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# Peripheral Living in the Post-Urban Era: from Humiliation to the Struggle for Social Justice

Vereno Brugiattelli

PhD

## Abstract

Peripheral living in cities around the world often takes the form of neglect and humiliation with a lack of material resources. This phenomenon affects a significant percentage of the world's population and is destined to grow. Peripheral living, a "grey zone" of the "urban sea", is demarcated from the main institutions and is often seen as an undifferentiated space: included and excluded by the institutions; and included in and excluded from citizenship. In many cases the inhabitants on the periphery of cities and *megacities* are viewed as dangerous, delinquent, and incapable so the society that counts strives to protect itself by building lines of demarcation and urban fences. In the past, cities were founded with city walls for defence against possible external threats while today these boundaries have been replaced by internal limits that separate the urban area into zones reflecting the hierarchy of power. In this article I intend to provide an interpretation of peripheral living from the viewpoint of the social, cultural and political problems which cause the diverse types of deprivation and misrecognition towards the "inhabitants of the periphery". In my analysis of this negativity, I will discuss the strategies which peripheral communities implement in the struggle for recognition of their rights, for dignified and humane living, for social justice and to be recognised as capable of achieving personal fulfilment.

**Keywords:** Peripheral living, Megacities, Boundaries, Misrecognition, Commoning

## 1. Introduction

The rise of the global market with the expansion of *megacities* has profoundly transformed natural and urban landscapes by nurturing the progressive growth of settlements causing the erosion of fertile land and the destruction of ecosystems and biodiversity. According to UN data, by 2050 at least 70% of the global population will

live in cities. The exodus and migratory flow from the countryside, from the hills and mountains towards densely populated urban areas is destined to continue. With the expansion of cities the peripheries are growing. These areas often house millions of people struggling to exercise their rights and existing without basic services such as education and medical care besides being misrecognised as capable persons and in their way of life. In the face of such injustice individuals constitute communities that gain awareness of their material and social living conditions leading to forms and strategies of struggle. The communities are established on a common basis (*commoning*) and communicate through the creation of “communal spaces” which become bridges between people of different political, cultural or religious backgrounds. These communal spaces are like “thresholds”, allowing the differences to meet, facilitating the start of a differentiated “we” which is indispensable in a fight for common objectives.

## **2. Urban living in the post-urban era**

During the 19<sup>th</sup> and early 20<sup>th</sup> centuries increasing industrialisation attracted significant migration resulting in industry-cities. This tendency continued into the second half of the 20<sup>th</sup> century with labour force movements from the Southern hemisphere towards the industrialised cities in the North. In recent decades, however, the migratory flows have no longer followed the same pattern. For some time now, as Alberto Magnaghi observes, there is “a double *territorial decentralisation*: firstly, *regional*, where the productive decentralisation and the molecularization of big industry has led to a territory with “sprawling towns” which destructively invade the countryside and “urbanise” vast regional areas; secondly, *global*, implying a move of the global productive cycle from the North to the South East of the world causing forced urbanisation, mainly from international migration, of millions of agricultural workers” (Magnaghi, 2020, p.71).

Commercial and production changes cause profound urban transformations: it is the end of the industrial city and with it the traditional town characterised by certain distinctive features. A powerful process of deterritorialization starts where inhabitants are separated from the historical and cultural heritage of their local environment. Regardless of their location, towns and cities all look alike and share architectural structures which are totally decontextualised and devoid of local historical connections. All these features are characteristic of the “post urban” era.

The “post urban” represents the cancellation of identifiable features of cities with deterritorialization and the disintegration of urban areas: like strands built up areas spread along coastal regions and rivers, and in the valleys stretching into lowland



areas, wherever possible. Riverbeds are narrowed with streams channelled underground and roads, seaside bathing resorts, pavements, restaurants and hotels form embankments along coastal areas. The boundaries between towns and the countryside give way to the spread of urbanisation characterised by construction homogeneity which is a common feature of urban settlements worldwide. The homogenization of the land is dictated by a mindset that asserts a certain way to build, plan and organise space.

Salvatore Settis states that a global urban model is establishing itself with “three converging characteristics: - the verticalization of architecture; - the megalopolis, cities without limits (*urban sprawl*); - new intraurban boundaries (*new urban divisions*), where the better-off live in safe, “modern” zones while the less fortunate are relegated to urban ghettos, *slums* and increasingly impoverished neighbourhoods” (Settis, 2017, p. 95). Urban sprawl is characterised by internal boundaries that often symbolise the division between civilised living and chaos, between legality and illegality, culture and subculture, development and underdevelopment etc. In certain cities in Africa, Latin America and Asia an extremely high percentage of the population of the megacities, up to 30-35% of the population, lives in *slums*, *favelas*, *bidonvilles* and shanty towns. In these poor, dangerous areas living conditions are degraded and insanitary with high rates of disease and criminality. The different forms of exploitation of the labour force in factories by Western and Asian multinationals and corporations together with mechanised farming methods have led to the loss of self-sufficiency of the local populations marking the shift from poverty to “mass misery” (Morin, 2016, pp. 61).

### **3. The divided city: *gated community* and peripheral community**

The sprawling city fuels peripheral living or “grey zones” which arise where the land was once fertile or in urban areas that is no longer of value for the property market. People with hopes and a strong desire for self-fulfilment and those looking for a better life and opportunities flock to these areas. However, many fall into misery, deprivation, emotional stress, loss of references, violence, exclusion and humiliation. A lot of cities are internally divided by walls built to separate, contain, isolate and to marginalise those people considered “losers”, “defeated by life”, “incapable”, or idle and dangerous criminals. “The city expands devouring the countryside but, at the same time, it fragments creating two contrasting and complementary formations: the *favela* and the *gated community*. The walls of the city become walls in the city. According to United Nations data, a seventh of the world’s population, about one billion people, today live in *bidonvilles* or *shanty towns* which do not deserve to be

called cities; in some countries (such as Ethiopia and Uganda) the “cities” are 90 percent made up of *slums*” (Settis, 2017, pp.74-75)

Wealthy neighbourhoods, the *gated communities*, are protected by insurmountable city walls with barbed wire and armed guard surveillance. These *gated communities* pursue the idea of building themselves a sort of “perfect community”. If, once upon a time, the utopian ideal of a city aimed at justice, equality, well-being and happiness for all its inhabitants, the *gated communities*, on the other hand, represent a perfect community for a privileged few. As stated by Settis, the term *privatopia* has been adopted to indicate this type of community. A *Privatopia* project “(quite the opposite of utopian) aims to control the living space ensuring the quality of services and protection from incursions of “others” (immigrants, the poor ....)” (p. 75) from the so-called peripheries. In the areas and neighbourhoods of the excluded, the marginalised and the worthless according to the society that counts, other communities emerge. Individuals united in their need for survival, the rituals, beliefs and symbols of their culture, as well as existing connections, organise themselves into communities. These communities use communal spaces to meet, demonstrate and stake claims thus developing a “commune” (*commoning*).

In Africa, Latin America and in many cities in the Southern hemisphere “the roads in urban areas are transformed into crucial sharing spaces providing not only the ground, but also the emblematic images that represent, support and reproduce behaviours, habits and forms of communication” (Stavrides 2022, p 133).

#### **4. Misrecognition of capabilities and peripheral living poverty**

The living crisis reflects the social crisis and vice-versa. They go hand in hand. Social injustice, inequality and social differences lead to miserable and inhumane living without dignity. Such forms of dwelling, in turn, cause extremely serious social crises. The governments of wealthy nations ignore these situations in the same way as reason ignores subconscious desires. Their public policies tend to be restricted to dealing with the superficial symptoms rather than focusing on the root causes which generate misery and desperation. With regard to the millions of people who find themselves living in Dante’s most desperate and inhumane circles, governments, supported also by the powerful elements in the global economy, ignore the mobilization of the less affluent in society by implementing a policy of *misrecognition* on various levels: from civil and social to political.

Civil misrecognition means that the concrete possibilities of an individual to exercise their civil rights as stipulated in their nation’s Constitution are not recognised.

Millions of people, mainly living in the world's cities and *megacities'* peripheries, have no way of exercising their rights or exploiting their freedom because they are excluded from education, with no internet access or professional opportunities, as well as having no financial backing or access to bank loans etc. Social misrecognition results in the exclusion from social services and the possibility to play an active role in society. The misrecognition of political rights deprives individuals of the chance to exercise their political rights. All these forms of misrecognition profoundly affect a person's emotional, sentimental and intellectual life; they influence an individual's sense of trust, approval and self-esteem. They trigger feelings of frustration, humiliation and desperation which are common sentiments amongst the whole community. But in many cases, according to Axel Honneth (1992), these feelings cause such a profound and strong sense of indignation that individuals and the community are driven towards a struggle for recognition.

The living crisis, thus that of cities, constitutes the litmus test in order to understand the problems of society. Social inequalities correspond to the arrangement of living spaces. The differences do not only stem from the enormous diversity in income which characterises the inhabitants of the various areas of a city, but also from the wide gap that separates those who have, from those who do not have, *capabilities* at their disposal, in other words, access to services, social structures and resources, the right to exploit their capabilities and opportunities.

Amartya Sen claims that liberty invests both the *processes* that "allow free actions and decisions and the real *possibilities* that human beings have in given personal and social conditions. Lack of freedom can derive both from inadequate processes (like the denial of the right to vote or other political and civil rights) and from the fact that some people are not given adequate opportunities to satisfy their basic needs (including lack of food, premature death, avoidable diseases or involuntary hunger)" (Sen, 2010, p. 23). Lack of liberty and *capabilities* result in a form of living characterised by material, spiritual and cultural deprivation. This is local *de-humanized* living. Zygmunt Bauman observes that anonymous, supranational economic and financial forces exert pressure so that individuals are denied the freedom to move, migrate or live elsewhere. In this state of deprivation their living takes the form of detention camps where exceptional destitution becomes the norm, in other words a "normal" form of living (Bauman, 2010, p. 85)

Deprived living offers only a future of limited opportunities because people are denied *capabilities* and therefore the chance to choose a lifestyle which fulfils their wishes and expectations. Being denied the ability to access fundamental resources

such as education, medical care, nutritious food supplies, clean water, a healthy environment, protected stable employment and the internet leads to inequalities which profoundly and negatively affect the quality of living and a person's well-being and their expectations. Such deprivations affect the most fragile and vulnerable of the poor population: women, children and the disabled (M. Nussbaum, 2001).

The lack of income does not constitute a sufficient explanation for inequality since it often stems from the deprivation of ability and a state of illiberal living. Sen states that the poverty of degraded living needs to be considered not only as a lack of income, but also, and above all, as deprivation of fundamental freedom, lack of rights to access capabilities as an impediment to an individual's ability to realise a fulfilling and worthwhile life.

### **5. Common spaces and the struggle for a humane form of living**

In the poorer neighbourhoods and in the peripheries the inhabitants organise themselves in democratic movements to manifest their discontent and to put forward legitimate demands. Such movements also exist to fight the appropriation of natural resources or to obtain access to basic goods and services or to show their disapproval of the various social injustices. They constitute real communities where individuals freely discuss issues and problems as well as the objectives and strategies to adopt as a movement. Political matters are debated and transformed. These communities frequently come up against opposition on the part of the ruling institutions which aim to contain, marginalise and interrupt the network linking the movements. In addition, the objective of the institutions is to establish a process of *normalisation* to render the movements' actions harmless. The communities are formed because they have something in common (*commoning*): energy, time, material and cultural resources, spaces and objectives etc. Stavrides in *Common Space. The City as Commons* states that "the process of redefinition is always a process of both material and immaterial transformations. Giving a new meaning to existing practices and resources becomes as important as inventing new practices" (Stavrides, 2022, p. 55). Newcomers contribute to this revision and transformation. In this way *commoning* contrasts the dangers, to which it is continuously exposed, of homogenisation and consensus stagnation, and of normalisation. Normalisation, he claims, consists in channelling behaviour "towards prevailing power relations" (p. 74). It is fundamental that the communities remain open to dialogue not only internally, but also among the different communities.

The creation of "threshold spaces" is decisive as places where people can meet and discuss issues in reciprocal involvement. Stavrides, referencing Foucault, speaks

about *eterotopie*: meeting places where “the differences meet” (p.71). These are common spaces that are decisive for the creation of a culture of involvement which is indispensable to reactivate traditional solidarity practices, to give living a humane face, to eliminate city boundaries and to implement forms of struggle for social justice. These communities temporarily use spaces that become common. It is also in this way that they evade the processes of normalisation implemented by the ruling institutions. In the common spaces the communities generate democratic processes of mutual recognition which have positive repercussions on the daily lives of the “peripheral people” economically, socially, ethically and spiritually. According to Rancière (2010), these communities are real political communities implementing democratic decision-making processes that are non-centralised and hierarchical. In many cases, they constitute examples of direct participatory democracy.

In certain cases, these communities acquire the collaboration of architects and urban planners in order to recreate the urban spaces and to give shape to healthy, aesthetically-pleasing, welcoming, functional and safe living able to generate a sense of well-being for those who live there. In some large Latin American cities, we find examples of large-scale peripheral construction projects aimed at grass roots regeneration and emancipation, promoted by the local authorities with involvement and collaboration on the part of the community.

## **Conclusion**

Living, as a condition which specifies man’s “being-in-the-world”, characterises in an existential sense man’s way of being, way of life and behaviour. It becomes a form of degradation not only in relation to income, but also in the absence of and misrecognition of basic liberties, of *capabilities*. The cities of the poor are enclosed within the “barbed wire” boundaries of substantial deprivations of freedom. Sometimes these deprivations are compensated by a form of living that, though poor, does not descend into misery thanks to relationships and bonds of coexistence characterised by mutual aid, solidarity, friendship, a sense of sharing material resources and respect etc., in other words, a whole set of ethical values often absent in opulent societies.

In many cities around the world the mobilisation of communities, interconnected through the sharing of common spaces, constitutes for millions of people very important realities for implementing forms of democratic struggle for the elimination of social injustice, for the effective exercise of human rights, for humane dwelling where aspirations and projects for a good life “with and for others” can be fulfilled.

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# **The Role and Significance of Sociological Theory Within Research Traditions in Relation to the Historical Context of the Postmodern Turn**

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## **Abstract**

The paper starts from the role and meaning of sociological theory in the context of research traditions. It begins with a discussion of the positioning of theory within qualitative research approaches in the time context of the late 1980s and early 1990s during the so-called of the "postmodern turn ". Given that the aim of the paper is to consider the genesis of research traditions in sociology with an emphasis on ethnographic research traditions, but it is difficult to start the discussion without grasping the essence of sociological theory. When talking about theory and ethnographic research, there are numerous forms of specific theories that ethnographers have, each of which is applicable to specific topics. The inappropriateness of the theory and the specific research topic results in a misunderstanding in relation to the main research questions. Within the work, the order of knowledge is also problematized, which is associated with ethnography on the one hand and postmodernism on the other, as well as a „reflexive" turn. The postmodern sensibility is especially visible within the reflective moment during the writing process. Postmodern ideas therefore first introduce a new level of criticality within ethnographic research and draw attention to certain topics, processes and phenomena that have not been sufficiently discussed within wider social reflection.

**Keywords:** research traditions, postmodernity, reflexivity, ethnography, theory

## **1. Introduction**

### **The Role and Meaning of Sociological Theory - the Relationship Between Research Traditions and Sociological Theory**

Always current discussions about the positioning of theory within the qualitative methodology of social sciences is related to discussions that are especially intriguing when it comes to ethnographic theory (Collins and Stockton, 2018). In this sense, the goal of the work itself is primarily reflected in the consideration of the genesis of



research traditions in sociology with an emphasis on ethnographic research traditions in relation to the historical context of the postmodern turn. The method of analysis and synthesis was used to study certain features, relations, and interrelationships within the studied context.

The word ethnography itself comes from the word *ethnos*, which represents a socio-cultural group, and the word *graphy*, which can describe the process of recording and recording reality, and at the same time implies the intention of openness. Thus, the etymology of the word refers both to the research process and to the product of the research in the form of an ethnographic report, usually a monograph (Charmaz and Mitchell, 2001). Such doubts and ambiguities in the understanding of the term while simultaneously recording the experience of actors and asking questions within the cultural discourse result in the absence of connection between these qualitative methods with a research approach, which leads to questioning the position and role of theory within ethnographic research.

Understanding the historical genesis of research traditions in sociology, including the ethnographic research tradition, especially its incorporation within sociological methodological instrumentation, is difficult to begin without grasping the essence of sociological theory (Abrutyn, 2016; Calhoun et al., 2012; Ritzer and Stepnisky, 2021) "We could freely say that sociology is the science of progress", Afrić (1989, 8) believes, and continues that understanding the differences that appear between different sociological research traditions can be much easier if one points to its foundations, i.e. to the difference in the understanding of sociology as a science that is primarily reflected in different interpretations of social reality. This is where the way of understanding the subject of sociological study comes from. Given how they define their ontological, epistemological, and methodological assumptions differently, research traditions are classified into different worldviews, which are determined by their constituent paradigmatic theories. That is, research traditions are determined by theoretical compositions within which numerous normative, empirical, and axiological theories are elaborated (Afrić, 1989, 55-56). The structure of sociological theories arises as an answer to some fundamental questions. Regardless of the radically different answers to them, it is common to all sociological theoretical projects (Nisbet, 2007). What is common to all types of theories in sociology and to all sociological theories in general, and on which all sociologists agree, is the fact that theories are not things but processes (Wilson, 1983 as cited in Afrić 1989). Common to all sociological theories is the development in gradual processes of increasingly precise and detailed statements. "The fact is that sociologists who see the progress of sociological theory in its ever-increasing generalization on the one hand, while on the other hand they insist on more and more accurate and detailed predictions, i.e., those who see progress in the theory's ever-increasing approach to reality, do not see its progress in its practical effects" (Afrić, 1989, 106).



Mouzelis explains the emergence of the "disease" of sociological theory about the understanding of theory as a "final product" and tries to establish "why things went wrong". This approach is in some respects like the generation of theory within grounded theory. One of the fundamental problems pointed out is contained in the excessive rejection of Parsons and the tradition of structural functionalism in its original or derivative forms, which leads sociological theory to a dead end (Čaldarović, 2000,11).

Excessive reactions to Parsons resulted in different variants of interpretive sociologies, as well as a fondness for the micro, which is only one side of the micro-macro dichotomy. According to Čaldarović Mouzelis takes on the difficult task of trying to find a "therapy" for a sick sociological theory (Čaldarović, 2000, 13).

One of the possible therapies is found within the attempt to connect the institutional and figurational structure (macro level), according to Mouzelis' conception, Parsons, and Marxist sociology "in one". This combination, which is otherwise unimaginable, is based, according to Čaldarović, on a very reductionist presentation of Marx's sociology on the one hand, and on the other hand on a slightly more innovative presentation and refinement of Parsons' AGIL scheme. Mouzelis begins with the classic distinction between two types of theory: theory as a set of interconnected independent statements that try to say something new that we do not yet know about the social world and whose claims can be confirmed or refuted by empirical research, and theory as a set of tools that only facilitate or prepare the ground for building a substantive theory. In non-Marxist sociology, the second type of theory is denoted by different names such as conceptual framework, paradigm, meta-theory, or heuristic tool. Preference is given to Generalities II. and Generalities III. coined by Althusser when distinguishing theory as a tool/means (Gen. II.), from theory as a provisional finished product (Gen. III.). All existing theories contain both types of theoretical claims (Mouzelis, 2000). The distinction between the two types of theories is considered essential, and neglecting it leads to misunderstanding among social scientists (Čaldarović, 2000, 19-21).

The real problem does not consist in the denial of sociological theory as a subdiscipline specialized in the construction of conceptual tools (Generalities II.), but it is necessary to ensure that the offered conceptual tools become more useful, and that the type of connections between theory and empirical research (between Gen. II. and Gen. III.) established by Parsons and his followers be strengthened and improved. Sociological theory, as an activity with a logic different from that of philosophy or other related disciplines, can help sociologists clear and prepare the ground for empirical research. Therefore, the main task of sociological theory is not exclusively to provide fully developed, conceptual creations, such as Parsons or Giddens, but also to provide provisional, flexible, open, transitional frameworks useful for empirical, comparative research of special sociological problems. The emphasis is on the elaboration of a smaller number of interrelated concepts that, instead of offering a

general overview, are useful when reducing "distorted communication" and asking interesting empirical questions for specific problem areas. Given that sociology has a multiparadigmatic character, the main task of sociological theory is to maintain and increase pluralism and try to transform the "separation" of disciplines into "open" differentiation (Mouzelis, 2000, 223-225).

## **2. The position of theory in qualitative and quantitative research: peculiarities of ethnographic theory**

Within the tradition of qualitative research, one encounters an approach in which empirical and theoretical research are interwoven. Theoretical ideas may appear as a phase during or even at the end of fieldwork, rather than at the very beginning, which is not the rule. According to Bryman, one of the most cited approaches concerning theory and research is analytical induction (Znaniecki, 1934), and another concerning the relationship between theory and data in qualitative research is based on grounded theory (Glasser and Strauss, 1967). The shift has been made to the extent that the theory is allowed to appear among the data in a peculiar way, and in this way, it does not lose contact with empirics and manages to cope better with the complexity of social reality (as cited in Bryman, 1996).

Quantitative research seeks to define a theory based on the internal connection of variables. They are reciprocally connected through hypotheses or research questions. The position of theory in qualitative research is more problematic because there is no standardized terminology or rules here. The terminology (theory, sample) used by the researcher obviously varies with the type of qualitative research design (Creswell, 1994; Cardano, 2020; Copley, 2021).

What Hammersley means by theory are assumptions about the necessity of connections within categories of phenomena. One form of theory developed through ethnographic work is labeling theory. Some theoretical developments that can be recognized in the methodological writing of ethnographers are the following (Hammersley, 1998): claims that ethnographic work produces theoretical insights whose validity and value can be assessed by the reader; the idea that theories are universal propositions that can be produced from the study of a particular case.

None of these arguments are entirely exclusive. But in any case, ethnographers should be sensitive to the indicated problems. According to Fetterman (1998; Fetterman, 2019), no research can be realized without a common, implicit theory or model, whether it is an explicitly anthropological theory or an explicit personal model. A theoretical approach helps to define and "come to grips" with research problems. The problem is most often approached with a certain theory or depending on a set of theories about how the work is progressing. The "trick" is therefore to choose the most appropriate level of theory for a given task. The ethnographer recognizes the importance of epistemological foundations for model selection. Thus, according to Fetterman, the typical model of ethnographic research is based on a

phenomenologically oriented paradigm that best captures multicultural perspectives, that is, the multiplicity of existing realities. Fetterman here simply says theories or models, which is in line with the opinion that there is no clear distinction between the terms model and theory, because both indicate some simplifications of reality, necessary in terms of reaching generalizations (Jary and Jary, 1999, 420).

In this context, it is necessary to point out the complex relationship between the theory and the model. If we start from the statement according to which "theories are statements that go beyond facts, and although they most often refer to systems of concepts and their interrelationships, they can also refer to just one concept, because the concept goes beyond a multitude of facts that make up the non-conceptual from the term "understanding" (Afrić, 1989, 102), contrary to this, the model is a representation of something else, which is designed for special reasons. This representation depends and takes many forms, depending on its purpose. All models have one common feature, regardless of their purpose, and that is: placement of elements in a system designed according to the model. It is possible for every relevant element to be located; in which case the model represents an absolute replica. The steps involved in building a theoretical model are as follows: the variables that should be used to characterize and understand the process must be specified; the forms of relations (relations) that connect these variables must be specified; ignorance and the need for simplification lead to the fact that all relations other than the identity of the subject are subject to error and therefore, with the aim of effective statistical judgment, these errors (wrong terms) must be specified; the parameters of the model must be estimated and the scope of identification established and verified. If it is inappropriate, the model must be reformulated and finally, the model must be updated and used, which speaks of its strength, durability, and reliability (Bullock et al., 1999, 536-537).

Models differ in relation to the degree of approximate reality. Its functions also vary, and it can be equally heuristic as well as explanatory. This includes proposals for new research hypotheses suggesting comparisons between unknown phenomena and those better known or better explained; these simplifications of a complex reality due to analytical requirements tend to obtain a general concept or tend to the most important places of fundamental explanations of the causal mechanism; the comparison between the "ideal" model and the real world is intended to increase awareness of real processes. In any case, it is concluded that there is no clear difference between the terms model and theory (Jary and Jary, 1999, 420).

According to Creswell, theory can be presented as a visual model. It is especially useful to translate the variables into visual images. Thus, Blalock (1969) translates verbal theories into causal models in a way that enables readers to easily visualize the connections between independent, mediating, and dependent variables (Creswell, 1994).

The ethnographic method and ethnography have their beginnings in anthropology and ethnology. The foundations of ethnography in anthropological research of diverse cultures are highlighted in the works of Malinowski and Margaret Mead. Anthropological concepts, methods, and techniques of data collection in the ethnographic field itself create the so-called the process of producing ethnography (Fetterman, 1998). However, although it is not possible to deny the anthropological and ethnological foundations and ideas of ethnography on the research of diverse cultures, ethnographic research was shaped by the principle of openness which manifests itself towards the researched social groups, cultures, and societies, and thus also towards other social sciences. The development of ethnography thus takes place in a certain parallel way through historical stages and within anthropology, ethnology, but also sociology. The goal of this paper is the articulation of ethnography within the sociological discipline and the application of sociological theories in this approach.

Žažar (2016), citing several authors, points out that the diversity of sociological thought is visible through its multi-pragmatic nature and calls sociology a fragmented science that suffers from important levels of incoherence. The constant process of fragmentation at theoretical levels has turned sociology into a science focused on researching intricate details. Žažar sees interdisciplinarity as a solution to the process of dismantling sociological theories. Rogers (as cited in Žažar, 2016) defines interdisciplinarity as understanding a problem through the integration or execution of different concepts, methods, and epistemologies from different disciplines in a new way. Interdisciplinary research is not a substitute for research within one scientific discipline, but it gives specific research topics an additional dimension. It is possible to connect methodological and theoretical levels between sciences in this way in research but connecting the epistemology of each discipline would paradoxically lead to the disappearance of the foundations of that science (Žažar, 2016).

Returning to the discussion of theory and ethnographic research, we find countless forms of specific theories that are before ethnographers, each of which is applicable only for certain topics. At the same time, they can mislead or result in misunderstanding if they are applied to inappropriate problems. Theories then explain little. Out of the considerable number of theories offered, most researchers explicitly or implicitly opt for one or two theories: idealistic or materialistic. Idealist theories suggest that fundamental changes are the result of mental activities, thoughts, and ideas. Materialists, on the other hand, believe that these are material conditions: ecological resources, money, production models - in the sense of the first movers. However, no single approach can satisfy all requirements. Ethnographers therefore choose one of two approaches to tailor their efforts, specific needs, or questions of interest. Thus, one of the most represented idealistic theories in anthropology is precisely the cognitive theory, which implies the possibility of describing what people think. Using linguistic (ethnosemantic) techniques, it is possible to create taxonomies of the way individuals perceive the world. For example,

idealist theory explores the worldview from the perspective of mental origins, beginnings, cognitive maps, beliefs, and knowledge (Fetterman, 1998, 6).

Classical theory of idealism in anthropology includes culture and personality theory, sociolinguistics, symbolic interactionism, and ethnomethodology. On the contrary, ethnographers who support the materialist theory view the world as one that coincides with observed forms of behaviour. A limited but classic political-economic materialist theory is historical materialism or neo-Marxism. According to Marxist theory, all changes result from changes in forms or production, control over forms of economic power, class consciousness and class conflicts. Other materialist approaches in anthropology include techno environmentalism and cultural ecology. Theories should not be elaborated by adding constructions, assumptions, propositions, and generalizations; they can be medium-scale theories or personal theories about how the whole world works or just a small part of it. Ethnographers do not explicitly use grand theories because they do not automatically agree with them. Grand theory can be instructive, but many ethnographers point out that it is too broad and inappropriate for everyday research. Ethnographers typically use theoretical models indirectly related to grand theories to guide their work. Grand theories, models, and personal theories, all together fall into the idealist or materialist set-fundamental dichotomy useful when analysing other research projects. Approaches overlap in the field, but many researchers begin selecting theories or models (which are primarily idealistic or materialistic) before they even begin to conceptualize the problem. Furthermore, the choice of theories may also depend on simple reason, suitability, and ease of use. Ideological theoretical foundations are more often built, before conducting research, paving the way through the labyrinth of data. When theory ceases to be a guide, it is no longer useful, and when data ceases to feed the theory, it is time to perceive a new theory (Fetterman, 1998).

In general, regardless of the above, there is little discussion about the nature of theory within ethnographic work. There is agreement on the leading role of theory in historical explanations of the testing process, reformulations and retests that are also recorded in the ethnographic tradition in changing forms, such as grounded theory and analytic induction. The logic of progress in history and ethnography involves development from descriptive and explanatory accounts, through theories of development and testing, and back again towards better descriptions and explanations (Hammersley, 1998).

According to Hammersley, the concept of theoretical description is problematic, and it can be interpreted in several ways. The author also questions the possibility of ethnographic research when developing theoretical understanding. For him, the ethnographic adoption and acceptance of the goal of theoretical description leads to a fundamental misconception about the nature of description and the explanations it produces. Ethnography inevitably places great emphasis on description and offers a distinctive type of description: theoretical description. But the nature of these

distinctions is not truly clear. In short, according to this author, a description cannot be a theory, but all descriptions are theoretical in the sense of their relationship to concepts and theories. Ethnography, finally, according to this author, can hardly serve when developing theory (Hammersley, 1998).

### **3. Postmodern outlines of sociological theory as a basis for ethnographic research**

The extent of knowledge-based discussion related to postmodernism on the one hand and ethnography on the other is quite a challenging task. Within the 1980s, postmodernism becomes its own negation. But regardless of what postmodernism means over time, it is certain that it signifies the spread of conflicting definitions that refuse any moulding. Here one encounters a legacy related to the problematization of the notions of representation and legitimacy of knowledge, and the concept of aporia is introduced as a fertile area for developing practices. Lather is not interested in the "new" ethnography but is looking for the shaping of ethnographic practice which abandons the indicated type of scientific followed by other disciplinary methodologies (Lather, 2001).

The postmodern approach within qualitative research unites several different topics, but three are the most obvious. The first concerns all existing knowledge and the leveling of hierarchy and differences in all its forms. Doubt becomes the primary guiding perspective. The postmodern context of doubt "concerns" all methods equally, and none of them remains immune, nor does it have a privileged status. This radical relativism, with its decentralizing impulse, dissolves the remains of empirical and methodological compulsions, "encloses" all voices and representations as equally valid. Second, postmodern sensibility illuminates the relationship between "self" and "self and others". Ethnography engages in the marginalization of the researcher's separation identities as "scientists" or "objective observers" from those within the study. The third element is the narrative turn, which manifests itself as a critique of traditional ethnography, treating the world as a text to be read and privileging subjective discourses (Snow and Morrill, 1995).

Katunarić points to the easy rejection of old theories by postmodernist interpretations of society. They, again, express something that prompts the need for a new theory. The indicated interpretive attempts introduce new expressions or at least added terms into classical and modern contents. The overall impression is confusing, since the new theory should revise the entire legacy of sociological thought about society, because society is built on foundations that were not observed until then or move in directions that "old" theories did not foresee. The postmodern statement hardly reaches the theoretical level, its own identity, the necessary generality, or establishes it in a reductionist way, which until a certain moment was considered to belong to the pre-modern phase of social science and sociology itself, and as far as sociological theory is concerned, it introduces two problematic tendencies. One is the refutation of generalizing judgments about society, including



teleological judgments about social changes, and the second tendency is the opposite, generalizing and teleologizing in a special sense, which finds the basis for a comprehensive theory of society outside of sociology, in economic models of human activity. The multiplication of theoretical viewpoints did not increase the debatability, polemic or dialogue between different authors. On the contrary, such communication is significantly decreasing (Katunarić, 1995, 35-37).

The task of theory is to raise interesting questions and sensitize empirical research, and it is precisely with the results of empirical research that we return to general theory. The interdisciplinary field of ethnography is potentially "rich" in this sense, and therefore, despite different conceptions and approaches, ethnography can significantly contribute to theoretical grounding.

Mouzelis gives a useful instruction to the postmodernist orientation of the time, which, according to him, should "stop submitting to the tyranny of intellectual conveniences", "ignoring the old and automatically choosing the new, regardless of its true value". Mouzelis further states that its more "modernist" wing should discard its, according to him, "fundamentalist baggage and redirect its attention from universalist schemes and philosophical foundations "based on flexible, temporary conceptualizations that are suitable for the problems and dilemmas of empirical research" (Mouzelis, 2000:225).

Since the mid-80s of the 20th century, when postmodern challenges enter the scene, qualitative researchers undergoing "postmodern divides" demand the abandonment of all established and exclusionary values, perspectives, theories, and prejudices as the basis of ethnographic research. Qualitative researchers are now occupied with something "bigger" than mere recording and observation. The focus is on the researcher who plays an active role in the story. New pages are printed that reflect the researcher's direct and personal engagement within a certain historical period (Denzin and Lincoln, 1998; Delamont and Atkinson, 2011, Cooper and White, 2012).

Poststructuralist and postmodern criticisms are preoccupied with questioning "ethnographic authority", emphasizing the discursive naiveté in ethnographic writing that is unaware of the way in which something is "written" and plays the role of creator of culture rather than its inventor and "reflector". It is recognized that ethnographic practice and writing must be aware of its own position and connection to the world. This awareness mirrors the symbolic and structural positioning of all human subjects, the entire human experience (Willis and Trondman, 2000; Grgurinović, 2012).

#### **4. "The death of theory" in postmodernism**

According to Daly (1997), postmodernism means the end of traditional forms of theory (Mutman, 2006), but this certainly does not mean the end of theorizing activities within ethnography. On the contrary, theory retains its position as a rearticulation of what theory is in the postmodern sense. As well as Katunarić (1995), who calls postmodern theories of society a "confusing interlocutor", Daly finds that ethnographic theory viewed through the prism of postmodernity behaves like a lost person. Social scientists, in fact, argue for her presence, but there is no indication of her physical presence.

Studying the position and role of theory within the long history of ethnographic research has never lost its interest. This did not happen even in the period of postmodernity, which within that context introduced a dose of critical awareness of what it means to do ethnography as a form of social science. The Chicago School of Sociology started from ethnographic accounts that resulted in substantive theories regarding, for example, the "treatment" of death, the consumption of marijuana, and all the way too much more formal theories of identity and interactions. With postmodern theories, new epistemologies, paradigms, and discourses have resulted in greater reflexivity and are related to the results of ethnographic endeavors. Special attention was directed towards the final ethnographic text because of the reflection of numerous interpretive levels and meanings, social and cultural determinations. The most important contribution is seen within the "call" against privileged claims about the representation of truth or the reality of experience. In doing so, historical experience is imposed as a decisive factor when understanding postmodern theoretical transformations (Daly, 1997).

Within postmodern forms of thought, ethnographic authority was shaken, which was manifested through a crisis of representation. There is scepticism towards the researcher's direct recording of "lived" experience. The postmodern world suggests the impossibility of further presenting the theory as an objective representation of the participants' real world. The theorist is not perceived exclusively as a thinker, a reflective and participating member of the presented social reality. Theory no longer has a privileged place within the representation of the actor's experiences and intentions. Rather, the theory is, by its very nature, given. As Denzin agrees (1978 according to Daly, 1997) theory has an indispensable place within science, and its absence leaves the research report at the level of descriptive empiricism.

It is interesting to point out Daly's personal experience in connection with the theory, which is usually placed somewhere inside "thick complicated books". After a long and arduous journey, interdisciplinarity seemed to him a good reason against the use of any theory. He was of this opinion until he encountered this topic himself in his doctoral work. Then, according to him, he realized the importance of theory when looking at the world in a separate way, which was very encouraging. But that happened only when he was able to conduct research and produce a theory in his own



characteristic way, and this is due to the moment that enabled him to see the theory as something personal and at the same time as an independent process. Theory is then directly involved in the selection of key elements, construction of concepts, relevance, values, and emphasis within the study. The traditional position of the theory is recognized when the status of science is raised according to the "privileged voice" carried by the elite, and its creators are also those who supervise a certain disciplinary field. Postmodernism called for the abandonment of such monolithically shaped truths and sought to understand the changes and complexity of social reality. This leads to the demystification of the radical tradition of objectivity in favor of awareness of value, meaning, interpretation, and finally, the question arises: what does it mean to have the role of a scientist who is interested in researching people? While theory on the one hand may have a privileged position in science, the increase in diversity across and within paradigms results in growing scepticism about its overall status. The pluralization of scientific values, procedures and requirements increases uncertainty regarding the meaning and value of theory. The number of terms used when it comes to theory (models, paradigms, backbones) is noticeable, and three distinct levels of generality are noticeable: origin and variety, their use and multiplicity. The meaning of the theory is even more indicative in the light of postmodern considerations. So where is theory in postmodern science? If we move away from theory as an axiomatic, predictive, and predictable thing, what do we leave behind? Looking at it from the perspective of postmodernity, the question arises, is theory different from opinion? That is, if we define opinion as "a view that we consider significant", then is the theory different in any way? Is it more legitimate than some other forms of commentary, such as religious, journalistic, and political ones? Should theories be privileged? What is the difference between a theoretical story and another? (Richardson, 1991 according to Daly, 1997).

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Theories in the interpretive tradition are essentially "stories". Theoretical stories are interpretations and creations of meaning that enable the theoretician to make sense of the stories of the research participants (first-class stories) and the theoretician's own experience of living in and being a part of these stories. Thus, theory, like any other form of narrative, is a structure that shapes meanings and determines consequences. First-rate stories are locally narratively based. A secondary story is an

interpretive commentary on those living stories. The scientific story is embedded in the lived and observed experience and language of social science. Calling a theory, a story confirms that it is a type of story (Van Maanen, 1988) shaped by the skill of the author, literary conventions and means (Atkinson and Hammersley, 1994).

Within the traditional canons of positivist science, theory is a direct reflection of experience. Postmodernism, on the other hand, focused on the demands of intellectual, objective representations and the formation of a text that unites all the voices mentioned. At the most fundamental level, continuous observations of the subjective meaning of certain actions now become imperative. Scientists, who increasingly distance themselves from their own participation, become both research subjects and narrators. Theoretical stories and the experience of stories are rooted in culture and based on cultural understanding, which implies the simultaneous subjectivity of both theorists/researchers and participants. Theory is therefore transformed from a single voice, a single echo, towards a multi-voiced conversation (Daly, 1997).

Objectivity also has a significant place in theoretical formulation. One way of achieving this appropriateness at the theoretical level is to involve participants in theory building processes. The logical consistency of the presentation is one of the most prominent features that separates the objects of scientific thought from the thought objects constructed by common-sense thinkers in everyday life. Theoretical accounts are therefore more understandable when they are written in a logically consistent manner. When it comes to postmodern theory in the interpretive tradition, it is ordered as both generated and generative. By entering "self" into a scientific text, we encounter what Geertz (1983) refers to as the blurring of genres - humanistic and scientific models, and when subjectivity becomes an equally important part of the text, the result is something between quasi-scientific and quasi-humanistic. Moreover, the theoretical form is based on a combination of systematic observation, personal experience, and a complex sense-making process. In postmodern science, theories should not possess privileges and inviolability. There is an opinion according to which this science is "subjective, idiosyncratic, ambivalent, conflictual, related to inner life and related to experience that cannot be measured, tested or fully shared" (Krieger, 1991, 2, according to Daly, 1997).

Thinking of theories as second-rate stories affirms the importance of theory in interpretive science and reshapes our thinking about theory by keeping the storyteller in it. According to Daly, keeping theorists "in the game" is the basis of producing science with integrity. How else can we expect to support the position that our methods imply the active involvement of persons, and theories do not? (Daly, 1997).

According to Stewart, researchers' "slide" towards an ontology in which the actor's perspective becomes "truthful", and ethnographic demands tend to understand these multiple truths. Through their writing, postmodernists demonstrate an approach to a

multiple representation of reality, which, however, did not answer how certain knowledge was acquired. The answer to this question leads to the method. It is the method that helps in getting to know the real world. Thus, the main contribution of postmodernism, specifically the contribution to the ethnographic method, is found in sensitizing readers to the existence of multiple perspectives, including ethnographic ones (Stewart, 1998).

The postmodern epistemological challenge at that time, therefore, does not only concern the connection between the observer and the observed, but also the relationship between the ethnographer-author and the ethnographic text. Ethnographic orientation must include true description and a systematic methodology analogous to reflexive awareness. In the wake of these considerations, while respecting all the resulting variability of criteria, Richardson (2000) discusses the judgment of ethnography with the help of two criteria: scientific and artistic. Postmodern, as it has been pointed out, anew "awakens" the processes of collecting and reporting results and brings new challenges within the discipline as well as boundaries of ethical, aesthetic, theoretical and empirical foundations. As a result, many ethnographers no longer wish to be distant, neutral, distant, and related to this, to practice traditional ethnography. Richardson welcomes the blurring of genres, the complexity of writing, the blurred boundaries between "fact" and "fiction", "subjective", "objective truth" and "imagination". It unlocks the door and gives freedom to the personal search for different possibilities of manifestation, and at the same time warns of the need for greater self-awareness in relation to authorship, authority, truth, validity, and reliability. The new way of writing opens a discussion regarding the criteria for evaluating ethnographic work - new or traditional. Traditional ethnographers are concerned about how their work will be received and whether it will violate the norms of ethnographic writing. Ethnography, namely, is always created through research practices. Richardson points out the requirement for the continuous formation of new criteria, as well as new parameters for selecting the criteria themselves. She believes in "maintaining" the entire ethnography in accordance with high and demanding standards. In doing so, Richardson singles out five criteria that she herself uses when judging ethnographic articles or monographs: Substantive contributions - do the texts contribute to the understanding of social life? Does the author demonstrate the deeper foundations of the human world of understanding and perspective? How do these perspectives affect the construction of the text? 2) Aesthetic merit: are the parts aesthetic enough? Is the text artistically designed, satisfying, complex and boring? 3) Reflexivity: how was the information obtained? Ethical problems? How is the author's subjectivity both the producer and the product of the text? Is there appropriate self-awareness and does it open the reader up to decision-making? Do the authors consider themselves responsible according to the standards of knowledge and narrations of the participants? 4) Impact: Does it affect me? Emotionally? Intellectually? Does it produce new questions? Does it encourage writing? Does it encourage new research practices?

Does it encourage action? 5) Expression of reality: does the text embody the feeling of lived experience? Is it experienced as a true/credible representation of culture, society, individuals, or "reality"? Finally, creative art is one prism through which we see the world and analytical/scientific is another, and attention is drawn to the fact that we still see the world best through both lenses (Richardson, 2000).

## 5. Conclusion

The question of the position and role of theory within ethnographic research, that is, the positioning of theory within qualitative methodology, is the subject of many discussions.

Ethnographers usually have no dilemma when diverging and abandoning a particular theory. When the data no longer "feeds" the theory, and it no longer proves to be a useful guide within the research, it is simply abandoned. The concept of theoretical description is also problematized, which according to critics lacks an element of distinctiveness, especially when it comes to explicitness and coherence, so one of the solutions is found within the proposal of the so-called dense descriptions.

Discussion based on the order of knowledge in the context of postmodernity and ethnography in ethnography itself manifested itself within a reflexive turn. The problems of representation and legitimacy of knowledge are revisited. The guiding perspective now becomes doubt. Dominant values, perspectives, and prejudices are questioned as sources of ethnographic research. It is about the deprivileging of texts, critical scepticism and knowledge, and the establishment of re-questioning of the relationship between oneself and others. The researcher's identity as an objective observer is placed in the background, and a narrative turn occurs as a kind of criticism of traditional ethnography. Ethnography enriched with postmodern sensibility brings new insight into newly established social relations and structures. Postmodern also implies the abolition of traditional forms of theory, but this does not mean the end of theorizing activities in ethnography. Postmodern ideas bring a critical awareness of what it means to "do ethnography" as a form of social science.

Finally, one of the main contributions of postmodernism to contemporary ethnography, which can also be seen as one of the contributions of this paper, is to sensitize the reader to the existence of multiple perspectives, which implies the multiplicity of ethnographic perspectives through the transmission of diverse experiences. Basically, postmodernism has awakened the problem of data collection and reporting, brought challenges within the existing rules of the discipline and the boundaries of ethical, aesthetic, theoretical and empirical foundations. Some of the directions of future theoretical and methodological efforts can therefore be directed towards the analysis of the positioning of the theory in relation to the postmodern turn and within a wider disciplinary, interdisciplinary, and transdisciplinary context.

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# Metanoia Vs Paranoia – New Existential Position

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## Abstract

Comparative analysis of metanoia not only as a psychological but a broader spiritual concept versus the paranoid existential position with the accent on the projection as a primitive defence mechanism. These phenomena were studied from phenomenological, psychodynamic, and theological points of view. The theory of personality of Christian psychotherapy and Transactional Analysis concepts are applied. The ego as a psychological apparatus limits human behaviour and actions by constant activation of defence mechanisms that often lead to psychopathology. In Christian psychotherapy metanoia as the desired level is a state of deep spiritual transformation opposite of the distorted psychological conditions.

**Keywords:** metanoia, paranoid existential position, ego, projection, christian psychotherapy, transactional analysis

## Introduction

The existence of modern man takes place in the limited space of mental functioning. At this level, he acts out his individual life plan and the collective script of his existence.

In defining oneself, others, and the world, it uses the narrow and relative prism of its frame of reference, which is a filter towards reality, and the ego with its defence mechanisms is a device for maintaining the balance between separate elements.

In this paper, we extend the egocentric perspective of interpreting human existence by including the spiritual dimension.

We offer a model that moves the processes from the psychological to the transpersonal level and builds a new existential position as a relationship between



man and God. With this, we raise the ontological questions about human freedom, autonomy, and the ideal vision of his highest self-actualization.

## **Methodology**

This study is descriptive and in addition to the application of psychological concepts from the theory of personality Transactional analysis: *life positions, frame of reference, redefinition, and discount*, we operate with the concept of *metanoia* from the aspect of Christian psychotherapy and perform a comparative analysis between the dynamics of processes at the psychological level and the spiritual level.

## **A Frame of Reference and Life Positions**

According to classical psychology, man positions himself and establishes relationships in relation to three dimensions: himself, other people, and the world in which he exists, and defines them from the prism of his frame of reference. "An overall perceptual, conceptual, affective, and action set" (Schiff & Schiff 1975).

Based on this, he builds his position as a deep and thorough existential experience with its roots in the childhood period, formed on the basis of the complex interplay of interpersonal relationships, primarily within the family in the relationship with parents and other significant adults.

Eric Berne, in an attempt to describe the pattern of psychological power games and the predictability of social transactions, proposed the concept of life positions (Berne, 1962).

To define the classification of life positions, Berne introduced the concept of being "OK", which consisted of being fair with oneself and others, as well as seeing oneself and others as having equal rights.

Stewart and Joines (1987) seemed to define the degree of OKness a person feels as the "essential value" (p. 117) that one perceives in oneself and others. The life position arises as a result of the early life decisions that the child makes about himself and his role in life and among other people. It further becomes a specific way of social interaction, communication, and connection, and in states of distress, a personal automatic pattern of behaviour, action, and social interplay.

According to Berne, the subjects of all positions focus on "I" versus "Others" and their predicates focus on being "OK" versus "not OK." Thus, the basic predicates are:

I am OK

I am not OK

You are OK

You are not OK

These predicates then form the four possible life positions:



I'm OK—You're OK (optimal, healthy)

I'm OK—You're not OK (paranoid)

I'm not OK—You're OK (depressive)

I'm not OK—You're not OK (hopelessness)

These existential positions are a way of perceiving and experiencing the world.

### **Paranoid life position**

We have chosen the paranoid life position for analytical observation while describing it through Bern's concept as a social adaptation and not as a clinical diagnosis.

We consider it to be the most representative in contemporary social dynamics as a reflection of individual psychological development scenario formatting, but also as an often taken existential attitude driven by individual narcissism and self-love, but also the exogenous induction from global mass psychology that encourages and constantly maintains a sense of existential discomfort and feeling of fear.

I'm OK—You're not OK is a position occupied by individuals who have a high opinion of themselves (superior) and criticism and accusation towards others (inferior). This position requires that there be someone to be 'worse than in order to maintain the sense of self as ok. A defence mechanism is a projection, where the person, in order to maintain a good self-image, projects all unacceptable and bad contents and feelings outward onto other objects, which he then perceives as bad and hostile. It is considered to be the most interpersonally destructive and can result in hostility and aggressive behaviour.

Diametrically opposed to the paranoia of modern man or any of these life positions is the state of metanoia. Classical psychological schools observe and describe human existence in relation to three axes: self, other people, and the world, not taking into account the spiritual dimension - the relationship with God. Only by including the spiritual aspect can we talk about a fully realized existence and wholeness of man as a person.

### **Ego and defence mechanisms**

In the domain of psychology, the basic dimension is mental health, which implies the integrated functioning of cognitive functions with emotions and the adequacy of human behaviour. The main role in this is played by the ego as an executive apparatus that enables integration, regulation, and testing with reality. One of the most remarkable achievements in ego psychology is Freud's discovery of the concept of defense mechanisms. He described 17 and classified them according to developmental level (Vaillant, 1992).

They are the basic instruments through which the ego regulates and dampens affects, impulses, and unconscious contents in order to ensure coherent and integrated

functioning and maintenance of psychological equilibrium. "They can be adaptive, but equally maladaptive, these mechanisms can be understood both as building blocks of psychopathology and as potential stepping stones of Ego development" (Vaillant, 1994).

We would add not only in ego development but the same together with ego can be an obstacle in higher spiritual development. The ego with the mechanisms has an adaptive, defensive to the level of the survival function for the integrity of the person. But what is the person really defending against, what are his threats, and in what ways is he threatened? We know that the ego is a mediator between the external and internal world of the individual. Through cognitive functions, it processes the external reality and helps in adopting adequate actions and behaviours. But what about its inner world?

With the formation of the psychoanalytic method and work on the unconscious, Freud discovered that the person actually defends himself from his own unconscious contents, intense affects, aggressive impulses, unaccepted contents, and phantasms, and processes all this successfully or less successfully through defence mechanisms.

He was the first to describe that the person has a tendency to split and separate affects from mental contents, so he described the tendency to dissociate, and disintegrate as a basis for the appearance of symptoms and psychopathology. So the threat to the self lies in the being itself, in its unconscious, and from the aspect of Christian anthropology and psychology in the fallen human nature itself and what it names as passions.

Passions are related to egocentrism and they are in constant connection with the defence mechanisms that are their instruments, with a defensive and self-protective function. Above all, the ego defends itself from the fear of annihilation and constantly strengthens its position, keeping the person in survival mode. The mind functions only with the secondary function through the ego. There are two main mechanisms: suppression as internalization and projection as externalization.

Defence mechanisms, and even less ego with its defensive action, will hardly help in reaching mental health or the goal to which Christian psychotherapy aims - healing of the being.

On the other hand, the modern and imposed model of life with all its challenges aimed at strengthening egocentrism, consumerism, and global and excessive digitalization keep man trapped in the space between two false realities, the virtual one in which he is given power and grandiosity and the external one in which daily is devalued by the mass psychology of fear and global catastrophes. In such a climate, man is isolated and lonely, starved for contact and relationship, in a constant defensive position full of doubt and fear, in a state that the Austrian psychiatrist Viktor Frankl describes as an existential vacuum (Frankl, 1992).

## **Fallen Human Nature and Passions**

From the point of view of Christian anthropology, at the base of fallen human nature are passions. They are the main drivers of its action. "Passion is painful - to the point of depravity, a mental force that through repentance should be transformed into a benefactor" (Ilievski, 2022).

"In Christian theology, unlike emotion, passion (pathos) has been defined in morally and theologically engaged ways as a disobedient movement of the soul" (Graiver, 2021).

Our ego self tends to identify with its passions: gluttony, avarice, and glory. In such egocentrism, the main human passion is self-love, which we need to transform into love of God and love of humanity.

In Christian psychotherapy, the main emphasis is placed on the transformation of passions into virtues. This process of profound transformation known as metanoia is a state of radical change of mind by taking on a new perspective and relationship to oneself by radically renouncing the ego.

"This transformative process entailed not only transcendence of the passions and attachments to material things but also transcendence of the ego and the partiality of the perspective out of which it experiences and acts so that one could become genuinely open to others" (Graiver, 2021).

Such self-denial corresponds to the first stage of spiritual development – cleansing the heart of passions. It begins from the moment we repent, confess our sins and begin to live in the Church, under the leadership of a spiritual father - in obedience and lasts until the heart is opened for mind-heart prayer (Ilievski, 2018).

"This inner disposition, which provided the foundation for contemplation, is often described in monastic writings as a state of dispassion (ἀπάθεια) or purity of heart (puritas cordis) – a condition or state (κατάστασις) of deep calm, inner peace, and integration, in which one is no longer under the domination of ever-changing thoughts and negative emotions" (Graiver, 2021).

Our heart, which is our spiritual centre, plays the most important role in this process. In the theological sense, we are talking about the "spiritual heart" (Ilievski and Ilievska, 2017, pp. 96-97) in which the essence of the mind is located, it is, therefore, also the source of the inner word. If we utter the prayer with the inner word, instead of any thoughts, we will make our heart the source of personal prayer.

The Holy Fathers have indicated it as an ideal, which is the gathering of the energy of the mind in its essence in the heart, or the so-called unadorned circular prayer movement of the mind.

## Mind and Metanoia

A central theme in Christian psychotherapy is the mind, its dynamics, and its transformation. According to Christian patrology the mind is called the eye of the soul. "The true centre of human identity is the mind (νοῦς) created in the image of God and capable of union with God" Festuguere, A. J. (1960). This distinction is essential for further understanding of spiritual processes.

The ego as the executive apparatus of the human psyche is closely related to the secondary function of the mind and through it, the mind is channelled and diffusely scattered outward into the world. Its energy is used to absolve reality and the material world. It is disseminated through psychological functions, cognitive, emotional and behavioural. Its function is at the soul level.

The primary function of the mind is that used to gather the mind inward and in its contemplative state. It is the function through which man communicates with God through prayer.

According to Christian anthropology and psychology, the primary and basic goal of man is the transformation of his mind, (metanoia/μετάνοια – change of mind), that is, the acquisition of spiritual reason. It implies a process of transformation of the energy of the mind through its primary function - prayer unity with God, that is, with His uncreated energy, so that once already transformed energy behaves in a transformed way in its secondary function - communication with the world (Ilievski and Ilievska 2019, p. 18).

So, basically, metanoia implies a process of transformation, a transformation of the energy of the mind, resulting in an overall transformation of the person with his transformed action in the world. "Rather, in the Eastern monastic tradition it was primarily the mind that needed to be transformed and renewed in the image of Christ" (Graiver, 2021). In the classical Greek translation, it is implied "to change one's mind on reflection".

In the domain of psychology, this concept is often defined and described. According to psychologist P. Clarkson, it simply is a "turning point in life and psychotherapy" (Clarkson, 1989) and according to Jung "mental transformation" (Jung 1956/1986, p. xxvi).

Some authors use this term to denote transformation and offer two models in the definition: "models of a sudden change in the composition of the self, when the self is a passive recipient of the process (for instance, in certain types of religious conversion), and models of gradual transformation based upon an active effort over years of intentional and systematic practice" (Shulman and Stroumsa, 2002).

In this particular case, in this paper, we mean exactly the second model. In this whole process, the ascetic feat has the decisive role as a formative dimension in self-transformation. So it is not about a single moment of magical transformation that

occurs suddenly and without any practice, but on the contrary through a continuous and correct spiritual feat and gradual gradation through the degrees of spiritual development (Ilievski, 2015, pp. 165-173).

The importance of the ascetic dimension in that process of self-transformation is pointed out by other authors who study Christian psychology and monastic practice. "Asceticism belongs to this gradual mode of self-transformation" (Graiver, 2018, pp. 19).

### **Proposed Model and Description of Dynamics**

The usual way of functioning of the ego with the basic mechanisms of suppression and projection is inadequate and insufficient in dealing with the daily challenges and solving the problems of the individual. Defence mechanisms in overcoming cognitive dissonance distort perceptions and prevent the reception of the true picture of reality. "The use of ego mechanisms of defence usually alters perception of both internal and external reality and often, as with hypnosis, the use of such mechanisms compromises other facets of cognition. Defence mechanisms can alter our perception of any or all of the following: subject (self), object (other), idea, or feeling" (Vaillant, 1971).

In this way, other processes described in the Transactional Analysis are activated: discounting and redefining, which maintain the processes at the psychological level without the possibility of further development of the individual and achievement of a higher transpersonal level.

"The person who discounts believes or acts as though some aspects of the self, other people, or reality is less significant than it actually is". This targeted reduction of stimuli maintains the limited frame of reference and maintains the established symbiotic relations, and in addition to the redefinition, a subjective reshaping of reality occurs (Mellor & Schiff, 1975). This purposefully reduction of stimuli maintains the limited frame of reference and maintains the established symbiotic relationships, and in addition, with the redefining, a subjective reshaping of reality occurs. "It is the means by which people defend themselves against stimuli which are inconsistent with their frames of reference, and redefine the stimuli to fit into the frame" (Mellor & Schiff, 1975).

In order to get out of this "circulus vitiösus" and move to a higher spiritual level, it is necessary to practice a personal feat of asceticism and apply the FCP Method (Ilievski and Ilievska, 2017) which is based on the Jesus prayer as a way of building a community with God.

Asceticism in classical psychology is classified in the group of healthy defence mechanisms, "a methodical regulation of the content and scope of all thought and action," thus producing in the individual a conscious, willful, and anti-instinctual control over one's own psychological and physiological processes, in subordination to the religious end (Weber, 1963, p. 161).

In Christian psychotherapy, asceticism is above all a basic spiritual discipline from which the inner spiritual struggle and feat begins. "Although asceticism is as much a process of mental as of physical discipline, Historians of Christianity and theorists of asceticism have tended to focus on the latter" (Graiver, 2021).

Unlike projecting, which is a mechanism of externalization, in ascetic discipline there is a retroflexion of psychological energy inward and the phases are in the reverse direction:

1. Detachment;
2. Decatexis;
3. Retro flexion;
4. Self discernment

In contrast to the psychological process at the level of ego:

1. Externalization;
2. Attachment;
3. Cathexis;
4. Distortion

## **Discussion**

In the Christian anthropology, the trichotomous model for man is presented, according to which he is body, soul and spirit with an aspiration and struggle to overcome the dualism between the soul and spirit (Ilievski, 2015).

In the Christian anthropology such predestination is determined in human nature itself, the archetype of God's image according to which man was created and which waits in each one of us to be actualized. "Theosis – for man to be united with God, not in an external or a sentimental manner but ontologically, in a real way" (Kapsanis, 2006). That would be the ideal vision for the human being.

A transition point in that process is metanoia, but not as a magical moment of transformation, but as a starting point in a feat of spiritual development that has its own hierarchy and degrees described in Christian psychotherapy.

According to Christian patrology holy fathers showed that path, that is, a more perfect way of knowing God, through communion with Him, and by including the primary function of the mind, that is, direct communication with God - person to Person.

"...Those who act like this, who have purified their hearts with holy silence and in an inexpressible way approached Him Who is above all feeling and thought, see God in themselves as in a mirror" (Ilievski, 2022).

Only in this Meta position is the man in a true relationship with God. That state above every feeling, above every thought in which dualism, the split between soul and spirit, is overcome, it is a new spiritual dimension above the psychological level with its existing cognitive and emotional elements.

## Conclusion

“As long as we are closed within ourselves–within our ego– we are individuals but not persons” (Kapsanis, 2006). The ego is an obstacle in understanding the true spiritual reality, its function is survival, defence and adaptation within the world that offers a redefined picture of reality.

The basic function of the ego is the external direction of psychological energy, primarily with a protective function and satisfying the needs of the individual. His excessive defensiveness can turn into a state of excessive suspicion and paranoia.

Man lives in a script matrix through which mass culture indoctrinates him daily by limiting his true potential for higher self-actualization and spiritual growth (Ilievska and Ilievski, 2020). The question arises, to what extent is man autonomous? Does he live out his ontological freedom?

Christian psychology and anthropology offer a solid base for expanding this narrow perspective on human nature. Further research should be done on the ascetic practice proposed by the ascetic-hesychastic school sublimated in Christian psychotherapy with the aim of enriching the classical psychological model and overall personal growth and development.

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# Human Rights, Non-Human Rights, and Multinational Corporation in the Global Age: H Rights Paper 2022 No.3

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## Abstract

In the age of globalization few elements of the legal atmosphere are viewed with such universal public favor as is the guarantee of Human Rights. The advent of such guarantees is almost uniformly viewed as a mark of human progress, as conferring a positive benefit, as providing necessary relief from want or redress for wrongs of oppression. However, there are multiple ways to view the substance and employment of the Human Right as a source of legal remedy and as instrument of legal oversight. In a general way the idea of Human Rights follows on a long history of rights variously conceived, a history that extends back to the medieval or even the ancient period of the Western tradition. But the instrument employed today is, in fact, a modern innovation of very recent origin. In nascent form it first began to emerge in the interwar period within the British system when it was changing from an imperial to a commonwealth structure of legal oversight. Very soon it was also employed as the legal basis for British entry into the European War of 1939 against Germany. It re-emerged on a worldwide scale after the Allied Victory in World War II, especially at the Nuremberg Trials. It then became integral to a post-war program to construct a stable system of world order--as it was enshrined in the United Nations Declaration of Human Rights. Examining the historical context in which Human Rights were first conceived helps in understanding their original composition. Viewing them in relation to the multinational corporation makes it possible to understand their global importance in a twenty-first century *Rule of Law*.

**Keywords:** Human Rights, Corporation, State, Transcendence

## Introduction

### A Historical Context

Probably no aspect of the project to construct a global regimen of governance is more universally celebrated than is the legal instrument of *human rights*. Those rights, enshrined in a founding declaration of the *United Nations* are looked upon by the global public as an unqualified good, a mark of human progress. However, despite the favorable view held by jurist and public alike, when examined closely there is, in fact,

no settled consensus among legal scholars or political theorists concerning precisely what a *human right* is, its content, and purpose, or how it is to be defined. (Domingo 2010)

The general topic of rights, civil, property, and procedural, for example, are, of course, a main staple of both Western legal traditions, Anglophone and Civilian. Historians often trace the concept of legal rights back to ancient sources, including Plato, or to medieval writers such as Thomas Aquinas. In the modern era early figures such as Hobbes and Locke are thought to be important, as were various *Enlightenment* thinkers, including Montesquieu.

Perhaps the most widely held view in the eighteenth century was that rights either naturally inhered in all persons or they had been bestowed upon all persons by a beneficent god. However, the formulation of a concept of specifically *human rights* in current usage is of a much more recent provenance. In fact, an understanding of legal events at the time it originated provide a clue to why the *human right* came to exist as a distinct legal instrument. Such an understanding might also give some insight into what it means today. (Dworkin 2013)(Moyn 2018)

Of the many ways to understand *human rights* perhaps one of the most useful is to study them in the context of legal development from which they derived. That is, especially to view them as emerging from the interstices existing between the two primary structures for the ordering of persons and things in modern Western legal culture. First was the law-based, territorially defined, nation-state, traditionally said to have originated at Westphalia in 1648. Generally, based on explicit principles of sovereign independence. These included exclusive authority for domestic affairs, the right to conduct diplomatic relations, and to wage war. Whether taking the form of a kingdom, republic, or commonwealth, each state was recognized to have such clearly outlined authority. This explicitly defined frame of governance became so successful that in hundreds of separate iterations it would eventually come to cover nearly the entire habitable territory of the earth. (Lesaffer 2009)

However, the English were ambivalent toward the Continental innovation of the state, and following the *Glorious Revolution* in 1688, approached the problem of rule quite differently. Their new form of governance combined the outward forms of a medieval *Norman Kingship* with the closely centralized inward powers typical of modern *absolutism*. Avowedly inexplicit in nature, it was famously based on an unwritten constitution comprised of members, hereditary and professed. This organic edifice included three ruling classes of the *Royal*, *Noble*, and *Gentle*, who convened in a *Parliament* that was deemed to be *omnicompetent* in all questions legal and religious.

Until that time, Britain had only been on the periphery of European affairs. But with the overthrow of King Charles II and the installation of William of Orange, the Dutch *Stadtholder*, as King William III, the kingdom would soon be transformed. Amsterdam had been the center of worldwide commerce, but when William arrived with his

entourage of mariners, bankers and lawyers, London soon became the center of world finance and trade, as Britain soon became the pre-eminent naval power of the world. (Babington 1995)(Habermas 2008)

### **Empire and Incorporation**

Historically, Continental scholars had been an active source of legal innovation, including the nation-state. But in the nineteenth century they produced another major advance, the *Napoleonic Code* of 1804. Moreover, because their law was based in principles of logic and reason, European law could easily be adapted to purposes of overseas imperial administration. Since it also claimed to an affirmative view of human nature it could plausibly be adapted as an overlay to the native custom of distant colonies. At the same time its rationality met the needs of modern commerce.

However, the British case was quite different. The Common law, now *writ large* around the world, was still a collegial law based on the principle of consensus among its members. Its antique methods and medieval assumptions were unsuitable, not only for imperial rule. Beyond that, they lacked the principled predictability of the Civilian method, and were useless to engage the complexities of modern commercial enterprise. By the early nineteenth century the Common Law was a source of recurring legal crises in the British Empire. Nonetheless, being unconstrained by fixed principle, or rigid logic, it had the advantage of malleable adaptability. It was also receptive to borrowing from its European counterpart. (Benton 2016)

The deficiencies of English law would be greatly remedied by the Benthamite legal scholar John Austin, who spent the sabbatical year of 1827 in Germany, the center of legal scholarship in the nineteenth century. He returned to England with the doctrine of *Positivism*, along with the concept of *Abstractionism*, or *Formalism*. These would provide a great advance on medieval English practice. *Positivism* solved many philosophical problems in the application of Common law as it adopted the premise that law was the command of the sovereign, and the sovereign could be any person or group of persons able to impose its will with continuity and stability. In this Hobbesian view the workings of law were distinct from any conventional standard of fairness, or any alternative measure of right and wrong--giving rise to the idea that English law was somehow value-free in its operation. The Hegelian *Abstractionism*, on the other hand, opened an entire realm of judicial imagination, greatly expanding the scope of legal possibility. (Rumble 1985)

Then, following on Austin would be another innovation, a British counterpart to the Continental nation-state. It was the creation of Robert Lowe, an imperial pro-consul who came to be known as father of the multinational corporation. In fact, for purposes of governance at a distance his new structure had many advantages over the state. First, insulated from public view, it was free from the tumult of public politics. Along with that, not responsible for matters of public welfare and public order, it could be focused on the single purpose of enriching its shareholders. (Maloney 2005)

In certain conditions, it could operate virtually as a government to conduct diplomatic negotiation and even to wage war. But most of all it was transcendent in its composition, unimpeded by topographic barriers, geographic distance, or national boundaries. For purposes of raising capital, assembling labor, and appropriating natural resources, the multi-national corporation became the primary legal mechanism of British expansion. It also fit well into the imperial atmosphere described by A.V. Dicey as an elevated and magisterial *Rule of Law*. (Cosgrove 1980)

Viewed from the perspective of rights, the corporation was a *persona ficta*, having existence in the law as a legal personality, very much like its human counterpart. Even though it was not a human person in the biological sense, it had many of the citizen, procedural, and property rights that were held by natural humans. It could sue or be sued in a court of law. It could enter into contracts, own property, and take title to land.

But by the influence of both Austin and Lowe, this fictive being also had the potential reach of a worldwide *Leviathan*. It could be transcendent, extra-territorial, and supra-national. It was also non-moral in its actions as it was completely the insensate creature of those who owned and managed its affairs. In fact, as a legal entity it amounted to an overpowering presence. This creation combined with the premise, *Rule of Law*, based in the principle of *omnicompetence*, and backed by naval power, became a featured structure of the *Pax Britannica*. (Bell 2007)

## **An International World**

The first decade of the twentieth century marked the onset of a major transformation in Continental jurisprudence and legal philosophy. Most notable was the official promulgation, in 1900, of a new German legal system, the *Bürgerliches Gesetzbuch*, or, BGB. Long anticipated, it was the product of a century of study and deliberation. One important aspect of the BGB was that its clarity of reason and humane principles made it adaptable to a wide range of governing structures, state, kingdom, monarchy, empire, or commonwealth—as well as the potential basis for an international legal order. The obvious advantages it offered caused many of its provisions to be adopted, or received, by a variety of nations, not only in Europe, but also in South America, Africa, and Asia.

Correlate with the announcement of the BGB were the *Hague Peace Conferences* of 1899 and 1907. They brought to a successful conclusion the groundwork laid down by German American legal scholar, Francis Lieber, and were hosted by Czar Nicholas II. The hope was to provide a basis of peaceful relations among the European states. A first step in that aspiration was achieved when the conferences established the *Permanent Court of Arbitration* and the *Permanent Court of International Justice*.

But these new products of Continental jurisprudence further divided the legal world into a competition between the two Western traditions, Civilian and Anglophone. In a rapidly changing twentieth century this rivalry was of profound importance. But

discussions of legal advance were temporarily lost in the destructive conflict of what was then called *The Great War*, and later called *The First World War*. As it occurred, that war would have enormous legal consequences. (Lesaffer 2009)(Schiff 2008)

*The Great War* also brought a reaction against militarism generally, as well as the idea of imperial rule. At the same time, there was a serious drive to strengthen the right of self-determination for all peoples, including former colonial populations, in a world system based on sovereign statehood. This emerging attempt to construct a more equitable international legal order was based on the *League of Nations*, founded in 1920, and given form through the mechanisms of the new German-Swiss law.

As imperial forms of rule were falling into disfavor, Europeans were focused on developing a legal fabric in which to embed the nation-state. The purpose was to replace the catastrophes of war with diplomatic mediation and judicial arbitration. But the British looked beyond the Continent in a supranational way that was more concerned with *The Economic Consequences of the Peace*. (Keynes 2015)(Schake 2017)

Within the British realm this period marked the end of the *Pax Britannica*, and a re-conception of British holdings as no longer dependent on the Royal Navy. Instead, the British pursued the *Rule of Law* outlined by Lord Dicey. Governance of the realm would come to be primarily a judicial matter rather than a military one. In this approach the various territories would become self-governing polities within a commonwealth order centered in the mother country. In the new panorama of power, the multi-national corporation would provide a primary tissue of connection—but it lacked general authority over individual persons. (Benton 2016)(Joerges 2005)

### **Commonwealth and Consensus**

During the period between the world wars a serious friction occurred between the overlay of economic architecture and an established system of international law. The British *economistic* approach was vulnerable to critique because its legal assumptions included no necessary ideas of fairness or moral standards of right and wrong—especially in disparities of property and wealth. What the English lacked was a credible claim that their law produced a judicial good other than merely—in the Dicey approach—the imposition of its own imposed rule. Moreover, English law, as a basis of order, had fallen into disfavor; its influence being questioned by those who advocated an international system embodied in the League of Nations.

Yet, the situation was complicated much further than a mere dispute between pragmatic opportunism and principled predictability. By the mid nineteen-thirties both prevailing schools of thought were being challenged by the rise of a newly militaristic Germany. It was threatening both the *League of Nations* system and the British imperial realm. Moreover, it made this challenge, not merely on the basis of either military power or an expedient legal casuistry. The German position was

advanced instead by the convincing arguments of its widely admired legal theorist Carl Schmitt. (Byers 2003)(Schmitt 2007)

Viewed strictly from a geostrategic perspective, Britain faced a challenge, once again, to both its naval supremacy and its imperial network. But in accord with its new juridic premise, Britain engaged these questions, not in the vocabulary of militarism, but as a question of law. However, the response was not addressed according to the principles of international law, but in the form of a new legal. The instrument had recently been crafted to remedy a deficiency in the Commonwealth regimen of states and corporations. (Darwin 2016)

This new legal device had been formulated in the Sankey Committee of Parliament beginning in 1937, and first made public in the *Sankey Declaration* of 1940. That same year H.G. Wells was commissioned by the committee to publish a fuller account in a book entitled *The Rights of Man*. These were the first announcements of the idea of *human rights*. Originally, it was posed as justification for British legal authority to reach within the territorial confines of any member of the Commonwealth. But it was now being set forth as a justification to extend that authority to whatever region of the earth it saw necessary. If required, the new legal doctrine could supply a plausible legal justification for the British entry into war against Germany. Viewed as a *Positivist* premise, this had no necessary meaning in terms of any conventional standard of right or wrong. Instead, it was concerned with a *Positivist* ability to impose its legal order. (Wells 2015)(Coquilletto 1999)

The properties of this new right were especially adapted to the world of the twentieth century. First, the *human right* was unique in that it penetrated the shield of sovereignty that defined each nation-state. In other words it gave a legal basis for intervention into the internal affairs of another state—a direct contradiction of the Westphalian premise. Justification for such a move would be based on a consensus of agreement among a number of allied nations. Along with that the *human right* was only concerned with the affairs of natural persons, not incorporated, artificial persons. (Allport 2020)

In fact, it was indifferent to the multi-national corporation, having nothing to do with such an entity. Although it could fatally penetrate the shield of sovereignty, the essential characteristic of statehood, it would leave undisturbed the transcending regimen of the *persona ficta*, the corporation. As it turned out, Britain had declared war on Germany late in 1939, and was soon armed with a legal basis to convince world opinion that it was entitled to do so. (Parish 2012) (Borgwardt 2005)

THE GLOBAL AGE: Legal historians often mark the inception of a global law with events of the Nuremberg Trials that followed World War II. After the *Allied Victory* there was debate concerning the fate of political and military leaders who had brought the *Axis Powers* into war. The possibility of summary execution was rejected as having the appearance of mere retribution. Instead, it was agreed that the fate of



those leaders should be decided according to a public process of adjudication. (Taylor 1992)

But much more importantly from both a juridic and geopolitical perspective, it amounted to the establishing by precedent a new form of worldwide law. The innovation was portrayed as an advance over the fundamental assumption existing since Westphalia, that in matters of war, as in all other situations, authority over their individual citizens rested with the government of each independent state. But the new claim of non-moral *Positivist* authority meant that acts and events, even though not fitting into conventional strictures of law could—from a moral perspective--require intervention. (Moyn 2018)

Until that time the procedures of international law extended between, but did not enter within, national borders. The innovation at Nuremberg was to penetrate the sovereignty of a nation, by a supervening claim of authority based on consensus among nations. The effect, in historical terms was to posit a worldwide transcendence whereby an action could directly reach any single individuated person on earth. Viewed from the perspective of its future significance, it also established a global atmosphere that could both envelop and supersede an international system of law. Most of all, it did so on the *Positivist* assumption that authority ultimately rests with any claimant or claimants that had the capacity to enforce their judicial will. (Rafal 2006)(Malloy 2008)

The formal inception, as a permanent fixture of what would become a new global order, can be understood within the simultaneous founding of the *United Nations Organization* and the *International Monetary Fund* in 1945. Together they comprised a two layered regimen to reshape the world: an international forum for open deliberation based on the nation-state. Along with that was a body of consultation that privily directed the immanent affairs of finance and trade. Both institutions wielded persuasive power to influence legal policies in their respective spheres. This simultaneous founding filled a legal vacuum left by the war, as the great trinity of global doctrine was unfolded: The *Rule of Law* over all persons and things, the guarantee of democratic government in every nation, along with the uniform accountability for the *human rights* of every legally individuated natural human person in the world. (Cutler 2003)

These concepts not only established the legal premise for a post-war hegemonic system, they would also later become primary stated values for a regimen of global law in the twenty-first century. But there was no equivalent mechanism reaching across borders in relation to artificially created legal personalities—multinational corporations--or those who owned and managed them. The effect of this omission was to make that legal construct integral to the architecture of global governance and absolved from any potential violation of *human rights*. (Ruggie 2013)(Slobodian 2018)

Perhaps most of all the advent of the *Human Right*, as a legal instrument, was symptomatic of a time when the age of imperial militarism was merging into an era of international legalism. Or perhaps, when seen in conjunction with the multinational corporation, it represented two constituents for an entirely new structure of hegemony. That legal atmosphere of unobstructed reach would be understood primarily in terms of mathematical, theoretical, and political economics.

Yet, no matter the context, both the instrument of *Human Right* and the structure of the multinational corporation reflected elements of *omnicompetence*, *extra-territoriality*, and *collegiality* peculiar to the Common Law tradition. Along with that, the unique claim of legitimacy based on consensus among parties also reflected the pattern of a medieval guild law. For whatever lofty purpose the *Human Right*, or its derivatives, are now employed, for purposes of understanding, it is useful to examine the very practical and pragmatic reasons for which such instruments originally came into being, to examine the legal context in which they were born. (Moyn 2018)(Kennedy 2016)

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# Terrorism - A Concept Under Construction: The Use of the Term in Mexican Congressional Debates in the First Half of the XX Century

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## Abstract

The paper focuses on the perceptions of “terrorism” that Mexican politicians developed in the initial decades of the 20th century, and which definitions did emerge in the Congressional debates. The aim is to assess which events were crucial in shaping an official narrative of the phenomenon, and, in doing so, it will apply the *Foucaultian* theory, looking at the issue of discontinuity, which provides an analytical key to assess the whens and whys for the emergence of a State-centered discourse on terrorism.

**Keywords:** Institutional Narrative Terrorism, Mexican Politics, Congressional Debates

## Introduction

Historiography shows that there is **no consensus** in the conceptual **definition** of the term "**Terrorism**". The phenomenon of terrorism has, nonetheless, a common element across the different views: the use of violence.

On that regard, Max Weber's analysis about the concept of state comes to our aid: he says that there is a "**... monopoly of legitimate physical coercion, in view of the implementation of legal systems**"<sup>1</sup>. **The state is seen as the ultimate source of legitimacy for the use of physical violence.**

Mario Stoppino<sup>2</sup> considers that the use of legitimate violence relies on the political and legal order in which it is produced, according to its own historical experience.

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1 Weber, M. (1922). *Wirtschaft und Gesellschaft*. Tubingen, Mohr. (trad. it. 1974, 1° vol.). 53.

2 "Analyzing the violence exercised by the Government which in fully developed political societies is just characterized by its monopoly of «legitimate» violence, the A. examines both the ordinary use of violence by the Government, meant to strengthen the political commands, and its terroristic use, typical of some totalitarian systems where violence has the direct function to inhibit the potential opposition and the indirect one to turn passive attitudes into active adhesion to the regime. Turning then to the uses of violence in conflicts among groups, and particularly internal groups of a political system, the A. distinguishes the functions of violence in respect of the antagonistic ...". Stoppino, M. (1973). *Gli usi politici della violenza*. *Il Politico*, 445-467. [www.jstor.org/stable/43207674](http://www.jstor.org/stable/43207674). (Accessed 22 Feb. 2020).

That means that each nation-state has a different characterization of legitimate violence based on different cultural, political, economic and social principles.

This is why for almost fifty years (since nineteen seventy two -1972--) the United Nations have not been able to find a definition accepted by the representatives of all countries regarding terrorism<sup>1</sup>. That means that the particular interests of each State have prevailed.

Since the conceptualization of terrorism assumes the use of <<violence to coerce, force or persuade a "state", society or social and/or political group through acts of terror in order to reach a political end>> it is clear that we **need to study** the phenomenon on the **basis of the legal-political order** to which it refers.

These premises lead to the aim of this work: *to show the meaning of terrorism in the context in which it comes up.*

### **The historical context: Latin America and Mexico in the twentieth century**

From the mid twentieth (20<sup>th</sup>) century Latin America has been in a condition of political fragility in the context of a problematic economic situation and the generalized unrest of different social realities.

The interference of the United States in the region –over the years of the **cold war** and the **aspirations of an imperialist capitalism--** has contributed to the destabilization of different state entities, some of which of young age.

**The status quo of national and international politics** in the region clearly shows a socially and politically unstable situation. As for Mexico, the political order is rather stable, although not exempt from the influences of the authoritarian policy mentioned. After the convulsion of the Mexican Revolution in the early century, the system develops a government with a republican form with a strong Presidency.

The authoritarian turn and the centralization of the decision-making process with respect to the three branches of government, that eventually would be referred to by historians as the phenomenon of "Presidentialism", is interpreted as the failure of post-revolutionary solutions and political actions during the first half of the twentieth century. The weakness of the State is manifest in the place and role of nationalism, the function of elections and, finally, the difficulties of democratization in Mexico<sup>2</sup>.

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1 Rojas León, A. (2012). Acción, acto y fenómeno terrorista: propuesta teórico-conceptual sobre las implicaciones del terrorismo en el siglo XXI". Reflexiones. 91 (1). Universidad de Costa Rica San José, Costa Rica. 97-116. <http://www.redalyc.org/articulo.oa?id=72923937008>

2 "En la obra de (Rafael) Segovia hay un estudio temprano de la Ilustración hispánica, en Tres salvaciones del siglo XVIII español, México: Universidad Veracruzana, 1968; un incomparable estudio empírico de la cultura política mexicana: La politización del niño mexicano, México: El Colegio de México, 1975, y una serie de ensayos sobre la vida política mexicana, reunidos en Lapidaria política, México: FCE, 1996." Escalante Gonzalbo, F.(2004). Los años amargos. Pensamiento político en México a fines del siglo veinte. Historia y Política. Ideas, procesos y movimientos sociales, (11), Madrid, 2.

Since the thirties (1930's) the centralization of the executive power based on the political hegemony of the official party (PRI) had been established. This element, combined with the relative tranquility in the relations with the United States (and therefore a threat of military intervention in Mexican territory discarded), along with a situation of internal political stability, lead the Mexican government to aim at increasing the autonomy to govern<sup>1</sup>.

The political stability and the economic development that began in the forties (1940's) inhibited the sources of social conflict in the country. The lack of political opposition to the regime and a long tradition of laicity also helped to prevent the Church from taking a stance on state affairs.

A watershed moment that opens up **the reformist general aspirations** and **increases the electorate base** during the term of Adolfo Ruiz Cortines in the mid-fifties (**1953**) is given by **the constitutional reform that grants women the right to vote**<sup>2</sup>. The circulation of **communist and socialist ideas** becomes unstoppable and their bearers are the students and workers who organize themselves into **structured groups**.

Social conflicts pop up and in nineteen fifty-eight (1958) **the government dissolves a demonstration** by the teachers with a **violent action**. The unrest continues and in the spring of nineteen fifty nine (1959) the government **represses violently a demonstration** by the railway workers<sup>3</sup>. The leftist cultural ferment is fostered by a fundamental event that thrills the hearts: **the success of the Cuban revolution** gives rise to the fear, by both the national state apparatus and the United States, of spreading such a movement to Mexico.

It would be almost a decade later, on October the second (2th), nineteen sixty eight (1968), after several months of student demonstrations and strikes in schools and universities, that the irreparable occurred: the "Matanza (Slaughter) de Tlatelolco"<sup>4</sup>, in which the government of Díaz Ordaz gave orders to open fire to the students. Three years later (in 1971) the student movement would be utterly repressed, in the so-

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1 SCHIAVON, J.A. (2006). La relación especial México-Estados Unidos: Cambios y continuidades en la Guerra y Pos-Guerra Fría. CIDE. México. 137.

[https://cide.repositorioinstitucional.mx/jspui/bitstream/1011/118/1/000068956\\_documento.pdf](https://cide.repositorioinstitucional.mx/jspui/bitstream/1011/118/1/000068956_documento.pdf) (Accesed 24/02/2020)

2 On October 17, 1953, the right to vote and be voted for Mexican women was recognized. Lau Jaiven, A., & Rodríguez Bravo, R. (2017). El sufragio femenino y la Constitución de 1917. Una revisión. *Política y cultura*, (48), 57-81.

[http://www.scielo.org.mx/scielo.php?script=sci\\_arttext&pid=S0188-](http://www.scielo.org.mx/scielo.php?script=sci_arttext&pid=S0188-)

3 Ortiz, O. (1978). *La violencia en México*, (prólogo y selección), Editorial Diógenes, México.

4 Corruption and authoritarianism unleashed Mexico 68. Those who participated in the 146 days that the student movement lasted will never forget it. The massacre occurred on October 2, In Poniatowska, E. (2008), *La Matanza de Tlatelolco*, El País. AGUAYO, S. (2015). *De Tlatelolco a Ayotzinapa: Las violencias del Estado*, Editorial Ink, Mexico, <https://books.google.com.mx/books?id=GeWZCgAAQBAJ>

called "jueves de Corpus"<sup>1</sup>, when groups of armed and paramilitary youngsters got infiltrated and squashed a demonstration, so starting what would be called the era of the "dirty war".

## Methodology

In the analysis of the acts of the Debates of the Mexican Congress, we apply a Foucaultian methodological model whose validity has been proven in previous researches<sup>2</sup>. We carefully examine the documents and look for the appearance of the term "terrorism", register and count it, and then perform a statistical analysis on the acquired data. This approach has revealed its utility elsewhere<sup>3</sup>, in a quite different context, both geographically, temporally and culturally, with even some concrete and more recent applications<sup>4</sup>.

An equally interesting aspect of this is the manner in which this language has been woven into – and indeed has facilitated – a broader discourse of security within which considerable rhetorical progress has been made. Here, the present leadership appears largely to have embraced the lessons of contemporary academic debates over the concept of security<sup>5</sup>, replacing hitherto dominant conceptualizations of this term with

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1 "1971: Ocurre en México la 'matanza de Jueves de Corpus' o 'El Halconazo Un día como hoy ...'", AGENCIAS CIUDAD DE MÉXICO, domingo 10 de junio 2018, actualizada 4:44 pm, <https://www.elsiglodetorreon.com.mx/noticia/1468817.1971-ocurre-en-mexico-la-matanza-de-jueves-de-corpus-o-el-halconazo.html>

2 Semboloni L. (2013). The Use of the term "Nation" in writings by Lucas Alamán and Mariano Otero, *Storia e Futuro*, (31), Bologna. <https://storiaefuturo.eu/the-use-of-the-term-nation-in-writings-by-lucas-alaman-and-mariano-otero/>

<sup>3</sup> "The language used when referring to terrorism on one hand helps determine some of the policy options available at particular historical junctures (as the phrase 'War on Terror' exemplifies), while on the other hand stands in the way of other plausible courses of action." Richard Jackson, R. (2005) *Writing the War on Terrorism: Language, Politics and Counter-terrorism*, Manchester University Press, Manchester. Lee Jarvis, L. (2009) *Times of Terror: Discourse, Temporality and the War on Terror*, Palgrave, Basingstoke. "the impact of the war on terror on the global South, gender dimensions of terrorism, historical cases of terrorism, the cultural construction of terrorism, pathways out of terrorism, and the political causes of terrorism..." Richard Jackson. (2007). *The Case for Critical Terrorism Studies*, *European Political Science*, (6-3). <https://www.aber.ac.uk/en/media/departmental/interpol/csrvc/case-for-a-critical-terrorism-studies-richard-7.pdf>. p.6.

<sup>4</sup> "The Brown government has tended primarily towards a more sophisticated language of terrorism than one might have expected, albeit one that has still over-emphasised the threat ..." (Oral Answers to Questions — Prime Minister: Engagements (11 Jun 2008), Hansard Commons (HC) Deb, 11 June 2008, c302; Written Ministerial Statements- Monday 9 March 2009 - <https://publications.parliament.uk/pa/cm200809/cmhansrd/cm090309/wmstext/90309m0001.htm#0903091000072>

<sup>5</sup> For excellent recent overviews of the relevant debates on security, see both: Williams, P.D. (ed.) (2008). *Security Studies: An Introduction*, Routledge, London and Collins, A. (ed.) (2010). *Contemporary Security Studies (2nd Edition)*, Oxford University Press, Oxford. (2010). *Speaking of Terrorism: Gordon Brown's War of Words*, The Royal United Services Institute for Defence and Security Studies (RUSI), 12 February 2010, England. <https://rusi.org/publication/speaking-terrorism-gordon-brown%E2%80%99s-war-words>

a far more nuanced and potentially productive understanding.

The term terrorism appears, within the period examined, in twenty four (24) sessions in the debates of the Chamber of Deputies, during the year's nineteen twenty one to seventy three (1921-1973). From that total, one-third (8) are counted in a period of almost fifty (50) years (from 1921 to 1969), and the remaining two thirds (16) appear in the period of the last four years (1970-1973).

From the first pinpointed document, dating back to May 1921, it is already possible to connote the term under analysis: terrorism refers to violent acts of a rebellion against the legitimate-order system of the state, that is, it is linked to a rebellion within the state. A curious observation should be noted here, concerning another term appearing along with terrorism: "revolutionary" is to be considered with a positive connotation, given the socio-political context of the Mexican Government in that period, presenting itself as the product –on political as well as on legitimacy basis—of the Mexican Revolution.

The first document:

"El C. licenciado y diputado Octavio Paz, desempeñó durante la época de Huerta el cargo de agente del Ministerio Público adscrito al Juzgado de Distrito de Campeche en el año de 1913, cargo que le fue conferido especialmente para el proceso que se instruía ante ese Juzgado contra el gobernador **rebelde** Manuel Castilla Brito y socios por **los delitos de rebelión y conexos**, y al que fue designado el licenciado Paz por las siguientes circunstancias:... la conveniencia de nombrar un agente ....a efecto de que procediera .... a ejercitar la acción correspondiente contra los presuntos responsables de esa **rebelión**, ... Durante esa época de **terrorismo** fueron villanamente asesinados los señores José María Blengio, en unión de sus dos hijos, menores de edad, y Fernando Minet, Salvador Avila, Ramón Pineda y otros...

.... Aquellos infelices indígenas ... se trata de uno de los defensores de las masas anónimas, quedando impunes esos **crímenes**..... en nombre de la justicia y en nombre de todo, pido que me fusilen a mí y que se salve la vida de mis hijos...quedando impunes esos crímenes....

... La XXVII Legislatura del Congreso de la Unión, a iniciativa del representante ante ella por el Estado de Campeche, C. Juan Zubarán, aprobó una ley de pensión a los familiares de los **citados revolucionarios**...."<sup>1</sup>

In the next documents, we find that in 1932 the word "terrorism" is associated with violent crimes committed against civilians, in a response to internal politics in the central region of Mexico:

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1 Honorable Congreso de la Unión (HCU), Diario de los Debates (DD), Crónica Diputados(CD), Legislature XXIX - Año I - Período Extraordinario - Fecha 1921/05/11 - Número de Diario 43, cronica.diputados.gob.mx. -

<<" ... Avísanme ayer fué asesinado Facundo Calderón cuadrilla Amacuahuitl, Municipalidad de Arcelia, Edo. de Guerrero, por elementos armados Gobernador Castrejón. Suplícote interponga su valiosa influencia efecto cesen asesinados son víctimas frecuentemente pacíficos campesinos. ...

¡A base de un **terrorismo** infundado desea seguir sosteniendo su Gobierno! - Atentamente. - Diputado Rufino Salgado R."

- A la Comisión que tiene antecedentes y transcríbese al C. Presidente del Partido Nacional Revolucionario y a la Secretaría de Gobernación. ...>>1

The appearance of the term in 1942, with a world war in progress, sees it associated with the actions of the Nazi regime, thus relating the phenomenon with a foreign policy:

<<... Están reunidos ustedes esta noche para condenar las atrocidades de Hitler en Europa y ofrecer toda su asistencia a las Naciones Unidas en la guerra contra el Eje. Ustedes recordarán que el día 25 de octubre pasado los dos, el presidente Roosevelt y yo, expresamos el horror que experimentan todos los pueblos civilizados en vista de las carnicerías y el terrorismo nazi ....>>2

The document of 1958 shows a shift in the narrative of terrorism. The social discontent with the government becomes organized and the resistance begins to be violent. The intervention in the Chamber of Deputies brings up the whole social context, and terrorism is a term used to refer to the resistance to legitimate authority, and the indiscriminate use of violence:

<<... Respecto a los partidos que amenazan y quieren realizar un juego de fuerzas con su retiro, debemos recordar la forma escandalosa y grosera con que realizaron su campaña preelectoral. Campaña de insultos y calumnias, **campaña de incitación al desorden y expresión** de la más absoluta falta de respeto.

Al mismo tiempo, debemos recordar cómo las Autoridades de la República les permitieron la más amplia libertad para seguir con esa campaña de vituperios y diatribas. ... a los abusos que han intentado después de las elecciones.

No podemos dejar de mencionar, la salvaje zacapela de Guadalajara realizada por elementos de Acción Nacional, los cuales son pretexto de una refriega con elementos de la C. R. O. C. se lanzaron sobre el Palacio de Gobierno en actitud **abiertamente subversiva**.

Lapidaron ese edificio público, lanzaron cal a los ojos de los policías - acto de incalificable barbarie y aun hirieron con puñal y por la espalda a un patrullero- . Y

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1 HCU. DD. CD. (1921). Legislature XXXIV - Año II - Período Comisión Permanente - Fecha 1932/02/17 - Número de Diario 49 - [cronica.diputados.gob.mx](http://cronica.diputados.gob.mx).

2 HCU. DD. CD. (1942). Legislature XXXVIII - Año III - Período Ordinario - Fecha 1942/10/06 - Número de Diario 9 - [cronica.diputados.gob.mx](http://cronica.diputados.gob.mx).



ahora, para continuar con **actos de terrorismo** como ése, pretenden escudarse en el artículo 9o. de la Constitución, ... Por ejemplo - con toda claridad- el artículo noveno dice que no tiene derecho a deliberar una reunión armada.

También dice que no será legal la reunión en la cual se profieran injurias contra la autoridad, o en que se haga **uso de la violencia** o de las amenazas para presionar a la autoridad a resolver en el sentido en que la reunión lo desee.

Ninguna autoridad, y menos aún este Poder Legislativo, puede oponerse a la realización de asambleas de ciudadanos; pero cualquier autoridad debe - la ley se lo exige- impedir **los actos tendientes a romper el orden público y la paz social** que la patria necesita para su progreso ...>> 1

It is already clear that the established order is able to invoke the use of legitimate force to maintain public order and social peace. In any case, an internal political situation is always described.

With the entrance of Mexico to the scene of international geopolitics, in 1961 the term terrorism appears related to the description of international events, in the specific case of Gandhi's India:

<<La técnica **pacifista** de Gandhi. - ¿Cómo pudo - se ha preguntado el mundo - lograr su independencia la India como fruto supremo de la paz?

La India, antes de la libertad, era un pueblo sin esperanza y sin destino. ....

¿Cómo era posible organizar la fuerza y la inteligencia de la India en un movimiento capaz de hacer cambiar y desalojar los poderes del Imperio? ....

¿Cómo organizar el viejo sueño de libertad de la India, si todo intento de violencia o **terrorismo** aconsejado por los líderes de la vida pública de otras épocas había fracasado rotundamente?

Ghandi, que fue ... el maestro de una nueva acción política.

Su técnica, lejos de aconsejar **el uso de la fuerza de las armas**, proclamó el **uso de la fuerza de las almas**. Como usted lo ha recordado, reiteradamente, en sus discursos, señor ministro Nehru, Gandhi, entonces, dijo a su pueblo...>>2

It is associated with the use of force with the purpose of changing the established order, and in favor of a specific political choice, though it is always located in the context of internal politics in the country of reference. That particular use presents Terrorism as opposed to Pacifism.

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1 HCU. DD. CD. (1958). Legislatura XLIII - Año III - Período Comisión Permanente - Fecha 1958-07-24 - Número de Diario 36 - [cronica.diputados.gob.mx](http://cronica.diputados.gob.mx).

2 HCU. DD. CD. (1961). Legislatura XLV - Año I - Período Ordinario - Fecha 1961/11/16 - Número de Diario 31 - [cronica.diputados.gob.mx](http://cronica.diputados.gob.mx).



It will be till 1968 that the term terrorism becomes a general topic of discussion within the Congreso de la Unión (the joint sessions of the Chamber of Deputies and the Senate). The Mexican political context makes the political class to discuss, define and control the phenomenon of terrorism. The first complete document, dated December 17 of that year<sup>1</sup>, about the debate in the Chamber of Deputies on the Organic law for the courts of justice (“Ley Orgánica de los Tribunales de Justicia”), produces a frequency of 21 times of the word terrorism.

For the following period 1970-73, the term appears several times<sup>2</sup>, but 1970 is the most relevant year: the word "terrorism" appears 110 times.

It should be noted that this study is a work in progress, as it responds to a three-year research project, so this is a partial analysis of the documents found to date.

### Analysis

1. When the term "terrorism" appears in the debates of parliamentary sessions it aims at amending the criminal code with the introduction or otherwise of the crime of "terrorism". The interventions have therefore a formal and legal nature, refer to a broad spectrum of different international situations and cannot be decontextualized from the historical period the Mexican Republic is in.
2. This means above all that the very appearance of the term, almost absent in the past, is embedded in the political situation of 1968, with the strong student and popular protests that led to the fierce repression by the government on October 2nd, called "the Massacre of Tlatelolco"<sup>3</sup>.
3. Another historical factor to highlight is the Olympic Games in Mexico (starting on October 12, 1968), a sounding board and world showcase for both protesters and government actions. Unfortunately, these facts would not remain isolated, as the attacks in Munich four years later (1972) eventually revealed.

Within this context, during the debates of 1970 the political force that refers the most to the term is that of the majority, **Partido Revolucionario Institucional** (PRI). That use makes reference to foreign legislation and international law in order to support the legislative reforms in place at the national level.

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1 HCU. DD. CD. (1968). Legislatura XLVII - Año II - Período Ordinario - Fecha 19681217 - Número de Diario 29; <http://cronica.diputados.gob.mx/DDebate/47/2do/Ord/19681217.html> , 655549 bytes  
2 1970-73 - during 16 sessions, there is a frequency of 115 times.

3 On the subject see the article by Oriana Fallaci, direct testimony <http://www.orianafallaci.com/numero-42-1968/articulo.html>. In the newspaper «I've never seen anything like it. Even colleagues who made Vietnam say they have not seen anything like it. It is true that the students fired, and perhaps first, but the police did the shooting on a crowd of ten thousand people» (“olimpiadi con la paura”, Corriere della Sera, Paolo Bugialli, 1° pagina, Venerdì, 4 ottobre 1968).  
[http://archivio.corriere.it/Archivio/interface/slider\\_pagine.html#!paolo-bugialli/NobwRADghgtgpmAXGA1nAngdwPYCcAmYANGAC5wAepSYADINgDbYAEARgK4DmAlli4x5gAvGF0gA](http://archivio.corriere.it/Archivio/interface/slider_pagine.html#!paolo-bugialli/NobwRADghgtgpmAXGA1nAngdwPYCcAmYANGAC5wAepSYADINgDbYAEARgK4DmAlli4x5gAvGF0gA)

The documents also show how political forces distance themselves from the acts: in fact the Popular Socialist Party attributes the acts of terrorism to right-wing forces<sup>1</sup>.

The discussion of the Congress involves:

- a) The analysis of the penal codes of foreign states, in some of which the death penalty is used, explicitly referring to the United States of America. This fact shows the verbal tightening by Mexican politicians on the response to the phenomenon of terrorism in progress in Mexico.
- b) The approval of the Resolution "Action and general policy of the Organization with respect to acts of terrorism and in particular the kidnapping of persons and extortion related to this crime", by the Organization of American States (OEA, in spanish) in relation to the escalation of violence in Central and South America

To typify the crime of terrorism, the deputies open the discussion starting with the crime of social dissolution (article 145 of the Criminal Code)<sup>2</sup>. The abolition of this article was one of the six requests that the student movement forwarded to the government (Pliego Petitorio)<sup>3</sup>.

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1 The words of the deputy Lázaro Rubio Félix are clear: <<Los actos de terrorismo, a través de la historia, han sido provocados siempre por las fuerzas de la derecha, que se han opuesto y se oponen al progreso de los pueblos y jamás han sido realizados por las corrientes progresistas que tienen y disponen de otros medios para alcanzar sus objetivos. ... Los revolucionarios, los que manejan ideas, los que tenemos fe en el futuro de México y de la humanidad, jamás hemos recurrido al terrorismo. Nunca hemos usado estas armas a las que sólo acuden los impotentes, los frustrados y los que no tienen perspectiva histórica...>>. HCU. DD. CD., (1968). Legislatura XLVII - Año II - Período Ordinario - Fecha 19681217 - Número de Diario 47.

<http://cronica.diputados.gob.mx/DDebate/47/2do/Ord/19681217.html>

2 "Creo que debemos abordar el problema muy responsablemente. Una cuestión tan delicada, tan grave como ésta, no podemos resolverla sobre las rodillas, es preciso examinarla más detenidamente para no cometer el error gravísimo de hundir al pueblo mexicano en otros 20 prolongados años de lucha por la supresión de delitos mal configurados, como 20 años ha tenido que luchar sufriendo pérdida de vidas, de libertad, para lograr la supresión de los "delitos de disolución social." Sánchez Cárdenas miembro del PCM. HCU. DD. CD., (1970),

<http://cronica.diputados.gob.mx/DDebate/47/3er/Extra/19700724.html> (24/07/1970).

3 4 de agosto de 1968, << ... Días antes de la matanza, la organización estudiantil enlistó el pliego petitorio de sus demandas, el cual quedó oficialmente conformado el 4 de agosto de ese año. Dicho pliego estaba confirmado por seis puntos (demandas) y un séptimo transitorio.

- 1 Libertad de los presos políticos
- 2 Derogación del artículo 145 y 145 bis del Código Penal Federal
- 3 Desaparición del cuerpo de granaderos
- 4 Destitución de los jefes policiacos Luis Cueto y Raúl Mendiola, así como del teniente coronel Armando Frías
- 5 Indemnización a las familias de los muertos y de los heridos por los actos represivos
- 6 Deslinde de responsabilidades de los funcionarios involucrados en actos de violencia contra los estudiantes

Both the Socialist and the Communist parties are opposed to the policies of the PRI and that, despite the apparent satisfaction of the student movements' request regarding the derogation of article 145, in reality the government has foreseen harsher penalties for crimes that punish behaviors very similar to those qualified as social dissolution (rebellion, sedition and mutiny). If on one side the opposition raised by the **Partido Popular Socialista** concerns the excessive penalization brought about by the amendment to the Criminal Code, on the other side the Partido Acción Nacional (PAN) opposes the strong psychological connotation given to the crime of terrorism, while emphasizing the purpose of the terrorist act: to disintegrate the political and social structure of a state.

One of the declarations promoted by Preciado Hernández, one of the founding members of the PAN, expresses opposition to the definition given to terrorism contained in the proposed amendment to the Criminal Code. The definition of terrorism taken from Henry Pratt Fairchild's Dictionary of Sociology,

*"Crime against public security, consisting of the commission of acts of violence qualified by the means used, use of explosives, incendiary substances, or weapons that are normally capable of causing considerable damage to the life or integrity of persons or of any other purposeful means to cause serious damage to public services, with the purpose of disturbing public order, frightening society or certain social groups, or carrying out revenge or reprisals to achieve the disintegration of the social or political structure"*<sup>1</sup>.

referred to by the PAN deputy, defines the purpose of terrorism in the act of disintegrating the social and political structure of a state and not the definition contained in Article 139:

The proposed modification of the PAN is to delete all the terms referring to alarm and fear and to keep only "terror". It also required to delete the expression "or a group or a sector of society", letting "seriously disturb", in order to define the crime for the purpose of the terrorist act: to disintegrate the political and social structure of a state.

The final result arrives (in 1970) with the derogation of article 145, as well as the definition of the crime of Treason to the Fatherland (article 123) and finally the configuration of the crimes of Terrorism and Espionage, contained in the same section of the Criminal Code, Articles 139 and 140 respectively.

**The crimes of Terrorism and Sabotage are defined, which thus become autonomous, and distinct from the crime of Treason to the Fatherland and the crime of Social Dissolution is eliminated.** <sup>2</sup>

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1 Definition of the word terrorism from Henry Pratt Fairchild's Dictionary of Sociology. HCU. DD. CD., (1970) <http://cronica.diputados.gob.mx/DDebate/47/3er/Extra/19700724.html> (24/07/1970)

2 "Delito de Terrorismo. El Terrorismo, como su nombre lo indica, provoca un estado anímico, individual o colectivo, de miedo, espanto, pavor de un mal que amenaza o de un peligro que se teme, de

## Conclusions

The term terrorism is introduced and repeatedly mentioned in the context of the construction of a legal and formal definition, and as such, it is necessarily linked to the social effects and repercussions it inflicts. In the specific case of Mexico and its circumstances, it is worth noting that the term terrorism and the construction of the concept turn out to be relevant in the context of the quest to participate in the global politics, and therefore the need to identify the concept and definition of the phenomenon in such a way that can be shared by the majority of States in the world stage. Hence, further and deeper studies, of both political and historical nature, are needed in order to achieve a common ground for the interpretation of the anti-terrorist actions and strategies, as well as for the very meaning of terrorism. In the last decade a number of researches and papers have been carried out on the issue, mainly over the contemporary period<sup>1</sup>. The difficulty emerges though from the roots or historical origins of the “terrorism” phenomenon, as every country has its own historical experience that has yielded particular actions and institutional narratives, with their own political ideas and strategies. It is necessary, therefore, to provide a basis that allows to homogenize the institutional response given that the terrorism has become a supranational phenomenon. The present study aims at centering the attention, from a historical-political perspective, over the construction of a narrative around the concept of terrorism, an approach that has been scarcely followed by scholars despite the number of works recently published<sup>2</sup> over the subject, and that could offer new insights into the actions and strategies of each historical experience of a particular political-geographical area.

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angustia, aflicción, congoja o desesperación” This definition will be the triggering reason for the criticisms of the PAN referred to above, for which the definition of psychological damage should be subordinated to the definition of the purposes for which the crime is committed. HCU. DD. CD., (1970). <http://cronica.diputados.gob.mx/DDebate/47/3er/CPerma/19700714.html> (14/07/1970).

1 Farrell, W. R. (2019). *The U.s. Government Response To Terrorism: In Search Of An Effective Strategy*. United Kingdom: Taylor & Francis; Chenoweth E., English R., Gofas A., and Kalyvas S.. (ed.) (2019). *The Oxford Handbook of Terrorism*. OUP Oxford, United Kingdom; Salinas de Frías A. M., Samuel K., White N. (ed.) (2012). *Counter-Terrorism: International Law and Practice*, OUP Oxford, United Kingdom. Yonah A., Introduction, in *Combating Terrorism: Strategies of Ten Countries*. (2002). University of Michigan Press, United Kingdom. 1-23.

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# Correlations of Oral Hygiene and Health Behavior of Teenagers Living in the Cumulatively Disadvantaged Northern Region of Hungary

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## Abstract

**Objective:** In the present research, we aim to highlight the urgent need for prevention and health education by exploring the oral health indicators of the most deprived groups in Northern Hungary, especially in the light of the severely negative effects (pandemic) and circumstances of the past years. **Material and Method:** The study included 111 students living in Borsod-Abaúj Zemplén county with a high level of disadvantage, but studying in a secondary school in a large city, average age  $16.2 \pm 1.5$  years, gender ratio 37.3/62.7(%). We performed a dental screening, completed a questionnaire on lifestyle and health behaviour, and used Rosenberg Self-Assessment Scale, Shame Experience Scale. **Results:** Dental status of the students is poor, with many decay and few filled teeth. They consumed energy drink, alcoholic drink (strong alcohol) in high percent, and this occurs great frequency in the family. Students exercise little outside of class, do not play sports regularly, and hardly ever see their parents playing sports. Students do little physical activity outside of school, do not play sport regularly and their parents are hardly ever seen playing sport. Their feelings of shame are minimal and their self-esteem low, many have special educational needs. **Conclusion:** Together, the results can increase the separation of these social groups to an extent that is already difficult to manage even at the level of society as a whole. All of this calls for cooperation between psychopedagogues, special education teachers and health professionals.



**Keywords:** health education, oral hygiene, health behavior, disadvantaged situation, special education teacher

## Introduction

Hungarian indicators of oral health are weak. In the ranking of the countries of the European Union, we are among the lasts, both in terms of children completely caries free and DMFT<sup>1</sup> values, based on the CECD<sup>2</sup> data base (Hajdú, Kertesi,2015). This situation was further worsened by the pandemic of the last three years as is confirmed by several international studies (Hertento,2022, Sari,2022). According to the conclusions of the study, the pandemic had a predictably bad effect on the oral health, especially in case of disadvantaged parents with low income. In Hungary this is enhanced by the fact, that preventive services are underutilized in both adult and pediatric dentistry (Pinke et al,2011). That didn't improve in the last decade either, based on HBSC<sup>3</sup> 2020 data.

It is a well-known fact that social-economic background and level of education have a great influence on the state of teeth (Faragó et al,2020)(Northridge et al,2020). In our research project we tried to assess the oral health status of people living in extreme poverty/poverty, in the light of brushing teeth and eating habits and the availability of primary prevention services. We also examined the form and extent of the various health behavior risk factors in this population.

In Hungary the risk of poverty is determined on the minimum subsistence level calculations by the Central Statistics Office (KSH). We can evaluate poverty, unemployment, old age, disability, housing problems and social exclusion as a social risk, which in the long run, imposes a heavy burden on all layers of society. A uniform metric is used to measure poverty in the European Union, the so-called AROPE (At Risk of Poverty or Social Exclusion) ratio. This represents the proportion of people exposed to social exclusion based on three indicators. Among these, the most common indicator is the so called 'Relative income poverty'. This measure represents the proportion of people living in households where 'net income does not reach 60% of the median income' (Dávid et al, 2021,p.373.). The other two measures in the dimension of deprivation and work intensity, give the ratio where they are forced to give up material possessions, and how many of them are out of the labour market (KSH,2020). According to this, 17.7% of the total population of Hungary lives in poverty and social exclusion. In Northern Hungary it characterizes every fourth family. People living here are twice as deprived as the national average (Dávid et al,2021).

In addition to all this, deep poverty is characterized by low education, segregation, unemployment and the existence of large families, as well as the chance that the disadvantaged situation will reappear.<sup>1</sup>

Cserti Csapó Tibor and Orsós Anna wrote in the 2013 book 'Equal opportunities in today's Hungary', that the 'young face of poverty' is dominant among people living in deep poverty. According to their data, 30% of the poor belong to the 0-17 age group. (Cserti,

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<sup>1</sup> DMFT: the sum of the number of Decayed, Missing and Filled Teeth in relation to the population

<sup>2</sup> CECD: the Council of European Chief Dental Officers, database 2015

<sup>3</sup> HBSC: Health Behaviour in School-aged Children

Orsós,2013,p.99). All of this is supported by the research we previously conducted in the small region of Abaúj (Kőrösi, Kiss-Tóth, 2020).

These marginalised groups are particularly difficult to reach with prevention programmes, dental education, and the usual methods. Unfortunately, the average population also has difficulties in this area, despite the fact that, in addition to curing diseases, a dentist must also think about their prevention. Every doctor is also an educator, who must fulfill an important educational role during his preventive work. It is not only an opportunity, but also a legal obligation. The current health law prescribes for dentists to actively participate in health education (Health Law, 1997, CLIV,79.□(bb)).

An important tool of health education is the permanent personal communication. It is not an easy task, since the majority of dentists don't have pedagogical knowledge that would help them in this. These skills may only develop over years, but according to experience they can be improved. Health education with pedagogical methods could be applied more effectively and more widely if specially trained teachers would do it together with dentists. This is especially true for cumulatively disadvantaged groups living in extreme poverty.

However, we must not forget the responsibility of the patient: not only the care system or health educators have a serious task in this issue. If the patient often cancels the visits, skips brushing and dental care procedures, step by step, he will get closer to irrevocable damage to his teeth and alveolus. In other words, the active cooperation of the patient and the healthcare workers is essential for the preservation of health.

Traditional ways of communication and traditional educational tools can be hardly used with the studied population. All this is even more important in the light of the data, according to which, in many cases, they either have special educational needs, or they also struggle with a behavioral disorder (Shenkin,2005).

The important goal of our present research, in addition to getting to know the the oral hygiene data, is to assess with the help of Rosenberg Self-esteem Scale and the Shame Experience Scale, what is the self –evaluation and how strong is the sense of shame in the studied population. In this way, an insight is indirectly gained into the way how the professionals could inculcate the prevention approach in these groups.

As revealed in an American study (Bersell,2017), the inaccessibility of dental care in disadvantaged groups calls for urgent steps. It is primarily in the field of prevention, that can only be implemented with the involvement of prevention specialists, stronger funding and greater support from allied professions.

### **Methods and data:**

Students living in the cumulatively disadvantaged settlements of Borsod-Abaúj-Zemplén county, but studying in a high school of a big city, participated in the data collection of our research. Beyond oral hygiene data, it extends to young people's lifestyle, psychosomatic condition, self-esteem and possible sense of shame. During the research, we completed a dental screening and a questionnaire for lifestyle and health behavior, and also used the Rosenberg Self-assesment Scale (Horváth et al,2022) and the Shame Experience Scale (Vizin, 2022).

With the help of these two scales we can get to know, how young people relate to themselves and to their possibly harmful health behavior. In case of RSES scale, the higher value shows greater self-esteem, while in the Shame Experience Scale higher values indicate the presence of a higher chronic shame.

During data collection we also used the Fagerström Test for Nicotine Dependence (FTND). The Fagerström Test for Nicotine Dependence can be used to evaluate the the nicotine addiction related to smoking. FTND is scored from 0 to 10. Higher the score, graeter the chance for a physical nicotine addiction. The shorter version of FTND is the Smoking Severity Index. With this tool heavy and light smokers can be identified more precisely (Pénzes, 2022).

The screening test was done by Dr. Ildiko Faragó, in a dental chair, under well-illuminated circumstances, with single used tools.

There were no radiological examinations performed.

To survey caries prevalance, DMFT values accepted by the WHO (1997) were recorded. D: decay, M: missing, F: filled, T:teeth ,where DMFT value is the amount of decay, missing and filled teeth for the studied population.

The questionnaires in the research were used with the help of measuring commissioners.

#### *Characteristics of the sample:*

111 people participated in the study, they were on average 16.2 +/- 1.5 years old. 62.7% of them were girls and 37.3% were boys.

## Results

### Social- economic background:

The students' parents have a low-level of education. ( Figure 1.)

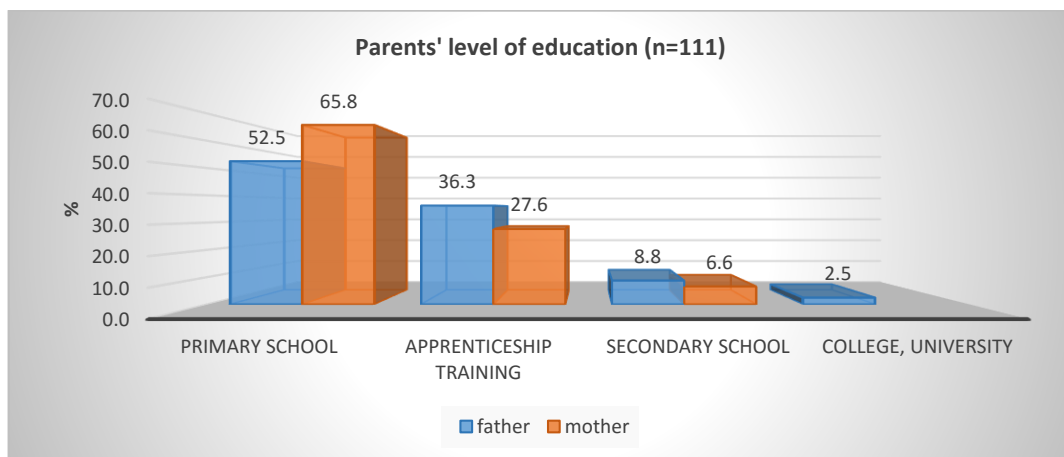


Figure 1. Parents' level of education in the study population

Based on the responses to the questionnaire, 52.5% of the fathers and 27.6% of the mothers have only primary education. 36.3% of the fathers and 27.6% of the mothers have vocational

qualifications. Significantly fewer people have a high school diploma: 8.8% of the fathers, 6.6% of the mothers. Only fathers have higher education: 2.5%.

28% of the parents do not work. They are among those with lower education.

On average the students live in a slightly larger than two -room apartment ( $x=2.2$ ). 12,8% of them live in a one-room apartment, 52.3% live in a two-room apartment, and 34.9% live with more than two rooms. On average 4.6 persons live in a household, 9.7% live in households with two people, but 50% live in households with more than 5 people. 5.6% of students live in households with more than 8 persons, but there are also students living in households with 10 people.

A student on average has 2.4 siblings. 17.3% of them have one sibling, 28% have two, but the most of them have three or more ones (48%). There are few only children among them (6.7%).

There is a weak correlation between the mother's education and the number of siblings. ( $r=-0.21$ ) Mothers with low education have more children.

The majority of bigger families live in larger apartments ( $r=0.52$ ). In the 11% of the families bringing up 3 or more children, there is no piped water. In 19% of the households there is no bathroom.

31.5% of the students don't have breakfast at home. Most of them regularly have cooked meal, but 38.1% of them eat cooked meal at home only at the weekends, and 6% of them do this very rarely. They don't really like soups (3.6%), they prefer pasta (21.6%), cooked vegetables (12.6%) and meat (13.5%).

58.1% of them consume energy drinks on a daily (33.7%) or weekly basis (26.5%). Boys and girls consume energy drinks in almost the same proportion, but boys consume a slightly higher proportion.

54.6% of the students drink alcohol with different frequencies. 27% of them consume alcohol every day, 21.6% every week, 24.3% rarely and 25.7% only at family gatherings (Figure 2).

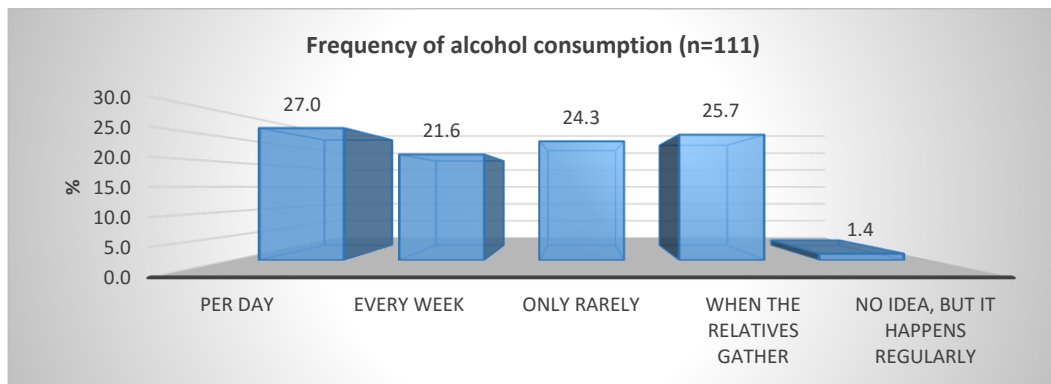


Figure 2. Frequency of alcohol consumption among examined students

There is no significant gender difference in terms of alcohol consumption, but the girls drink more ( $r=0.24$ )(Figure 3).

Pálinka, beer and whiskey are most often consumed, but several people also mentioned vodka.

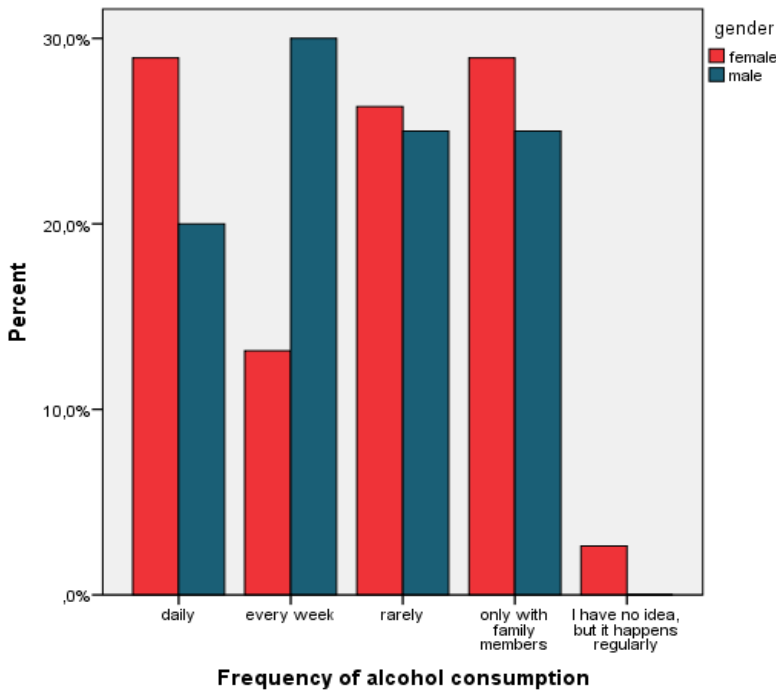


Figure 3. Frequency of alcohol consumption in relation to gender in the study population

In 23% of the answers students wrote, that their family members also consume alcohol on a regular basis.

Most of the students don't do any sports in their freetime (Figure 4.).

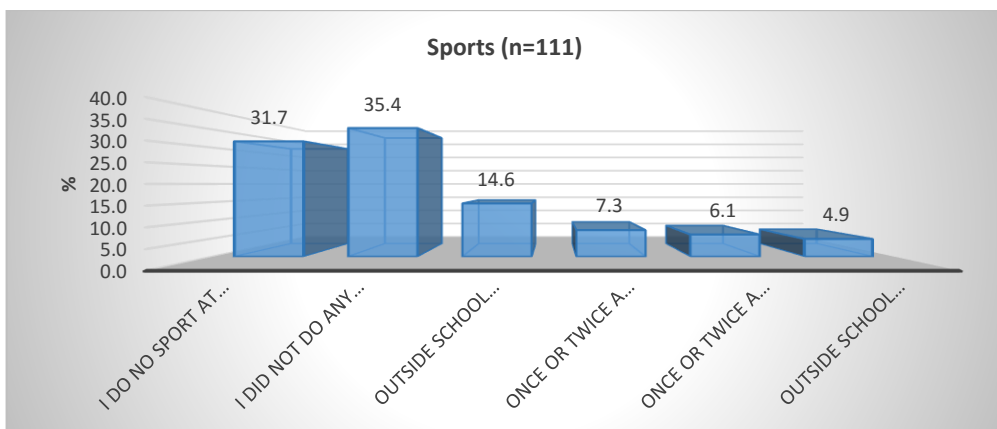


Figure 4. Free time activities, sports among examined students

Most of the students don't do any sports in their free time. 31,7 % of them don't do sports, because they are exempt from physical education. The others only occasionally do exercises

as an out-of-school activity. Boys are more active than girls. There is a weak correlation between the students' and their parents' sporting habits ( $r=0.25$ .) The students mostly play football (4.9%), ride a bike (2.7%) or go dancing (1.9%).

44.3% of the students smoke. The Fagerström Test for Nicotine Dependence can be used to evaluate the the nicotine addiction level related to smoking. This tool is scored from 0 to 10. When evaluating the results, 0-2 points show very low level of addiction, 3-4 points show low level of addiction, 5 points show medium level of addiction, 6-7 points show high level of addiction and 8-10 point show very high level of addiction. In our sample the participating smokers average score is  $6.3 \pm 2.8$ , so the students showed high level of addiction. 11.1% of smokers showed very low level of addiction, 9.3% showed low level of addiction, 13% showed medium level of addiction, 27.8% showed high level of addiction while 38.9% showed very high level of addiction.

### **Self-evaluation:**

A maximum of 40 points can be achieved on the Rosenberg self-evaluation scale. The average score of the students participating in the data collection is  $24.9 \pm 7.97$ . That means that the students' self-esteem is lower and the standard deviation is high. Lower self-esteem is not in connection with dental status ( $r=0.044$ ), and their bad teeth are not something to be ashamed of ( $r=0.018$ ). The girls' self-evaluation is lower than boys' ( $r=0.25$ ,  $p < 0.05$ ).

A maximum of 100 points can be achieved on the Shame Experience Scale. The average of that in the sample is  $52.7 \pm 17.6$ . This rate is also low. Examining the subscales, the average score for characterological shame is 25.1, the average score for behavioral shame is 20.7, and the average score for body shame is 8.7. All values of the shame scale minimally exceed the threshold criteria. In case of girls, body shame is significantly higher, than that of boys ( $r=0.27$ ;  $p < 0.046$ ), but that is not related to poor oral hygiene. The shame scale shows a moderate correlation with alcohol consumption ( $r=0.3$ ;  $p < 0.014$ ). In relation to alcohol consumption, bodyshame is the most prominent ( $r=0.31$ ;  $p < 0.012$ ).

This is followed by characterological shame, and there is a weak correlation in the behavioral dimension ( $r=0.21$ ).

### *Dental health status, DMFT values*

So far, 69 students have participated in the dental screening, but the screening process has not yet been completed. The DMFT average of the remaining teeth is  $7,2 \pm 5,7$  (mean  $\pm$  standard deviation). The minimum index is 0, the maximum is 29. In the case of many students, it can be said, that the most of his teeth are decayed. ( Figure 5.) The students have an average of  $4.8 \pm 4.3$  decayed teeth. We found a student with 20 caries. On average  $1.3 \pm 1.7$  teeth were missing (M value), and only  $0.43 \pm 0.9$  teeth were filled (F value).

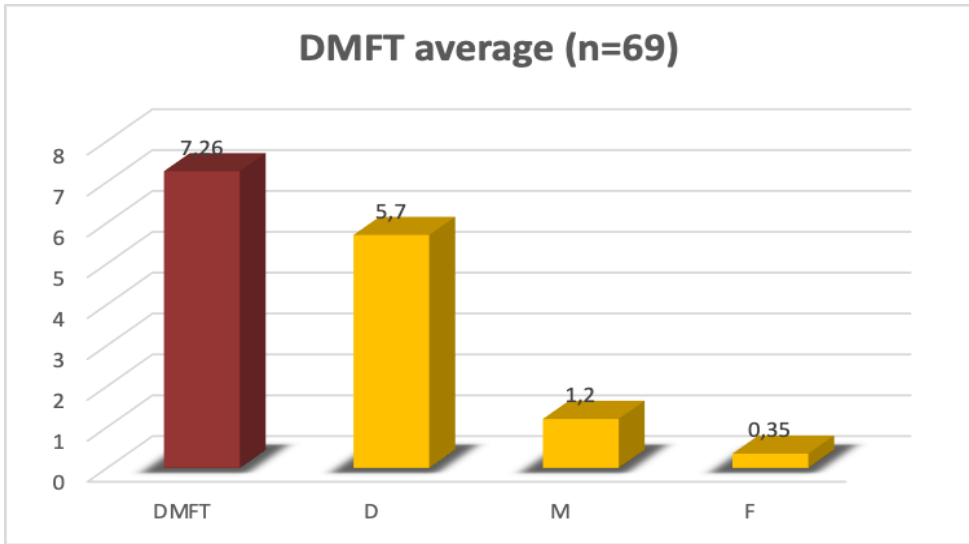


Figure 5. Dental status (Decayed 'D', Missing 'M', Filled 'F' average) in the examined population

There is no correlation between the DMFT index and gender ( $r = 0,007$ ), but boys' teeth are somewhat in worse condition than girls' ones. (Table 1.) The percentage of caries-free young people is 0.03% in our study.

DMFT n=69

| Gender | average | SD      |
|--------|---------|---------|
| girl   | 8,1290  | 6,56629 |
| boy    | 8,2222  | 5,52593 |

Table 1. DMFT value in relation to gender in the study population

The majority of the students are aware of their own dental status ( $r=0,313$ ,  $p<0,014$ ), as young people with bad teeth admit the fact, that they have bad teeth.

There is a no correlation between the frequency of alcohol consumption and DMFT values( $r=0.1$ ). But, young people who drink alcohol more often, have worse teeth.

91.6% of students have seen their parents brushing their teeth, but 8.4% of them have never seen their parents performing this activity.

35% of the students were shown the correct brushing by their parents, 15.6% were educated by the nurse, and 7% by the dental staff.

According to their own opinion, 42% of them were not educated in this issue.

## Discussion

Based on what was described in the introduction, the studied population consists of young people coming from a cumulatively disadvantaged environment, yet they continue their education in secondary school. In our present research, we focused on their oral health status, oral hygiene habits, health behavior habits and the self-evaluation, self-esteem, and shame that may be associated with these. The analysis of the existing socio-cultural background was also an important aspect in terms of their health-related behavior.

In order to reduce inequalities it is very important to improve mental and physical health. Identifying the problems can help determine the areas that need improvement for different disadvantaged groups. Special attention should be paid to a healthy lifestyle, prevention-related awareness and coping with stress.

Based on the results, we can conclude that most of the students studying here live in large families (where there are 3 or more siblings), with low-educated parents (65.8%), and a large percentage (50.5%) have more than five people living in one household. Nearly 11% of households with at least three or more children do not have running water, and it is also typical for these large families to have no bathroom (19%). In these families 28% of the parents do not work.

Educational institutions in disadvantaged regions try to organize screenings and programs in order to preserve and improve the health of young people, but the parental role is decisive in the health behavior of students (Kopkáné et al, 2020).

The best example of this is alcohol consumption: 27% of students consume alcohol daily, and 23% at family gatherings. 25.7% of family members regularly consume alcohol, while nearly 23% do not do any sports. There is a weak correlation between the students' sports activities and their parents' sports activities ( $r=0.25$ ), the students who do not exercise have parents who do not exercise either. The picture is made even worse by the fact that a large percentage of them do not do any sports because they are exempted from physical education at school.

A large percentage also consumes energy drinks on a daily basis, and in terms of smoking, in a population with an average age of 16 there is a high proportion of smokers who would not be able to give up smoking at all. The smoking rate is high among students, and their nicotine addiction is outstandingly high. According to HBSC research data, more than 12% of Hungarian high school students smoke, 57% of them daily (HBSC, 2020).

Their condition of teeth is also worse than the Hungarian average, but they typically do not feel ashamed about it (DMFT 7.2). Alcohol consumption however



is associated with shame. Smoking and alcohol are known to act as stress relievers in a population that does not have adequate strategies to cope with the difficulties of everyday life.

All these harmful health behavior habits are of particular importance in cumulatively disadvantaged groups, since we know that among them there is a higher percentage of diseases that are common in Hungary, such as cardiovascular diseases, pulmonary diseases (asthma, lung tumors), oral cavity tumors, dental problems. Cancers are among the second most common causes of death in developed countries, and their prevention is also of great importance in the oral cavity (Furka, 2022).

66.7% of the Roma population over the age of 19 already have some kind of chronic illness (Cserti, Orsós, 2013). The importance of health education and health promotion can easily be seen if we add to all of this the fact that their habits of going to the dentist are characterized by the desire to quickly eliminate pain, but not by participating in any kind of preventive activities.

### **Conclusion**

Based on our results, we can say that there is an urgent need for specially trained specialists, special pedagogues, and psychopedagogues who can significantly improve the oral hygiene attitude and mental health of these cumulatively disadvantaged young people with primary prevention tools and specific educational methods. Community health development programs that strengthen social support and, in the case of schools located in disadvantaged regions, the use of qualified professionals to reduce the problem play an important role in achieving the goals. We consider it particularly important to emphasize this in a population that, despite all efforts so far, is racing down the slope of social segregation.

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# The Covid-19 Pandemic in the Light of Populism

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## Abstract

This article discusses the negative impact of populism on covid-19. In the article we are trying to analyze the essence of populism. We believe that populism is not an ideology or a phenomenon characteristic of any part of the political spectrum. Its occurrence is the same across the political spectrum. Populism can also be linked to the covid-19 pandemic. As part of this connection, there have been several misconceptions surrounding the pandemic. These are misconceptions that deny and vulgarize the pandemic, cast doubt on the effectiveness of vaccination, cast doubt on the Sputnik V vaccine, as well as other misconceptions and untruths. The article provides a deeper analysis of these lies, and also points out the perniciousness of their connection with populist politics.

**Keywords:** populism, covid-19, misinformation, vaccination.

## Introduction

Populist politics is one of the ancient phenomena that has accompanied it since the very beginning of human history. Pluralistically oriented social concepts were opposed by others - Nazism, fascism, Marxism, Falangism, etc. Their real influence gradually decreased after the Second World War. "Within the new social movement, new ideologies emerged in the 1960s" (Rosůlek 2012, p. 162). Multiculturalism, pacifism, feminism, etc. pointed to the lack of legitimacy of existing pluralistic systems.

Historically, the original root of populism is the approach of the political elites that represented the agricultural circles of North America in the 19th century. They were concentrated in the People's Party (Rosůlek 2012, p. 163). We consider it necessary to point out that populism cannot be reduced only to ultra-right parties, since its elements are manifested in almost the entire spectrum of the political spectrum. For example, in the 1960s and 1980s, the left engaged in populist politics.

## Theoretical study of the issue

It is sometimes customary to attach a certain meaning to the term populism. Since there are no classical texts of the 20th century, or even texts recognized as key ones that could serve as a common starting point for all studies of this phenomenon, it is difficult to single out any social philosophy or ideology as the essence of populism in its purest form. Trying to find common features of populism in a motley political spectrum is really difficult. Etymologically, it is very difficult to deduce anything, except perhaps for the relatively recent People's Party from North America. Populists have influenced the later argumentation of both key political parties in the US. This party positioned itself as a mass party, voted for by declassified elements and marginalized groups. Populism did not escape the political practice of the 20th century, where it manifested itself across the entire range of the political spectrum. It cannot be described as a phenomenon of the political center, right or left.

The Latin term *populus* means "people" and was associated with the population of the Roman Empire as *populus Romanus*. This collective entity could acquire property, enter into contracts, and be appointed heir. We can meet this term in the framework of Russian political history. We are talking about the orientation of the Russian intelligence towards the Russian peasants in the sense that they will build a socialist society. An important political scientist, one of the first to describe populism, is Ernesto Laclau. He did this in his seminal work *Politics and Ideology in Marxist Theory*. "Populism links Laclau to the concept of hegemony. It begins at the moment when popular democratic elements act as antagonistic views against the ideology of the ruling bloc" (Rosůlek 2012: 166). Populism is often seen as one of the causes of military conflicts. "Military conflicts have one thing in common in terms of origin, populism" (Hikmet 2016, p. 298). Another populist theorist, Margaret Canovan, describes populism as an appeal to people who oppose established power structures and the prevailing ideas and values of society. Canovan tries to characterize populism as a form of political thinking and rhetoric containing a set of rhetorical devices and devices with one common feature - constant appeal and reference to the collective form of people (Chamulová 2009).

It is important to realize that the idea of a single, monolithic people with the same problems and preferences is misleading. We believe that the term populism cannot be considered only in the sense of a democratic state. There are many types of social organization, and democratic systems are only one part of the whole. Finally, not all countries of the world have a democratic state system. We can talk about populism both in history and in the present. We can find several attempts to characterize populism, apart from the one already mentioned, for example, the idea of direct contact between the people and the political elite without institutions that would constitute the transmission lever. Populism in this case is essentially a strategy aimed at ensuring direct contact between the elites and the masses. Some populist leaders are leaning towards a plebiscite. In principle, we can say that populism as such is not

tied to any geographical or historical context. It can appear in a different culture, as well as in a state with a different structure and historical development. Consequently, it is not ideologized, it is neither a social philosophy nor an ideological trend, it does not have a specific place in the political spectrum and is not tied to a specific political culture. "Left populism is predominant in Latin America, appears in Greece and often also in the countries of Central and Eastern Europe, respectively in the post-communist states" (Štefančík 2022, p. 42). The far-left anarchist position really works only marginally. Right-wing populism can be found in Austria, Italy, Germany, Denmark, Norway, Sweden, the Netherlands, etc. Right-wing populism is mainly focused on protecting the cultural identity of a particular culture, the concept of otherness (Štefančík 2022, p. 42). Right-wing populism has its own language, dominated by conspiracy theories that divide people into theirs and them, appeals to emotions, scandalous tendencies, adjectives expressing skin color, and so on. (Štefančík and Hvasta 2019).

The topic of covid-19 resonates around the world to this day. Although the war in Ukraine took first place in the media in the Central European space, the topic of covid-19 is still relevant. The pandemic appeared at the end of 2019 in China. "The public became more aware when the first cases of pneumonia caused by a virus of unknown origin were reported among local residents in Wuhan, a city located in Hubei province in central China, in late December 2019" (Przybyla and Bačík 2019, p. 44). If until the end of 2019 this topic was not highly relevant in the media space, then since the beginning of 2020 the topic has become the most topical in the world, which lasted until the start of the war in Ukraine. The penetration and connections of the topic of the pandemic are quite diverse. There is also a connection with ethics and social philosophy.

The covid-19 pandemic has definitely come as a big surprise to the whole world. Mainly due to the large distribution around the world. It was not a matter of spreading to several continents, the pandemic covered all continents in a short time. Some naturally isolated states have benefited from their geographical position - they have suffered only slightly. The pandemic has also affected the social sphere. Here it was reflected in the deterioration of relations at different levels. Negative economic developments are also significant. Many countries have experienced relatively significant economic downturns. Strict restrictive policies, vaccination of the majority of the population, and other measures in many states have prevented even more deaths in many states.

Today's task is to learn how to prevent a crisis and especially how to deal with a crisis in such a case. It is about eliminating mortality, as well as economic consequences. The strict lockdown was able to largely eliminate the health effects of the pandemic. The movement of goods is saved. This strategy has also been largely applied in countries that are geographically isolated or that have a policy of high closure to foreign tourists. Denmark, for example, coped well with the pandemic. In Asia, many

countries have suffered, except for states with a relatively closed foreign policy. The whole of Europe suffered greatly. The worst performers in South America were Argentina, Chile and Brazil. The situation was also bad in many African countries. The naturally geographically isolated Australia and Oceania fared relatively best. In terms of the economic situation and trade turnover, the pandemic marked a real economic downturn in many countries. International trade, tourism and, in some cases, even manufacturing has experienced declines. Uncertainty in financial and capital markets has also increased. "The measures taken to prevent the spread of the COVID-19 pandemic negatively affected the entire economy, consumption was limited, and there was a general slowdown in the economy" (Krásna 2021, p. 32).

### **Covid-19 as a topic of populist misinformation**

The underestimation of the pandemic is due to the arguments of some populist politicians. Ignoring and simplifying the pandemic is a serious problem. Basically it has two reasons: ignorance and populism. Some theorists and politicians oppose the violation of human freedom. You can ask how things are with human freedom and anti-pandemic measures. Measures against a pandemic should not be spontaneous, chaotic or determined by the arbitrary decisions of politicians. On the contrary, their introduction is due to compliance with the findings of scientific medicine. Decisions should not have political reasons and should not be associated with any clientelism. Public communication and education are also important. "The COVID-19 pandemic has made it clear that effective public health messaging is an essential component of a robust pandemic response system" (Nan, Iles and Ma 2022, p. 1).

The primary objective of restrictive measures is to protect the life and health of the population. Restriction of movement and social contacts pursues this main goal. A significant change is the increase in remote work. This form of work can have far-reaching implications.

There are certain connections between the topic of covid-19 and populism. In the countries of Central and Western Europe, parties across the political spectrum have been involved in discussions about the covid-19 pandemic. Parties at the end of this spectrum, both right and left, were no exception (Štefančík 2022, p. 16). Štefančík made an interesting argument according to which "populists consider scientists to be part of the elite, and since they do not trust the elites, they do not trust scientists either" (Štefančík 2022, p. 97). According to this author, populists do not even trust those institutions that change people's lives with measures against the pandemic. This attitude is called scientific skepticism. "Populism, associated with doubting the results of scientific research, is aimed at the scientific, research and academic elite and depicts it as opposed to ordinary, ordinary people" (Štefančík and Zamborová, 2022, p. 393). Reality is completely different. "Scientists are obliged to participate in solving problems, explain, offer ready-made solutions, advise the public and advisory bodies, guide public opinion, and prevent the spread of pseudoscience" (Lešková Blahová 2022, p. 38).



In the early months of the pandemic, it may have seemed to some that the measures against covid-19 were aimed at a fictitious pandemic. This disease has not yet become widespread. Questions arose on several fronts. Several doubts arose. The first concerned the plausibility of the danger of the covid-19 pandemic. The second was related to the effectiveness of wearing masks. The third doubt concerned the meaning of vaccination against the pandemic. It was also appropriate to ask whether these measures are contrary to human rights and freedoms. The economic aspect of the issue is also a relatively important issue. Remote work, on the one hand, makes changes in the form of exclusion of social contacts. On the other hand, remote work provides many significant opportunities for change, especially in the sense that the worker is not tied to work at the place of residence. The measures are also related to the restriction of freedom. From the point of view of liberal philosophy, this is definitely a restriction of freedom. It should be noted that the concept of freedom is also present in Spinoza, as an understanding of necessity. It is necessary to look at meaningful anti-pandemic measures as a necessity if they are implemented in close accordance with the conclusions of scientists. However, anti-pandemic measures should not be abused for the sake of senseless measures and clientelism.

The economic side of the problem is also interesting. During a pandemic, it is interesting to look at the well-known contradictions between Keynes and Friedman about government intervention in the economy. During a pandemic, such interventions are essential. The approach taken by Keynes is definitely more correct in this context. Friedman's approach in this matter would mean taking special care of his business, thus losing the holistic effect. If the state applied the Friedman approach, the economic situation would become unsustainable. Many businesses need to be rescued from the government during the pandemic crisis, without government intervention they would not have survived (Gaffová, Šatanová 2017). Reliance on the natural mechanism of the market economy, according to Friedman, would necessarily lead to the death of many enterprises that would not have a chance to survive. "With the world on the cusp of another steep recession and with an environmental catastrophe looming, we can no longer afford the luxury of an economic policy that concentrates on fighting inflation, leaves unemployment for emergency measures, and wealth and income distribution to the market." and ignores environmental issues" (Skidelski 2020, p. 345).

As we have already mentioned, populism also uses conspiracy theories in its argument. This fact is also pointed out by the philosopher Popper in *The Open Society and Its Enemies*. Popper argues that these are reminiscences of religion, which was once a near-universal explanation, especially in the context of bad events. According to Popper, religious explanations were later replaced by conspiracy explanations. Several conspiracy theories regarding the Covid-19 pandemic have been reported. For example, in Slovakia, information appeared on social networks, according to which test equipment was deliberately saturated with a pathogenic mixture. Thus, the real purpose of testing was to cause disease in the population.



Another of the problematic theories has emerged in connection with the Russian Sputnik V vaccine. There were negative statements by a Slovak doctor about this vaccine. She claimed that each bottle contains a different sample that has been tested in different countries of the world, and only the name connects them. At the same time, the aforementioned employee did not have samples from other states, so she did not have the right to such a deduction. Finally, the Sputnik V vaccine was approved in Slovakia, and citizens were able to get vaccinated with it. Although the said person found two different batches, he unduly expanded the sample of two samples into test samples distributed throughout Europe. Based on two chemical analyzes, it is not possible to draw conclusions from several dozen samples. The named vaccine was developed by a serious scientific institution with a long scientific tradition, which is part of the Russian Academy of Sciences. All professional and scientific topics were politicized in Slovakia. The result was the dismissal of the Prime Minister of the Slovak Republic and his replacement.

A fairly common conspiracy theory is that covid-19 is a media hoax. According to these statements, the covid-19 pandemic has no content. The conspirators claim that the entire real nature of the covid-19 disease does not exist and is a fabrication. They think it's a media game. The opinion that the pandemic is a fiction and does not actually exist was also expressed by some politicians. With a sharp increase in the number of cases and with the experience of lethal outcomes in everyday practice, this position of opinion has gradually become marginalized. Another relatively common belief is that a pandemic is an attempt to wipe out the number of people on the planet.

“A hugely popular conspiracy theory has been the idea that vaccination is primarily tied to the profits of pharmaceutical companies” (Štefančík 2022, p. 111). It is clear that many companies and individuals have profited from vaccination. It should be remembered that the main reason for vaccination was not financial gain. The primary reason for vaccination has been and remains the protection of the population. Many empirical studies, as well as statistical data, clearly point to the obvious positive effect of vaccines in preventing a pandemic. “Regularly updated data from the US for December 2021 shows that vaccines reduce the risk of infection by 67% and the risk of hospitalization by 85%” (Fľak 2022, p. 2). There are many scientific studies and statistical analyzes that provide real results. “In this area, sensitive and non-confrontational communication with the provision of facts is important” (Vaclaviková and Gažovičová 2021, p. 95). Real facts speak of positive results in the prevention of the pandemic, its course and symptoms.

The other side of the issue is the degree of danger of vaccination. The truth is that vaccination is not always without negative side effects. Several deaths in direct causal relationship to vaccination have been reported in Slovakia. It was a one-digit number, up to 10 people. Unfortunately, the adverse effects of vaccination also came in this form. Other adverse health effects have also been reported. Statistics from the Slovak Republic say that 1715 serious consequences of various types of covid-19 vaccines

have been registered to date. It is worth noting that of the total number of severe consequences, only 6 severe consequences are attributed to Sputnik V. Similarly, no deaths have been reported in connection with the Sputnik V vaccine. Serious side effects included: persistent increase in blood pressure (mainly in patients treated for hypertension), pre-collapse, collapse, loss of consciousness, thrombosis, allergic reactions, anaphylactic reactions, facial nerve palsy, vaccine failure, phlebothrombosis, pulmonary embolism, sudden cerebrovascular accident, thrombocytopenia (mild to severe), fibrillation, myocarditis, myocardial infarction, arthritis, pericarditis, hypertensive crisis, hearing loss, polyneuropathy, hyperthermia, epileptic seizure in patients treated for epilepsy (National Institute for Medicines Control, 2022). Much is also said about the effect on female pregnancy. "The fact is that there is a common amino acid sequence between the viral spike protein and syncytin-1 (a protein in the placenta), but it is too small to initiate an immune response that can affect pregnancy" (Saleem 2020, p. 1).

In comparison, in Slovakia 20,964 people died as a direct cause of the covid-19 pandemic, which is the size of an average regional city. This is a relatively large population. Fortunately, the percentage of deaths from the pandemic was not comparable to the cholera epidemics of the 19th century. Despite the sacrifices on the part of the vaccinated, where 7 deaths were recorded, despite some side effects, vaccination saved the lives of a large number of people.

In this regard, another misconception has appeared that vaccination is ineffective. According to this view, the overall value of vaccination is zero because vaccines were developed too quickly. This point of view simplifies the work of scientists in the field of medicine. As a counterargument, one can cite real experimental results, as well as statistical indicators (Petráš 2021; Andrews et al., 2022; Zheng et al., 2022). The vaccine reduces the risk of infection and also facilitates the course of the disease. This is an effective and fully justified tool in the fight against the covid-19 pandemic.

In connection with vaccination, there have been rumors that covid-19 vaccines change DNA. "There are other myths that this vaccine contains a tracking device and can change a person's DNA" (Saleem 2020, p. 1). The role of the vaccine is to build the immune system. With it, the body must create a sufficient amount of antibodies. The vaccine does not interact with DNA and does not have the ability to transform it in any way. It is also true that it is impossible to get sick directly from a vaccine. There were also rumors that vaccines affected blood types differently. Experiments have not confirmed this fact.

The success of general population testing remains in question. It is known that the reliability of the PCR test is close to 100%. The antigen test has a reliability of 34-80%. This depends on various factors such as the stage of the disease, the amount of virus in the sample, and the method of collecting and processing the sample. Obviously, a confidence of 50% or less refers to a result that has 2 possible values - person covid-19 positive and covid-19 negative without meaning. This means that the validity of

the antigen test is indeed questionable. According to statistics, 7,391,882 PCR tests were used in Slovakia, but as many as 44,672,712 antigen tests. Thus, the effectiveness of testing was indeed very questionable. Antigen tests have been widely used, despite the variance of significance, the lower limit of which is less than 50%. I believe that this measure has not achieved the necessary effectiveness and the expected effect. Testing has replaced strict lockdowns, resulting in unnecessary deaths.

## Conclusion

In principle, the pernicious influence of populism can be ascertained in several directions. The full extent of this influence is also having an impact in the area of covid-19. It manifested itself in the interpretation of obvious misconceptions, affecting primarily a part of the less educated population. Sharing, spreading and repeating such disinformation has very negative consequences. This increases the number of people who reject various forms of measures against the covid-19 pandemic. In principle, there are three types of nonsense spread not only by other people, but also by populists. First of all, these are the most common statements based on premises: a) the covid-19 pandemic is a hoax, it does not exist; b) the negative effects of vaccination exceed the positive ones, as a result it is harmful, c) the Sputnik B vaccine is a vaccine with a high level of unwanted side effects. All three statements are misconceptions, helped to spread by poorly informed and uninformed citizens, as well as populist politicians. According to a study (Pažitný et al. 2021; Pažitný et al. 2022), several thousand people could be saved in Slovakia if the anti-COVID policy were identical to those in Denmark. A certain share of responsibility for these deaths is also borne by populist politics (vaccinations should have been higher, a hard lockdown was introduced late, permission for weddings without a reason, politicization of the use of the Sputnik V vaccine, a false dilemma - either mass testing or strict quarantine that puts questioned the danger of a pandemic by some politicians). It is necessary that citizens trust scientists, science as a socially useful institution, and not dubious politically motivated claims.

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# Documenting Distinctive Features of Indigenous Bapedi Music

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## Abstract

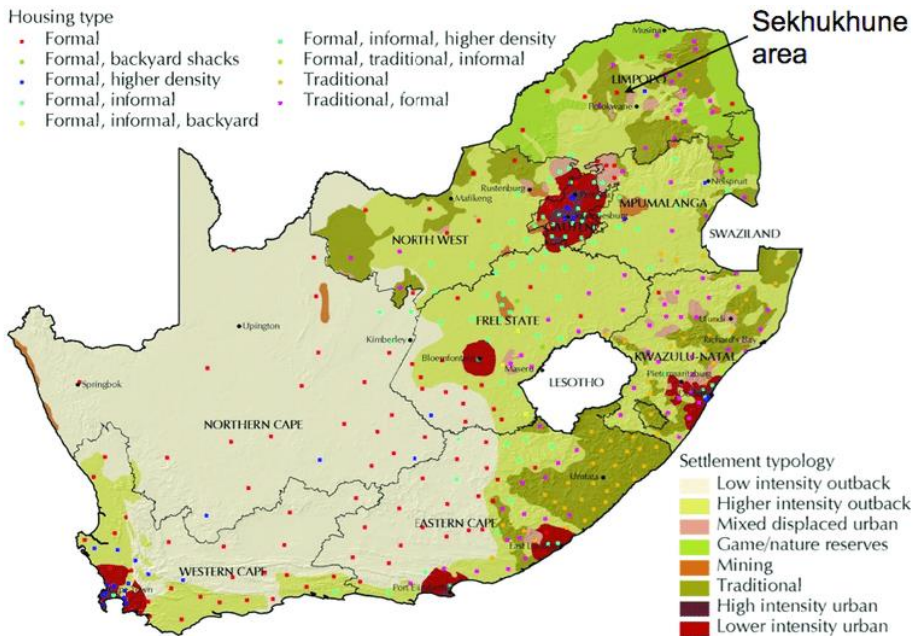
In the Bapedi music tradition, characteristics, and the role of indigenous music in the community is one area that requires scholarly attention. An investigation into the use and influence of pure, natural, and authentic indigenous music in the context of religion and wellbeing is inevitable. The purpose of this study was to investigate the significant role played by indigenous music in the daily lives of Bapedi people, as well as the characteristics of the music. To address the objectives of the study, the following primary research question was considered: what is the cultural relevance of indigenous Bapedi music? The primary sources for data collection include observations and oral interviews that were conducted through face-to-face interaction. The interviews were aimed at eliciting first-hand information on the knowledge of the subject matter. The secondary sources included among others, materials such as journal articles, books and theses, and of course personal experience. The results have shown that indigenous Bapedi music is a social activity in which everyone participates and requires coordinated cooperation. It was concluded that Bapedi people use a wide variety of sounds within a single performance. The impression created during observations and interviews was that music rhythm and percussive sounds are highly emphasized in indigenous Bapedi music.

**Keywords:** Bapedi people, indigenous music, Bapedi music tradition, religion, well-being.

## Introduction

Bapedi people are found in Limpopo Province, but a large percentage of this ethnic group is situated in Sekhukhune area (**see figure 1**). Indigenous Bapedi music is unique. Performing indigenous music and making indigenous musical instruments is an integral part of the Bapedi community and it varies not only from traditional dance group to traditional dance group but from village to village. Indigenous Bapedi music is a total art form closely linked to dance, gesture, and dramatization. It permeates Bapedi people's way of life and has a function, and a role to play in the Bapedi society. Songs are used for religious ceremonies and rituals, to teach and give guidance, to tell stories, to mark the stages of life and death, and to provide political guidance or

express discontent. They also serve to entertain and are used in ceremonial and cultural festivals. Singing, dancing, and playing indigenous Bapedi musical instruments ensure that a dynamic event transpires. The impact of the music is tantamount; the beauty of it, like African sculpture, is secondary to the primary function. Performances may be long and often involve the participation of the audience and much of it is associated with a particular dance. Historically, indigenous Bapedi music was attributed to the collective society and not to individual musicians; and this is still happening, perpetuated by traditional music practitioners in contemporary Bapedi society.



**Figure 1:** Geographical Location Map of South Africa showing Limpopo Province & Sekhukhune area.

[https://www.google.com/search?rlz=1C1CHBD\\_enZA954ZA954&q=Local+municipalities+in+Sekhukhune+District&tbm=isch&source=iu&ictx=1&vet=1&biw=1280&bih=609&dpr=15](https://www.google.com/search?rlz=1C1CHBD_enZA954ZA954&q=Local+municipalities+in+Sekhukhune+District&tbm=isch&source=iu&ictx=1&vet=1&biw=1280&bih=609&dpr=15); [accessed 07 February 2023].

### Theoretical Perspective

This study is underpinned by a Cultural Theory of Education as proposed by Frederick Gearing and his research partners (1975). The theory reflects the approach which tries to deal with most of the information which is used in the normal course of events by most of the people in a community (Gearing et al. 1975:2). The theory focuses on the development of relational competencies that are necessary to create and sustain social cohesion and growth-fostering relationships, such as the capacity to recognize and attend to the needs of others. It seeks to define heuristic concepts of culture. With



this theory, Frederick Gearing and his research partners tried of an investigation which is improbably ambitious. According to these scholars, their investigation addressed a contemporary community of some size and complexity; for example, a neighbourhood which is ethically heterogeneous and mixed in terms of economic class (1975:4). The theory also seeks to describe the community's total education structure, which is to say the full array of regularly recurring face-to-face interchanges through which all salient items from the community's full pool of cognitively organized information is regularly distributed and redistributed among the members of the community across the generations. According to these scholars, such an ambitious investigation required a team at work over some duration. Summarizing their consensus opinion, these scholars believe that cultural theory of education is far from "finished". They advocate that the cultural theory of education (in contrast to the individual empirical studies) reflects collective efforts (Gearing et al. 1975:9). Theoretically, this school of thought contributes to the notion that there is no individual who can live in isolation. This theory reminds us to belong to somewhere in the community and participate fully in any if not all cultural activities. The theory is applicable to this study because with this study, the author is trying to deal with most of the information pertaining to Bapedi music tradition. In approximation to the present study, the theory tries to create and sustain social cohesion and growth-fostering relationships, such as the capacity to recognize and attend to the needs of others. This study also addressed a contemporary Bapedi society of some size, and a complexity of different music genres found in the Bapedi society, but also described the structure of Bapedi people's indigenous music and their mode of transmission. The theory is adopted for this study, because indigenous Bapedi music is attributed to the collective society and not to individual musicians. Like the author's contention, the theory contributes to the notion of communal undertaking which promotes social cohesion, knowledge sharing and skills' transference.

### **Previous related studies**

Multiple studies have been conducted to investigate the role of music in the community (Aluede 2012; Amlor 2016; Boer & Abubakar 2014; Breidlid 2009; Demmrich 2020; Ekanem 2012; Eze & Van der Wal 2020; Flandreau 2016; Frith 2004; Idang 2015; Ikechukwu 2013; Le Roux & Sauer 2016; Luhrmann et al. 2021; Maila & Loubser 2003; Mbaegbu 2015; Mkabela 2005; Ndemanu 2018; Ruud 2013; Silverman 2018; Stevenson 2018; Teffera 2006). In particular, Idang (2015:100) opines that culture has been classified into its material and non-material aspects. He believes that while material culture refers to the visible tactile objects which man can manufacture for the purposes of human survival; non-material culture comprises of the norms and mores of the people (2015:100). Idang further postulates that culture is dynamic in the sense that it is continually changing. He is of the opinion that the value of a thing, be it an object or a belief, is normally defined as its worth (2015:100). Corroborating the above observations, Teffera (2006:44) writes that traditional musical instruments



among other things serve in the various kingdoms as court music instruments predominantly for the entertainment of the royal regalia. According to Teffera, additionally other music instruments such as gourd or calabash rattles, drums, and wooden concussion idiophones also play an important role in accompanying the flute or trumpet ensembles (2006:44). He has observed that aerophones such as closed bamboo flutes and open-ended calabash trumpets without finger holes produce a single tone so that a full melodic line will be created while playing together (2006:44). In the same vein, Ruud (2013:1) has observed that some people may sing, participate in a choir, dance to music, compose songs, play precomposed music, or play in a band as part of a reflexive strategy to improve their health and well-being. According to Ruud, music is used on a regular basis to refocus one's attention or address and align oneself with troubling memories to spark an emotional catharsis (2013:6). Ruud asserts that music therapists have traditionally resisted a concept of music as 'work' and have instead embraced more processual conceptions of music, where contextual, music-structural, and individual circumstances influence its interpretation and experience (2013:7).

One recent study showed the role played by long social connections and a pleasant interactive experience among traditional Bapedi music practitioners (Lebaka, 2023). In his study, Lebaka has observed that music is not alien or extraneous to the Bapedi people, but part of the Bapedi culture (2023:1). During his study, it has also emerged that among traditional Bapedi music practitioners, communal music-making plays a vital role in knowledge/expertise sharing, and musical creativity revolves around improvisation, recreation, and variation (2023:8).

### **Research strategy**

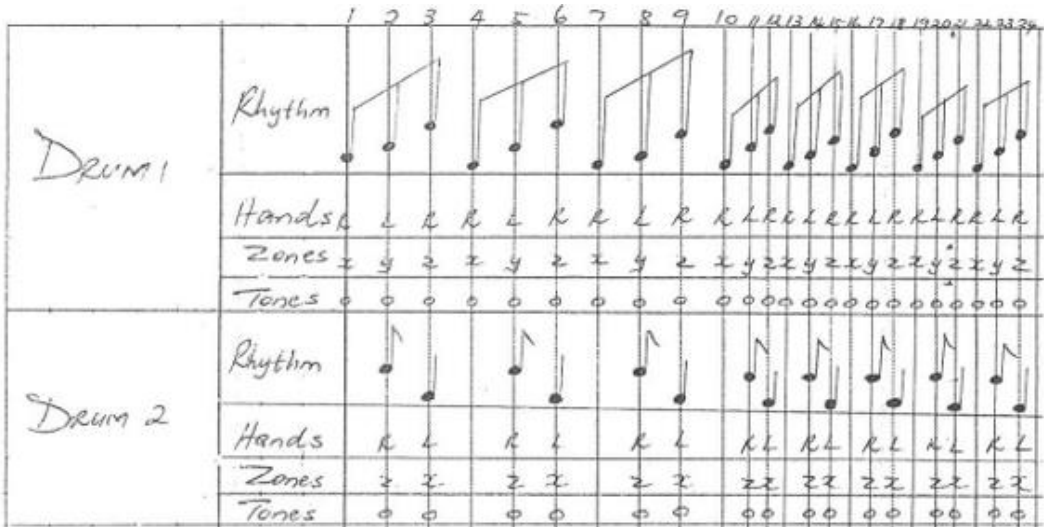
To achieve the objectives of the study, the primary sources for data collection included observations and oral interviews that were conducted through face-to-face interaction. The interviews were aimed at eliciting first-hand information on the knowledge of the subject matter. Participants were selected because of their knowledgeable and informative qualities. The secondary sources included among others, materials such as journal articles, books and theses, and of course personal experience. The main objective of this research study focused on the significant role played by indigenous music in the daily lives of Bapedi people, as well as the characteristics of the music. Therefore, special attention has been given to distinctive features of indigenous Bapedi music. Literary evidence has shown that very little has been documented about indigenous Bapedi music. To fill this gap in the literature, I aimed to study the relevance of indigenous music within Bapedi people's cultural context. My point of departure was to conduct field research in Sekhukhune area, to get first-hand information about the relevance of indigenous music in the Bapedi culture. My primary concern in this study is to appraise and reconstruct Bapedi culture and African culture in general. The study is primarily motivated by the fact

that indigenous music plays an indispensable role in the daily lives of the Bapedi people.

## Results and Discussion

### Polyrhythm

During observations and interviews, it was established that within Bapedi peoples' cultural context rhythm and percussive sounds are highly emphasized. It was further observed that several different rhythmic patterns are played at the same time and repeated over and over (see figure 2). It is worth noting that indigenous Bapedi music such as 'Salane' (see table 1), is characterized by many rhythms such as interlocking rhythms, inherent rhythms, etc. It has emerged from the interviews that *malopo* songs do not have the same ritualistic value, and the song 'Salane' is regarded by Bapedi traditional healers as the most important vehicle to communicate with their ancestors. It is a truism that these rhythms may vary from one song or performance to the other. This viewpoint is endorsed by Mbaegbu (2015:176), who notes that black Africa shows certain cultural unity. In a similar vein, Ruud (2015:7) postulates that there are many ways of conceptualizing music. He contends that different disciplines within musicology are linked through shared underlying assumptions about the very nature of music (2015:7).



The image shows a handwritten transcription of the song 'Salane'. It is organized into several horizontal sections. At the top, 'DRUM 3' is written in a large, stylized font. Below it, there are four staves labeled 'Rhythm', 'Hands R', 'Zones', and 'Tones'. The 'Rhythm' staff contains a series of notes and rests. The 'Hands R' staff contains letters 'L' and 'R' indicating hand movements. The 'Zones' staff contains numbers '1' through '4' indicating different zones. The 'Tones' staff contains circles representing tones. Below these are two more staves labeled 'FEET' and 'CLAPPING'. The 'FEET' staff contains notes and rests, and the 'CLAPPING' staff contains 'x' marks indicating clapping points. The entire transcription is written on a grid of vertical lines representing measures.

**Figure 2:** Transcription of the song 'Salane' (my transcription); drumming, dancing, and hand-clapping rhythmic patterns.

### Song text and translation

| Sepedi                                      | English   |
|---|---|
| Ngwakong wa tate go na le madulo a mantšhi  | In the house of my father, there are many dwelling seats.               |
| Rena ka Sione re ka se ye                   | We shall never go to Zion.  |
| Re ya gae ga Mmotla                         | We are going home at Mmotla's place.                                    |
| Ga Mmotla wa kgoro ya boraro                | At Mmotla's home in the third kraal                                     |
| Re ile go hwetša tatago rena                | We are going to see our father.   |
| Hlabirwa se hlwela boroko                   | Hlabirwa, who is always asleep.   |
| Sebodu sa mapompana se kae? Mogatša Pheladi | Where is the laziest person? Pheladi's husband                          |
| O phasitše bongaka, o phasitše lehu la gago | You have qualified as a traditional healer; you have passed your death. |

**Table 1:** Malopo song 'Salane'.

### Explanation of the symbolism

The song 'Salane' is only sung when problems seem particularly difficult to surmount. It is sung when traditional healers encounter problems with respect to the divination bones. In case the traditional healer cannot interpret the divination bones, or during the healing process, there is slowly recovery by the patient and during the first step (*go tielwa*) of the training session when the trainee does not fall and disclose what the personal ancestor requires from him/her. The primary purpose of singing this song is to summon the ancestors to intervene in case problems are encountered. During my field research I have observed that always when traditional healers and their trainees enter the homestead where *malopo* ritual is to be performed, this is the first song to be sung, to invite their ancestors to join them and protect them against any harmful effects which may prevail. It is also sung when the ritual is over, especially when participants disperse to their respective homes. By singing the song, both

traditional healers and their trainees invite their ancestors to protect them on their way back home. The central message of this song is that:

You have trained as a traditional healer, satisfied all the requirements as a traditional healer, and qualified as a traditional healer, but take care and look after yourself because you have qualified for your death, for other traditional healers will be jealous in case you are good, prosperous and productive, and have many patients, making a lot of money. The assumption is that they may attempt to kill you. Take care and look after yourself.

### **Call & Response**

It has emerged during the study that in the Bapedi culture, traditional music practitioners compose their indigenous music through frequent rehearsals which are open to criticism from their listening participants/audience. Much of what they do when they interact with others during communal music-making is based on call-and-response technique, as well as imitation.

According to Morogwa Angelinah Tshela (personal communication, 25 July 2016), some songs give equal or greater weight to the words than the music, while others give more attention to the structure and form of the music than the words. Based on the above observation, it is evident that during communal music-making, the context of music-making whereby call-and-response pattern is employed, is a natural way of combining enjoyment with education.

In the Bapedi culture, personification is so common that it has become a common place expression in everyday language of the society. In this culture, indigenous songs are characterized by a call and response singing technique pattern. The chorus is mainly done by all participants (respondents), the soloist exclusive, but some villagers attend many rehearsals and performances during social, cultural, and ritual ceremonies and can also join in the chorus. Villagers mainly support the singers and dancers by hand clapping.

### **Repetition**

During interviews and observations, it was established that indigenous Bapedi music is repetitive. A large percentage of the songs have short phrases (**see table 2**), and very easy to memorise. The repetitive, structured, often danced –with sounds of music are found in almost every society – along with language. There is something deeply human about music, but deeply cultural about it as well. Congruent to the above observations, Demmrich (2020:36) writes that monotony, repetition, and simplicity of the ideally purely instrumental music – as we know from drumming, gonging, or clapping – stimulate neuropsychological processes (theta brain waves), which in turn elicit religious experience. Demmrich further notes that in contrast, vocals and especially meaningful words are seen as an intellectual stimulation that can disrupt religious experience during music listening (2020:37). In his view, a

disruption due to less repetition and simplicity can also occur during Christian organ music, which can stimulate religious experience only slightly among church-socialized individuals (2020:37).

### Song text and translation

| Sepedi                     | English                            |
|----------------------------|------------------------------------|
| Ba bolaile Mmangakane      | They have killed Mmangakane.       |
| Mosadi o moso, moloi       | A black woman who is a witch.      |
| Lentsu la ka ke makgwakgwa | My voice is not clear.             |
| Le gana ge ke goeletša     | I am unable to call louder.        |
| Mmangakane moloi           | Mmangakane, you are a witch woman. |

**Table 3:** *Malopo* song ‘*Mmangakane*’.

### Explanation of the symbolism

The song ‘*Mmangakane*’ is dramatic. The singers (traditional healers and their trainees) feel bewildered and lonely. They think of all their loved ones, within and outside the family circle. They are lamenting that when they call their ancestors, their voices are not clear. They are frustrated because they cannot call louder and seemingly the ancestors cannot hear their call. The message put across here is that they feel lonely because all their loved ones from both immediate and extended families have passed on. They are earnestly appealing to their ancestors to bring them back, unfortunately ancestors cannot hear them as their voices are not clear and not audible enough for the ancestors to come to their rescue.

### Improvisation

After interacting with the traditional Bapedi musical practitioners, I have no reason to doubt that Bapedi people tend not to be interested in any music which lacks improvisation. Seemingly, the rhythm is in their blood. They like movement, moving to music and cannot sing or play instruments without moving to the music. It has emerged from this study that participants are not interested in any music genre whereby their creativity and innovation is suppressed. During observations, it was evident that within Bapedi people’s cultural context, participating actively in music making, when needed, enables the participants understand Bapedi reed pipes’ music artistically and contextually (Lebaka 2017:145). It was further observed that Bapedi reed pipes’ music as a living art form, it is largely dependent on improvisation, re-creation, and variation (**see photo 1**). These observations are endorsed by Teffera (2006:39), by asserting that the use of the hocket technique is very important in constructing a complete melodic line. According to Teffera, the hoquet style in combination with the creation of polyphonic and polyrhythmic patterns is widely spread and applied in East African aerophone ensemble performances, as well as in other instrumental and vocal music practices of East African traditional music (2006:39).



**Photo 1**

Reed pipes' players, on their own, drawing upon their creative intelligence, use improvisation, re-creation, variation, and gestures to make their performances impressive (Ga-Marodi village, 20.10.2007), Photographer: Jukka Louhivuori (Lebaka 2017:145).

### **Drumming/Hand clapping**

In the Bapedi culture, like in African culture, the drum is generally regarded as the heart of the community. It is the most significant instrument as it reflects people's moods and emotions, and its rhythm holds dancers together. Indigenous Bapedi music like African music, is founded on drumming, accompanied by handclapping, and sometimes replaced by handclapping (**see photo 2**).



**Photo 2**

*Mathasana* (trainees) playing the drums placed between and held by the legs; Photographer: Morakeng Edward Kenneth Lebaka (Researcher); Place: Kotsiri



village; Schoonoord area (Greater Sekhukhune District Municipality); Date: 22 July 1998.

During my research study of indigenous musics of all cultures in South Africa, I observed exceptional characteristic of the Ndebele music tradition, whereby drumming is replaced by a whistle to regulate the beat or tempo. Sharing insightful information about drumming in East African courts, Teffera (2006:37) writes that predominantly, drum sets have intensively been used in many East African courts. According to Teffera, apart from their use as typical signal instruments for transmitting messages to the masses (for example in the kingdom of Buganda in Uganda), their presence in almost all musical events has always been very common (2006:37). Furthermore, he states that using drumming to accompany songs and dances, processions, state proclamations, and royal coronations has been a very common practice (2006:37). In the same vein, Ruud (2013:6) observes that it seems that music is used on a regular basis to refocus one's attention or address and align oneself with troubling memories to spark an emotional catharsis. Ruud reminds us that music offers itself as a mirror of an inner state and thus help the person to recognize, identify, distinguish, and finally tolerate the emotion that was produced in his/her interaction with the music (2013:9). He believes that music is used in the everyday life to regulate, maintain, and improve health (2013:10).

### **Democratic**

During the study, it was noticeable that in the Bapedi culture, music is a social activity in which almost everyone participates. Within Bapedi people's cultural context, it is democratic. Democracy implies the government of the people by the people and with the people. That simply implies that indigenous Bapedi music is the music of the people by the people and with the people. Indigenous Bapedi music is often collaborative and requires coordinated cooperation, in which participants belong to "constituencies" that are not similar but complementary. These observations are endorsed by Le Roux and Sauer (2016:165), who posit that music can be viewed as a metaphor for wholeness, symbolizing restoration, transcendence and relationships.

### **Melody**

From the cultural perspective of the Bapedi people, music highlights African values with various traditions accompanied by a melody. Many events of importance are celebrated with music, whether it is a marriage, a birth, or a ceremonial rite passage. There are songs that accompany grinding of corns, digging, chopping, and harvesting. There are songs of praise and criticism, and songs recounting history. As a result, music is often performed outdoors, in the streets, courtyards or village squares. Traditional Bapedi music practitioners use a wide variety of sounds within a single performance. A singer may shift from an open relaxed tone to one that is tighter and more constricted. Supporting the above views, Mbaegbu (2015:177) is of the opinion that the term 'music' means sounds made by playing instruments or 'singing'.

According to Mbaegbu (2015:177) African music also includes any sound produced by the Africans with their mouths popularly known as the 'African voices' (2015:177). He further opines that the most important thing about any type of African music is that it has beauty of form and is intended to communicate some emotion (2015:177). He is convinced that music is not alien or extraneous to the African, but part of their culture (2015:177).

## Emotions

During observations and interviews, it was interesting to learn that indigenous Bapedi music can also tap into empathy inducing emotions that are assumed to be felt by the performers. This is supported by literary evidence that 'music with a fast tempo has been found to evoke positive emotions, such as happiness, excitement, delight, and liveliness, while music with slow tempo evokes negative emotions, such as sadness, depression and gravity' (Ruud 2013:7). Ruud (2013:9) states that music is very helpful in the emotional work that is necessary to integrate feelings of loss with other concomitant emotions. He is of the opinion that the impact of musically induced emotions is important (2013:9). In his view, research on music and emotion points to an element of emotional contagion when listening to or playing music (2013:9). In agreement with Ruud, Demmrich (2020:36) notes that people can cope with existential fear by identifying themselves with the two cultural symbol systems, music, and religion, since they represent a continuity of their own belief system beyond the limits of their own personal existence. Attesting to the above viewpoints, Le Roux and Sauer (2016:162), note that a whole person has physical, emotional, social, and spiritual dimensions. They believe that emotions are often mediators of spiritual awareness (2016:164).

## Ululation

It is worthwhile to mention here that ululation is one of the most familiar sounds in the Bapedi music tradition; a wailing or high cry formed with the mouth and tongue that changes between two or three notes and is used to show emotion at a ceremony. Singers will sometimes whisper, hum, grunt, yodel, shout and even imitate animal noises. It is noticeable that indigenous Bapedi music also combines aspects of dancing and playing instruments that are interwoven into the fabric of life. For example, the core of *malopo* rituals is vigorous dancing motivated by ululation. Spectators or audience ululate in support of ancestor worship and indeed men will not execute this, it is specifically meant for women.

## Cycles

During observations it was evident that much of indigenous Bapedi music is circular (see figure 3). This circular concept of time ultimately defines a structural set. The set represents a structural module from which the entire performance is derived. The performance consists of a steady ostinato framework of multi-concentric rhythms on which various manipulations of the set are realized by a leader (e.g., a lead drummer).



It is in these complex structural manipulations (against a background of a steady ostinato referent) that Bapedi music tradition finds its finest rhythmic qualities. During observations and interviews, it was also established that most of indigenous Bapedi songs are short and repetitive (see table 3), and the melodic phrases are mostly repeated in a cyclic form. Tones an interval of a fifth apart (i.e., that have a kind of tonic dominant relationship or ‘soh-doh’ relationship) were often heard almost in all the songs, produced by beating on the drums. This tonal relationship is expressed in the notation, by placing the drum pitches on two different visual levels. An example of such drumming patterns heard at Ga-Maloma village (Schoonoord) area is the following:

Example of drumming patterns

Name of the song: ‘Šibišana Mašabela’.

Form number of the cycle:

14: 3+3+3+ [3+2]

The image shows a handwritten transcription of the song 'Šibišana Mašabela'. It consists of several horizontal lines representing different rhythmic elements over 14 measures. The top line is a melody line with notes. Below it is a 'DRUM' section with two levels of notes. The 'Feet' section shows a sequence of 'R' and 'L' for right and left foot. The 'CLAPPING' section shows 'x' marks for clapping. The bottom line shows 'Clapping patterns in conventional notation' with notes and rests.

**Figure 3:** Transcription of the song ‘Šibišana Mašabela’ (my transcription); drumming, dancing, and hand-clapping rhythmic patterns.

Song text and translation

| Sepedi                             | English   |
|------------------------------------|---|
| Šibišana Mašabela                  | Šibišana Mašabela                                 |
| Ke moswa Mmakwapa                  | I am the youth called Mmakwapa                    |
| Ba re ka re ka bitša ga ba nkarabe | I call to my ancestors, and there is no response. |
| Badimo ba mphuraletše              | Ancestors are angry with me.                      |

**Table 3:** Malopo song ‘Šibišana Mašabela’.

## Explanation of the symbolism

The song *Šibišane Mašabela* is sung during the first step (*go tielwa*). It is performed as a call to the ancestors to inform the patient (*lethasana*) of their demands. It is at this stage that the patient must disclose to the traditional healer what the personal ancestor expects from him/her. For example, a goat or cow with specific colour. In case some *malopo* songs are sung and there is no response from the personal ancestor, then this song is sung. In case disclosure fails, the last song to be sung will be 'Salane'. Performing this song guarantees that the patient will fall and disclose what the ancestors are demanding from him/her. Seemingly, 'Salane' is the most appropriate song to summon the ancestors especially when problems seem particularly difficult to surmount.

## Concluding Thoughts

The results have shown that indigenous Bapedi music is a social activity in which everyone participates and requires coordinated cooperation. It was concluded that Bapedi people use a wide variety of sounds within a single performance. The impression created during observations and interviews was that music rhythm and percussive sounds are highly emphasized in indigenous Bapedi music. It was further observed that participants and observers learn more quickly and with less effort when they are enjoying themselves. Based on the research findings of this study, it is evident that in the Bapedi society, the transmission of knowledge with special reference to indigenous music is centred on a systematic aural-oral learning progression.

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# **Service Related Competences: Education Practices in the Republic of North Macedonia**

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## **Abstract**

This paper presents research on service related competences in Republic of North Macedonia. This research was conducted as part of Erasmus+ CBHE project entitled "Enhancing and validating service related competences in versatile learning environments in Western Balkan universities (e-Viva)". Innovations and development of new technologies including automation of manufacturing processes cause paradigm shift in business models in manufacturing sector while service sector emerges as potential for economic growth by absorbing more labour and offering diverse services. Thus, development of service related competences is an important issue for overall development of service sector. Assessment of service related competences in South East Europe aimed at the identification, analysis and description of current education programmes and practices relating to service orientation with focus on the interface between formal and informal learning in the higher education sector and possible connections to validation practices in relation to EQF, NQFs and the related instruments (ECTS, ECVET and EUROPASS).

*Method:* Results of desk research, online questionnaire results and results of interviews with stakeholders (one-to-one or focus group) as well as interpretation of needs analysis in North Macedonia are elaborated and presented in this paper.

The results of this project and research show that significant attention is devoted to development of competences in service sector in North Macedonia. The findings indicate that respondents/parties are aware about the positive aspects of the “Service Related Competences”, especially regarding the professional, career development, and employment prospects. There is a need of online courses where basic theoretical concepts should be presented, and then, in combination with practical learning, the same should be exercised and learned how to be used in practice.

**Keywords:** Service, Competences, Education, Validation, Entrepreneurship, North Macedonia

## Introduction

Structural change in the economy is an inevitable concomitant of economic growth. Its impact is visible, not least, in the shifting employment and value-added shares of the different sectors of the economy. In the early phases of economic growth, the expansion of the industrial sector dominates. However, its dominance is soon contested by the service sector. In fact, by the end of the twentieth century, there is no advanced economy in which the service sector has not absorbed the largest share of employment and value added (see, e.g., Schettkat, 2007). This transformation often described as the rise of the “service economy” – has since long been noted and addressed in economics (see, e.g., Fourastié 1952, Chenery 1960, Kuznets 1971, Pasinetti 1993). Nonetheless, the causes and contingencies are still not entirely clear.

The service economy is usually associated with tourism, education, insurance, financial services, retail, health or similar, but also the products themselves recently have growing service component, enabling modern product-service system.

Analysts of the contemporary political economy of advanced industrial nations have largely neglected the role of the service economy in determining labour market outcomes and policy trade-offs. An important exception is Iversen and Wren (1998), wherein the concept of a ‘trilemma’ is developed in showing how the shift to employment in services creates new trade-offs between inequality, unemployment, and budgetary restraints.

During last decades number of manufacturers at that list is decreasing, while the number of service companies is increasing, clearly showing growing relative importance of service-oriented economy. GDP percentage made up by service

economy is very high in the most developed countries; example is Hong Kong with even 95%. Service economy requests very different competences of labourers and leaders. Regarding leadership, the Hong Kong Institute of Service Leadership and Management, highlighted 25 principles valid for the service economy (e.g. principle of 15 min of leadership, principle of self-leadership, and other), actually defining needs for different and upgraded education for future service economy employees (Shek et al., 2015).

Interestingly, a similar clustering of countries holds when we examine service-sector employment trends for high skill workers. Anglo-American states have high levels of private service sector employment and high inequality among high-skilled workers. Scandinavian states have high levels of skilled public-sector employment and more wage compression among high-skilled workers. Finally, Continental countries have both restricted high-skill service sector employment and sustained wage compression. However, the theoretical mechanism developed by Iversen and Wren to explain cross-national differences in the employment and wage inequality of low-productivity workers does not give us much purchase in explaining these similar patterns among high-skilled workers. Whereas wage compression at the bottom end of the wage distribution presents the threat of unemployment, wage compression at the top end has no such influence indeed firms would be happy to employ skilled workers for wages significantly below their marginal product. In particular, so-called 'FIRE' services (finance, insurance, real estate) are high value added and have seen a large increase in their share of the workforce in many OECD countries over the past few decades. Other less productive services have also increased their share of the workforce, including retail and catering (largely low productivity) and social services (often public or non-profit and consequently with unclear levels of productivity). There is a strong demand for college-educated workers not only from the dynamic sectors, which rely on the ability of employees to perform non-routine cognitive tasks (Autor, Levy, and Murnance, 2001) but also from a host of non-dynamic sectors which either focus on providing social services or public administration. Turning to labour supply, the incentive of graduates to pursue employment in either dynamic or non-dynamic services depends on the differential wages and benefits offered in these different professions and on the overall level of wage compression in the economy. Consequently, different institutional environments may channel university graduates into different areas of the service sector. In particular, where graduates must repay fees they will be more likely to seek employment in dynamic service sectors with less wage compression.

Modern economy is more and more characterized by the development of service economy, and that process is even checked for the relationship to innovation processes. "Servitisation" process is evident not only in developed economies, but also in transitional and countries in development. Many countries are also showing that enhanced innovation can be associated with the increasing participation of the service economy, supported with the technical and technological progress, underlining ICT (Gryczka, 2017). Service economy adapts the most rapidly to changes at the modern market and moreover has the potential to absorb labourers not needed any more in manufacturing. Labour need transformations in last decades, that were decreasing the number of agricultural employments but also later the industrial employments, found new employments mostly in the service economy, leading to modern society as a service-oriented economy (Cioban, 2014).

All of these is bringing more and more attention to development of service related competences at university graduates. The publication of Georgetown University very attractively titled "The Economy Goes to College - The Hidden Promise of Higher Education in the Post-Industrial Service Economy", underlines that the US economy transformation from industrial to a post-industrial economy was followed with labourers increased skill levels requested. US economy focus changed from manufacturing to the delivery of variety services like finance and business services, healthcare and education, or lately IT services. From 1947 to 2011 share of employments in production industries dropped from more than 40% to less than 15%, but that requested also a shift in education of new employees that are mostly engaged in service economy (Carnevale and Rose, 2015).

This was the origin for considerations of the eViva project partners to apply for the Erasmus+ CBHE project aiming to build capacities at partner countries' universities to include both formal and informal training for students, targeting achievement of specific service economy-oriented competences at graduates. Consortium led by European University of Tirana, with partner institutions from Albania, Austria, Bosnia and Herzegovina, Germany, Kosovo, Montenegro, North Macedonia, Portugal and Serbia recognized the need for previously described upgrade of their study programmes and applied for a project titled "Enhancing and validating service related competences in versatile learning environments in Western Balkan universities (e-Viva)". Later approved project as its first activity had national gaps assessments for the countries of Western Balkans, actually doing deep research on service related competences education practices in South East Europe universities (and thus finding what needs still to be brought into practice).



As is generally known, in the countries of South East Europe, in accordance with the trends of economic development, university curricula are also being developed. This means that in the faculties for the study of engineering disciplines, areas/subjects are being developed that give students learning outcomes related to the development of service related competences.

Consequently, education for acquiring service-oriented competences has recently been acquired at engineering faculties, in addition to the formal form, especially intensively through informal education. Within these forms, students acquire knowledge related to development: communication, creativity, critical thinking, leadership, problem-solving skills, teamwork skills, vision development, planning and management, initiative, perseverance, perceiving opportunities, etc. (Bacigulapo et al., 2016). In this way, the countries of South East Europe join the generally accepted global trend of developing service-oriented competences through different types of education (Nair et al., 2013). In addition, service-oriented competences are also, in addition to formal and informal education, developed through the forms of so-called, lifelong learning, which has recently become especially important in the countries of Southeast Europe (Sitthisak et al., 2007).

In the third trimester of 2020, the active population in Macedonia numbered 958,770 persons, of which 759,445 were employed and 199,325 unemployed. The service sector employs half of the employed population, followed by industry and construction (27%) and agriculture (24%). Over 99% of the total number of companies are small and medium-sized enterprises, contributing with more than 76% benefit [State Statistical Office of RNM, 2020]. According to the activity of the companies, the larger part of the Foreign Direct Investment (FDI), or around 59.3 million euros, out of the total FDI for the January – June 2020 period, which was 327.57 million euros [Economic Chamber of the RM, White book 2019] was invested in the service sector.

The Employment Agency of the Republic of Macedonia conducts an analysis of the skill needs on the labour market once a year. The survey research for the Analysis of the Skill Needs on the Labour Market provides useful short-term indicators of employers' expectations regarding new employments and the skills required in order to be more competitive on the labour market [Employment Agency of the RM, Skopje 2019].

On the other hand, the Law on Public Sector Employees in the Republic of North Macedonia mentions the Principle of Service Orientation. On article 8/2, is explicitly mentioned: “public sector employees are service-oriented, i.e. active, innovative,

cooperative and flexible towards efficient and effective application of the parties' rights and interests, bearing in mind the public interest. (3) Public sector employees are obliged to provide proper referral of all parties to the competent services towards application of their rights and the realization of their interests. Consequently, almost all public institutions include this principle in their acts/statutes.

Many training providers, i.e. providers of non-formal learning operate in North Macedonia. However, there is no single register consolidating all of them. Although the Adult Education Centre can issue certificates in informal learning, still, most providers lack certification and are not obliged to have since uncertified trainings are also recognized as relevant references in business.

The collaboration between the business sector and higher education in North Macedonia resulted with the establishment of Technology Parks. Technology Parks are venues designed and organized to support innovations usually functioning within universities, also known as research parks or science parks. These institutions are intended to support university (student) innovations, as well as outside ideas aiming towards creating a highly developed technological society.

Learning Technologies in the sense of supporting learning at work and the application of blended technologies are not present as a specific strategic direction in education policy in RNM. However, in the last decade there have been several projects in higher and high school education promoting these. The entire education system, particularly high school and higher education underwent program reforms, now created according to learning outcome-based approach. Still, industry maintains the opinion that graduates are difficult to employ due to the problematic adjustability to the working environment and the slow transfer of knowledge and skills in the real working environment. The technical faculties offer several e-learning courses for students intending to familiarize themselves with the use of information and mobile technologies in specific areas.

The law requires practical lessons in high school and higher education (internship), however legal provisions, particularly in higher education, lack sufficient and clear definition of internship thus preventing students from achieving actual results in such lessons. None of the higher education institutions or high schools offer distance-learning programs. None of the universities offers 5A level programs. Only one five level program was detected offering a high school diploma in artisanship, the result of a collaboration between a vocational high school and a chamber of commerce.

The verification process of adult education programs (non-formal learning programs) offering qualifications or partial qualifications began in 2012 in RNM. In addition, since 2014, 35 individual programs for acquiring specific knowledge, skills and competences have been verified. Currently, there are 77 verified providers of non-formal training authorized to issue certificates recognized by the state. Regarding the requirements for special knowledge and skills potential candidates with higher degree of education should possess, the research revealed that employers mostly emphasize the requirement of speaking a foreign language (English, German, Italian), basic computer applications knowledge (MS Office, Auto Cad). Additionally, advanced knowledge and skills in the field of information technology (server administrator, CISCO, Java programmer, Oracle) are preferable. Among other skills, particularly emphasized are communication skills, ambition, responsibility, confidentiality, precision, teamwork, and data entry, reading skills, flexibility, marketing skills, and managing skill.

The Adult Education Centre has been working on creating a Validation of Non-formal and Informal Learning system (VINFL) in Macedonia since 2014. So far, this has resulted in the preparation of several documents, staff training, and the development of legislation for the validation process.

The Macedonian Qualifications Framework (MQF) aims to improve the education and training system by applying an outcome-based approach, to alleviate the access to learning in every context and make the results clear for each citizen, to raise the general level of qualifications of the entire population and strengthen the link between qualifications and employment opportunities. With the adoption of the Law on the National Qualifications Framework in 2013, and the appointment of an official representative as a full member of the European Qualifications Framework Advisory Group, the country obliged to harmonize the MQF with the European Qualifications Framework (EQF).

According to the European Training Foundation, North Macedonia is making strong progress in education. The ETF has been supporting and advising the government and local stakeholders in cooperation with the EU and other donors on a range of issues (ETF, August 2021). These include implementing qualifications reform, reviewing the VET financing framework, establishing Regional VET Centres, mapping developments in work-based learning, refining the employment strategic framework and enhancing skills intelligence gathering to better link VET and labour market demand.

Methodology (Century Gothic, 16 pt)

Research methodology was developed in order to identify, analyse and describe the state of art in education programmes and in practice related to service orientation. The focus was on the interface between formal and informal learning in the higher education sector and possible connections to validation practices in relation to EQF, NQFs and the related instruments - ECTS, ECVET and EUROPASS (eViva project, 2019).

The purpose of the survey was (eViva project, 2019)

Report which backs up the REBUS approach and project setting.

Needs analysis underlining the REBUS concept that shall be developed within the project.

Entrance to educational stakeholders and employers and discuss the significance of the results making comparisons with previously published work.

The output of the survey was planned to be (eViva project, 2019):

- Report which gives a good reason for our eViva approach and project setting.
- Needs analysis underlining the eViva concept that will be developed within the project.
- Entrance to educational stakeholders and business sector

Survey was employed on the following target groups:

- Educational stakeholders
- Potential employers (enterprises, NGOs, public employers, industries)
- Learners (students/learners in formal education)

The content of the service related competences survey was (eViva project, 2019):

- Level of awareness about these competences among the target groups
- Rating of the importance of these competences for target groups
- More detailed idea which sub-competences are considered being important in a service rendering enterprise/sector
- The content of the survey was to identify how these competences can be acquired

Research framework implemented in eViva consisted of three parts:

- Desk research
- Online questionnaire

- Interview with stakeholders (substantiating the online questions) either in individual interviews or in focus group interviews

Desk research consisted of four parts:

- Service related competences in practice
- Service related competences in higher education and continuing professional development
- Learning technologies and blended learning in higher education
- Job related competences, informal learning and validation
- Each part of the desk research consisted of set of questions. Each partner performed desk research, and afterwards partners from each country created national desk research

Online questionnaire consisted of six parts:

- Target group
- Valuing the importance of the service related competences
- Acquisition of service related competences
- Validation of service related competences
- Digital learning
- Future communication details
- Partners from each country made national analysis of answers on online questionnaire
- Interviews were conducted as either individual interviews or focus group interviews. Each partner country institution performed interviews separately. Interview consisted of five parts. Each part included a set of questions as guidelines for the interview

The parts of the interview were:

- General demand for education on service related competences
- Stakeholders support
- Provision of service related competences education
- Methodology (learning location and technologies blend of different learning modalities and blended learning aspects)
- Validation and assessment of service related competences

At the end partner, country institutions made national report, which included desk research, analysis of results of the online questionnaire and interview reports as well

as interpretation of research and needs analysis. Based on national reports from all partner countries transnational report was created.

## Results

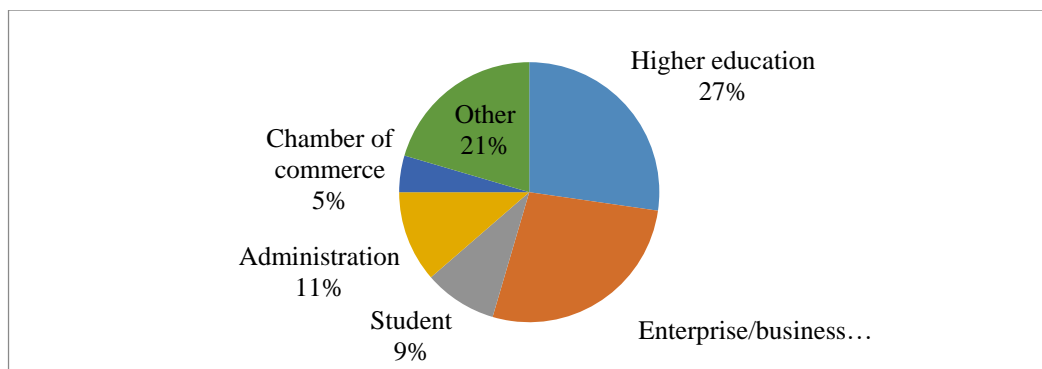
The research about the status of service related competences in North Macedonia was performed by representatives of the Mother Teresa University (MTU) and the Institute for Sociological, Political and Juridical Research (ISPPJ), University "Ss. Cyril and Methodius" in Skopje.

This research provided answers to numerous questions regarding the current state of service related competences in North Macedonia, needs and opportunities for their development, as well as questions regarding validation of these competences and conditions for their development. Desk research shows that significant attention is devoted to development of competences in service sector in North Macedonia.

The aim of the online research was to understand how familiar stakeholders in Higher Education (e.g. professionals as well as students) are with the concept of the Service Economy and Service Related Competences in connection with web-based learning environments as well as with approaches and instruments for validation of learning outcomes in their practice.

In the online research a total number of N=44 respondents completed questionnaire from Republic of North Macedonia, or 9,93% from the total number of respondents from all countries involved in the project (total N=443. The Macedonian research sample (N=44) broken down according to demographic traits included female (33) 75.00% and male (11) 25.00%.

The respondents belonged to the following age groups: <30 years (29,55%), 30-40 years (34,09%), 41-50 years (20,45%), 51-60 years (6,82%) and >60 years (9,09%).

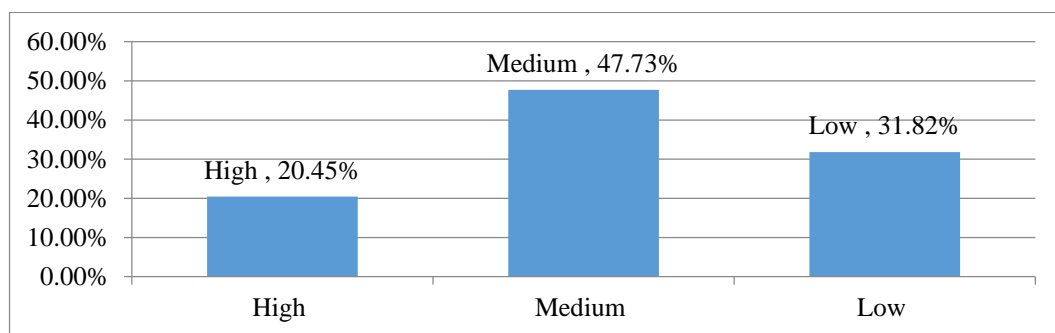


**Figure N01:** Research sample description by employment/education status

According to the employment and educational status, the respondents are divided as following: Higher education representatives (N=12) 27,27%, Enterprise/business representatives (N=12) 27,27%, HE Students (N=4) 9,09%, Administration (N=5) 11,36%, Chambers of commerce (N=2) 4,55%, Other: primary and secondary education representatives, NGO sector representatives, employers' organizations representatives (N=9) 20,45%.

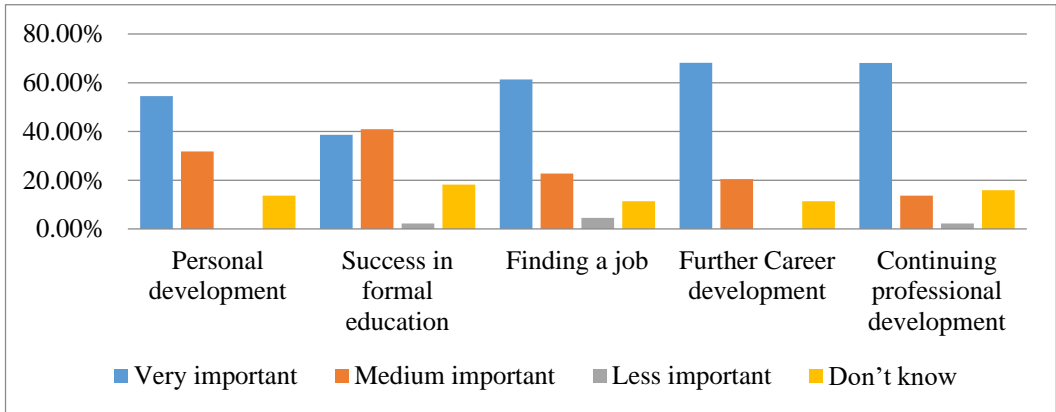
### Descriptive data analysis

The first thematic question was oriented toward the knowledge about the topic and it was formulated as follows: "How would you rate your knowledge on the concept of Service Related Competences?" Almost half of the respondents (47,73%) said that they have medium knowledge of the concept, 31,82%, have low knowledge, and only 20,45% have high knowledge about the concept Service Related Competences.

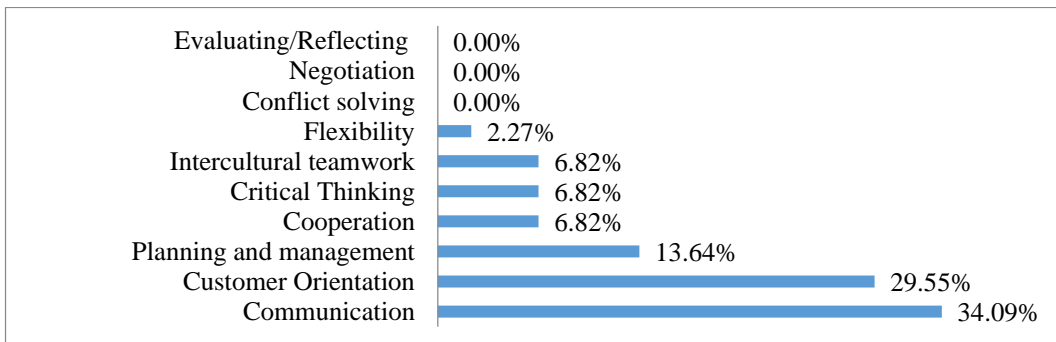


**Figure 1.** Knowledge of respondents about the concept of service related competences

The second thematic question was about the importance of the concept of "Service Related Competences" for different aspects of life especially professional part of the life. The respondents think that "Service Related Competences" are very important for "Further Career development" (68,18%) and with the same percent for "Continuing professional development" (68,18%), than for "Finding a job" (61,36%), "Personal development" (54,55%) and at least they opted for "Success in formal education" (38,64%). The choice of answers was mostly in ranges of very important and medium important, only less than 5% of answers was in the column less important only for options: "Finding a job" (4,55%) and in "Success in formal education" and "Continuing professional development" with same percent (2,27%).



**Figure 2:** The rate of importance of Service Related Competences



**Figure 3:** The aspects and competences consider most important for persons who are “service related”

According the results, from individuals who are “service related” it is expected to have high levels of positive aspects and competences as they are communication (1<sup>st</sup> place), customer orientation (2<sup>nd</sup> place) and planning and management (3<sup>rd</sup> place). It is interesting finding that flexibility is chosen in a very low percentage (2.27%) and conflict solving, negotiation and evaluation/reflecting were not selected at all.

In the third section, the respondents were asked for their opinion about how/where the Service Related Competences can be acquired in the best way.



**Table 1.** In which formal educational domain service related competences are best acquired

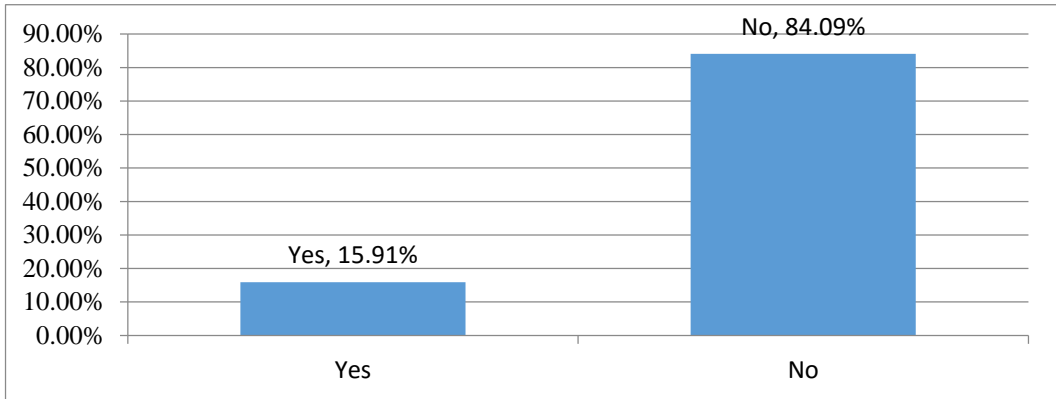
|                                   | Very important (%) | Med important (%) | Less important (%) | Don't know (%) |
|-----------------------------------|--------------------|-------------------|--------------------|----------------|
| School education                  | 31,82              | 43,18             | 18,18              | 1,2            |
| Adult education                   | 45,45              | 43,18             | 6,82               | 2,3            |
| Vocational Education and Training | 72,73              | 18,18             | 4,55               | 1,8            |
| Higher education                  | 54,55              | 38,64             | 2,7                | 1,1            |

According to the results, respondents think that vocational education and training is most important for acquiring Service Related Competences, on the second place is higher education, on the third place is adult education, and at the fourth place are school education. If we add the number of answers very important and medium important, we can see from the results that internships or traineeships and mobility were rated slightly higher than workplace or voluntary work.

**Table 2.** In which informal learning context service related competences are best acquired

|                                | Very important (%) | Medium important (%) | Less important (%) | Don't know (%) |
|--------------------------------|--------------------|----------------------|--------------------|----------------|
| In mobility                    | 45,45              | 36,36                | 4,55               | 13,64          |
| Voluntary work                 | 29,55              | 54,55                | 4,55               | 11,36          |
| At the workplace               | 65,91              | 22,73                | 4,55               | 6,82           |
| In internships or traineeships | 56,82              | 31,82                | 4,55               | 6,82           |

Regarding the informal learning context, the results indicate that the workplace and the internships/traineeships are considered as more important for acquiring Service Related Competences, then the mobility and voluntary work.



**Figure 4.** Awareness of respondents about the learning programmes or activities for promoting the acquisition of service related competences

On a question whether they are aware about the learning programmes or activities for promoting the acquisition of service related competences (Figure 3), overwhelming majority respondents answered No (84.09 %).

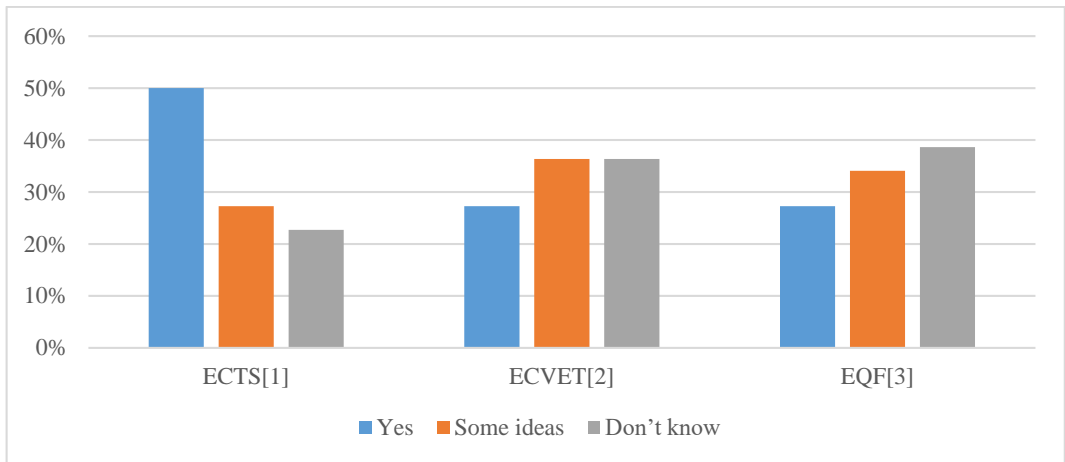
**Table 3.** Validation of service related competences

|            | Do you have an idea about the validation of these competences? (%) | Do you consider the validation of competences as important? (%) | Do you know approaches for validating service related competences? (%) |
|------------|--|---|--|
| Yes        | 18.18  | 82  | 18   |
| No         | 82   | 0,00  | 82   |
| Don't know | 38.64  | 16  | 0,00   |

Last set of questions in online questionnaire was related to the means of validation of service related competences (Table 3). While 18.8 % of respondents answered (Table 3) that they are somewhat familiar with the concept of validation of these competences, 38.64 % stated that they have no idea.

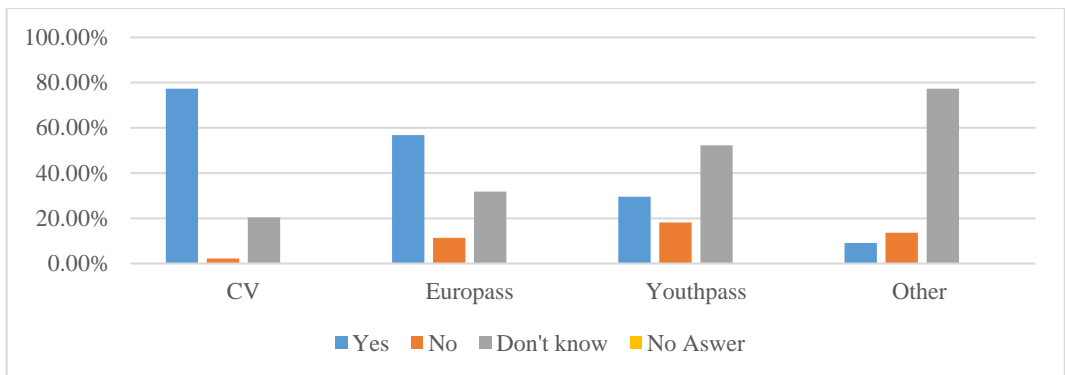
At the same time, majority of respondents (82%) answered that they consider validation important, while only 0.00% consider it not important and 16 % did not know. Most indicative was the answer to the question whether the respondents are

aware of any approach or tool for validating service related competences. Overwhelming majority (82%) answered that they never heard of any such approach.



**Figure N° 5:** Familiarity on instruments

Given the figure above, among 44 participants to this survey in North Macedonia 50% of knew about ECTS while 27.27 % had some ideas about it. 22.73 % did not have any knowledge about ECTS. Regarding ECVET just 27.27% knew about it while 36.36% had some ideas and the rest of 36.36% did not know about ECVET. EQF is among less known instruments, 38.64% of participants did not know about it while 34.09% had some ideas, 27.27% of participants knew about it.



**Figure N° 6:** Allocation of proofs of Service-Related Competences

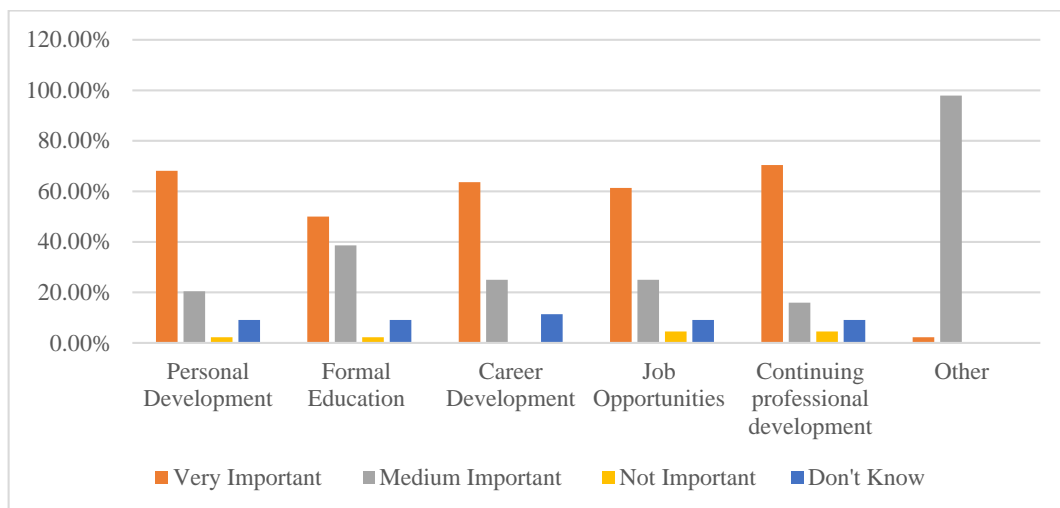
77.27% of Macedonian respondents answered to allocate proofs of Service Related Competences on their CV, while 2.27% responded no to the same question. On the

other hand, 20.45% did not know whether they would allocate Service Related Competences to their CV or not.

In comparison to CV, 56.82% of respondents answered to allocate their proofs of Service Related competences to on their EUROPASS 11.36% answered negatively while 31.82% did not know whether they would allocate proofs of Service Related Competences on their EUROPASS.

On the question whether participants of the eViva survey would allocate their proofs of Service Related Competences on their Youthpass 29.55% said yes while 18.18 % not and over half of respondents, more specifically 52.27% did not know the answer about this question.

9.09% of respondents would allocate proofs of service related competences somewhere else. While 13.64% answered to not allocate this proofs somewhere else. 77.27% percent of participants of the survey did not know whether they would allocate this proof somewhere else.



**Figure N<sup>o</sup> 7:** The importance of the validation of competence

Chart above shows that 68.18% of surveyed Macedonians considered validation of competences very important for personal development while 20.45% considered moderately important. 2.27% considered validation of competences not important. Among respondents, 9.09% did not know whether validation of competences is important or not.

Half of the surveyed participants from North Macedonia considered validation of competences very important for formal education while 38.64 considered moderately

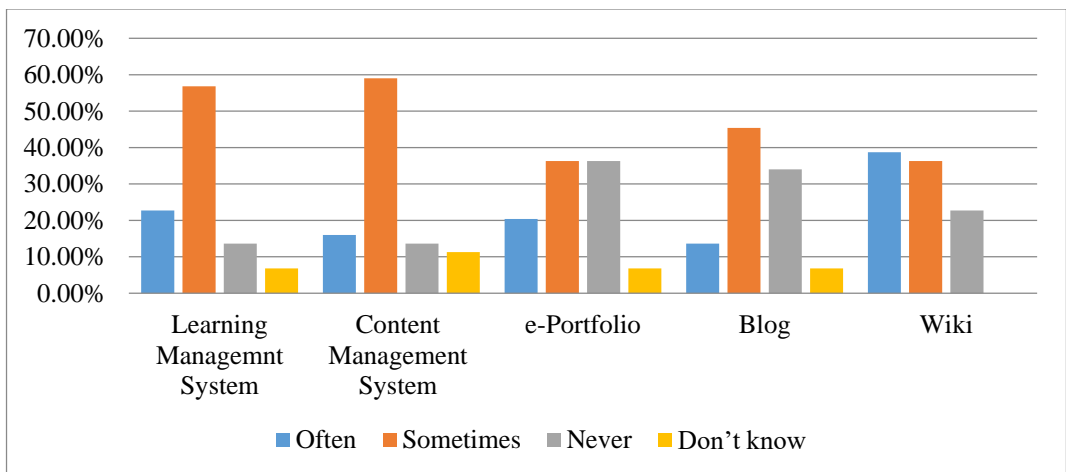
important while 1 responded or 2.27% considered validation of competences for formal education not important at all. 9.09% did not know the answer of whether validation of competences it is important or not for formal education.

According to the results 63.64% of respondents considered very important validation of competences for career developments. 25% considered moderately important while 11.36% did not know whether validation of competences is important for career development.

Validation of competences for job opportunities is considered very important for 61.36% of surveyed participants from North Macedonia. 25% consider this matter moderately important while 4.55% of the respondents did not find important validation of competences for Job Opportunities. Furthermore 9.09% of responded to not know if validation of competences is important or not for job opportunities.

The fifth thematic question was related towards the digital learning, and the respondents were asked whether they use digital learning (e-learning/blended learning) in their university, educational organization, etc. The majority of the respondents (61.3%) replied that they are using digital learning, while 38.7% replied that they are not using digital learning in their institutions.

Furthermore, in this thematic part the respondents have been asked how often they worked with web-based learning tools and instruments in their personal or professional life. According the data received the majority of respondents often uses Wiki web-tool (38.7%), LMS (22.7%) and e-Portfolio (20.4%). It is evident that choice of answers was mostly in ranges of “sometimes” and “never”.



**Figure 8:** Web-based learning tools and instruments

The chart above brings data on the question whether they are familiar with open learning system that connect with validation. It is evident that the majority of the respondents are not familiar with the web-aided system (63.6%) and 36.3% responded that they do not know about this system.

The majority of the respondents (61.3%) consider that using Open learning system is useful, while 34 % do not know and 4.5% considered that is not useful the usage of the OLS.

### Qualitative results

In regard to the topic two focus groups have been conducted. The interview guidelines were identical and standardized for all partners involved in the E-VIVA project. Besides moderators/members of the E-VIVA project team, respondents include the following persons/representatives (presented in the report with unique codes): A - Administration; B1 - Business; B2 - Business; P - Professor in higher education; S - Student; S1- Student1; S2- Student.

Regarding the question on how do you understand the concept of the Service Economy and Service Related Competences, various answers have been received. Despite of being a teacher, student or business, many of the interviewees agree on the fact that service economy is related to that typology of economy where most important economic activities are based in services. Anyway, they do not exclude the manufacturing of goods as part of the system as well. On the other hand, even though they could not answer properly about service related competences, they argument this is due the fact there is very little efforts to introduce and adopt service related competencies to the new generations. They consider service related competences as competences that a country or an individual requires to perform in order to commit intangible outputs. Competences adopted with the new economic conditions in order to provide what is mostly required services. Moreover, the respondents were not able to specify clear definition of service related competences. They all agree that service related competences are the knowledge that graduated students/pupils should have obtained because of the education process, which will help them to accommodate fast to the working organization and to the work/employment, as well as to establish appropriate relationships with the customers. Additionally, they all agree that there is no direct demand for service related competencies in the public and the private sector as well, but there is a great need.

In order to attract greater attention for the subject of service economy and service oriented competences in RNM, the cooperation between education sector and

business has to be maintained on a continuous basis, and through partnership relation, especially in high schools and higher education. In their opinion, this partnership has to begin already during preparation of educational programs. Then, a consolidated approach should be designed during internship and mentorship in the organization. Moreover, according to the participants, both Governmental and Non-Governmental institutions should be engaged in promoting the impact of these competences, furthermore they should give incentives to increase awareness and especially, to the youth as a long term sustainable development. The representative from academia highlights the role of HEI in this regard. They all agree there are many tools to be used for promotion, with particular emphasis in the role of social media, which can be considered, be the main channel for distributing information on the perspectives of Services related competences and other marketing tools such.

The respondents consider that there is a lack of entrepreneurial education in the country. Although there are courses for entrepreneurship in secondary and higher education, they are unpractical and not related to the real business. One positive example are school contests for entrepreneurial ideas. The lack of entrepreneurs is not only because of educational system, but also of the social environment of the country (political and economic). The unstable environment affects the shortage of entrepreneurs to a large degree, and because of that leads to absence of the need for service related competences.

The role of Chambers of Commerce is considered as very important in supporting and implementation of the concept of service related competences in the educational process. It is stressed that the chambers of commerce should establish stronger relationship with educational sector to promote this concept, through organizing joint conferences and education of their own members. When it comes to introduction of the service oriented competences in the national legislation, the opinions of the respondents were somewhat divided, because, in their opinion, legal obligations would not help a lot. When it comes to internship all respondents, agree that it should be better regulated in the respective laws. The current regulation does not suite the needs of the practice.

The business sector representative criticized the academic educational and training programs. Respondents agree that the business sector can contribute to training in service related competencies by means of scholarships, accepting pupils/students for practical work/internship. These efforts should be rewarded with certain benefits for the business e.g tax relieves/exemption.



Related to the question on how can stakeholders of government and administration, in particular education policy institutions, provide better educational approaches related to Service Related Competences, all of the participants expressed that the most important part is to understand the urge of updating educational curriculums. Additionally, integrating the same ones with countries that have been successful in transforming their educational system towards today's needs. The representative from administration suggests that consultants and specialists of the field should be hired in order to bring new policies that would result on improving current educational approaches. Respondents stressed that relating theory with practice in the higher education programs is a significant problem. Business representatives consider that the cooperation with professors is good, but it is difficult to come to common solutions when it comes to programs for training or education, which they need the most for the real business/work practice. Regardless of the existence of entrepreneurship courses in the educational process, the quality of knowledge depends primarily from the manner in which the professor presents the contents of the course to students/pupils. The courses are currently designed without any practice or practical learning. Students are not sufficiently motivated for these courses and gain little knowledge because of non-existing instructions for practical activities in managing/dealing with business, lack of contact of the contents and the way of communicating them with the real sector.

The need for integration of programs with the practice is more than obvious. Respondents gave several positive examples of foreign non-governmental organizations and their programs, and foreign investors they consider good. Their examples can be used in future. Respondents stressed that there is a lot to be learn from foreign investors in the country and that cooperation with them is needed, both for the government (policymakers) and for education sector.

Focus group participants expressed that an actual lack of entrepreneurship in all programmes at HEI is the mind-set to satisfy customers need and later on to calculate risks and profits. The understanding of the definition, the impact of entrepreneurship in many of the challenges that the country faces such as unemployment, brain drain, social inclusion etc. might be a good start for change. Most of them think there is a total lack when it comes to the presence of a design thinking approach to integrate the customers in the product and service creation.

When participants have been asked where the learning should take place, they mainly answered that the best location to learn SRC are Higher education institutions, VET Schools, NGOs, Training Centres, Business premises, International mobility

institutions, etc. Moreover, the interviewees think that better success can be achieved if the theory can be combined with practice.

Respondents agree that in this type of programs a combination of different learning modalities should be used. For example: case studies, role playing games, simulations, clinical teaching with experts from the business, field work where students will be faced with real tasks and problems, e-learning, etc. In order for this approach to be implemented, respondents stressed that the mentor system in the practical teaching should be improved (similar or same as in dual studies).

Respondents consider that information technology can and should be used for learning of service-oriented competences. There is a need of online courses where basic theoretical concepts should be presented, and then, in combination with practical learning, the same should be exercised and learned how to be used in practice. Nevertheless, no one from the respondents did not know to point out at least one learning technology specifically. Respondents favours practical learning. Practical learning via direct contact and communication with clients, teamwork, workshops with discussions, and work on specific cases are considered as most useful methods for acquiring service-oriented competences.

In regard to customer relation and for service creation and rendering, the participants in the focus group stressed mainly in client orientation, communication, flexibility and the aspect of problem solving and networking is considered important as well. Additionally, all participants share the opinion that leadership and project management do not have significant influence for service orientation to clients.

Related to the question on assessing Service related competences, the respondents consider the methods of direct testing, testing with simulation and testing in real situation (on desk) to be as most important for assessment of service oriented competences.

The professionals from Higher education thinks that the competences should be certified in long and short term. In short term, by archiving important assessment documents as a proof of the knowledge acquired; in long term by following and validating the level of applicability of competences. Meanwhile the representative from the administration thinks that if there are any proofs on learning or training competences would be include on individuals CV.

Related to the validation framework, many respondents were not aware of any validation framework. The administrative and the HE teachers mentioned the following two validation frameworks: EntreComp: The Entrepreneurship

Competence Framework, which offers a tool to improve the entrepreneurial capacity of European citizens and organisations and European Qualifications Framework.

## **Conclusion**

After a detailed analysis of the data collected was conducted, and the findings were disaggregated at the institutional and national level in the preceding section, a more condensed and generalized picture of the discussion at the national level shall be presented in this section.

The following issues have been observed in the country's contexts examined by this paper:

Vocational Education and Training (VET) institutions have demonstrated greater acquisition capacities with regards to formal education domain service related competences,

On the other hand, workplace settings have demonstrated increased effectiveness in the acquisition of informal learning context service related competences (on-the-job training, etc.),

However, interruptions have been identified concerning mechanisms fostering knowledge retention and validation of service related competences. Therefore, in the country observed there are problems with institutionalization and sustainability of service related competences.

The Government of the Republic of North Macedonia considers education, training, research and innovation as key factors for strengthening the national economy and wellbeing of the citizens. These efforts resulted in numerous steps: Entrepreneurial Learning Strategy; Advisory Group monitoring the implementation of the Innovation Strategy; National Council for Higher Education, Science, Innovation and Technology; Fund for Innovation and Technology Development (FITD), competent for promoting and encouraging innovations. The collaboration between the business sector and higher education resulted with the establishment of Technology Parks. Technology Parks are venues designed and organized to support innovations usually functioning within universities, also known as research parks or science parks.

The Macedonian Qualifications Framework (MQF) aims to improve the education and training system by applying an outcome-based approach, to alleviate the access to learning in every context and make the results clear for each citizen, to raise the general level of qualifications of the entire population and strengthen the link between qualifications and employment opportunities. With the adoption of the Law

on the National Qualifications Framework in 2013, and the appointment of an official representative as a full member of the European Qualifications Framework Advisory Group, the country obliged to harmonize the MQF with the European Qualifications Framework (EQF).

In the Republic of North Macedonia, so far, no programs from the field of informal learning has been accredited – but there are many non-formal programs. *The Adult Education Centre* has been working on creating a Validation Non-formal and Informal Learning system (VINFL) in Macedonia since 2014. However, this has resulted in the preparation of several documents, staff training, and the development of legislation for the validation process. The process follows the phases: identification, documentation, evaluation and certification, with trained assessors involved in the third phase, assessment.

The Employment Agency of the Republic of North Macedonia conducts an analysis of the skill needs on the labour market once a year. Ministry of Education and Science, launched “Skill development and innovation support project” (SDISP). In the Republic of North Macedonia, the service sector employs half of the employed population; over 99% of the total number of companies are small and medium-sized enterprises, contributing with more than 76% benefit.

The findings of this research indicate that respondents/parties are aware about the positive aspects of the “Service Related Competences”, especially regarding the professional, career development, and employment prospects.

The communication and customer orientation competences should be the core of the educational/training programs for Service Related Competences.

In the Republic of North Macedonia, there is a lack of knowledge about Validation of competences as well as the approaches.

Regarding the instruments such as ECTS, ECVET and EQF, the findings indicate that also in this area there is a lack of knowledge about the instruments.

In the Republic of North Macedonia, the majority of the Institutions are using digital learning. Nevertheless, still a sufficient number is not using at all any digital learning tool in their Institutions.

Concerning the web learning tools instruments the study shows that Institutions in the country are familiar with the learning tools instruments and they are using them in their personal and professional life. Nevertheless, they are not active users since in many learning tools they responded that they are using sometimes, as for LMS, CMS

and Blogs and maybe mainly this happened in public higher education institutions. The data implies that Institutions mainly uses Wiki web browser as learning tool in their individual and professional life, and this argues correctly the balance of the respondent's responses.

It is evident that Institutions in Republic of North Macedonia are familiar with the open learning system (LMS, e-Portfolio) that connects with validation and the majority of the Institutions are using those tools but still a solid number don't know about the web aided learning system.

Additionally, under the context of the definition of service related competences, the graduated students/pupils should have obtained because of the education process, which will help them to accommodate fast to the working organization and to the work/employment, as well as to establish appropriate relationships with the customers. Both Governmental and Non-Governmental institutions should be engaged in promoting the impact of these competences, furthermore they should give incentives to increase awareness and especially, to the youth as a long term sustainable development. Noted by academics that there are many tools to be used for promotion, with particular emphasis in the role of social media, which can be considered, be the main channel for distributing information on the perspectives of Services related competences and other marketing tools such. Influencers could play a very important role to advertise and attract more students.

The importance of customer orientation as a key factor on defining entrepreneurship Nowadays because the customer is the foundation of any business' success. They are aware there is clearly a lack of entrepreneurial education in the country and the urgent need for a customer-focused strategy if companies/businesses want to survive in the long term in a market of rapid change. Customer orientation is especially important when it comes to education. It can offer significant data to measure the extent to which new curricula and scientific activities in HEI can be further developed to fulfil then the expectations of the market.

Furthermore, under the context of increased economic growth (despite periodic downturns) and increased national and foreign investment in several industries of the tertiary and quaternary sectors of the RNM observed, local and central government focus has shifted into nurturing the development of service related competences, specifically targeting HR competences, technology and innovation.

Moreover, the role of Chambers of Commerce is considered as very important in supporting and implementation of the concept of service related competences in the

educational process. It is evidenced that the chambers of commerce should establish stronger relationship with educational sector to promote this concept, through organizing joint conferences and education of their own members. Additionally, noticed by the business sector that they can contribute to training in service related competencies by means of scholarships, accepting pupils/students for practical work/internship, etc.

Lack of entrepreneurship in all programmes at HEI is the mind-set to satisfy customers need and later on to calculate risks and profits. The understanding of the definition, the impact of entrepreneurship in many of the challenges that the country faces such as unemployment, brain drain, social inclusion etc. might be a good start for change. In addition, there is a total lack when it comes to the presence of a design thinking approach to integrate the customers in the product and service creation. Business representatives consider that the cooperation with professors is good, but it is difficult to come to common solutions when it comes to programs for training or education, which they need the most for the real business/work practice.

The most important part is to understand the urge of updating educational curriculums and integrating the same ones with countries that have been successful in transforming their educational system towards today's needs. Furthermore, evidenced by administration that consultants and specialists of the field should be hired in order to bring new policies that would result on improving current educational approaches.

The use a blend (mix) of different learning modalities to promote Service Related Competences in North Macedonia is a perfect combination. The following modalities has been proposed: case studies, role playing games, simulations, clinical teaching with experts from the business, field work where students will be faced with real tasks and problems, e-learning, etc. Noted that information technology can and should be used for learning of service-oriented competences. There is a need of online courses where basic theoretical concepts should be presented, and then, in combination with practical learning, the same should be exercised and learned how to be used in practice.

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<http://www.csoo.edu.mk/images/DOCs/2017/methsectstndmk.pdf>



# **Social Media use and its Relationship with Collaborative Learning and Students' Motivation in Abu Dhabi Schools United Arab Emirates**

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## **Abstract**

In the current years, social media and its various platforms are providing range of facilities to different community members including the students. However, the significance of social media usage towards the learning of the students can not be ignored. The purpose of present study is to examine the trends in collaborative learning of the students through social media usage. For addressing this objective, literature support has been provided in a reasonable manner. Furthermore, questionnaire was developed through various items from existing literature for both social media usage and collaborative learning as measured through Five points likert scale. Meanwhile, data has been collected with the help of different techniques. A valid sample response of 403 respondents from different grades ranging from 9th to 12th has been collected from different schools as situated in Abu Dhabi, UAE. After data collection, demographic analyses through cross-tabulation have been presented in an appropriate manner. More specifically, both measurement model and structural model were also accessed to confirm the reliability and validity and relationship between the variables. It is found that measurement model for the relationship between social media usage and collaborative learning is quite fine. Finally, the results through structural model confirm that there is a significant and positive impact of social media usage on collaborative learning of the targeted students. The study findings have provided some meaningful discussion for various policymakers

specifically in the education sector. Finally, there are some limitations through which future directions are also determined.

**Keywords:** social media usage, collaborative learning, motivation, measurement model, structural model

## Introduction

In the modern world, children have access to social media applications and the internet across different devices that include laptops, smartphones, desktops, and tablets (Badri, Al Nuaimi, Guang, & Al Rashedi, 2017). Social networking is now an integral component of children's social life. Social media is now a learning platform that can be used to enhance student performance and engagement. Social media provides students with opportunities to communicate, access information, chat, research and keep in touch. To put it simply, social media does not only pave the way for better knowledge transfer, but it also encourages collaborative learning between students which eventually creates a shared understanding between students, conversations with other classmates, teachers, increases students' awareness in various subjects and develops students research skills (Redecker, Ala-Mutka, & Punie, 2010). Social media also plays an important role in education and learning by facilitating collaboration, developing positive relationships between students, merging the learning curriculum with advanced technology that makes the learning process more relatable, fun and interactive to the students whether in class or after classes (Fewkes & McCabe, 2012).

Social media has the potential to facilitate higher-level learning outcomes through collaborative learning (W. Al-Rahmi, Othman, & Yusuf, 2015). Social media also helps in enhancing student motivation, which is an essential factor for student success (Cheung, Chiu, & Lee, 2011). Unlike standard websites, social media has certain applications that provide students and society with multiple ways of collaborating. Social Media sites are made of different tools, which include collaborative projects such as Wikipedia, blogs, social network sites such as Facebook, and content communities such as YouTube. Social networking sites (SNSs) are deemed to possess a strong academic culture that is built around their online community. Social media enhances knowledge transfer and promotes collaborative learning through discussions with peers, creating understanding among students, and discussions with lecturers (Al-rahmi et al., 2015). Social media increases knowledge sharing and enhances students' research skills. Social media enhances collaboration and assists in

the development of relationships among students as well as provide instantaneous opportunities for curricula enhancement and dissemination that is external to the actual classroom (Fewkes & McCabe, 2012).

Collaborative learning has been found to have a positive impact on student motivation. Student motivation plays a key role in influencing student performance in schools. If students do not feel motivated while at school or in learning, their performance usually declines as they do not feel engaged in schools (Gbollie & Keamu, 2017). Collaborative learning influences student motivation by ensuring that any student who is involved feel engaged in the learning process. Social media is enhancing collaboration learning in schools and among students (Badri et al., 2016). The nature of motivation and learning strategy is essential to improving student-learning outcomes. Collaborative learning is an education method that is used in learning and teaching environments that involve two or more people (Ojo & Ntshoe, 2017). Collaborative learning creates a positive working and learning environment for students who enjoy working in groups. Ojo and Ntshoe (2017) state that students are able to learn successfully by participating in activities where they can learn from their peers and by explaining their ideas to others. Social media has made it possible for collaborative learning and the positive environment it creates among students that can help develop student motivation in learning. Collaborative learning is an educational strategy for learning and teaching that involves groups of students who work together to solve a problem, create a product, or complete a task. Collaborative learning is based on the concept that learning is a naturally social act whereby those involved discuss among themselves. Technology has increased collaboration among people trying to solve a task as it has made communication easier. Social media applications have enhanced collaboration among individuals. Students are using technological devices to make collaborative learning successful; schools and parents are encouraging students to make use of social media as a useful tool for learning in order to increase student motivation.

## **Literature Review**

As stated by Gray, Vitak, Easton, and Ellison (2013), the use of social media applications such as Facebook, WhatsApp and YouTube as a factor for collaborative learning empowers students to perform different exercises in a smooth manner and face less worry in their academics. It additionally empowers them to reinforce interpersonal relationships and associations with their friends in an environment of learning. Utilizing Facebook additionally delivered a collaboration that is viewed as helpful as far as social association and interpersonal relationship is concern {Gray et

al. 2013). In the modern times, the basic view of taking a gender perspective at education is seen as long-term learning aptitudes as opposed to knowledge engagement (Fallows and Steven 2000). Many authors consider collaborative learning vital for students to acquire for future employments engagements. Hence collaborative learning is characterized as coordinated effort or procedure or wherein at least two individuals endeavor to facilitate and adapt new knowledge.

Men and Muralidharan (2017) stated that social media support collaborative learning. Collaborative learning involves the interaction of students where they form groups to solve various problems or carry out assignments. As such, social media provide a broader scope for interaction among students as they can discuss through social media without physically meeting. According to López-Bonilla and López-Bonilla (2013b) it is the most appropriate time for educators to look for ways of incorporating social media into classes. According to Mutekwe (2015) social media can be used in boosting creativity and help learners to explore further the course content. Various options are provided by social media that can enhance learning, such as lectures uploading YouTube videos while explaining certain concepts learned in class. Through satisfaction of the learners need with corporative learning, students can balance their distinctiveness and peer connection leading to students' motivation (Men & Muralidharan, 2017). While the studies discussed in this section will provide an insight into collaborative learning through social media, they will also be used to identify gaps in research work done by scholars. The discussion will delve deep into each variable, namely social media, collaborative learning, and students' motivation in school. However, the main focus of this review section is collaborative learning among students. The goal is to establish a link between the three variables discussed by researchers and scholars, where collaborative learning and students' motivation in schools are dependent variables.

Collaborative learning methodologies first arose in several ancient civilizations. Different educational ideas have evolved in their stead in Western and colonial Eastern Hemispheres. Collaborative learning was revitalized in the latter half of the twentieth century after researchers demonstrated that students learned more quickly and retained more information when they were actively involved in the teaching and learning process rather than simply receiving knowledge from their educators. A study conducted by Al-Rahmi & Zeki (2017) stated that the use of social media has a positive influence on the active collaborative learning environment. Most school tutors are less familiar with the use of social media when it comes to teaching and interacting with students. Also, most of the lectures lack skills on how to use social

media (Al-Rahmi & Zeki, 2017). Sawar et al. (2019) stated that most students dislike the existing platform put in place by most institutions since they do not facilitate interactions. López-Bonilla and López-Bonilla (2013a) asserted that most students prefer to use social media in collaborative learning; however, lectures argues that students do not depend on the use social media for learning but instead for communication and entertainment purposes. Social media is used as a tool for communication among learners and instructors and be divided into two types: synchronous and asynchronous. The tools play a crucial role in supporting different idea sharing. During collaborative learning, various ideas from students are shared and in this case, social media enhances easy interactions among learners. Figure 1 provides the layout for the framework of the study.

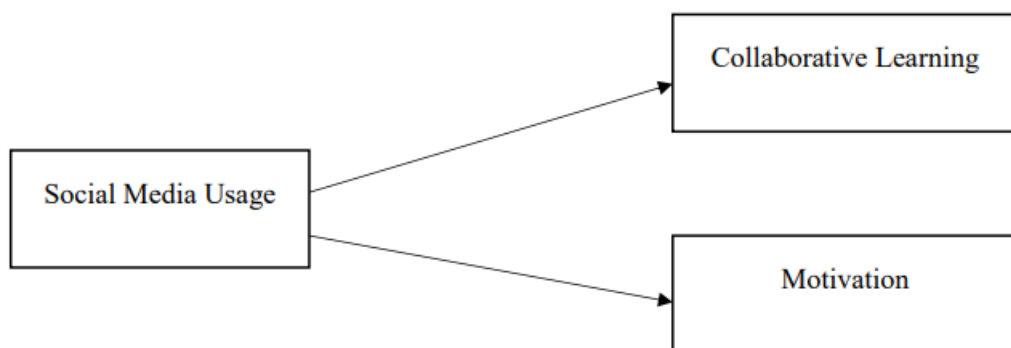


Figure 1: Research Framework

Based on the research discussion, H1 and H2 is determined.

H1: there is a significant impact of social media usage on collaborative learning.

H2: there is a significant impact of social media usage on student's motivation.

### **Research Methodology**

Research design can be defined as the framework that entails the methodology and techniques that guide a researcher in undertaking the research process from strategy selection, collection, processing and analysis of data. There are three types of research designs: Exploratory, Confirmatory and Descriptive. A researcher selects the research designs that serve to answer the research questions and achieve the research objectives Mitchell, Frank, Harris, Dodds, and Danforth (2013). Exploratory research design is one which is undertaken when there are few or no similar studies done that the research may rely on. Hence exploratory design's goals are to create a

familiarity with the research problem and develop new hypotheses (Mills et al., 2010). Confirmatory research design, on the other hand, is research done to provide more compelling pieces of evidence of similar research done before. The research is usually restricted from developing new theories and hypotheses by prior studies (Kennedy and Watt, 2018). However, current study is going to apply quantitative research design. Data collection for this study has been conducted through a structured questionnaire distributed to students in secondary level/Cycle 3 from or grades 9 to 12 in the public school particularly in the Island of Abu Dhabi UAE as this is the crucial level that qualifies student for admission into colleges and universities in the UAE. The researcher will distribute questionnaire by official student email using Survey Monkey to collect the data also the researcher will use stratified random sample method.

As stated in chapter three, the current study has considered the data collection through a self-administrative questionnaire where the items of independent and dependent variables have been extracted from existing literature. For data collection, it is stated that the unit of analysis is individual where a total sample of 354 respondents from different schools was observed. However, to achieve maximum responses, the stated sample of 354 was inflated 100 percent through which a new sample of 708 questionnaires was finalized. With the help of 6 team members, a researcher had conducted the process of data collection. This process took 7 weeks of time duration while distributing the stated number of questionnaires among the targeted respondents. Meanwhile, the proposed time duration to complete the survey was also shared with the targeted respondents where an overall questionnaire was translated into easy English language for the convenience of respondents. Total 708 questionnaires were distributed among the targeted respondents; however, it is found that the returned questionnaires were 463, showing a response rate of 65.39% which is found to be reasonable enough. A detailed investigation of the received questionnaires has made it evident that several questionnaires were missing with the valid responses, therefore, dropped from the final sample. More specifically, a total number of 58 copies were finally excluded from the total sample. Finally, it is found that there were 404 copies of valid questionnaires with no missing responses which indicate a valid response rate of 57.06%. In this regard, various researchers have provided their justification regarding the valid response rate. For example, Mugenda and Mugenda (2003) have stated the fact that a response rate of 50% is observed as an adequate sample, whereas 60% is entitled as good, whereas 70% is found to be very good. This means that the overall valid response rate under the present study is adequate for applying descriptive and inferential analysis. Furthermore, various

authors have justified the data collection through questionnaire technique with the better success rate in terms of response rate (Farouk, Abu Elanain, Obeidat, & Al-Nahyan, 2016). Besides, explaining that the sample size in any study should be greater than 30 and smaller than 500 would be accepted as reason enough for the data analysis. Based on the above discussion, this study infers that a sample size of 405 respondents as achieved through valid responses is quite reasonable through which data analyses have been conducted. Upcoming sections are providing the output and discussion related to data analyses and related techniques. Besides, Table 1 covers the details for the number of questionnaires as distributed, questionnaires returned by the respondents, and valid response rate and usable questionnaire, respectively.

### **Instruments**

This research accounts for a brief discussion on the social media use and its relationship with collaborative learning and student's motivation in Abu Dhabi schools. The variables proposed in this study to be use: social media, collaborative learning and student motivation.

The questionnaire aims to determine social media use and its relationship with collaborative learning and student's motivation in Abu Dhabi schools. This questionnaire consists of questions on a five-point Likert scale, 1 Strongly Disagree, 2 Disagree, 3 Neutral, 4 Agree, 5 strongly Agree. In the questions of this questionnaire will be close ended.

### **Data Analyses**

In this study, the researcher used correlation method to explore the relationship between quantitative variables and to measure the linking or strength the relationship between SMU independent variable with CL and SM depend variables. To understand the relationship between variable to variable such as increase or decrease.



| Research Objectives  | Research Questions  | Research Hypothesis   | Data Analyses |
|--|---|---|---------------|
| O1. To determine the relationship of social media use on collaborative learning          | Q1: What does the relationship between social media use and collaborative learning? | H1: There is a significant relationship between social media use and collaborative learning | Correlation   |
| O2. To determine the relationship of social media use on students motivation             | Q2: What does the relationship between social media use and student's motivation?   | H2: There is a significant relationship between social media use and student motivation     | Correlation   |
| O3. To determine the impact of social media use on collaborative learning                | Q3: How does the impact between social media use and collaborative learning?        | H3: There is a significant impact between social media use and collaborative learning       | Regression    |
| O4. To determine the impact of social media use on students motivation                   | Q4: How does the impact between social media use and student's motivation?          | H4: There is a significant impact between social media use and student motivation           | Regression    |
| O5. To investigate the impact of social media use on students psychological development  | Q5: How does social media use impact on student's psychological development?        | H3: Social media use has significant impact on student's psychological development          | Regression    |
| O6. To determine the impact of social media use on students safety needs                 | Q6: How does social media use impact on student's safety needs?                     | H4: Social media use has significant impact on students safety needs                        | Regression    |
| O7. To determine the impact of social media use on students belongingness and love needs | Q7: How does social media use impact on student's belongingness and love needs?     | H5: Social media use has significant impact on students belongingness and love needs        | Regression    |
| O8. To determine the impact of social media use on students esteem needs                 | Q8: How does social media use impact on student's esteem needs?                     | H6: Social media use has significant impact on students esteem needs                        | Regression    |
| O9. To determine the impact of social media use on students self-actualization           | Q9: How does social media use impact on student's self-actualization?               | H7: Social media use has significant impact on students self-actualization                  | Regression    |

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