, and internalization contribute to identity development.

4. **Narrative and discursive analytical approaches:** This method studies identity through personal stories and narratives, emphasizing the role of narrative in constructing and understanding identity. It emphasizes the reflexive and value-semantic mechanisms that allow people to analyze and construct their identity [2; 56].

5. **Discourse-analytic approaches:** These approaches focus on the language and discourse used in the construction of identity, analyzing how identity is represented and discussed in different contexts [3; 73].

6. **Social constructivism and performative approaches** **Performative national identity:** Based on social constructivism and symbolic interactionism, this approach studies how national identity is constructed and represented through social practices and personal attitudes. It emphasizes the performative nature of identity, where identity is constantly constructed and reconstructed in the course of social interactions [4; 135].

While these approaches provide a comprehensive understanding of identity, they also highlight the complexity and multifaceted nature of the concept. Each approach has its own strengths and limitations, and future research may benefit from integrating these different perspectives to develop a more holistic understanding of identity.

Thus, foreign researchers of the phenomenon of identity actively use an interdisciplinary approach. Classic works that laid the foundations for the analysis of identity are the works of Erik Erikson, who considered identity as a continuous process of self-determination of an individual in society. Erikson defined identity as a dynamic structure constantly subject to change under the influence of external and internal factors. He also identified the stages of identity formation, which became the basis for further research in this area.

In recent years, identity has also been explored in the light of postmodern theory, where it is viewed as a decentralized, multi-layered, and constantly changing process. For example, the works of Anthony Giddens and Stuart Hall emphasize that in the context of globalization and rapid technological development, identity is becoming more fragmented and contextual. Giddens focuses on the reflexivity of the individual, that is, the ability of an individual to analyze and rethink their identity in the context of rapid social change. Stuart Hall notes in his works that globalization blurs the traditional boundaries of cultures and nations, creating conditions for the formation of hybrid identities, which is especially relevant in multicultural societies.

Stuart Hall's approach to the study of identity is based on the discovery of identity as a dynamic, flexible, and constantly changing construct. Stuart Hall views identity as a phenomenon formed under the influence of historical, social, and cultural processes. In contrast to the classical understanding of identity as a static and constant state, Stuart Hall argues that it is created and revised depending on the context and conditions of a limited world. Thus, we can note the main aspects of the phenomenon of identity according to Stuart Hall's theory:

1. **Identity as constructs:** Hall argues that identity does not exist as something pre-given or justified. It is constructed under the influence of discourses and ideologies occurring in society at any given moment in time. For example, different historical periods create different notions of identities that are applied and imposed through the dissemination of information, state institutions, and cultural practices [5; 6].

2. **Procedurality and plurality:** An important feature of Hall's connection is the idea of multiple identities, i.e., that people have multiple identities that can exist in a dynamic atmosphere and even consider each other similar. In this process, Hall pays attention not only to cultural identity but also to other identities such as gender, class, and ethnicity.

3. **Identity as positioning:** Hall characterizes identity through the term "positioning", implying that it has always emerged in a process with other people and communities. This positioning can be voluntary or imposed, and it changes depending on the context, the person's behavior, and the perception of his or her place in the society of interactions [6; 225].

4. **The role of power and discourses:** Hall draws attention to how power influences identity, particularly through discourses — the structure of speech that determines how things should be talked about. Thus, the surveillance of social groups can control discourses based on what is considered "normal" identity, pushing me away from what is observed as marginal or other.

5. **Hybridity and migration of identities:** Hall actively develops the concept of "hybridity" in nine world countries and globalization. He notes that modern migration processes create new forms of identity that cannot be attributed to one nation's culture. Moving from one culture to another, people create hybrid identities that combine elements of different cultures. [7; 58].

Hall's approach thus allows us to analyze identity as a complex, fluid construct constantly being revised under the influence of historical and social conditions. This perspective helps us better understand how globalization, popular culture, and intercultural interactions influence identity in contemporary society.

Among the theoretical and methodological approaches to studying the phenomenon of identity, it is worth noting the following key aspects from the works of the authors Badmaev V.N., Lamazhaa Ch.K., and Mirzabekova A.Sh.. These studies help to understand the theoretical and methodological approaches to the study of identity, and note possible problems and prospects in this area. In the studies of Badmaev V.N., the problem of ethnic and cultural identity is considered from the point of view of an emphasis on regional and cul-

tural characteristics. He studies the processes of ethnic self-identification, analyzing the factors influencing identity in the context of globalization and cultural homogenization. Thus, Badmaev V.N. pays attention to the interaction of countries influencing ethnic identity and also offers methodological tools for their study. In his monograph, Badmaev V.N. analyzes important scientific and practical problems — the phenomenon of national identity, noting the dynamism and instability in the context of information and communication networks, as a result of which the influence of primary identity is strengthened: as a nation, historical-ethnic symbols, religion, traditions, etc. [8; 93].

The importance of Badmaev V.N.'s research is that he not only conscientiously examines various approaches to this concept (social-psychological, sociological, philosophical, etc.) but also gives his understanding of its content, as formulates the basic principles of methodology in studying this phenomenon. He offers the following methodological aspects for examining the chosen problem:

1. **Philosophical and anthropological:** a process of awareness of an individual's belonging to a specific national-ethnic community.

2. **Historical and perspective:** understanding of ethnic roots, all the features of the historical path of development of the nation — to determine its future.

Thus, the research of the theoretical and methodological approach to the phenomenon of identity, according to the works of Badmaev V.N., is understood not as a permanently given constant but as a dynamically developing "social matrix". The author rightly believes that the development of the concept of identity is capable of concretizing socio-philosophical ideas about the process of the emergence and development of nations.

Chimiza Kuderoolovna Lamazhaa, a researcher on the phenomenon of identity, uses a multi-aspect approach that includes both theoretical and practical aspects. Her work focuses on the study of migration identity, cultural adaptation, and interaction of different cultures. Several of the author's main works devoted to the study of the phenomenon of identity can be distinguished. For example, "Archaization of Society. Tuvan Phenomenon" [9; 182] is a monograph that examines the process of archaization in the context of social transformations, emphasizing Tuvan identity. "Tuvan Studies. New Horizons" is a work devoted to modern studies of Tuvan culture and identity [10; 49].

Lamazhaa Ch.K.'s theoretical and methodological approach to studying the phenomenon of identity is multifaceted and profound. She integrates various theoretical concepts and methodological strategies to analyze complex aspects of identity, especially in the context of migration and cultural change. The main elements of this approach are listed in the table below:

Table 2

Theoretical and methodological approach of Lamazhaa Ch.K.

Approaches	Description of approaches
Multidimensionality of identity	This approach explores how identities emerge and change through the interaction of various factors such as history, cultural traditions, and social contexts.
Cultural contextualization	Identity is formed in the context of specific cultural practices and norms. The author analyzes how traditions, language, and customs influence how individuals perceive themselves and their belonging to different groups.
Social interaction	Emphasizes the importance of intersubjectivity in the process of identity formation. It considers how relationships with other people (families, communities, national groups) contribute to the formation of both individual and group identities. This interaction includes elements of approval and acceptance, which also influences the processes of self-identification.
Theories of Identity	This approach draws on various theoretical models of identity, including the concepts of social identity and cultural identity. It applies and adapts them to reflect better the complex realities that migrants and culturally diverse people face.
Methodological approaches	Using qualitative research methods such as interviews, focus groups, and ethnographic observation allows for a deeper understanding of people's subjective experiences and reveals the hidden meanings attached to identity. This approach helps to reveal personal and collective narratives about oneself and one's place in society.
Critical approach	By incorporating critical reflection into research, analyzing existing theories of identity, and questioning their universality, the author draws attention to the social and political contexts in which identities are formed and how they can be changed under the influence of external factors.

Thus, Chimiza Kuderoolovna Lamazhaa's theoretical and methodological approach to studying the phenomenon of identity is an interdisciplinary synthesis of various theories and methods. She pays attention to the diversity of identities, their contextual aspects, and interactions, which allows for a deeper understanding of how identity is formed and transformed in the modern world. This approach contributes to a more complete and multifaceted understanding of identity, especially in the context of globalization and migration.

In Kazakhstan, identity studies have also gained importance, especially in the context of the transformation of society after independence. Domestic researchers focus on the problems of ethnic, national, and cultural identity in the context of post-Soviet changes and globalization.

The works of Mirzabekova A.Sh. are worth mentioning. The author actively studies the phenomenon of identity, especially in the context of social philosophy and cultural self-identification in the multi-ethnic societies of Kazakhstan. For example, in her monograph "Problems of Cultural Identity in Social Philosophy", Mirzabekova A.Sh. examines theoretical and methodological approaches to the study of cultural identity and analyzes its dynamics in the context of modernization and globalization. [11] Also, it is worth noting the article "Cultural Identity: Challenges of Modernity", in which Mirzabekova A.Sh. analyzes modern challenges such as migration, globalization, and information technologies that affect identity, especially among the younger generation.

Thus, the main focus in her works is on the dialectic of the general and the individual in cultural identity, as well as the interaction of traditional and modern aspects in the formation of identity. Thus, the main aspects of the study of Mirzabekova A.Sh. are worth noting:

1. Cultural identity and self-awareness: cultural identity is the basis of an individual's self-awareness. She views identity as a multi-layered phenomenon with ethnic, religious, national, and personal components.
2. Problems of globalization and identity: exploring the impact of globalization processes on traditional cultural identity, she raises questions about the loss of uniqueness of local cultures and their adaptation to global standards.
3. Traditional path of identification: one of the key areas of her research is the analysis of the traditional path of cultural identification of the Kazakh people, including the role of oral folklore, customs, and national symbols in the formation of identity.
4. National idea and identity: An important place in the author's works is occupied by the analysis of the formation of a national idea as a tool for strengthening common identity in a multi-ethnic state.

Conclusion

Based on the analysis of the authors' works, several main problems and prospects can be identified in the theoretical and methodological approach to studying the phenomenon of identity:

- Fluidity of Identity: Many researchers, including Stuart Hall, point out that identity changes under the influence of social and cultural transformations. This fluidity requires careful consideration of the development of new methodological approaches, and the acceptance of the dynamic nature of identity.
- Globalization and homogenization: Badmaev V.N. and Mirzabekova A.Sh. draw attention to the influence of global processes on ethnic identity, which leads to the deculturalization of traditional boundaries and cultural characteristics.
- Preservation of cultural heritage: In the context of global problems, the preservation of ethnic identity, especially in multi-ethnic regions, raises important methodological questions that study culture.
- Socio-economic and political factors: Mirzabekova A.Sh. advocates the influence of factors on the processes of self-identification and development of ethnic groups, which actualizes issues of social development and cultural interaction.

This review defines the main theoretical and methodological approaches to the study of identity phenomena and confirms the relevance of this topic in the context of modern socio-cultural changes.

In conclusion, it is worth noting several perspectives in the study of the phenomenon of identity, shown in the Table 3:

Perspectives in the study of the phenomenon of identity

Prospects	Expected results
Developing interdisciplinary approaches	The combination of philosophical, sociological, and cultural analysis will allow for a more holistic understanding of the phenomenon of identity.
Exploring local identities in a global context	Exploring local identities can help preserve cultural heritage in the context of globalization.
The influence of the digital environment	Contemporary research should take into account how digitalization and the Internet affect self-identification.
Reconsidering Traditional Categories	Identity should be considered not only through ethnicity or nation, but also through individual, professional, and transnational aspects.
Creating regional theories of identity	Local research can become the basis for developing regional models of identity that take into account unique historical and cultural conditions.

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Бірегейлік құбылысын зерттеудің теориялық және әдіснамалық тәсілдері: мәселелері мен шешу жолдары

Бірегейлік құбылысын зерттеу қазіргі әлеуметтік және гуманитарлық ғылымдарының өзекті мәселелерінің бірі. Жаһандану, көші-қон және көпмәдениеттілік жағдайында бірегейлікті қалыптастыру, сақтау және өзгерту мәселелері ерекше өзектілікке ие болуда. Мақала бірегейлік құбылысын зерттеудің әдіснамалық тәсілдерін талдауға, сондай-ақ оларды әртүрлі тәртіптік салаларда қолдануға байланысты мәселелер мен шешу жолдарын анықтауға арналған. Зерттеудің мақсаты бірегейліктің әртүрлі аспектілерін (жеке, мәдени, ұлттық) зерттеу үшін қолданылатын тиімді әдіснамалық тәсілдерді айқындау, сондай-ақ олардың ғылыми және практикалық маңыздылығын бағалау. Сондай-ақ, бірегейліктің негізгі бағыттары: әлеуметтік-философиялық, әлеуметтанулық, психологиялық және антропологиялық тәсілдерді талдауға баса назар аударылады. Мақалада дискурсивті талдау, феноменологиялық әдіс сияқты заманауи әдіснамалық стратегиялар мен құралдарға шолу жасалған. Сәйкестілік тұжырымдамасын операционализмдеу мәселелері, сондай-ақ осы құбылысты зерттеудегі пәнаралық тәсілдің қиындықтары қарастырылған. Зерттеу нәтижелері әрбір әдістемелік стратегияның зерттелетін бірегейлік аспектісінің контексіне байланысты өзіндік шектеулері мен артықшылықтары бар екенін көрсетті. Интегративті тәсілдерді әзірлеу қажеттілігі туралы қорытындылар жасалды. Жұмыстың құндылығы сәйкестікті зерттеуге байланысты әдістемелік мәселелерді терең талдауда, сондай-ақ болашақ зерттеулерде қолдануға болатын жаңа тәсілдерді ұсынуға жатыр. Жұмыстың практикалық маңыздылығы оның нәтижелерін қазіргі жаһандану

жағдайындағы бірегейлену процестерін түсіну үшін әлеуметтік-саяси және мәдени зерттеулерде қолдану.

Кілт сөздер: бірегейлік, теориялық және әдіснамалық тәсілдер, пәнаралық тәсіл, мәдени бірегейлік, әлеуметтік бірегейлік, ұлттық бірегейлік, жеке бірегейлік, жаһандану, көпмәдениеттілік.

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Теоретико-методологические подходы исследования феномена идентичности: проблемы и перспективы

Исследование феномена идентичности является одной из ключевых проблем современных социальных и гуманитарных наук. В условиях глобализации, миграции и мультикультурализма, вопросы формирования, сохранения и трансформации идентичности приобретают особую актуальность. Данная статья посвящена анализу методологических подходов к изучению феномена идентичности, а также выявлению проблем и перспектив, связанных с их применением в различных дисциплинарных областях. Целью исследования является выявление эффективных методологических подходов, применяемых для изучения различных аспектов идентичности (личностной, культурной, национальной), а также оценка их научной и практической значимости. Основное внимание уделяется анализу ключевых направлений: социально-философских, социологических, психологических и антропологических подходов к феномену идентичности. В рамках статьи проведён обзор современных методологических стратегий и инструментов, таких как дискурсивный анализ и феноменологический метод. Рассмотрены проблемы операционализации концепта идентичности, а также трудности междисциплинарного подхода в изучении данного феномена. Результаты исследования показали, что каждая методологическая стратегия имеет свои ограничения и преимущества, в зависимости от контекста изучаемого аспекта идентичности. Сделаны выводы о необходимости разработки интегративных подходов. Ценность работы заключается в углублённом анализе методологических проблем, связанных с исследованием идентичности, а также в предложении новых подходов, которые могут быть использованы в будущих исследованиях. Практическая значимость работы состоит в возможности применения её результатов в социально-политических и культурных исследованиях для понимания идентификационных процессов в условиях современной глобализации.

Ключевые слова: идентичность, теоретико-методологические подходы, междисциплинарный подход, культурная идентичность, социальная идентичность, национальная идентичность, личностная идентичность, глобализация, мультикультурализм.

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