

REVIEW

by Prof Vera Tervel Marovska

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of the materials submitted for defense procedure

of a dissertation for the acquisition of the educational and scientific degree *Doctor*

at Paisiy Hilendarski University of Plovdiv

in filed of higher education: 2. Humanitarian Sciences;

professional field 2.1. Philology (Modern Bulgarian Language)

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Title: *The meaning of Evidentiality in the Modern Bulgarian Language*

Academic supervisor: Prof Krasimira Angelova Chakarova, PhD

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1. General description of the submitted materials

By order No. PD–21–680 dated 25.03.2024 of the Rector of the Paisiy Hilendarski University of Plovdiv, I have been appointed as a member of the scientific jury to ensure a procedure for the defense of a dissertation work titled *The meaning of Evidentiality in the Modern Bulgarian Language*, for the acquisition of the educational and scientific degree Doctor in filed of higher education: 2. Humanitarian Sciences, professional field 2.1. Philology; doctoral program Modern Bulgarian Language (Morphology).

The author is Vasil Nikolov Stamenov, a full-time doctoral student at the Department of Bulgarian Language of the Faculty of Philology at Paisii Hilendarski University of Plovdiv, with a supervisor Prof Krasimira Angelova Chakarova, from the same department.

The materials presented by Vasil Nikolov Stamenov in hard copies is in accordance with Art. 36(1) of the Rules for the Development of the Academic Staff of PU, and includes the following documents:

- Application to the Rector of PU for initiation of procedure for dissertation defense
- Curriculum vitae in EU format

- Minutes of the departmental committee meeting related to the opening of the procedure and the preliminary discussion of the dissertation work;
- Dissertation work;
- Author's abstract
- List of scientific publications on the dissertation subject;
- Copies of the scientific publications.
- Declaration of originality and authenticity of the presented documents.
- Certificate of compliance with the specific requirements of the respective faculty;

The candidate has provided 5 articles on the dissertation subject.

2. Brief biographical information about the candidate

Vasil N. Stamenov was born on 11.12.1995 in Asenovgrad. He completed his primary and secondary education there. From 2014 to 2018, he studied Bulgarian philology at Plovdiv University Paisii Hilendarski. After completing a Bachelor's program, he continued his studies to obtain a Master's degree in Contemporary Bulgarian Studies. On 01.03.2020 he was admitted as doctoral student with academic supervisor Assoc. Prof Kr. Chakarova in the Department of Bulgarian Language at the PU.

In the period from September 2021 to 2023, he is a part-time Bulgarian language teacher in the Department for Language and Specialized Training of Foreign Students at Plovdiv University. Since 01.09.2023 he has been an assistant in modern Bulgarian language in the branch of Plovdiv University in Kardzhali.

3. Relevance of the topic and expediency of the set goals and objectives

The problem of *grammaticalized evidentiality* in the Bulgarian language is still perceived as debatable. Therefore, the topic of the dissertation is relevant and researchable. The tasks set are meaningful and the results expected from them would be sufficiently indicative of the nature of the *evidentiality*.

4. Knowledge of the problem

The dissertation bibliography includes more than 250 scientific works. It also includes a survey examining the very meaning of *evidentiality* and its expression in the Bulgarian language, as well as the associations it provokes. Therefore, the doctoral candidate knows in detail the problem and the existing scientific analyses and interpretations, which ensures the success of his research.

5. Research methodology

The work offers a traditional chronological description of the existing grammatical documentation, elements of system-structural analysis and functional-but-semantic characteristics, survey research.

6. Characterization and evaluation of the dissertation work

In the words of V. Stamenov himself, the purpose of the research is to briefly analyze the different opinions about the *evidentiality* in general theoretical terms, to note the contributions to the Bulgarian linguistics, starting from the opinions found in grammars of the Revival period to the modern concepts of the Bulgarian linguists; to summarize the accumulated facts and to present reasoning related to I. Kutsarov's idea that the grammaticalized *evidentiality* can be considered as part of a binomial morphological category (D, p. 3). However, this argumentation in the work is quite laconic (that is, adherence to the concept of Iv. Kutsarov is simply declared). And almost the same can be said about the concept of Kr. Chakarova, differing only in the chosen term receptivity, instead of obviousness.

The dissertation consists of an introduction, 5 chapters, a conclusion, bibliography and appendix (from 232-242 p.) or a total of 242 standard computer pages (TNR 12).

The first chapter discusses the concept of evidentiality and comments on several popular ideas about the relationship between the naming of the action and the way it is perceived, as well as all the following conclusions regarding its credibility or unreliability. It is emphasized that at the beginning of the 20th century, the term *evidential* was used by F. Boas to name the ways of perceiving the communicated information. The author also points out the possibility that in some languages (approximately about 25% of all languages in the world) this feature is necessarily expressed, i.e. it has a grammatical nature¹.

The thesis of the existence of *evidential* as an independent grammatical category is associated with the name of R. O. Jakobson and his popular study *Шифтеры, глагольные категории и русский глагол* (*Shifters, Verbal Categories and the Russian Verb*). According to M. Makartsev, this study was "*the first to introduce the issue of evidentiality in publications of international peer-reviewed journals*"; it, "*marks the beginning of the period of active interest in evidentiality on the part of the Western scientists*"².

Naturally, the positions of some of the Bulgarian linguists, who discuss *evidentiality* in their research, have also been commented on. According to R. Nitsolova, evidentiality in the modern Bulgarian language is a partially modalized four-membered morphological category consisting of the grammemes: indicative, conclusive, renarrative and dubitative³.

¹ Aikhenval, A. Y. *Evidentiality*. Oxford: Oxford University Press, 2004, p. 12

² Макарецев, М. М. *Эвиденциальность в пространстве балканского текста*. Москва, Санкт-Петербург: Нестор-История, 2014, с. 18.

³ Ницолова, Р. Семантическая гиперкатегория «характеристика говорящим сообщаемой информации и ее связь с временем и лицом глагола» // *Материалы международной научной конференции Санкт-Петербург 22 – 24 сентября 2003 г.* СанктПетербург: Наука, 2003, 108 – 112: 109; Ницолова, Р. Взаимодействие эвиденциальности и адмиративности с категориями времени и лица глагола в болгарском языке. // *Вопросы языкознания*, РАН, 2006, № 4, 27 – 45.

Kr. Aleksova also accepts the existence of the morphological category evidentiality. Along with the presumptive, evidentiality is the second grammaticalized means of expressing epistemic modality. She also argues that evidentiality is 4-grammeme category: with indicative, conclusive, renarrative and invertive (D, pp. 12-13)⁴.

E. Tarpomanova also writes about evidentiality in the Bulgarian grammatical system, which ties it to the indication of the source of information and accepts two main evidential meanings: sensory (through sight, hearing, touch) and mediated (through inference, citation, restatement). The author focuses on the "*grammaticalization of evidentiality in Bulgarian and Albanian*" and looks for the prerequisites that led to the phenomena in question. "Unmediated evidentiality is expressed by the indicative mood forms, which are additionally marked with the meaning of direct information. Mediated evidentiality is expressed in three forms - renarrative, inferential, dubitative" (D, p. 15)⁵.

The second chapter of the dissertation presents the concepts of the authors of educational grammars during the Bulgarian Revival. Next comes the period from the Liberation to the middle of the 20th century. The third part of the second chapter presents the opinions of scientists from the middle of the 20th century until today.

The author's conclusion that: "*The arguments presented so far, show that there is no unanimity in the Bulgarian linguistics on whether evidentiality is a grammaticalized meaning, what is its formal indicator; whether it could be part of a certain morphological category*" (D, p. 91) is true as far as most works from the nineteenth century until the 1980s are concerned. But in recent decades it is definitely be taken for certainty that *evidentiality* is a grammaticalized meaning and its formal indicator is the morphemes -x/ш-. However, the question of the category of which *evidentiality* is the grameme remains controversial.

The third chapter *Evidentiality in the Bulgarian language in the light of diachrony* is dedicated to the emergence of *evidentiality* and the hypotheses about it.

The fourth chapter presents the formal-semantic and functional features of the evidential forms in the modern Bulgarian language. They are presented in absolute completeness, incl. and with the forms of auxiliary verbs; in positive and negative status; in the demonstrative, imperative and conditional moods. I would ask the author if he accepts that there is an inferential tendency, and how he would explain the existing anomaly. How, generally, the evidential forms correlate with the non-evidential ones, if they are grammemes of a general category? Uses of evidential forms in artistic speech are also presented.

⁴ Алексова, К. *Дубитативът в съвременния български език*. София: УИ „Св. Климент Охридски“, 2023; Алексова, К. Презумптивът в български историографски съчинения от първата половина на XX в. // *Научни трудове на Пловдивския университет „Паисий Хилендарски“* – Филология, том 57, кн. 1, сборник „А“, 2019, 124 – 140.

⁵ Търпоманова, Е. *Евиденциалност в балканските езици: български и албански*. София: Ни плюс, 2015, с. 26, 201, 34.

V. Stamenov offers of course, some explanation. He writes on p. 85: "*The fact that the grammeme evidentiality has fewer forms than grammeme non-evidentiality should not be an argument against distinguishing the binomial category of obviousness/receptivity.*" And a little further: "*It turns out, that the identification of a two-membered category of receptivity, in which the marked grammeme evidentiality will be opposed to the unmarked non-evidentiality, does not contradict the basic principles of the theory of morphological categories developed by A. V. Bondarko.* In the Bulgarian language, there are grammemes that have more forms than the gramme with which they form an opposition. The difference by **two distinctive features** is inherent to the inflected languages, which does not exclude the possibility of distinguishing a separate morphological category" (D, p. 87)⁶. On page 90: "*A comparison could be made with the model of the three-member category of time according to the concept of I. Kutsarov. The researcher defends the thesis that there are three temporal grammemes: past tense, present tense, future tense*⁷. *The grammatical formations for absolute antecedence (nuca) cannot be combined with the markers of the meanings of relativity and resultativeness, however, for the present and future tense grammemes no such limitation exists*".

As for the symmetries and asymmetries in the field of verb morphology, I will say that the linguistic system always strives for symmetry. It can never achieve it in absolute perfection, because language is a natural sign system and is transformed and perfected in the course of centuries under the dominant sign of the principle of economy and under the influence of other languages. The formal base has always existed in the etymon language (e.g., the formal base of the *perfect*, gives rise to the grammemes of *distant taxis* and *restatement*, while the *perfect* grammeme also remains - and all three are categorically different). Asymmetry is usually the result of some abnormality. And one of the asymmetries in this case is the expression of *antecedence* in the modern Bulgarian language. Due to the lack of grammeme antecedence, the aorist enters the temporal system of the modern language on the principle of the "joker", i.e. to fill the gap. And the gap exists for no other reason than because the system of the Old Bulgarian tenses combines three morphological categories (if not as a result of completed grammaticalization, then at least in the process of grammaticalization) –time, taxi and type of action. They have been analyzed and differentiated in detail already in the modern Bulgarian, but the information collected by the linguistic historians suggests that they existed in an analogous form in the Old Bulgarian phase as well. In the modern language there is no special past tense precisely because there is a category of taxis.

The use of questionnaires in the scientific description of most linguistic phenomena is a great advantage of the research. Surveys are time-consuming and require serious preliminary consideration, but they provide information about the real development processes in affirming or rejecting certain

⁶ Бондарко 1976: Бондарко, А. В., Теория морфологических категорий. Ленинград: Наука, 1976.

⁷ Куцаров, И., *Теоретична граматика на българския език. Морфология*. Пловдив: УИ „Паисий Хилендарски”, 2007.

language constructs in the active speech use. This is also the case in reviewed dissertation. The data from the survey are interesting and the fact that V. Stamenov has differentiated the respondents by age, education and gender deserves a positive assessment. I have presented my critical remarks on this part in the relevant section of the review.

I would sum up that in terms of style and language the work is almost impeccable. It is written legibly and at the same time competently. The text impresses with credibility and uniform scientific terminology.

7. Contributions and significance of the thesis for science and practice

The dissertation research is a good basis for conducting further observations and analyses in order to make a convincing categorization of the still intensively discussed problem of the evidentiality (and also its relation to the more general understanding of evidentness).

In scientific and applied terms, the achieved results would optimize the teaching of the Bulgarian language as a foreign language.

8. Evaluation of the publications on the dissertation work

All five articles that the doctoral candidate has included are related to the dissertation topic—some more directly than others, but generally reflecting stages in the implementation of the larger study of the thesis. They have been published in recognized journals and are interesting with both their presentation and because of the knowledge of the author shown in them.

9. Personal participation of the doctoral candidate

The dissertation work and the proposed articles are the personal work of V. Stamenov. There are no co-authored studies among them.

10. Abstract

The abstract meets the requirements for its content and volume. It correctly reflects the essence of the dissertation work.

11. Critical remarks and recommendations

1. First of all, I would like to point out that this thesis must be refined, incl. by the rearrangement of its survey part. It should be thematically organized (the chronological overviews are not sufficiently indicative and blur important features of the development processes in the grammatical analysis). In the overview parts, the author's striving for comprehensiveness has led to the loss of analyticity in some arguments and declarativeness (for example, a whole page is written on D. Voynikov to summarize: "*Considering the explanations made, it can be summarized that D. Voynikov does not discuss the problem of evidentiality*" - D., p. 24). The same can be said about Iv. Momchilov, T. Shishkov, N. Parvanov, and for others, and this must be avoided.

2. Secondly, it seems to me that relying on data from the so-called functional-semantic research in this case cannot be seriously argued, since the semantics of *evidentiality* is sufficiently clear and tangible for the native speakers and the attention to what other linguistic means it can be expressed in is superfluous, since it has no explanatory power regarding its categorization (D, 5. Chapter, pp. 202-213). And this part of the research is extremely time-consuming and laborious for the author.

3. Many of the author's findings should be clarified.

For example on p. 81 (in the conclusions of the second chapter) he claims that: "*The forms of the present resultative tense (he means the perfect - V.M.) are sometimes defined as evidential, because they can be used in the transfer of facts witnessed by the speaker. We consider such an opinion inaccurate. In our opinion, in this case there is a neutralization between the meanings of evidentiality and non-evidentiality, and the place of the perfect forms is among the non-evidential grammatical entities*". In this case, it is obviously a question of unmarkedness according to the sign *evidentiality*, and not of neutralization, and that of the specific perfect sign, called *resultativeness*. Only when they express *resultativeness* the perfect forms can be used in the context of evidential forms (e.g.: *He wrote the text easily in English because he has graduated English high school*).

The writing on pp. 6-7 is also unclear or poorly worded: "*We think that from a semantic point of view the opposition according to the signs of evidentiality: non-evidentiality is oppositionally symmetrical, but in the plan of its expression in the Bulgarian language, there are some interesting regularities. For example, the forms of the non-narrative and non-conclusive past tense always express evidentiality too, while the renarrative and conclusive forms do not express evidential position of the speaking person to the communicated information*". In fact, *non-evidentiality* and *conclusiveness* are contradictory signs that are opposed to *evidentiality* – i.e. it is not at all logical to expect evidential correlates, due to the indicated semantic incompatibility between them. It is this fact that is the argument that the corresponding forms are united in a common category by many scientists, which, in our opinion, is not appropriate. The similarity of the formal indicators is only a result of the fact that they all derive from the forms of the perfect and the differentiation of the perfect semantics, however, this does not mean that they will refer to the same categorical paradigm (one category).

I also do not see any contradiction in the concepts of St. Stoychev, K. Kutsarov and mine, which are discussed on p. 85: "*In our opinion, in the concepts of V. Marovska on the tri-grammeme morphological category of taxis, K. Kutsarov's on the three-member morphological category, the type of narration/ knowledge of the speaker and S. Stoychev's of the independent category of evidentiality of the verb action, there are some contradictions. **The proposed models do not cover all forms of the Bulgarian verb.** V. Marovska and St. Stoychev do not include renarrative as a privatively or equivalently opposed grammeme to evidentiality...*" The fact that we do not include the renarrative is by no means accidental. For example, I do not think that the re-narration is a phenomenon of the same rank. Renarration is a feature that is logically relevant to non-evidentiality, but the feature "secondary narrarion

of the action or the result, secondary verbalization of the action or the result", or *renarration* is irrelevant to *obviousness* or to *evidentiality*. The renarrative forms are simply marked with the sign of "secondary narration", and the fact that the primary may be different from the point of view of the perception of the action – that is, it may be evidential or distant – is another matter.

The relationship between renarration and relativity is the same. It is true that more often than not the re-narration is relative because it is a secondary narration. But this is not a sign by which the renarrative form is marked. It is marked only with the sign of secondary narration. The rest is logical reasoning and consequences. The renarrative forms have a formal indicator + *J* and lack of an auxiliary verb in the 3rd person (and they are mostly in the 3rd person), while the continuant of the Yat- morpheme or the imperfect morpheme + *X/ III* or + *J E* is a marker of *relativity*. The presence of a continuant of the Yat- morpheme is in itself an insufficient formal marker. It must be combined only with *J*, but without *E* in the 3rd person (renarration); or with both (for the distant taxis), or with *X/ III* – for the evidentiality. Therefore, the statement that the models of the mentioned authors do not cover all forms of the Bulgarian verb is absolutely incorrect. Of course they cover all – this is the essence of formal-structural analysis, and it is the leading research method of the mentioned studies. However, it is not mandatory that all forms have an equalized categorical characteristic, i.e. to be forms of grammemes from the same category.

4. For some concepts, the in-depth argumentation of the author is unnecessary. This is the case, for example with the covert categories, especially since the author himself does not accept the so-called covert or crypto-categories and renounces their explanatory potential regarding the issues of interest to him. The cryptotype categories are metaphors, i.e. they are not about grammaticalization, and therefore about categories (in the sense of A. V. Bondarko).

5. The survey carried out as part of the dissertation is its advantage. However, this part (the appendix) needs further consideration of the questions raised. The offered speech samples (in this case sentences) should be simple and the attention of the recipients should be directed to the only verb. The thesis indicates which of the verbs in the complex sentences should be characterized, however, having more than one can make it difficult or confusing for some respondents. It is also stated that one response is required, but in most cases, there may be two – e.g. objective statement and testimonial, restatement, and conclusion are not mutually exclusive characteristics. Expecting respondents to distinguish between past perfect and past imperfect active participles, as well as whether their use is correct or incorrect, also seems unduly ambitious to me. The appropriateness of the question of *evidentiality* is also debatable if the sentence refers to an event from the deep past, which the respondents could not possibly have witnessed (e.g. Khan Kubrat, A. Einstein or Cyril and Methodius). In these cases, they don't need to look at the verb form at all.

12. Personal impressions

Vasil N. Stamenov is among our best students. Since 2019, he has been an active member of the Linguistic Club "Prof Boris Simeonov".

His general philological awareness and sincere interest in linguistic issues make an impression. This is also shown by the evaluations of his work during all his student years. In 2017, he won second prize in the 19th Student Olympiad in Morphology of the Modern Bulgarian Language, organized by the Faculty of Philology of Paisiy Hilendarski University of Plovdiv and the Linguistic Club "Prof Boris Simeonov".

In 2019, he participated in the XXI National Scientific Conference for students and doctoral students "The world is an open book" and won the first prize with a report on titled: *On the subject of root modifiers in the functional-semantic field of person in contemporary Bulgarian. The relation between person - evidentiality.*

In 2020, he participated in the Eighth International Conference of Young Scientists - Plovdiv 2020, where he presented the text *On the subject of the category of "receptivity" in the modern Bulgarian language*, awarded with the first prize.

In this sense, the good quality of the research on *evidentiality* realized in the form of dissertation is not surprising.

CONCLUSION

The dissertation contains scientific and scientific-applied results that can be evaluated as contributing to the history of modern Bulgarian grammar. They meet the requirements of the Development of the Academic Staff in the Republic of Bulgaria Act (DASRBA), the Regulations for the Implementation of the DASRBA and the relevant Regulations of Paisiy Hilendarski University of Plovdiv.

The dissertation shows that the doctoral student Vasil Nikolov Stamenov has in-depth theoretical knowledge in the scientific specialty Modern Bulgarian language and professional skills for independent scientific research.

As a result of what has been said, I give my positive assessment of the conducted research, presented by the above-reviewed dissertation work, abstract, achieved results and contributions, and I propose to the honorable scientific jury to award the educational and scientific degree "doctor" to Vasil Nikolov Stamenov in the field of higher education: *Humanitarian Sciences*; professional field *Philology*; doctoral program *Modern Bulgarian Language*.

10.05.2024

Plovdiv

Reviewer:

(Prof Vera Marovska)