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# SOURCES
## OF CASE CATEGORY FORMATION AND DEVELOPMENT DIRECTIONS IN THE AZERBAIJANI LANGUAGE

## FUENTES DE FORMACIÓN DE CATEGORÍAS DE CASOS Y DIRECCIONES DE DESARROLLO EN EL IDIOMA AZERBAIYANO

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## ABSTRACT

The case system represents a fundamental morphological-syntactic category in the Azerbaijani language, crucial for understanding the historical development and unique characteristics of this Turkic language. This system's evolution provides vital insights into the broader linguistic heritage of the region and the development of Turkic languages. Few previous studies have addressed the historical and linguistic connections between Sumerian and Azerbaijani case systems, particularly concerning the temporal origins of specific cases and their development. Additionally, the ethno-cultural context has been analyzed from a limited perspective, lacking a comprehensive understanding of the multiple influences that shaped this linguistic structure. The goal of this research is to examine the historical evolution and distinctive features of the Azerbaijani case system through the analysis of written sources and classical literary works. The research reveals that the Azerbaijani case system emerged from the Turkic case system foundation but developed distinctive features as the national language evolved from the beginning of the new era. While maintaining core similarities with other Turkic languages, it exhibits specific phonetic and functional distinctions. Evidence demonstrates that certain cases, including possessive and accusative, appeared earlier than previously acknowledged in linguistic literature. These findings necessitate a reassessment of the Azerbaijani language's historical and linguistic trajectory, particularly regarding its case system development. This research highlights the importance of considering deeper ethnolinguistic relationships in studying Turkic languages' historical development.

Keywords: Turkish languages, Azerbaijani language, morphological-functional analysis.

## RESUMEN

El sistema de casos representa una categoría morfológica y sintáctica fundamental en la lengua azerbaiyana, crucial para comprender el desarrollo histórico y las características únicas de esta lengua turca. La evolución de este sistema proporciona información vital sobre el patrimonio lingüístico más amplio de la región y el desarrollo de las lenguas túrquicas. Hay pocos estudios previos que aborden las conexiones históricas y lingüísticas entre los sistemas de casos sumerios y azerbaiyanos, en particular en lo que respecta a los orígenes temporales de casos específicos y su desarrollo. Además, el contexto etnocultural se ha analizado desde una perspectiva limitada, sin una comprensión integral de las múltiples influencias que dieron forma a esta estructura lingüística. El objetivo de esta investigación es examinar la evolución histórica y las características distintivas del sistema de casos azerbaiyano a través del análisis de fuentes escritas y obras literarias clásicas. La investigación revela que el sistema de casos azerbaiyano surge de la base del sistema de casos turco, pero desarrolló características distintivas a medida que la lengua nacional evolucionó desde el comienzo de la nueva era. Si bien mantiene similitudes fundamentales con otras lenguas turcas, exhibe distinciones fonéticas y funcionales específicas. La evidencia demuestra que ciertos casos, incluidos el posesivo y el acusativo, aparecieron antes de lo que se reconocía anteriormente en la literatura lingüística. Estos hallazgos requieren una reevaluación de la trayectoria histórica y lingüística de la lengua azerbaiyana, en particular en lo que respecta al desarrollo de su sistema de casos. Esta investigación destaca la importancia de considerar relaciones etnolingüísticas

más profundas al estudiar el desarrollo histórico de las lenguas turcas.

Palabras clave: lenguas turcas, lengua azerbaiyana, análisis morfológico-funcional.

## INTRODUCTION

Language is a remarkable achievement of human civilization, which has evolved into an elaborate system of communication through centuries of development. Beyond its fundamental components - which include basic units of sound, word formation, and grammatical structures - language serves as a bridge connecting the concrete world with abstract human thought (Yule, 2022). This sophisticated tool not only facilitates basic communication but also enables the transmission of sophisticated ideas, emotional experiences, and the rich elements of human culture. In our contemporary global society, mastering multiple languages offers numerous advantages improved self-expression capabilities, professional growth, as well as cultural awareness since learning different languages provides unique insights into diverse cultural perspectives and worldviews (Imanova, 2021). Modern research has also uncovered additional benefits such as protection against age-related cognitive deterioration, superior ability to handle simultaneously multiple tasks, increased innovative thinking capabilities, and enhanced personal identity development (Klimova, 2018). This evidence suggests that investing time in language acquisition represents a holistic approach to personal development, encompassing not just linguistic skills but also professional capabilities, mental acuity, and cultural understanding. The benefits of this investment continue to multiply throughout one's lifetime.

Among the huge amount of languages around the world, the Azerbaijani language is considered one of the most important representatives of the Oghuz branch of the Turkic language family. It has several dialects that retain several historic aspects of the Turkic language family (Huseynova, 2022a, 2022b). Its phonetic system is constituted by two important features, namely vowel harmony, whereby vowels in words maintain either front or back according to a word's derivation or pattern of suffixation, and consonant gradation, which consists of changing consonants in accordance with its position and phonetic environment. Characteristic in Turkic languages, Azerbaijani grammatically uses agglutinative structures, putting together words through affixes and suffixes to convey complex meanings. It has a Subject-Object-Verb word order, and to express gender, it has specific phraseological units instead of traditional gender marking (Huseyn, 2024; Huseynova,

2022a). In terms of vocabulary, historical interactions can be seen in borrowings from Persian, Arabic, Russian, and very lately, English. In this regard, the sociolinguistic configuration of Azerbaijani is a result of Azerbaijan's multiethnic composition represented by Turkic, Iranian, Caucasian, Semitic, and Slavic groups. Since the recovery of independence, the status of the language has reawakened, with an enhanced nationalistic and institutional role of the language during the post-soviet period (Garibli, 2021). In such a way, the language continues its line of development, finding a balance between the traditional components and the modernistic influence. It is through this symbiosis of historical preservation and modern adaptation that Azerbaijani maintains its relevance, both locally and globally (Huseyn, 2024; Huseynova, 2022a).

We believe that case category are among the several elements understudied in the rich Azerbaijani language. Specifically, a case category is a grammatical feature that indicates the syntactic and semantic role or function of a noun, pronoun, or noun phrase within a sentence, typically marked by changes in the word's form (such as through inflection, suffixes, or accompanying particles) to show its relationship to other words in the sentence (Malchukov, 2017). While examining the historical development of the case category, H. Mirzazade notes that :

although there are some slight differences in the formal signs of the case category of the noun, they have been preserved throughout all periods. When we reviewed the materials related to the ancient times of the Azerbaijani language, it became clear that the occurrence of nouns in all periods was consistent, following the same order... The consistent continuation of such a feature in the materials belonging to our literary language over a period of about seven centuries once again confirms the stability of the grammatical structure of our language. (Mirzazade, 1990, pp. 40–41).

The researcher-scientist, who demonstrated that this stability and regular development of the grammatical structure of the Azerbaijani language is also preserved in borrowed words, notes that many words came to our language from the languages of Arab, Persian, and other peoples who came to our country for trade, cultural, and other purposes. He writes:

These words, which appear mainly in lexical units, had to adopt the morphological features of the language they entered—the Azerbaijani language—rather than retain their original morphological signs. Thus, Arabic-Persian words (as well as Russian-European, Caucasian, etc.) adopted case suffixes belonging to our language to the same extent as Azerbaijani words. (Mirzazade, 1990, p. 40).

N. Mammadli interprets this process correctly, stating that:

Historically, the mass migration of Arabs, Persians, and Mongols to Azerbaijan is well-documented. However, these migrations could not destroy the national unity and physical existence of the Azerbaijani Turks, who were the majority; instead, the majority of the foreign tribes were assimilated here. (Mammadli, 1995, p. 5).

After the end of the ancient Turkic era, the new ethno-geographical boundaries led to the emergence of language environments based on original roots but adapted to new ways of thinking in the new ethno-cultural environment. With the emergence of new ethnocultural and ethnolinguistic environments, the process of differentiation in terms of structure and content began to strengthen, as it did in all areas of cultural life. When characterizing this process, we should not forget that from the beginning, medieval Azerbaijani culture was open to the archaic world with a diffuse border

... first of all, this diffuse transition clarifies that certain archaic structures and symbols continued uninterruptedly and passed into the Middle Ages. These structures and symbols retain some of their original meanings while also functioning as old schemas, archetypes that organize new thought materials in their new environment. (Mehdiyev, 1984, pp. 235–240).

Thus, in the ethnic composition of the new Turkish states and independent ethnocultural environments that emerged in this period, separate Turkish ethnoses stand out.

Considering the above, this study aims to examine the historical evolution and distinctive features of the Azerbaijani case system through the analysis of ancient written sources and classical literary works, focusing on its relationship with the all-Turkic case system and its unique developmental trajectory to accomplish this diachronic, synchronic, comparative-historical, and comparative-typological methods are used to analyze this historically persistent grammatical category that exists across world languages, including Turkish and Azerbaijani.

## DEVELOPMENT

### Influence of the ancient ethnocultural environment on the grammatical system and case category of the Azerbaijani language

It is known that the Uyghur-Karluk in the Karakhanid state, the Kipchaks in Jigatai and Dashti-Qipchag, and the Oghuz in Azerbaijan and Anatolia gained decisive positions. Islamic values began to replace the old divine-sacred traditions of the Turks, and these changes in people's

worldview were reflected in both oral folk creativity and written examples as the main means of expression of the people's perspective. "Thus, in the territories where the Turkic peoples spread, an ethno-cultural environment characterized by different processes of the medieval period formed. That environment is characterized by the following features:

a) Ethnocultural centers of the Middle Ages were formed based on the ethnic identity of the ancient Turkic era.

b) The deformation of All-Turkic thinking is revealed in both language patterns and the religious system.

c) Religion and mythology have separated from each other and never meet again at the same level as in the time of God (Aliyev, 2010, p. 60).

Undoubtedly, in the newly emerging ethno-cultural environment, differential signs appeared at different levels of the language system. These differential signs are manifested in the morphological categories of the language, including the case category. Even though the case suffixes that connect word combinations and words within a sentence perform the same task in old Turkish written monuments as in our modern language, the number of noun cases and their phonetic composition differ from those in our modern language.

To clearly observe this process, studying the written sources of that period is particularly important. Research conducted on ancient written sources and the language material of our classics proves that the case system of the Azerbaijani language developed from the all-Turkic case system. As Azerbaijan's national language began to form at the beginning of the new era, this morphological-syntactic category acquired unique differential features and became structurally, semantically, and functionally specified. Although sharp differences from Turkish languages are not noticeable in this process, certain phonetic and functional distinctions can be observed.

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The researcher-scientist, who showed that the stability and regular development of the grammatical structure of the Azerbaijani language is also preserved in borrowed words, states that many words entered our language from Arabic, Persian, and other languages spoken by people who came to our country for extortion, trade, cultural, and other purposes. He writes that Mainly, lexical units, such words, which appear in this form, had to accept the morphological signs of the language they entered, that is, the Azerbaijani language, not their own morphological signs. Thus, Arabic-Persian words (as well as Russian-European, Caucasian, etc.) adopted case suffixes belonging to our language to the same extent as Azerbaijani words. N. Mammadli interprets this process correctly, stating that:

Historically, the mass flow of Arabs, Persians, and Mongols to Azerbaijan is well-known. However, these flows could not destroy the national unity and physical existence of the Azerbaijani Turks, who are the majority, and even most of the foreign tribes were assimilated here. (Mammadli, 1995, p. 5).

Dmitriyev also pointed out this fact by saying, "Unlike other groups of languages, Turkic languages have a certain state. In other words, Turkic languages do not have the first, second, and third cases like in Russian, or the strong, weak, and mixed cases in German" (Dmitriev, 1969, p. 153). Furthermore, no part of speech has a specific case rule in the Azerbaijani language. No part of speech can always be found in its original syntactic position. Since a number of pronouns replace nouns, they are generally used in the noun position, the infinitive carries a noun characteristic, and some adverbs are not fully formed as adverbs. All other words and word forms can become substantive, and when they do, they do not deviate from the case system belonging to nouns (Seyidov, 2011, p. 226).

**Historical development directions of the case category in the Azerbaijani language**

The case category, as one of the primary and leading categories in Turkic languages, including the Azerbaijani language, encompasses various tribal linguistic elements as well as certain innovative features, which have historically contributed to the formation of the Azerbaijani national language through numerous morphological-syntactic and semantic processes. The preservation of ancient historical elements of the Turkic ethnos, which has historically lived in the territory of Azerbaijan, along with the reflection of language elements that have not been preserved in the literary language but are still present in dialects, allows for the investigation and clarification of important facts about the ancient historical layers of our language. From this perspective, studying the case category in our language from a historical viewpoint provides an opportunity to accurately determine the reasons for the emergence of these linguistic elements and innovations.

Additionally, historical research plays a significant role in uncovering the phonetic, morphological, and semantic nature of declension, signs of double declension, archaic case forms, reasons for historical case substitutions, and other problematic issues. The importance of studying this category in a general diachronic aspect becomes evident when we consider that research on the case category in our language has been mostly descriptive or dialectological, while diachronic studies have focused more on the works of specific individuals or the language of certain artistic and poetic monuments. Therefore, throughout this study, we have referred to Azerbaijani-language sources as well as other Turkic-language sources from the Middle Ages and made comparisons with the epic "Kitabi-Dede Gorgud" as the most reliable source for the historical investigation of any phonetic, lexical, or grammatical category of our language. As N. Jafarov has demonstrated, a number of historical layers are fossilized in the language of the "Kitab," which can be defined as follows:

1. "The language of the ancient Turkic epic (from the middle of the 1st millennium BC to the middle of the 1st millennium AD)

2. The Oghuz, and to some extent the oral literary language of the Kipchak Turks (second half of the 1st millennium)

3. Turkish in its formative stage (9th-11th centuries)

4. The Caucasian-Asia Minor Regional Manifestation of Turkic (First Half of the 2nd Millennium)" (Jafarov, 1999, pp. 119–122), enabling more accurate research.

No matter how much it is considered a common Turkish monument, the rich linguistic material of the "Kitabi-Dede Gorgud" epic, which is directly related to the Azerbaijani people and language, reflects the ancient specific features of the case category as a perfect artistic example that contains the ancient characteristics and rich grammatical categories of our language.

In the language of the epic, the case category reflects its interesting grammatical features. This category has manifested itself in the language of the monument in an almost fully formed way, and it has not changed either formally or in terms of meaning and content. (Naısoylu & Mehdiyeva, 2019, p. 110).

Research on the case category conducted on the language of the epic, as well as other written monuments and our classical literature, proves that "the forms used to express the cases of nouns in the modern Azerbaijani literary

language are widely used in the past written monuments of our language in almost the same sense" (Eyvazova, 1974, pp. 61–69). Although there are no significant differences in this category in our historical language, suffix variants not used in our modern language, certain functional-semantic features of cases, and their interchangeability are noteworthy. As S. Khalilov, who studied the language of the "Asrarname," wrote about the case category,

The history of form specification and normalization of cases, which coincided with the very early periods of the Turkish languages, is older than other grammatical categories. Of course, this does not mean that the case system in the later stages of language development did not undergo any changes or remained unchanged and stable. The results of the historical-comparative method, as well as observations on the written sources that testify to the ancient times of the Turkic languages, clearly show that certain changes have taken place in the case system, although the basic rules have remained intact. (Khalilov, 1974, p. 37).

Among Turkologists, different opinions have been put forward regarding the number of cases for nouns in the ancient and medieval Turkish languages. Among the researchers, A. von Gabain, M. Mansuroglu, A. Shukurlu, and A. Dilachar (who did not include the nominative case among other cases) list nine cases in ancient and medieval Turkish, while V.K. Kondratyev, Y. Mammadov, A. Rajabli, and M. Novruzov propose eight, and A.M. Sherbak, G. Karimov, and R. Askar suggest seven cases (Asker, 2003, pp. 193–197). The number of cases in the ancient and medieval Azerbaijani language is either six, as in our modern language, or seven with the addition of the joint-instrumental case.

The emergence of the Turkish case system and its historical development in our language, along with the study of its structural-semantic features, show that although the case system of the Azerbaijani language is compatible with our modern language at different historical stages, certain functional-semantic differences have also manifested themselves. Thus, while the normalization of the case category and the functional specification of cases continues in our language, historically, the cases of nouns have been interchanged, indicating functional-structural substitutions. In modern times, the frequent occurrence of this feature, primarily characteristic of dialects, in the works of our classics, as well as in our historical monuments, highlights the need to investigate the historical roots and reasons behind these linguistic phenomena. The fact that this feature, observed not only in the Azerbaijani language but also in the majority of Turkic languages, is found in ancient Turkish and Uyghur written monuments

indicates that case substitutions have an older history. H. Mammadov points out that the formal features that create syntactic connections between words in a sentence were not well defined before and writes, "A certain case suffix of the noun is sometimes used in parallel and sometimes in a single position. Case suffixes, which are fully stabilized in our modern language, replaced one another according to their position earlier" (Mirzazade, 1990, p. 42). Y. Mammadov, discussing case substitutions widespread in ancient Turkish written monuments, states, "In the Orkhon-Yenisei monuments, the cases of nouns are substituted for each other by function, unlike in modern Turkish languages, to such an extent that it can be considered a legitimate feature of the language of the monuments" (Mammadov, 1993, p. 34).

V. Aslanov, addressing case substitutions—primarily investigated under the term "migration" in the linguistic literature—shows that this phenomenon occurs in Turkic languages in two ways:

1. In connection with the development of the grammatical structure of the language, through the disappearance of one case and the transfer of its meaning to another case, or the stabilization of the syntactic functions of cases and the formation of new cases.

2. Through the development of the lexical meaning of the governing verb (Aslanov, 1960, p. 102).

If we consider one aspect here—that the cases of nouns were historically controlled not only by verbs but also by nouns—it would be more appropriate to understand the term "controlling verb" in the second paragraph as "controlling word."

E. Azizov, who, like M. Rahimov, associates this fact with "the existence of a close functional and semantic relationship between almost all case forms at the initial stage of language development" (Ragimov, 1960, p. 122) writes: "The materials of written monuments and modern dialects show that there was no grammatical differentiation and functional exhaustion among the case forms in the old Azerbaijani language, as in our modern literary language" (Azizov, 2016, p. 160). S. Khalilov, emphasizing that the case suffixes have historically replaced each other, notes that this characteristic of the Azerbaijani language persisted until the 16th century and shows that:

.. this aspect has noticeably decreased in the later stages of the language's development. It is no coincidence that the replacement of cases in meaning is rarely observed in the works of Govsi Tabrizi, one of the greatest followers of the Fuzuli literary school of the 17th century, as well as in the writings of M.V. Vidadidin and M.P. Vagif, prominent figures of the 18th century who were nourished by the

vibrant folk tradition, and in the language of many artists who wrote and created in the 19th century. (Khalilov, 1974, p. 83).

According to E.V. Sevotyan,

Such a feature arose, first of all, from the completion of the process of semantic differentiation of cases in ancient times, the clarification and stabilization of means of expression, as well as from the fact that verb control has different characteristics compared to the modern era. (Severtyan, 1956, p. 46).

Therefore, "the reason for the replacement of historical cases in meaning was the semantic standardization and clarification of case suffixes, as well as the incompleteness of the process of differentiation of verb types and forms" (Khalilov, 1974, p. 83). Additional reasons such as the change of control with conjunctions and the weakening of the relationship between nouns and verbs can also be considered.

Here, first of all, we want to address one issue: we have not classified the suffixes -a, -ə, which we often encounter in our historical language, as local case markers, nor have we classified the suffixes -da, -də as case substitutions. As demonstrated in the previous sections, historically, the oldest morphological indicators of the locative case in Turkish languages were -a, -ə, while the suffixes for the accusative case were -da, -də. Therefore, this feature allows both locative and derivational cases to be used in parallel for an extended period with two suffixes: the locative case markers -a, -ə and -da, -də, as well as the derivational case suffixes -dan and -dan. It is likely that after the emergence of the accusative case suffixes -dan and -da, the suffixes -da and -də began to be utilized in the function of the locative case; however, the process of clarifying their morphological indicators for both the locative and accusative cases continued until the 18th and 19th centuries.

Therefore, we did not include these linguistic phenomena, which most researchers presented as case substitutions. It is interesting that in almost all studies on historical case substitutions, the usage of the directional case in the position of the locative case and the locative case in the position of the accusative case has been identified as one of the case replacements. Although the large number of these instances has attracted researchers' attention compared to other cases of replacement, the real cause of this issue has not been explicitly articulated. Here, we consider it important to highlight H. Mirzazade's perspectives on the parallelism of morphological indicators for directional and locative cases. The author states that "the locative case is expressed by two morphological indicators, meaning that this case is represented both by the suffix

-da, -d , and by the directional case suffix -a, - , -ya, -y . ... Sometimes we observe the opposite". According to the author's valid assumption,

...both locality and directionality were probably expressed by a suffix very similar to each other in ancient times. This clarification was completed in later periods. This parallelism, which we find in the language of written monuments, can be regarded as a remnant of the past" (Mirzazade, 1990, pp. 46–47).

As can be seen, H. Mirzazade does not regard the directional-locative case parallelism as a common case substitution; instead, he views this phenomenon as a remnant of an ancient linguistic fact.

R. Askar's perspective on the utilization of the locative case in place of the accusative case is also noteworthy. According to the researcher, The use of the locative case instead of the accusative case has been 'inherited' to the Middle Turkish language from the ancient Turkic period. In the Orkhon-Yenisei and Uighur monuments, the locative case expresses both cases. For example: in the locative case - "Otuk's yig yish idi no mermis" ("There was no good ruler in Otuk's forest"), and in the accusative case - "Bölön celt in Tübut khagan" ("Bölön came from the khanate of Tibet") (Asker, 2003, p. 188). Later, in "Kitabi-Dada Gorgud," as well as in our dialects and in "Divani-lüğat-it Türk," the author provides various examples demonstrating that the locative case replaces the accusative case.

As observed, R. Askar's assertion that the use of the locative case instead of the accusative case is a "heritage" from the ancient Turkic period to the Middle Turkish language indicates the antiquity of this phenomenon; however, it does not fully elucidate the true nature of the event. Thus, this historical linguistic fact, evident in ancient Turkish written monuments, the ancient and medieval written documents of the Azerbaijani language, and various modern Turkish languages and dialects, is often not analyzed from the correct perspective. The late development of the speech state in Turkish languages and in ancient Turkish written monuments has fostered misconceptions, such as the notion that these forms were not fully developed.

## CONCLUSIONS

The case system of the Azerbaijani language represents a historical continuation and transformation of the Sumerian-Turkic case system, having evolved through a complex path to the present day. Our analysis reveals that numerous previous studies on the Azerbaijani case system have inadequately addressed the historical and linguistic connections between Sumerian and Azerbaijani, creating

significant gaps in understanding how these grammatical categories evolved. The ethnocultural context in which the Azerbaijani language developed has traditionally been analyzed from a limited perspective, failing to fully consider the multiple influences that shaped its linguistic structure. Comparative studies of the Sumerian-Azerbaijani case system have challenged long-held misconceptions, such as the supposed late emergence of possessive and accusative cases. Evidence demonstrates that these cases were present at much earlier stages than previously acknowledged, which not only modifies our understanding of their temporal origins but also emphasizes the importance of reassessing linguistic evolution in light of deeper ethnolinguistic relationships. Therefore, it is essential to deepen research into the early development of the Azerbaijani language, particularly its case system, to achieve a more comprehensive and nuanced understanding of its historical and linguistic trajectory.

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