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EDUCATION AND EDUCATIONAL RESEARCH

LANGUAGE AND LINGUISTICS

SOCIOLOGY AND HEALTHCARE

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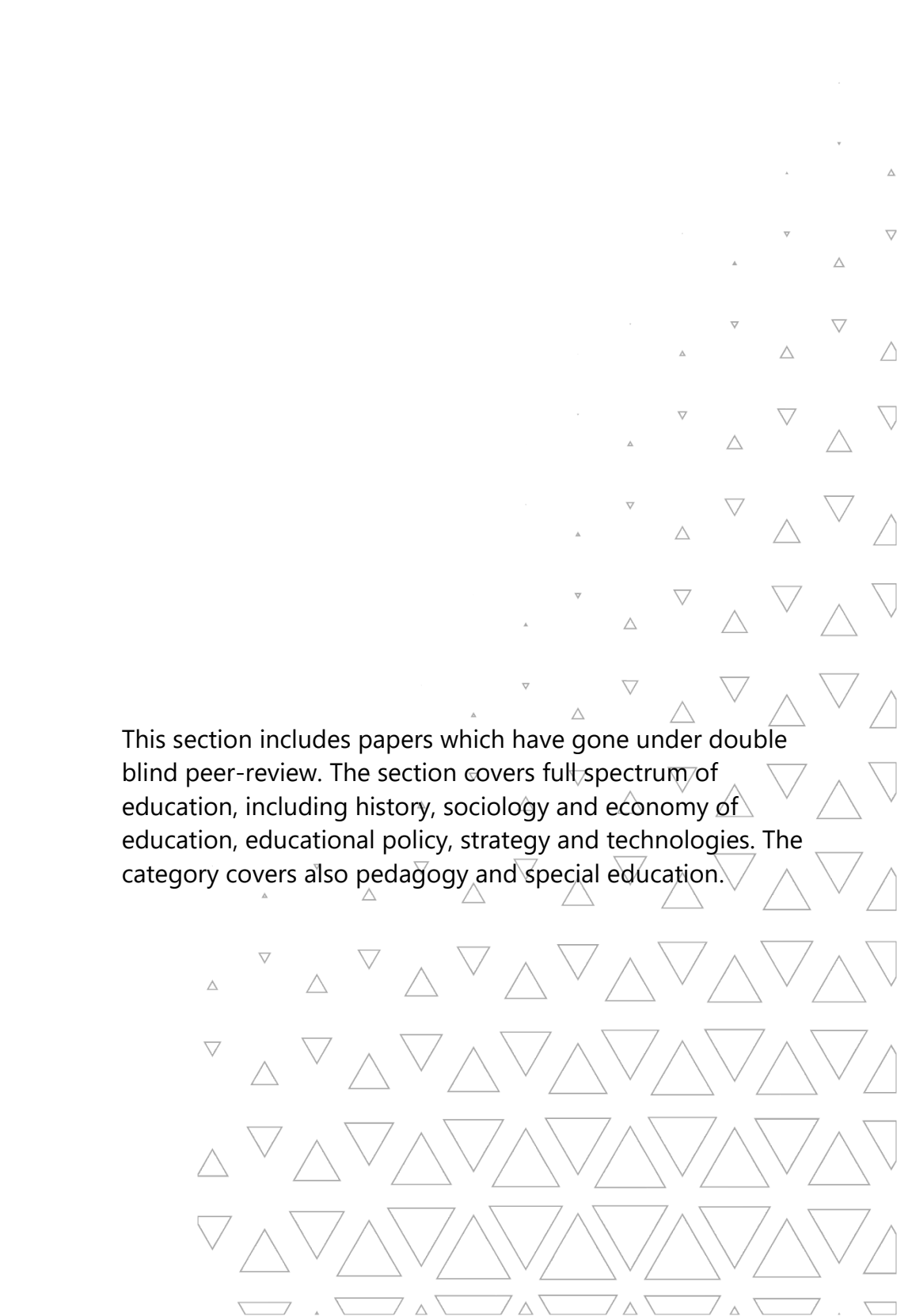
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## **Section**

# EDUCATION AND EDUCATIONAL RESEARCH



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This section includes papers which have gone under double blind peer-review. The section covers full spectrum of education, including history, sociology and economy of education, educational policy, strategy and technologies. The category covers also pedagogy and special education.



# APPLICATION OF TEACHER COMPETENCES IN EDUCATIONAL PRACTICE

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## ABSTRACT

The requirements for the quality of the teacher's pedagogical work and its assessment are constantly increasing. The paper focused on knowledge related to teacher competence. It resulted from research activities in several scientific research projects (e.g. the Slovak Research and Development Agency, Evaluation of Teacher Competencies), implemented at the University of Constantine the Philosopher in Nitra (Slovakia). The team of Slovak experts and teachers monitored (researched) the possibilities of identifying a complex of relevant professional competencies that need to be taken and developed. Overall, the research work within the national survey in the Slovak Republic was determined ten essential competencies of a teacher.

The aim of the paper is to introduce the competence of a teacher - the competence to develop a positive climate in the classroom. The positive climate in the classroom acts to shape the relationship between teacher and pupils. It affects the results of the pupil team and uses not only education but also training. Today (current) school is oriented on the personal and social development of the pupils. It is reflected not only in good school results, but also in the complexity of pupil values.

As part of the research process, the participating experts and pedagogues developed tools and criteria for the evaluation and self-assessment of the teacher's quality and the teacher's applied competencies in educational practice. These competencies were presented through case studies and the use of the implementation of the AAA evaluation methodology model. We consider it important to point out that the teacher should be a professionally qualified pedagogue who is always competent to educate and train. The essential condition for his further qualification growth is, at the same time, focused on attention and his own self-improvement.

**Keywords:** *teacher, essential competence, a positive climate in the classroom*

## INTRODUCTION

Key professional competencies currently play an important role in a teacher's professional work. This area was first addressed by Borich and Fenton (1977) [1],

who point out knowledge, performance and consistency competencies. One of the most comprehensive and up-to-date classifications has been developed by The National Council of Teachers of English (2014), which identifies contextual, conceptual, subject-content, transactional, educational, evaluative, organizational, competence related to the creation of teaching material to work with parents and to work with the community and other organizations. With the current social changes, the requirements for the issue of professional competencies, their identification and evaluation are also changing [2].

An important role in the educational process is the creation of a positive climate in the classroom. The teacher influences his students with his whole personality. Participates in the formation of the student's personality, behaviour, interests, and value orientation. It has an impact on the creation of new knowledge, skills of students. Cultivated teacher expression, trust, understanding, respect, tolerance, good behaviour, freedom of speech and one's own opinion are of great importance for the appropriate (correct) creation of a relationship between teacher and student. A positive classroom climate is, therefore, an integral part of the teaching process.

The modern school emphasizes the personal and social development of the student, which is reflected in good academic results as well as in the whole student values and their external manifestations. Therefore, it is necessary to approach the process of teaching and learning as a complex phenomenon, which includes several factors entering the learning.

## **TEACHER COMPETENCIES**

Based on the results of scientific research on the project *Assessment of Teacher Competencies*, carried out at the University of Constantine the Philosopher in Nitra (Slovakia), we arrived at a complex of ten key competencies: identification of developmental and individual characteristics of students, identification of psychological and social factors of student learning, student development and personality. Competencies, creating a positive climate in the classroom, planning and implementation of professional growth, mastering the content and didactics of subjects, planning the teaching process, teaching methods and organizational forms of teaching, using material resources of the teaching process, evaluating the course and results of teaching and learning.

The key competencies of a teacher represent a set of requirements that must be implemented in the teacher's work and, at the same time, represent a starting point for evaluating the quality of pedagogical work.

The current state of teacher evaluation in Slovakia is the creation of a new evaluation methodology, structured into three relatively separate tools: 1. Assessment sheets, aimed at evaluating the work of a teacher by a selected assessor; 2. A self-assessment sheet that allows the teacher to reflect on the work



itself autonomously; 3. The last tool is the Record of the interview of the evaluator and the evaluator, which provides a space for mutual penetration of opinions and attitudes of both participants [3].

A specific feature is a proposal on how to carry out evaluations of the quality of a teacher's work by evaluators (members of the state school inspection, methodologists, principals and school representatives, heads of subject commissions, teachers) through the application of the AAA evaluation methodology. The implementation of the AAA evaluation methodology represents the application of annotation, analysis and alteration in the evaluation of the quality of selected (selected) competencies of the evaluated teacher.

A - annotation. It focuses on the overall context of the teaching situation/lesson and didactic mastery of the content of the curriculum.

A - analysis. It is the second stage of the application of the AAA evaluation methodology. The evaluator analyses a specific lesson based on specific evaluation criteria of individual competencies and related indicators.

A - alteration. It is the last part of the AAA evaluation methodology; it expresses the relationship between: (a) assessment/evaluation of teaching quality; and (b) its improvement in the form of evaluator proposals.

Quality assessment means evaluating the degree of mastery of the set goals of pupils' education. The evaluator should monitor mastery of basic concepts and skills, analysis and understanding of content, generalization, and especially application.

We distinguish four levels of quality: 1. Failing quality: teaching does not benefit students, the required competencies of students are not developed, and the quality results from didactic shortcomings of the teacher in education; 2. Undeveloped quality: teaching provides students with the opportunity to acquire basic knowledge but does not allow for more comprehensive development of their competencies; 3. Stimulating quality: teaching leads students to an active understanding of the topic, provides them with stimuli for evaluation, judgment, derivation; 4. Developing quality: students show the ability to generalize knowledge, apply it, understand social relationships in the assigned tasks, and understand the topic in a broader context [4].

The proposal of alterations represents the creation of proposals by the evaluator to improve the quality of educational activities. The alteration is focused on the active search for ways to improve the teacher's pedagogical work quality. In cooperation with the evaluated teacher, the evaluator proposes alternative ways of working, which will result from the realized lesson.

We implemented the practical implementation of the AAA evaluation methodology through case studies. Case studies are processed based on real authentic situations during the lessons of experienced teachers. The lectures were attended by members of the project's scientific team, who assessed the quality of individual key competencies and actively participated in the preparation of proposals to improve the quality of teachers' pedagogical work [5].

## **CLASS CLIMATE**

The issue of climate in the classroom is the subject of professional research, based on which it was found that several factors influence its creation. The positive climate in the classroom supports the performance of students and teachers and their motivation for education and learning. "It is a very multifaceted and complex phenomenon. In the professional literature, it is often mentioned in connection with other terms such as the environment of the class, the atmosphere of the class, the character or ethos of the class" [6].

According to Gavora [7], the term classroom climate expresses the degree to which a pupil in a class is satisfied, whether students understand each other, the degree of competition and competition between them, and the degree of cohesion of the pupils in the class as a whole. Pupil satisfaction in the classroom is related to many factors. A teacher as a personality is one of them who knows or does not know how to work with a specific student team. His behaviour affects not only the whole class but also the students who make it up. One teacher may perceive a student or a team of students as problem-free, i. Positively, but another teacher may have a completely different (opposite) relationship to the student team. It can perceive students as unprepared, problematic, undisciplined. We can talk about harmonic or disharmonic relationships during the teaching process [8].

Lašek [9] states that the climate affects the student personally; the student is more or less interested in school, school work, positive or negative relationships in school, etc. In the socio-psychological sense, the student becomes an associate member of the group, participates in individual activities of the group, the student can be favoured by teachers or classmates, or is relegated to the background, etc.

Hanuliaková presents the following selected types of climate (environment):

1. Current and preferred classroom climate, it is essential to be able to recognize these two climates. The current climate is created in the current situation, but it can be very different from the preferred climate, and it is necessary to adjust it based on the requirements of parents, schools and teachers.

2. The communication climate is created as a result of the communication used between the actors. Communication influences the creation of a favourable climate in the classroom.

3. The creative climate induces productive activity among students and also has a positive effect on teachers. In such a climate, the creativity of students, their ideas and observations are emphasized.

4. Organizational climate is an essential aspect of "time management", which considers the degree of creative management, the expectation of creativity, and subsequent cooperation.

5. The moral climate, through which the moral personality of students is created, supports the creation of values such as empathy, prosociality, altruism, morality and others.

6. The mental climate results from formal and informal classroom relationships. Positive relationships create a favourable climate function and, conversely, a tense situation full of conflicts creates negative relationships and an unfavourable atmosphere [6].

It is essential for students and teachers to work in a climate that will positively affect them. The teacher must know which elements form and influence the classroom climate, how to change the negative climate, keep it positive, get students to actively cooperate, properly motivate them to learn, and effectively organize their learning activities.

It follows that the teacher should know several factors that affect the creation of a positive climate in the classroom: social competencies - characteristic empathic attitudes and behaviours, assertive behaviours and its techniques; communication competencies - communication with students themselves, t. j. communication procedures, to be friendly and to communicate kindly; organizational competencies - construction of the teaching process with the learning process (teaching) of students and relation to the learning process (acquisition of knowledge); the personality of the teacher, who must acquire the required moral and professional competencies; implementation of socio-ethical skills; use of active learning methods; a number of pupils in the class.

### **Application of AAA evaluation methodology in the teacher's competence to create a positive climate in the classroom**

During the lesson, the teacher meets with different subjects, so it is essential that he can communicate adequately and thus create a suitable climate in the classroom. When creating a classroom climate, the teacher should create a relaxed atmosphere, eliminate stressful situations, approach pupils individually, motivate them to work, activity, and help increase students' self-esteem. We present case studies from realized lessons of civics and chemistry, evaluated by the AAA methodology.

## **CIVIC LESSONS CLASS - 4<sup>TH</sup> YEAR OF GRAMMAR SCHOOL**

*Annotation.* The lesson was focused on the Pre-Socratic period and was realized in the form of written and oral repetition. At the beginning of the class, the teacher briefly introduced the topic of the lesson. He immediately asked the students questions about the written word. Pupils worked independently during the written work. The teacher thus created a relaxed atmosphere, which allowed the students to work actively, creatively and without stress in class.

In the next part of the lesson, after collecting the written work, the teacher led the students to open and effective communication with additional oral repetition of the topic and find the correct answers to the questions from the written word. It created a positive climate in the classroom, so students were not worried respectively. Afraid to express their opinion, answer questions and show interest in the issue. In the dialogue, the teacher tried to lead students to logical thinking, problem-solving and creative thinking. He emphasized that mutual respect is essential in every communication, allowing expressing oneself, not trying to have the last word at all costs, perceiving the other as a partner in finding the correct answer, and understanding the other.

During the lesson, there were a few disturbing moments and smiling situations, which the teacher calmly and humorously resolved, calmed the students, and guided them.

The discussion on the topic took place in a friendly atmosphere, but at the same time with respect for the teacher. At the end of the lesson, the teacher evaluated its course and assigned tasks for the next class.

*Analysis.* Information on the issue was provided suitably. Methods that created space for the student to express himself without fear of correct or incorrect answer supported his creativity, activity, independence, and knowledge acquisition in a non-violent, friendly, and exciting form.

The teacher tried to attract and maintain the student's attention throughout the lesson and through verbal and non-verbal communication to create a positive climate in the classroom, motivating students and getting feedback from them.

*Alteration.* When creating a positive climate in the classroom, the teacher could pay even more attention to the development of student's communication skills. To teach them to express their opinion in a cultured way, take responsibility for their decisions, respect the opinion of others, evaluate themselves and others positively, and solve everyday situations in interpersonal relationships creatively.

When working with students, the teacher should help internalize prosocial values and attitudes and acquire social skills - empathy and assertiveness. To lead students to adhere to agreed rules of conduct, open communication (truthfulness,

objectivity, accepting the truth about themselves and others), tolerance, and cultivated behaviour. To guide students on how to defend themselves and their rights in a non-aggressive way, to express their opinion.

The teacher could also mediate the topic through video or text reading, working in pairs or groups, didactic games, and thus teach students to cooperate, solve problems and discuss, and at the same time, more effectively implement a suitable climate in the classroom.

### **CHEMISTRY CLASS - 9<sup>TH</sup> GRADE OF ELEMENTARY SCHOOL**

*Annotation.* The lesson was focused on cosmetics, in which students were to get acquainted with the distribution, properties, and content of cosmetics in a discovery way.

The didactic goal of the lesson was to consolidate and expand knowledge and expertise in the field of chemistry, focused on the topic of Organic Substances in Everyday Life. The teacher had various teaching aids at his disposal, and similarly, the students brought multiple cosmetics for the lesson. In the motivational part of the lesson, the teacher used the method of storytelling and conversation, during which he ascertained the students' knowledge of the topic. A stress-free atmosphere was gradually created in the classroom, the pupils' interest in the issue of cosmetics and daily hygiene was active.

In the exposition part, the teacher devoted himself to information about the historical development of cosmetic products as a way of protection against weather conditions and insects; he introduced the role of decorative cosmetics. As part of the group work, students prepared and presented the composition and properties of cosmetics.

The fixation part was devoted to summarizing the acquired knowledge and pointing out several problems caused by chemical substances contained in cosmetic products. The teacher pointed out the chemical processes related to the production of selected cosmetics. Subsequently, the students summarized the properties of cosmetic products using the method of questions and answers. After evaluating the lesson, the teacher assigned the homework.

*Analysis.* The chemistry class was conducted in a friendly atmosphere. During the classroom class, the following situations were disrupted: the teacher spilled water on the floor, in which case it is important to pay attention to safety; one pupil sprayed perfumed water on a classmate's hair, the situation resulting in a disturbance of the working atmosphere in the classroom; when detecting the smell of hair shampoos, one pupil got the product in the eyes, the teacher had to deal with the situation promptly; even after the time limit of the lesson, the teacher answered the pupils with questions that were evoked by the interest in the topic.

*Alteration.* The following suggestions emerged from the analysis of the lesson: the need to increase teacher respect; observance of the principles of safety in teaching activities; quality organization of the teaching process; focus on improving classroom communication,; respect for each other.

The teacher demonstrated the pedagogical ability to create and maintain a positive climate in the classroom, creating a relaxed atmosphere and thus orienting students' interest in the topic. Pupils were creatively involved in the activity and were not afraid to express their opinion, the teacher gave them a space to discuss their discoveries, which he then corrected and presented their general statements. He led students to independent discovery, created a positive climate in the classroom, tried to lead students to independent logical thinking and creative thinking.

In the context of changes in teaching, the teacher should be aware that creating a positive climate in the classroom is one of his core competencies. This means implementing the teaching process with the intention of deepening and strengthening the creative thinking of students, developing and implementing communication skills in various interactions such as teacher - pupil or pupil - pupil.

The presented evaluation model considers systematic, it contains all the components involved in the construction of the competence structure. Within the model implementing the AAA assessment methodology, we have the ambition to direct evaluators to the real possibilities of assessing the work of the evaluated teacher through a relatively comprehensive analytical approach.

## CONCLUSION

The result of the project activity is a lot of information obtained, which is related to the selected key competencies of the teacher. An irreplaceable role in creating a positive classroom climate is played by the teacher's personality and ability to diagnose influences that negatively affect the classroom climate. This means monitoring the factors, resp. Implement activities that are important in creating a positive climate in the classroom [10]. It represents a positive attitude of the teacher (patience, interest, smile, emphasis on the student's individuality), respect for the personality of individual students, mutual acceptance of teachers and students, time and organizational management.

These requirements are related to changes in the context of school reform in the Slovak Republic. They reflect current needs, where the school is understood as a variable educational space in which teachers accompany pupils in their learning and learning process, developing their competencies and creating them comprehensively, individual personalities.

The teacher must be a professionally qualified pedagogical worker to create a positive educational environment, organize and plan the activities of students, influence them with their personality, be empathetic, creative, and humanistic. He must be competent enough to be able not only to teach and educate effectively but also to improve his pedagogical activity. The key competencies should focus not only on the student and the educational process but also on their professional self-development, which is never completed and requires increased attention and commitment.

## ACKNOWLEDGEMENT

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# **BUILDING MOBILITY COMPETENCE OF INTENDING TEACHERS**

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## **ABSTRACT**

The main idea of modern education is to build competences as a produce of university educational process. One of the most important competences of intending teachers to be built is mobility competence, which is a component of professional pedagogical competence.

We believe, to train a mobile teacher is possible within a purposefully created cross-cultural educational university environment, where the designed technology of developing intending teachers' academic mobility based on the cross-cultural approach is implemented.

The empirical methods of the research are represented by observation, interlocution, interview, questioning, testing, expert review, generalization of independent data, pedagogical experiment, and mathematical statistics.

To estimate the readiness of intending teachers for academic mobility under the conditions of cross-cultural educational environment, four levels of readiness are offered: optimal (high), admissible (middle), critical (low), and inadmissible (not ready). To determine the level, we have developed three criteria (cognitive, motivational-valuable, acting-reflective) and their indicators.

At the motivating stage of the pedagogical experiment we conducted surveys of different respondent groups (random sample including online format, 1261 respondents) with the help of the questionnaires we had developed. The received data were used in the training course "Teaching a foreign language through the culture of native speakers", which contributed to the building of mobility competence of intending teachers.

At the monitoring stage of our experimental education the comparison of the results of the incoming and outgoing assessment according to the developed criteria and indicators showed significant growth of the students' readiness for academic mobility, which allows us concluding that the designed technology of developing academic mobility based on the cross-cultural approach is effective in building mobility competence of intending teachers.

**Keywords:** *mobility competence, intending teachers, cross-cultural approach, technology, academic mobility*

## INTRODUCTION

In accordance with the Bologna Declaration, one of the key criteria of the quality of a national higher education system is students' academic mobility [1], which allows raising a competitive advantage of the national education when positive experience of native and foreign educational systems is taken into account [2].

Educational content at a pedagogical university should meet modern requirements and create favourable conditions for developing a personality capable for self perfection, self realization, and self development [3].

Inertia of thinking, immunity to criticism, fear of failure, unmotivated negation of any point of view, which does not coincide with their own opinion, affect negatively competent performance of professional duties by a teacher [4].

All this can be largely overcome or weakened on the basis of organized academic mobility, which allows studying and taking over successful experience of professional pedagogical activity at higher educational institutions in a native country and abroad [1].

Academic mobility plays a crucial role in the process of professional and personal growth, as every participant of academic mobility has to (when taking decisions) analyze life situations from the cultural point of view of the receiving and native countries [5].

So, one of the objectives of training professional teachers at a university is to build their mobility competence. We regard mobility competence as an integral trait characterizing the readiness of a personality to carry out professional activities under the conditions of academic mobility. Mobility competence is a complex structure including foreign language communicative, cross-cultural, adaptive, and media competences.

Foreign language communicative competence is a skill to solve, by means of a foreign language, topical issues of communication, to reach communicative goals [6].

Cross-cultural competence is an integral trait including knowledge of the other culture features, skills to interpret information of the other culture, experience of communicative activity, and such professionally important traits as empathy and tolerance [7].

Media competence is an integral professional trait consisting of skills to work with information including search, gathering, understanding the media language and subtext of media messages, their critical analysis, interpretation and an ability to create, receive and transmit media messages by means of multimedia [8].

Adaptive competence is possessing the knowledge and skills to get into the other culture by acquiring its norms, values, and patterns of behaviour.

To try and build mobility competence of intending teachers of foreign languages we have created cross-cultural educational environment at the Faculty of foreign languages of Novosibirsk state pedagogical university, Russia. We regard cross-cultural educational environment as a complex of conditions, where students' cultural features are taken into account, thus, contacting cultures in the face of students are compared and enriched, and this contributes to developing students' mobility.

The cross-cultural educational environment comprises four elements: spatial (the building, interior, infrastructure, equipment), cognitive (content of educational programmes, library and online resources), social (student-student, professor-professor, professor-student communication style; volunteer service, adaptive system, cultural and leisure activities), and valuable (values and traditions at a university, society, family, reference group).

The educational process within this environment is realized by means of the technology of developing students' academic mobility based on the cross-cultural approach. The technology embraces different pedagogical university activities, such as academic studies, scientific research, international projects, career guidance, etc., and is consequentially implemented in the following stages: analytical, prognostic, planning, motivating, acting, monitoring, and resultative.

Being limited by this paper framework, we will dwell only on the monitoring stage of the designed technology of developing academic mobility of intending teachers based on the cross-cultural approach.

## **MATERIALS AND METHODS**

The research was conducted in the years 2012 – 2017, when the programme of the events of the technology of developing academic mobility of intending teachers based on the cross-cultural approach was being implemented at administrative, organizational and content levels.

The participants of the research were 449 second-year and third-year students of the Faculty of foreign languages of Novosibirsk state pedagogical university, Russia. The choice of these years of education is explained by studying, at this stage, academic courses related to the country studies, culture, geography, and history of the English-speaking countries. One of the aims of teaching these courses to the students is building and developing cross-cultural competence (part of mobility competence) of intending teachers of foreign languages.

The empirical methods used by the researchers were observation, interlocution, interview, questioning, testing, expert review, generalization of independent data, pedagogical experiment, and mathematical statistics.

To estimate the readiness of the students for academic mobility under the conditions of the cross-cultural educational environment we defined the levels: *optimal* (high – ready for the academic mobility: possessing the skill of a mediator of cultures, the skill to adapt to another culture); *admissible* (average level of readiness: knowledge of most social norms; possessing the skills to get orientated in student sociocultural environment, to choose adequate behaviour, to manage their own stereotypes, to interpret correctly the context of the message); *critical* (low level of readiness: student's cognitive and moral positions are very weak; a low level of knowledge of the main social norms, of the skill to define in the process of communication the behavioral models of the native and foreign cultures); *inadmissible* (the absence of readiness: the absence of positive stereotypes in regard to the main cultural phenomena of the receiving country, of the skill to realize cultural differences by the keywords).

To see the effectiveness of implementing the technology of developing academic mobility of intending teachers based on the cross-cultural approach we defined certain criteria and their descriptors demonstrating the readiness of a personality to participate in the process of academic mobility (Table 1):

**Table 1.** *Criteria and descriptors of personality's readiness for academic mobility*

Criteria	Descriptors
Cognitive	<ul style="list-style-type: none"> <li>- a mature idea of the cultural diversity in the world is shaped;</li> <li>- the background knowledge of every culture under study is possessed</li> </ul>
Motivational-valuable	<ul style="list-style-type: none"> <li>- a need for learning a foreign language and constant language training;</li> <li>- collective with foreign students classes and extracurricular activities (visiting theatres, museums, exhibitions, and concerts);</li> <li>- values, traditions and norms of the native culture are mastered;</li> <li>- national-cultural specifics of initial and receiving communities are taken into consideration;</li> <li>- respect for other cultures</li> </ul>
Acting-reflective	<ul style="list-style-type: none"> <li>- getting effective result in the process of interaction with the representatives of another culture in a native or other community;</li> <li>- analysis and assessment in the process of cross-cultural interaction of one's own communicative acts aiming at effective cross-cultural communication</li> </ul>

*Source: Own source*

## RESULTS

During the period of 6 years (2012 – 2017) we were monitoring (incoming, intermediate, and final monitoring) the impact of the educational process on the 2<sup>nd</sup> and 3<sup>rd</sup> year-students.

The *incoming monitoring* was represented by questioning, testing, and interlocation.

When *questioning*, the students were asked to estimate their own level of knowledge and skills in the sphere of oral interethnic English language communication. The maximum possible number of scores being 2, the average respondent group score in the period of 2012 – 2017 was 0,36 by the motivational-valuable criterion and 0,38 – by the acting-reflective criterion, which corresponds to the critical (low) level. This confirms our assumption that interethnic communication skills of the intending English teachers are practically absent, which requires purposefully organized work to build and develop these skills, as the latter are the content component of the cross-cultural competence (an element of the mobility competence of intending teachers) and the basis of their readiness for the academic mobility.

The goal of *testing* was to reveal the level of students' knowledge of the culture, geography and history of the foreign country under study. The results of the incoming testing were the following: the average respondent group score in the period of 2012 – 2017 was 28,4 (at maximum 100) by the cognitive criterion, which corresponds to the critical (low) level of the knowledge under revealing. This confirms our assumption on the necessity to organize purposeful methodical activity on building and developing the cognitive component of the cross-cultural competence of intending English teachers.

Working out the questions for the *interlocation* with the respondents, we emphasized the motivational-valuable criterion of the formed traits of a personality prepared for academic mobility. The goal of the interlocation was to use the received results in the propaedeutic academic course "Teaching a Foreign Language through the Culture of Native Speakers". The results of the interlocation were the following: 30% of the students realize what the universal values are and can give their examples; 70% of the students know the notions "national interests", "homeland", but have difficulties in differentiating (or generalizing) interethnic and national interests; 90% of the respondents believe, that solving interethnic problems is possible through culture, but they could not give certain examples; 100% of the students consider it necessary to know the language of the country one lives in and English as the language of international communication, and they reasonably motivate their opinion.

The *intermediate monitoring* was represented by observation and interview.

We were *observing* the students during their academic classes (interactive lectures and practical lessons of professional courses) and under the conditions of extracurricular activities (linguistic and cultural tours abroad, international student projects in England, Belgium, France, Germany, Croatia, and China). When observing, taking into account the criteria of personality's readiness for academic mobility, we registered the following:

- cognitive criterion: development of cultural and country studies competence (in-depth knowledge of geography, history and culture of the language-speaking countries; knowledge of background vocabulary, of precedent material; comparative studies of mentality, national features of foreign language speakers and Russians; analysis of stereotypes of foreigners and Russians, etc.);
- motivational-valuable criterion: increased motivation to learn a foreign language; development of foreign language communicative competence (more confident use of vocabulary and foreign language structures); facts of tolerant behaviour to other culture representatives, their opinion, appearance and way of life; etc.);
- acting-reflective criterion; development of communicative competence (barrier-free communication); analysis of one's own speech and behaviour in order to effectively communicate).

The observation results let us see the positive tendency in forming and developing students' mobility competence due to the organized academic mobility at the faculty of foreign languages.

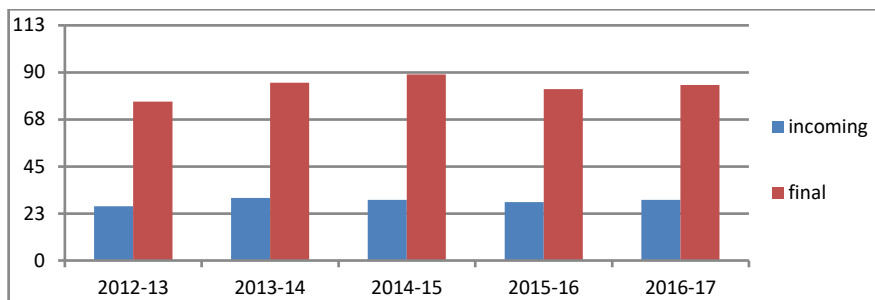
We *interviewed* the teaching staff of the faculty of foreign languages with the goal in mind to find out the changes, from their point of view, occurring in the students' readiness for academic mobility. The opinion of the teaching staff was based on observing the students in the education process and interpersonal communication. The interview results certify that by the year of graduation around 80% of the students;

- realize the world cultural diversity, possess the background knowledge of their native culture and culture of the language-speaking countries (cognitive criterion);
- behave in accordance with the norms, values and traditions of their own culture and culture of the receiving country; realize and take into account mentality features of the receiving cultural community; demonstrate an increasing interest in learning foreign languages by communicating with foreign students at their home faculty and in receiving countries (motivational-valuable criterion);
- are able to make their own decisions and act appropriately to get the result; analyze and estimate their own behaviour (including speech behaviour) from the point of view of achieving effective cross-cultural communication (acting-reflective criterion).

Thus, around 80% of the graduation year students majoring in foreign languages possess mobility competence and are ready for the process of academic mobility.

The *final monitoring* was represented by testing, questioning, expert review, interview and generalization of independent data.

The *testing* results (cognitive criterion) demonstrated that during the period of 2012 – 2017 the average score of the respondent group (83,2) corresponds to the optimal (high) level of cultural and country studies knowledge. Figure 1 shows the results of incoming and final testing in comparison.



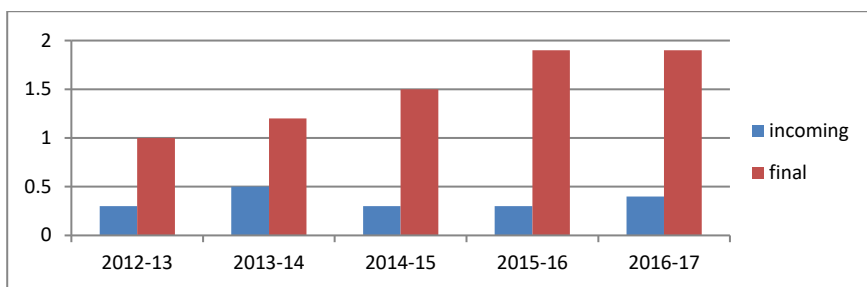
**Fig. 1.** Comparison of the levels of cultural and country studies knowledge.

Source: Own source

The obtained data was analyzed by using Student's t-test, which showed significant difference between the results of the experimental groups. Thus, the fact of increasing the level of cultural and country studies knowledge of the respondents, hence their levels of cross-cultural competence and readiness for academic mobility is statistically reliable.

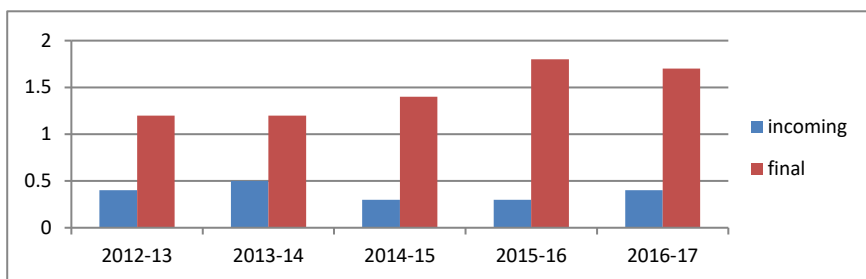
*Questioning* 300 students, who studied abroad, proved the necessity and correctness of the international activity, including students' academic mobility, organized at the faculty of foreign languages.

*Expert review* gave the questioning average score 1,5 against 0,36 by motivational-valuable criterion and 1,4 score against 0,38 by acting-reflective criterion, which is equal to the admissible (average) level, close enough to the optimal (high) level (Figures 2, 3).



**Fig. 2.** *Motivational-valuable criterion: incoming questioning and final expert review of students' readiness for academic mobility.*

*Source: Own source*



**Fig. 3.** *Acting-reflective criterion: incoming questioning and final expert review of students' readiness for academic mobility.*

*Source: Own source*

Being interviewed the administrative staff of the University pointed out qualitative and quantitative growth of students' participation in the process of academic mobility due to the organized cross-cultural training at the faculty of foreign languages.

The teaching staff *independent data* received (education, PhD degrees, rewards, studies abroad, international exams, guiding international projects, Web of Science and SCOPUS papers, etc.) attest in favour of professionalism, which allowed the teaching staff to create the cross-cultural educational environment at the faculty and form students' readiness for academic mobility.

## CONCLUSION

The technology of developing academic mobility based on the cross-cultural approach was realized in the form of experimental education at the Faculty of foreign languages of Novosibirsk state pedagogical university, Russia. The goal of the technology was to build students' mobility competence. The results were monitored with the help of such research methods as observation, interlocution,



interview, questioning, testing, expert review, and generalization of independent data applied in accordance with the developed criteria to estimate the level of students' readiness for academic mobility.

The programme activities of the technology, taking place during the period of 2012 – 2017, covered educational, scientific, international, further training and other spheres. Methods and technologies, used depending on the activity, became the following, for example: communicative method, method of projects, technology of creative thinking, technology of debates, portfolio technology, etc. (academic studies); planning, experiment, analysis (research); case studies, integration, creating of polycultural environment, etc. (international).

The monitoring data bring us to the conclusion that the proposed technology of developing academic mobility of intending teachers based on the cross-cultural approach is adequate and effective.

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# COMPETENCE TO DESIGN AND PLAN EDUCATION AND ITS APPLICATION IN SCHOOL PRACTICE

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## ABSTRACT

Planning is an essential part of the preparation and implementation of the teaching process. Designing and planning education is an important part of the complex professional competencies of teachers, which were the subject of several years of research carried out at the University of Constantine the Philosopher in Nitra. Scientific research of Slovak experts focused on the issue of the professional competencies of teachers. The starting point was to determine the current state of professional skills of teachers in the Slovak Republic, then a complex of necessary competencies was identified. The relevance of the teacher's competency complex was confirmed by their practical implementation, which was assessed by competent evaluators.

The paper presents the professional competence to plan and design, which we understand as a basic pillar of quality and effective education. A modern school requires the personal and social development of the student, good study results, but also in a complex of student values, which can be ensured by a methodologically and professionally thought-out organization of the teaching process.

One of the results of the APVV research project, *Evaluation of Teacher Competencies*, was the creation of tools and criteria for evaluating and self-evaluating the quality of a teacher's professional competencies in educational practice. Part of the paper is to present the practical implementation of a special methodology aimed at evaluating the competence to design and plan teaching, in the form of a case study model.

**Keywords:** *professional competencies of the teacher, designing and planning of education, evaluation of competencies*

## INTRODUCTION

Teaching and learning is the professional work of a teacher, aimed at helping students learn. Thinking about what students should learn, what values to acquire, what competencies to develop is at the heart of the planning process [1]. Planning means quality results of students, high efficiency of teaching, built on a methodologically adequate approach, selection of curriculum content, creation of educational activities. Good planning enables the implementation of innovative

approaches, the teacher's ability to respond to new content and requirements from society.

The analyzed competence is compatible with the current trend in education, where the focus is on the learner. Some aspects of this trend can be pointed out: the teacher is in the position of a mentor, a guide; learning is accompanied by mistakes; teaching is differentiated and adapted to students; learning is a multi-sensory process, it is authentic, practical; students are given space for activities, technologies are integrated with the curriculum; education is social-emotional [2].

It is important to note that an important aspect is incorporated in the teacher's competence to design and plan - self-reflection, thus reassessing the improvement of educational work, which would respect current trends in education. When planning, the teacher is expected to respect changes in society and in the education system. The teacher creates conditions that reflect these changes and are directed towards the active cognitive activity of students. Designing and planning is the process of organizing, it is the creative and independent work of a teacher.

## **EDUCATION DESIGN AND PLANNING**

Designing and planning education is one of the key professional competencies of a teacher, which plays a significant role in creating and maintaining a positive climate in the classroom. It is one of the basic pedagogical requirements, requiring one to think in advance about the content aspect of the work, whether from a long-term or short-term aspect. Didactic-methodical processing of content, measured to fulfil a pre-clear and comprehensibly formulated set of goals, is a necessary part of the work of teachers and students.

In the conditions of the Slovak education system, we can identify several specific competencies that are part of the competence:

1. knowledge: they are a starting point for adequate knowledge of the issue of competence,

2. skills and attitudes:

- a) be able to design and plan education in the context of the state and school educational program and accordance with the identified and required key competencies of the student,
- b) be able to reflect on the actual learning process of students and compare it with the projected function,
- c) to create an individual educational plan for pupils with special educational needs in cooperation with experts.

The starting point for design and planning is the teacher's ability to set teaching and learning goals. The definition of objectives is related to the

requirements of Slovak society, which are currently incorporated in Act no. 245/2008 Coll. On upbringing and education (Act on upbringing and education, 2008). Another group of requirements is related to the psychological processes of the student; the teacher must correctly differentiate and then meet the goals in the field of cognitive (intellectual), socio-affective (educational), and psychomotor (senso-motor skills of the student). The prerequisite for the application of competence is also the knowledge and fulfilment of key competencies of the student, which we characterize as a set of demonstrable individual abilities of active and conscious use of knowledge, skills, attitudes and values. The quality of upbringing and education is linked to the knowledge of the content aspect of the pupil's competencies and the methodological possibilities of their fulfilment in a specific subject [3].

Professional competence to design and plan the teaching process requires the teacher to apply knowledge and skills to several levels.

The teacher must have knowledge related to long-term design associated with creating the state educational program, which results from the work of experts. Active project activity is reflected in the creation and correction of school curricula, curricula and school curricula.

The core of the analyzed competence is medium-term design, applied mainly to create a functional thematic educational plan. Its creation is an essential and demanding project activity of the teacher, covering a relatively long period for stratification of the curriculum content and forms of its implementation.

The quality of short-term planning is demonstrable in creating models/scenarios of lessons and representing the teacher's daily pedagogical activity. It is a complicated individual thought process, the result of which is the creation of a lesson model, the prerequisite of which is the knowledge of all levels of design.

## **APPLICATION OF THE AAA METHODOLOGY IN EVALUATING THE TEACHER'S COMPETENCE TO DESIGN AND PLAN EDUCATION**

The need for a deeper analysis of the assessed performance of the teacher requires the evaluator to use the methodological possibilities provided by the AAA methodology [4].

Annotation (A) focuses on the presentation of the overall context of the teaching situation, it is a description of a specific educational situation, its content, methodological and didactic processing, student activities that allow the perception and reflection of the educational problem.

Analysis (A) provides space for the evaluator, which allows to communicate with the teacher and analyze the various components of the teaching process, the implementation of teaching methods. The analysis focuses on the application of evaluation criteria that are specific to the specific competencies assessed.

Alteration (A) represents the relationship between the achieved quality of fulfillment of specific competence and the possibility of its improvement in the proposals provided to the teacher by his evaluator.

We distinguish three levels of alteration quality:

Failing quality: teaching is not beneficial for students, the required competencies of students are not developed, the quality is the result of didactic shortcomings of the teacher in teaching.

Undeveloped quality: teaching provides students with the opportunity to acquire basic knowledge, but does not allow for a wider development of their competencies.

Encouraging quality: teaching leads students to an active understanding of the topic, provides them with stimuli for evaluation, judgment, derivation.

Developing quality: students show the ability to generalize knowledge, apply it, understand social relationships, in the assigned tasks show understanding of the topic in a broader context [5].

The mentioned methodology is an optimal model and evaluation tool within the short-term planning of education. The evaluator has the opportunity to monitor and assess the performance of the teacher and the work of students in one lesson, taking into account the specification of the requirements of the competence [6].

We have created a set of specific evaluation criteria and their associated indicators (criteria and indicators are part of the evaluation sheet), which we present in tabular form for clarity.

**Table 1.** *Evaluation criteria and indicators of competence to design and plan education*

<b>EVALUATION CRITERIA</b>	<b>INDICATORS</b>
<i>The planning system in the school and in the specific subject</i>	<ul style="list-style-type: none"> <li>• The teacher took into account the requirements set by the school curriculum when planning the teaching process.</li> <li>• The teacher relevantly fulfilled the objectives of the lesson in accordance with the school curriculum.</li> <li>• The course of the lesson showed that the teacher reflected the results of his / her monitoring from the previous teaching when planning.</li> </ul>
<i>Monitoring the development of the subject from a theoretical and methodological aspect</i>	<ul style="list-style-type: none"> <li>• The teacher included in the content of the lesson current knowledge of sciences.</li> <li>• It was evident from the implementation of the lesson that the teacher applied the didactic analysis of the curriculum in the process of its planning.</li> <li>• The teacher used teaching methods that support the active learning of pupils.</li> </ul>
<i>Planning reflects interdisciplinarity in education and assessment processes</i>	<ul style="list-style-type: none"> <li>• The lesson was planned with the active application of interdisciplinary contexts.</li> <li>• Part of the lesson planning was the active application of cross-cutting themes.</li> <li>• The teacher used a well-thought-out procedure for assessing and classifying students.</li> </ul>
<i>Lesson construction</i>	<ul style="list-style-type: none"> <li>• The teacher set the central and partial goals of the individual parts of the lesson.</li> <li>• The teacher implemented the planned content and performance requirements.</li> <li>• The teacher respected and adhered to the planned timing of the lesson.</li> </ul>

<b><i>Content and methodological aspect of the lesson</i></b>	<ul style="list-style-type: none"><li>• The implementation of the lesson respected the planned content classification.</li><li>• The selection and application of methods and forms of work corresponded to the fulfillment of the set goals of the lesson.</li><li>• The logical construction of the curriculum content corresponded to the requirements of didactic transformation.</li><li>• The methodological approach corresponded to the age of the pupils and their individual possibilities (specificity and individuality in the approach to the specified group of pupils).</li></ul>
<b><i>A lesson in the context of the pupil's needs</i></b>	<ul style="list-style-type: none"><li>• The teacher systematically developed selected competencies of pupils.</li><li>• The teacher used the educational aspect of the lesson planned in accordance with the topic.</li><li>• The contact and cooperation of the teacher with the students was thoughtfully realized.</li><li>• The use of material teaching aids was thoughtful and effective.</li></ul>

*Source: Own source*

In the next text, we present an example for the practical use of AAA methodology methods, which takes the form of a case study [7]. It is a record of the authentic teaching situation in the subject of civics, which was created on the basis of the evaluator's participation in teaching.

**CIVIC LESSONS CLASS - 2<sup>ND</sup> YEAR OF GRAMMAR SCHOOL**

*Annotation*

The realised lesson was in the 2nd year secondary school, in the compulsory subject of Civic lesson on the topic *The rule of law and its features*. The teacher sets general goals, specific goals, content and performance standards, relevant competencies of the student, teaching methods and forms of work, interdisciplinary connections, and material-didactic means.

The structure of the lesson consisted of all parts of a standard task. The introductory part, which formulated the general goal of the lesson was, was



followed by the control-diagnostic part. The teacher presented the students with a caricature showing the totalitarian regime - fascism. The pupil's task was to identify the totalitarian regime and name the individual features of totalitarianism based on specific examples from the cartoon.

In the *motivational phase*, the teacher created a table with two columns on the board.

In the first pupils, they wrote down the signs of the totalitarian regime; based on these signs, they subsequently tried to identify the signs of the democratic government and wrote them down in the second column.

The realised *exhibition part* was through a combination of methods of explaining the curriculum and Socratic conversation. The used process of working with professional texts was in the form of work in pairs; based on working with texts, the institutes deduced the basic principles of the rule of law.

The *fixation part* was devoted to confirming the findings. The teacher chose the method of individual independent work. The assignment of homework was focused on the cognitive side of the topic; at the end of the lesson, the teacher evaluated students' work and summarised the topic of the lesson in the form of key terms, which he recorded on the board.

### *Analysis*

We analysed the lesson based on six evaluation criteria. These criteria belonged to evaluating the competence to design and plan education (Table Evaluation criteria and indicators of the competence to design and plan education).

### *Alteration*

From the analysis of individual evaluation criteria, we came to several proposals:

- more rigorous use of monitoring to assess the quality of pupils' knowledge and skills,
- use interdisciplinary relations also with subjects of geography, informatics,
- set partial aims of individual parts of the lesson structure, as consistent planning of all parts of the lesson should also include partial educational and teaching goals; their identification will support the quality of learning outcomes – pupil competencies,
- the teacher planned to implement the cross-sectional topic of Multicultural Education, but it did not implement during the lesson. We suggest that when creating the scenario of the lesson, the

methodological approaches by which the mentioned implementation will be realised are also incorporated,

- the teacher, during the lesson, oriented the activity of the pupils also in terms of supporting its educational aspect. Therefore we suggest that the teacher include planning the lesson scenario and methodically specify this potential of the topic.

The presented evaluation model considers a systematic approach to the competence to design and plan education; it contains all the components involved in the construction of the competence structure. Within the model implementing the AAA assessment methodology, we have the ambition to direct evaluators to the real possibilities of assessing the work of the evaluated teacher through a relatively comprehensive analytical approach.

## CONCLUSION

Professional competence to design and plan education represents one of the competencies oriented to support professionalism, professional growth and organizational skills in the context of lifelong learning and career growth of teachers in the conditions of Slovak education [8].

The quality of the competence to design and plan is reflected in the teacher's work with students and in specific educational results. The reflection of the analyzed competence is aimed at a permanent increase in quality in education and upbringing in the environment of the Slovak school system [9]. The aim of identifying the essence of competence, its structure and orientation is: positive contribution to the teacher's work, reflecting current social needs, orientation to meet educational and teaching goals, meeting the requirements for student development, revealing strengths and weaknesses in designing and planning teacher's work.

The presented paper is the result of the scientific research project APVV, *Evaluation of teacher competencies* [10]. The paper presented the competence to design and plan education, evaluation of the quality of competence and was focused on the application of competence in school practice. The purpose of the research project was to present the assessment of competencies as a motivating factor that would direct teachers to perceive the assessment as a starting point for positive support of their work. We consider motivation to be an important factor in successful pedagogical work because it leads the teacher to pedagogical success and supports personal and professional growth.

## ACKNOWLEDGEMENT

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# EDUCATIONAL CHALLENGES FOR UNIVERSITIES DURING THE COVID-19 PANDEMIC

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## ABSTRACT

The purpose of the article was to present the impact of the COVID-19 pandemic on the didactic process and to start a discussion on what can universities do at this specific time to meet the requirements of the Polish Qualifications Framework and also how should the didactic staff communicate with the use of virtual space to achieve the expected quality of education.

The paper is a concept study based on the results of a literature search query, experiences derived from cooperation with institutions dealing in the management of regional development and labour markets, such as the Regional Labour Office, and the experience gained from holding specific positions at the faculty.

As former vice-deans for didactics, both authors have in-depth knowledge about the conditions for the education process implementation and the related challenges. Experience gained from holding a specific position made it possible to propose a comprehensive look at the challenges for universities related to education at the time of the Covid-19 pandemic.

The original features of the paper include: discussion on the importance of universities in the market economy and the education process, presentation of the current situation of universities at the time of the Covid-19 pandemic and the opportunity to get acquainted with the activities that were undertaken by universities in response to the new challenge, i.e. complete transition to distance learning.

**Keywords:** *didactic process, challenges for universities, higher education*

## INTRODUCTION

The World Health Organization (WHO) announced the SARS-COV-2 pandemic, caused by a new coronavirus on 11 March 2020, however, the term of COVID-19 pandemic is used due to the officially confirmed cases of infection in 2019. The first cases of infection emerged in Wuhan, Hubei Province in China and quickly spread all over the world. In a strongly related and integrated world, the problem of the Chinese economy affected the global economy. Many enterprises around the world is associated with agreements or even dependent on supplies from China, thereby resulting in them being impacted by the COVID-19

epidemic regardless of their size. The production and transport of goods from China became substantially limited, thereby limiting the provision of services based on products exported from China in many economies around the world. Global financial markets also reacted to these changes and the global stock market indices declined. This was followed by a health crisis and a healthcare crisis.

A series of often radical solutions were used to battle the virus, including complete lockdowns, quarantines, prohibition of business activity or movement. This took a toll on the labour markets and peoples' awareness. Such a substantial limitation of business and consumer activity contributed to a weakened economy. At the start and spread of the pandemic, the world economy entered a path of recession after earlier turmoil. It is believed that the pandemic became an additional stimulus which accelerated and intensified the economic crisis.

Beyond a doubt, the COVID-19 pandemic affected all economic aspects, coercing a series of changes in labour and lifestyle. It seems that it will remain the main or one of the main challenges for various institutions and social groups for a relatively long time. The higher education system will also face the effects of this situation in the long term.

The learning youth also experienced the pandemic's impact on their lives. Isolation and online education contributed to increased anxiety, e.g. of infection, and changed the youth's individual behaviours. In the document Policy Brief: Education during COVID-19 and beyond it was stressed that "COVID-19 pandemic has created the largest disruption of education systems in history, affecting nearly 1.6 billion learners in more than 190 countries and all continents" [1].

## **IMPORTANCE OF UNIVERSITIES IN THE MARKET ECONOMY AND EDUCATION**

The role of higher education in the development of an entire country and regional development is widely known and discussed. Universities shape the development of the local and regional knowledge-based economy and affect the labour market and the goods and services market. It was demonstrated that university presence at a given location contributes positively to regional development by providing better education for employees, education for entrepreneurs and through regional external effects [2]. Universities largely contributed to the political transformation by, among others, engagement in the creation of modern administrative solutions and by various interactions with entrepreneurs, which was especially important in Central and Eastern European states.

Universities have a substantial impact on the economy because they shape the knowledge, skills and social competencies of the people entering or already present on the labour market. The higher the candidate's potential, the greater the

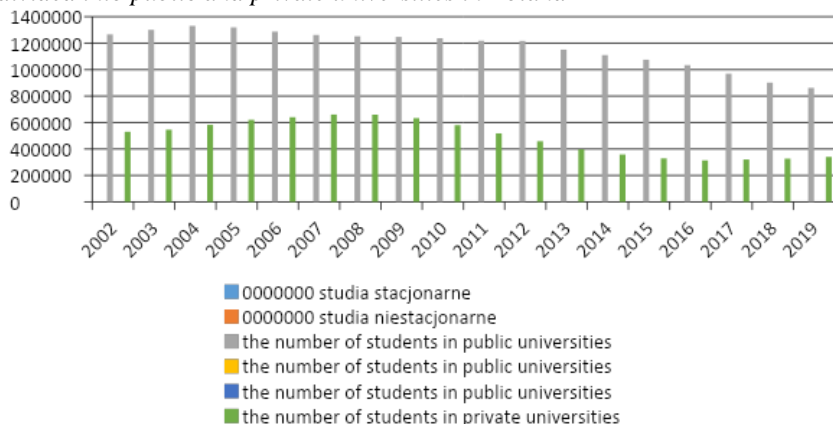
opportunities for finding an appealing job [3]. This potential is shaped during studies by the acquisition of relevant knowledge, skills and social competencies, as well as gaining experience (including experience in an international environment), knowledge of foreign languages and new technologies. The impact of tertiary education on the share of the self-employed in the total workforce was demonstrated. The high quality of human capital translates into innovativeness. Universities are therefore faced with a great challenge to improve this situation. Universities are no longer associated solely with shaping human capital, the catalogue of their functions is broader and this process is dynamic [4].

The changes in the structure and functioning of the education system are a result of the current social and economic situation, which substantially affect the functioning of universities.

Previously, the most important factors that affected the education market included the clear change in the demographic trends and less than optimistic forecasts, end of education of the so-called secondary boom generation, substantial changes in social behaviours, i.e. opening the labour market and consequently labour migration, change in the model of family and its life cycle [5, p. 28]. Last year, the emergence of the SARS-COV-2 virus substantially changes the “rules of the game” by necessitating the introduction of the didactic process’ digitalisation. This produced a new difficulty for the academic teacher to develop interpersonal relations with students, which in direct contact encourages them to seek and use various sources of knowledge and develop their skills to make the studying process effective.

Only 390 thousand people attended studies in the 1990/1991 academic year. For 15 years, this number was increasing systematically, until peaking in the 2005/2006 academic year, when the number of students increased five-fold to a staggering number of 1,95 million. Subsequent years featured a systematic decline in the number of students to approx. 1.67 million in 2013 and slightly over 1.34 million in 2016. According to the ministry’s forecasts, the downward trend will continue until 2025, when 1.25 million people will attend studies [6]. A total of 436,316 people commenced studies in 2016, which is nearly 10 thousand less than in the 2015/2016 academic year. This number included 340 thousand students who commenced education in public universities, featuring 132 (31.8%) institutions according to the data of Statistics Poland, while the number of non-public universities amounted to 238 (68.9%) [7].

**Fig. 1.** Distribution of the number of students in the period of 2002-2019 divided into public and private universities in Poland



Source: Based on Local Data Bank (<https://stat.gov.pl>)

Despite the substantial dominance in the number of non-public universities in Poland, this does not translate into the number of students. Students still mostly choose to acquire higher education in public universities as accredited institutions at the Ministry of Science and Higher Education (see Fig. 1). However, it is worth noting that after a visible decline in interest in education in private schools in 2014, we are currently observing an upward trend in this regard, including a simultaneous decline in the number of students in public universities (which is on-going since 2006).

The current market conditions, i.e. the increasing number of science and research institutions as well as commercial R&D institutions, increasing demand for knowledge services reported by business entities [8; 4], constantly growing e-learning education offer, make a modern university adapt to the social and economic environment.

At the same time, the correct functioning of each university depends on the existence of an academic community which is a collective identity created by the academic environment. Identity is understood as a sum of elements that identify and distinguish an organisation, in this case a university, in a market environment. One of the important aspects of managing a university's reputation is building, in the market environment, a feeling of trust that the education process meets the qualitative requirements of the university's key stakeholders.

The Bologna Process ensured that the level of education is comparable and adequate in all states despite the fact that particular European countries can freely select their curriculum. This allows for achieving the assumed learning effects. The Polish Qualifications Framework (PQF) was initially introduced to define



three categories: knowledge, skills and social competencies. The commencement of work on the introduction of the Integrated Qualifications System in 2008 resulted in the development and implementation of the Polish Qualifications Framework (PQF) in 2016 [9]. These measures allowed, among others, for referring the acquired qualifications to the qualifications in use in other European countries and pointing out qualifications provided in a traditional education and higher education system as well as outside of them (e.g. qualifications acquired on the market).

**Table 1.** *Second-degree characteristics of the Polish Qualifications Framework on social competencies classified as level 6 (bachelor's/engineering studies) and level 7 (master's studies)*

	<b>PQF characteristics level 6</b>	<b>PQF characteristics level 7</b>
<b>SKILLS</b>	using the possessed knowledge	
	communication using specialist terminology	communication on specialist topics with various recipient circles
	participation in a debate – presenting and assessing various opinions and positions as well as discussion	conducting a debate
	using a foreign language at level B2 of the Common European Framework of Reference for Languages	using a foreign language at level B2+ of the Common European Framework of Reference for Languages and higher level in terms of specialist terminology
	planning and organisation of work – individually and in a team	team work management
	independent planning and implementation of lifelong learning	independent planning and implementation of lifelong learning as well as guiding others in this scope
<b>SOCIAL COMPETENCIES</b>	critical assessment of the possessed knowledge	critical assessment of the contents received
	recognition of the importance of knowledge in solving cognitive and practical problems	
	meeting social obligations, co-organisation of activity in favour of a social environment	meeting social obligations, inspiration and organisation of activity in favour of a social environment
	initiating measures in favour of the public interest	
	thinking and acting in an entrepreneurial manner	
	responsible fulfilment of professional roles,	responsible fulfilment of professional roles with

	including: a) complying with the principles of professional ethics and requiring others to do the same, b) taking care of the profession's achievements and traditions	consideration of the ever-changing social needs: a) developing the profession's achievements, b) maintaining the profession's ethos, c) complying with and developing the principles of professional ethics and acting with respect towards those principles
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*Source: [9].*

The higher education qualifications framework in Europe is to be shaped according to the map of qualifications suitable for levels 5-8 of the EQF. This map should provide a clear description of the competencies of a person possessing a relevant diploma, present the relations between qualifications and demonstrate the ability to shift and continue the education as part of lifelong learning. The qualifications framework allows for the differentiation of education programmes in terms of their contents, form, profile and duration, while the specification of universal requirements (instead of the programme's contents) allows for classifying a given diploma or certificate at the relevant level of education [10; 9].

When analysing the entries in Table 1, there is no doubt whether students can fully achieve the assumed learning effects after months of distance learning. The universities certify the achievement of these effects on the labour market by issuing state diplomas. This is one of the many challenges faced by universities and its future effects cannot be completely predicted.

**CHALLENGES FOR UNIVERSITIES IN THE TIME OF THE COVID-19 PANDEMIC**

Universities are facing many challenges today, which include demographic changes, polarization of regional and urban centres, rapid changes in the socio-economic environment [11], but in a special way universities were forced to radically change their functioning due to the COVID-19 pandemic. The challenges they faced covered nearly all aspects of their activity. When analysing the didactic aspects, it must be noted that basically all universities in Poland shifted to distance learning, which involved various challenges, such as providing adequate e-learning platforms to communicate with students, preparing didactic materials in a manner that enables making them available on such platforms, training employees and students on using online platforms, etc. This was done surprisingly quickly to enable the learning process, often without adequate tools or training on using them.

It must also be noted that the transfer of the didactic activity to a virtual reality resulted in a loss in contact between the students as well as between the students

and academics. The phenomenon, which is yet to be fully explored, is the digital exclusion in distance learning during the COVID-19 pandemic. Not all didactic process stakeholders possessed adequate computer equipment to establish direct contact from home (e.g. no webcams). It is known that the differences in the conditions of functioning of students during the pandemic were substantial. Not everyone had the adequate space to learn or to actively participate in the classes (e.g. many people residing in a single apartment due to remote work or quarantine). The Polish universities mostly decided to close their dorms and make students leave for the duration of the announced pandemic. Research conducted in the Netherlands demonstrate that students conducting education at homes achieved very little progress despite relatively high quality and conditions of living, including Internet access, among others [12]. It is therefore possible to assume that universities around the world, including Polish universities, are faced with reducing the digital exclusion gap, perhaps in cooperation with local, regional or national authorities. These are only some of the problems faced by people in the education process.

In the traditional form of functioning, universities broadly recognise the issues concerning the generally understood well-being of the students and try to support them at various levels, either by intellectual stimulation (e.g. in scientific clubs), financial aid (e.g. through scholarships or the possibility of using dormitories), supporting an active and healthy life style (e.g. sport classes), internationalisation (e.g. possibility of participation in the Erasmus+ Programme) or through cultural measures (e.g. popular student springs). The pandemic caused most of such measures to be suspended and many students reduced their level of social and economic functioning, while running into problems related to, for example, stress caused by uncertainty, inability to take up work or lack of sufficient resources to lead a healthy lifestyle [13, 14]. Authors of many papers emphasise that universities, aside from teaching, have to provoke the youth to make social interactions and constitute a forum for the exchange of ideas and experiences. The COVID-19 pandemic substantially limited and flattened these functions.

In the current conditions, a university oriented on traditional communication with its Customers-Students was forced to quickly undergo a demanding transformation process into e-communication. One of the more difficult challenges for universities during the COVID-19 pandemic was to carry out a promotional campaign for supporting the recruitment process without the possibility of organising meetings and direct contact with potential candidates. Many universities in Poland were quickly re-deploying their resources and developing new skills. The universities proposed the following, among others:

- online open days,
- online walk-in selected university departments,
- candidate zone – an online guide on topics most important for candidates,

- intensified communication with the use of social media,
- open webinars dedicated to patronage classes,
- educational videos and presentations on YouTube and in regional television.

In administrative terms, the service of students and university employees also had to be shifted online, thereby requiring the development and implementation of online stakeholder service procedures. It was necessary to provide employees with adequate opportunities to work in a sanitary regime, resulting mainly in the implementation of remote work or adaptation of workplaces to the imposed requirements (e.g. installation of glass panes separating the university employees from stakeholders, installation of disinfectant dispensers, moving part of the administrative personnel to unused classrooms to reduce the number of people residing in a single room, etc.).

The scientific dimension also featured a revolution. Most scientific events (conferences, seminars, defences, etc.) were transferred online, thereby enabling the continuation of scientific activity but substantially reduced the quality of interpersonal interactions.

Such a turbulent environment and extraordinary conditions introduced in a big hurry resulted in a series of consequences. It can certainly be stated that the COVID-19 pandemic became one of the most important external stressors [15] that affected the entire academic and student environment, the quality of education and the quality of conducting scientific research. This was caused mainly by factors such as uncertainty, quick pace of the changes in the broadly understood education process and the need to adapt to the changes, need for quick acquisition of the skills of using other means of communication, concern for one's health and the health of his or her family, uncertainty concerning the economic situation and the situation on the labour market, often loss of employment (mainly for students) or forced resignation from a college lifestyle.

## CONCLUSIONS

The COVID-19 pandemic substantially affected the functioning of universities in Poland. On one hand, it accelerated the digitalisation of didactic materials or library resources. It coerced quick acquisition of knowledge and skills related to using distance learning platforms (e.g. Zoom, Microsoft Teams, Moodle) by both teachers and students.

However, such quick decisions on shutting down the universities' traditional functioning and commencing full-time distance learning was dictated by the uncertainty related to the pandemic's duration and testified to the high managerial competencies of the universities' management staff. Nearly three full semesters were conducted remotely on Polish universities and on the eve of the 2021/2022 academic year many universities decided to introduce hybrid classes (some of

them, mainly including bigger groups of students, will be remote, while others, mostly in smaller numbers, will be conducted traditionally). The radical decisions made at the beginning of the pandemic resulted in the graduation and obtaining a diploma by the students. It is difficult to imagine the consequences if the youth was unable to complete its education. The common digitalisation, skills to operate computer systems and the relatively high availability of computer equipment helped to overcome some of the negative effects of the COVID-19 pandemic in the higher education sector.

On the other hand, it halted certain internationalisation processes, for instance, due to the foreign travel prohibition. Due to the lack of traditional classes, the bonds between students and university employees either did not form or loosened. The students of second-degree studies hardly participate in any traditional classes at the universities because three full semesters took an online form.

A separate issue are the economic consequences of distance learning for academic cities. Students contribute to the creation of many jobs, e.g. in services, catering or in the real properties for lease market. That being said, their effect on the economy of academic cities is substantially reduced in the conditions of distance learning.

The purpose of the article was to present the impact of the COVID-19 pandemic on the didactic process and to start a discussion on what can universities do at this specific time to meet the requirements of the Polish Qualifications Framework and also how should the didactic staff communicate with the use of virtual space to achieve the expected quality of education.

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## **EXPECTATIONS OF GENERATION Z - A CHALLENGE FOR ACADEMIC DIDACTIC STAFF**

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### **ABSTRACT**

The social, cultural, and technological aspects of the environment significantly affect the generation Z student's behaviour. Expectations regarding teachers' work are rising and students' commitment to learning is declining. The aim of the article is to present challenges posed before the didactic process, based on the research results regarding the role and significance of the didactic staff in the opinion of generation Z. The presented issues constitute an introduction to a discussion regarding the current approach to the educational process, in the light of technological and social challenges. The methods selected for the purposes of this study are an analysis based on a profound source literature query, which was combined with empirical research performed among students at the Opole University of Technology, using the computer-assisted web interviewing method, by means of a proprietary survey questionnaire. Research results constitute an essential source of knowledge regarding factors that, in the opinion of generation Z students, have the most significance for the efficiency of the educational process, and for the construction of interpersonal relations between students and lecturers. On the basis of the achieved results, recommendations for the didactic staff were developed, regarding the creation of new, engaging didactic forms, and assuming the role of a mentor both for the career, as well as life path. The key value achieved in a result of the research is primary data, constituting the basis for developing a recommendation regarding challenges posed before the academic didactic staff.

**Keywords:** *educational process, generation Z, academic didactic staff, interpersonal relations*

### **INTRODUCTION**

Changes that have taken place within the employment market, during the last decades, suggest that better-educated persons possess (and will remain to possess) an advantage, as the employment market is becoming more and more a knowledge-based economy. In a result, ensuring access to high-quality higher education to the large portion of the population, capable of adapting to the swiftly changing workforce, is among the primary challenges which the institutions of higher education and educational systems, in general, must face [10].

The purpose of the research was to identify the expectations of the generation Z to-towards the academic didactic staff and the teaching process. The aim of the

article is to present the research results regarding the role and significance of the didactic staff in the opinion of generation Z, within the context of modern challenges posed before the universities.

In the classical approach, the university defined itself in a manner independent from the external environment. Based on strict standards of education, the university formed faculties and educational programs. Similarly, the direction and the scope of scientific research were formed. Another step was to introduce them to the market, i.e. complete enrolment and research results' sales. However, this approach is already a thing of the past. The modern university is fully directed at the social and economic environment, monitoring the changes occurring in the environment, and gathering information necessary for swift and flexible adaptation to the ever-changing market requirements, particularly, within the context of employment market expectations. The aforementioned become even more of a challenge, as the declared demand for a particular set: knowledge, skill, competency; comes from the students on the one side, and from the employees on the other.

Students, as the university's customers for educational services require a feeling of trust, that the process of education is in compliance with the qualitative requirements of the key stakeholders of the university, and will ensure their professional success, and the expected quality of life.

Employers, as the university's customers for a 'product' of educational services, pose a challenge of creating and perfecting the intellectual potential of future staff regarding employment market expectations.

In a very broad perspective, the key elements of the mission of higher education were reduced to four aspects [13]:

1. Creating human capital intellectual potential (student education area).
2. Creating new knowledge (the area of scientific research and the intensification of cooperation with the economic sector).
3. Promoting knowledge among its potential users (processes of socialisation of knowledge in result of research results commercialisation, and collaboration with external stakeholders).
4. Intergenerational knowledge transfer.

The four presented areas should be considered as strategic for every university which, depending on its own intellectual resources, accomplishes them in a more or less effective way. A university, intending to manage its image efficiently, should engage its own resources in active communication with the market regarding its own identity, in order to: attract attention, attract interest regarding its offer, strengthening involvement, and building loyalty. The market environment forces the organisation to undertake diversified marketing actions



within the aspect of fighting for a competitive position. The specifics of the university's operations within this area indicates that the key element of marketing actions is brand image shaped by the opinion within the environment, particularly, the students.

## **INTERGENERATIONAL KNOWLEDGE TRANSFER**

Evolutionary changes of recent years have significantly changed the environment and the way of how young adults function. The key area of a student includes the academic environment, serving both the higher education and upbringing purposes. The aforementioned occurs due to social and cultural aspects of the environment, that significantly affect the student's behaviour. It is related to the multi-dimensional nature and the specifics of the academic environment, which allows acquiring knowledge and skills, as well as, helps develop personality and attitudes, determining the value system and social behaviour of young people. Intergenerational projects can provide opportunities for younger people to develop qualities such as initiative, flexibility, openness, empathy and creativity and to understand the value of lifelong learning. Greater participation in positive intergenerational activities results in an increased sense of worth, self-esteem and self-confidence, and an enhanced sense of social responsibility. But, according to Rupčić [15], it is important to remember that 'Intergenerational relations have often been identified as sources of difficulty and conflict'.

Resources responsible for the adequate realisation of the educational process, i.e. primarily in compliance with students' expectations, is the didactic staff of the university, which, this way, more or less consciously, plays a major role in the process of brand building. The relation between expectations, and actual value received, shapes the students' satisfaction index, therefore, affecting for their affection towards the brand, which is the university.

Due to the multiplicity of tasks executed, the profession of an academic teacher is highly demanding. An academic teacher is simultaneous: an educator, a scientist, and an organiser. In his didactic work, the teacher transfers knowledge, which is primarily a result of his scientific activity. The teacher establishes an interpersonal relationship with students, in which he encourages them to use a varied surplus of knowledge and skills, aiming at the execution of the process of studying, that is practical application of the mind to the acquisition of valuable knowledge.

The 'interpersonal relations' term is associated with the mutual influence between persons, with social interaction and collaboration, based on respect regarding views and opinions. Additionally, the relation must also include trust. Previous research has shown that interpersonal relationships are an important predictor of many student outcomes such as: awareness of possessed skills, self-efficacy and self-confidence [1], [2], [3], [12].

A healthy teacher-student relationship is argued to be the characteristic of a productive academic environment [11], because of the association with student cognitive learning outcomes and motivation [12].

An academic teacher is a person which is adequately prepared for both didactic and scientific work, meaning, that he should possess a high scholarly culture and well-grounded knowledge, which he presents skilfully and in an interesting way to the students, simultaneously encouraging them for the independent acquisition of knowledge and further learning. Contemporary universities require the academic teachers to possess highly developed competencies: communicational, organisational, creative, logic, informational, as well as, media and marketing-oriented ones [7]. His didactic work should be characterised by dedication combined with passion, and an open mind, as these features aid the establishment of inter-personal relations, where the teacher is taking the role of a mentor of an indisputable authority among students, as well as, the social environment of the university [4], [8], [14].

In order to tackle the challenges which the academic teachers face currently, they must redefine themselves within the areas of:

- the complexity of the role of an academic teacher, resulting from varied roles assumed by them at the university,
- personal brand and self-awareness,
- possessed skills within the scope of conducting classes with students in accordance with their expectations,
- competencies allowing to be an aware academic teacher, within the context of the opportunities and limitations in shaping the development path.

Currently, the academic teacher is primarily expected to introduce innovative forms of education with an emphasis of encouraging creativity of an individual who will be well-prepared merit and practice-wise. Simultaneously, he must display a positive attitude towards novelties and changes, as well as, accept unconventional methods of work. An academic teacher will be able to develop the mature personality of students, if he, himself will display an exceptional personality, and possess the skill of introducing new development perspectives to the students. Therefore, he must possess high qualifications: spiritual, moral, and intellectual, as he is to be a model for the other.

## **METHODOLOGY**

The aim of the performed study was to learn the opinion of Students regarding the role and the significance of the human factor within the context of expectations regarding the didactic process. Computer Assisted Web Interview research was conducted among first and second-cycle students of all faculties of the Opole University of Technology. The author's survey, developed using the online form,

was placed on the university's websites and on the social media profiles of the university, student government and the profiles of individual faculties. The sampling was random. The number of students of Opole University of Technology at the time of the study was 6,412. With such a population indicated, the research sample should be 362 people, with a maximum error of 5%. In the course of collecting primary data, 725 respondents showed their activity, resulting in a maximum error of 3%. The designed survey questionnaire included 8 research inquiries, i.a. including:

1. What is important in the evaluation of a lecturer?
2. Which aspects, related to the didactic staff, are essential within the course of cooperation?
3. Are the actions undertaken by the didactic staff an element of building dedication of the Students to the life of the academic environment?

Based on the formed opinions, within the scope of a mind map of the issues and research questions, the following directional research hypotheses were presented, based on the professional and life experience:

H1. Interpersonal relations are a key factor for building the image of the university.

H2. Students expect not only the transfer of knowledge, but also, varied forms of cooperation.

H3. Didactic staff of the university should improve the ability of career support and counselling.

Research using the Computer Assisted Web Interview method was performed among the first and second grade students of all faculties of the Opole University of Technology. The survey sample was random. The general population amounted to 6412 individuals, whereas the required research sample: 362 individuals. During gathering of primary data, 725 respondents displayed activity, and so the maximum margin of error amounted to 3%.

## RESULTS

*What issues do the Students consider as significant in academic teacher evaluation?*

In order to receive more detailed information regarding the areas, which the Students consider as essential in academic teacher evaluation, 14 potential areas were identified, with the possibility of determining the scope of their significance (Table 1).

**Table 1.** *Significance of selected areas in the assessment of academic teacher.*

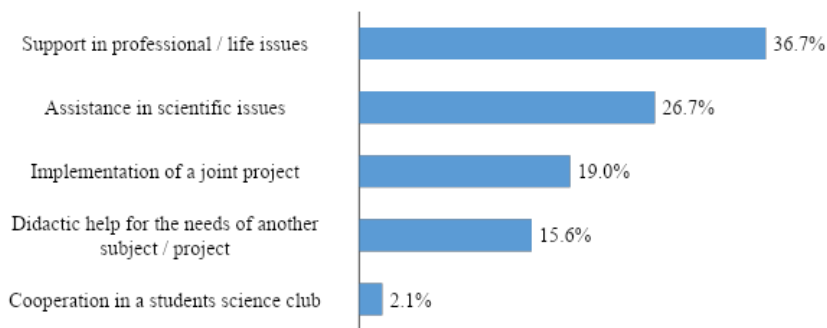
	not important	slightly important	moderately important	important	very important
The way in which he carries on classes	0.1%	0.7%	3.5%	15.6%	80.1%
Openness and affordability for students	0.1%	1.4%	6.1%	22.4%	70.4%
Ability to explain complexities	0.3%	0.8%	7.5%	24.9%	67.2%
Ease of establishing contact with students	0.3%	2.2%	13.1%	32.8%	52.3%
Dependability and transparency of evaluation criteria	0.3%	2.9%	15.6%	30.2%	51.3%
Illustrating topics of classes with examples	0.7%	3.3%	13.2%	35.6%	47.4%
Ability to appreciate students	0.7%	4.0%	16.8%	36.2%	42.1%
High verbal culture	1.4%	3.9%	21.4%	38.9%	34.6%
Professional experience	6.1%	8.6%	23.9%	31.6%	30.5%
Ability to discipline the group	1.9%	6.8%	25.2%	38.2%	28.4%
Punctuality and conscientiousness	2.5%	10.7%	23.2%	35.7%	28.4%
Clothing and general aesthetics	12.5%	18.9%	33.0%	26.7%	9.3%
Academic achievements	18.2%	19.2%	32.0%	22.0%	9.3%
Degrees and academic titles	22.4%	20.6%	30.0%	19.6%	7.9%

*Source: Own source*

Primarily, the respondents indicated the character of the teacher-student interpersonal relations character, pointing at the significance of social competencies, and personal predispositions of the lecturers, that primarily result from their innate features. Therefore, the challenge posed before the academic teachers is the development and perfection of the aforementioned features through training within the scope of: impression management, innovative educational methods, participation education model, e-technology use within the didactic process, conflict resolving, team communication, etc. The essential role is played by the university itself, as, apart from investing 'in science', it should also support this area of the didactic process, which is the care for the development of the intellectual potential and personal competencies of the academic teacher. The answers given, confirm hypothesis H1.

*What aspects related to the didactic staff are considered by the Students to be essential in regard to cooperation?*

Respondents were asked to indicate the most essential, in their opinion, experiences regarding cooperation undertaken by students with the scientific and didactic staff of the university (Figure 1.)



**Fig. 1.** *Significance of experience from cooperation undertaken by students with academic teachers.*

*Source: Own source*

The respondents' answers confirm hypothesis H2. The traditional forms of education, focus on 'transferring knowledge', whereas the modern forms of education encourage creativity and self-development. Students are more eager to acknowledge forms of cooperation that provide them with an opportunity for interaction and learning through 'experience'.

For testing the Chi-square test of independence was implemented. The Chi-squared test of independence is one of the most basic and common hypothesis tests in the statistical analysis and should be followed with a strength statistic. The Cramer's V is the most common strength test used to test the data when a significant Chi-square result has been obtained [9]. Cramers'V statistic ranges from 0 to 1, with higher values indicating larger strengths of associations.

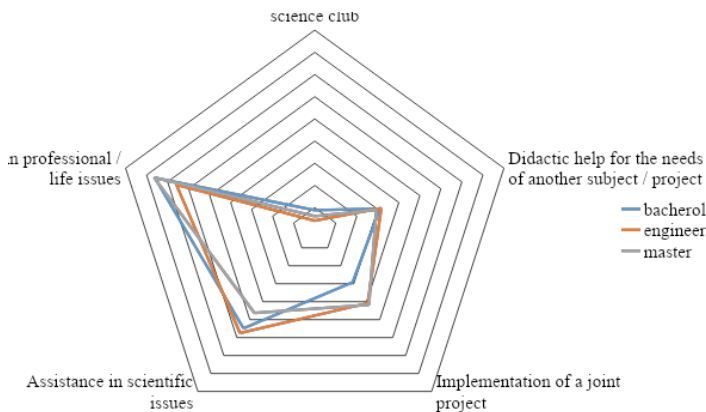
The hypothesis for the Chi-square test of independence for the significance of experience from cooperation undertaken by students with academic teachers and the level of education:

H0: Significance of experience from cooperation undertaken by students with academic teachers does not depend on the and the level of education - variables are independent.

H1: Significance of experience from cooperation undertaken by students with academic teachers

does not depend on the and the level of education - variables aren't independent.

The empirical value of the Chi-Square test statistic is 9.86, less than the critical value of 18.31, so there are no grounds for rejecting H0. The significance level for a chosen hypothesis test is  $\alpha=0.05$ , the P-value is 0.453 and Cramers'V value (0.171) indicates a weak relationship between variables, not enough evidence is available to suggest the null is false at the 95% confidence level. The significance of experience from cooperation undertaken by students with academic teachers does not depend on the and the level of education (Figure 2).



**Fig. 2.** Significance of experience from cooperation with academic teachers by level of education.

Source: Own source

Additionally, answers given by the respondents confirm hypothesis H3. A university if the last point on the educational path and the awareness of beginning a professional life, after achieving a university diploma, encourages students to contemplate their choices and the possibilities provided by these choices. Lecturers should not only assume the role of a teacher of a particular subject but of a mentor who supports the process of shaping the career path and further education.

*What actions, undertaken by the didactic staff, are an element of building involvement of the Students in the life of the academic environment?*

It is obvious, that the primary feature identified by the students is, didactic classes, and it is their quality that essentially affects the evaluation and opinion

from the students, as well as, the achieved level of involvement in the commissioned tasks. In the research conducted, it was key to identify activities of academic teachers different from didactics, that would, in the students' opinions be essential and actually impact the shaped relations. Table 2 presents 7 proposals of activities, directly related to the university or not related to the university, while recognised by the students.

**Table 2.** *Significance of the activities undertaken by the teaching staff in the assessment of students.*

	not important	slightly important	moderately important	important	very important
Cooperation with students	0.3%	1.3%	8.6%	27.9%	62.5%
Conducting research projects	2.8%	7.5%	21.4%	36.8%	31.2%
Professional career (outside the university)	4.3%	9.1%	26.7%	32.6%	27.6%
Social activity	2.4%	7.8%	25.9%	36.6%	27.0%
Science publications	4.6%	12.8%	29.7%	33.8%	19.1%
Interviews / columns in the media	6.3%	11.3%	31.6%	33.0%	17.5%
Hobbies (not related to the profession)	12.1%	15.5%	30.1%	24.7%	17.4%

*Source: Own source*

Cooperation with students is the indubitable leader, which was indicated as very important by 62.5% of the respondents, and with the important grade, it was collectively chosen by more than 90% of students; and so the result is a clear confirmation of the H2 hypothesis that 'students expect not solely passing knowledge, but primarily, varied forms of cooperation. The second activity recognised as very important (36.8%) is conducting a research project, and, along with the important status, it was collectively chosen by 68% of respondents. Additionally, students assess their professional (non-academic) career high, as it was as very important by 27.6%, however, in the joint evaluation (very important and important), social activity is taking the lead, chosen by 63.6%, amounting to a little more than 3% of the respondents.

In correlation to the issue, Which aspects related to the didactic staff are considered as essential in cooperation? a clear trend is emerging, regarding the students' expectations. It is a signal to take action in order to modify the shape and character of cooperation between academic teachers and students.

## DISCUSSION

The aim of the study was to identify the most essential factors impacting the relation between an academic teacher and a student. During the preparation of the study, 3 re-search hypotheses were proposed:

H1. Interpersonal relations are a key factor for building the image of the university.

H2. Students expect not only the transfer of knowledge, but also, varied forms of cooperation.

H3. Didactic staff of the university should improve the ability of career support and counselling.

All hypotheses were confirmed in the study, as demonstrated by the statistics and the result analysis, regarding issues such as:

What issues are considered by Students as significant in the assessment of academic teachers?

What aspects related to the didactic staff are considered by Students as essential in cooperation?

What activities undertaken by the didactic staff are an element of building engagement of the Students in the life of the academic environment?

The analysis of results allowed to propose recommendations within the area of challenges posed before the didactic staff of the university. The key recommendation, created based on presented issues, is the necessity of focusing attention and efforts on offering students, modern and engaging didactic forms. It is exactly during the personal meetings with a lecturer, when the interpersonal relations are being built, therefore, not only the current content but primarily the form of presentation and encouragement of students, are one of the largest challenges posed before the didactic staff. Conducting case studies should be a standard, with the consideration of the environment, as it allows to refer to the market reality, and enable to overcome the barrier of going from theory to practice. Generation Z (born after 1995), displays particular requirements in this matter, as a result of the conditions in which they were raised. Virtual space, social media, artificial intelligence, modern technologies - it is the daily life of generation Z. Some research has shown [6], that generation Z has an enormous appetite for new technology in all aspects of life. Traditional lectures and discussions (auditory learning) are very strongly disliked by this age group. They prefer interactive games, collaborative projects, advance organizers, challenges, and anything that they can try and see are appreciated.



Generation Z is, in essence, a challenge for the didactic staff, as, through the use of modern technology, they are used to doing numerous things at once. One may say, that they 'work on multiple monitors'. They watch a film on a computer, they do their homework on a tablet, while having a conversation with multiple persons at once via a smartphone. Simultaneously, the students display little focus and quickly lose interest, they are better at learning information in form of infographics, rather than textual content; they require constant stimuli and tasks or they quickly lose interest in the subject, as well as, focus.

Students appreciate teachers, who have non-academic professional experience and competencies coming from practice. In the process of acquiring new intellectual potential, universities should consider professional experience as one of the key conditions for employment, which, in the case of many Polish universities, is not a standard yet. Additionally, it is essential to facilitate a proper environment for the professional development of the didactic staff. The matter at hand is to allow them to simultaneously work professionally and as academic teachers at the university. Universities must create work positions consciously, that will allow acquiring valuable staff, identified by the students as practitioners from the market.

Another major challenge will be the departure of the 'preacher' role in teaching, for the sake of being a mentor of a career and life path. Contemporary conditions of the educational market, have transferred it dramatically to the virtual sphere, where it officially functions in the form of: e-learning courses, webinars, video workshops, dictionaries, dedicated information websites, etc. Simultaneously, an alternative, unofficial educational market has developed, as everyone can post content on the web, using logs, blogs, websites, and social media portals. A teacher is no longer the sole source of information and knowledge. Generation Z, and it is the generation to which current students belong, is using information available online without criticism, and it used to indirect contact with the use of technology and social media [5]. A recommendation for the didactic staff is to open to the modern means of communication and, due to the described features of the students that represent generation Z - redefining the approach of the academic teachers to the student. The educational process demands personalisation and a wider overview of the student as a person, his opinions, expectations, perceptions and fears associated with life-oriented matters.

Authors should discuss the results and how they can be interpreted from the perspective of previous studies and of the working hypotheses. The findings and their implications should be discussed in the broadest context possible. Future research directions may also be highlighted.

## CONCLUSIONS

The contemporary civilisation changes have a significant impact on the educational process in its different stages. The final stage - higher education - proves difficult, as we are dealing with a so-called 'young adult', who often refutes authority and questions the general opinion, while at the same time, contemplating on various life decisions and requiring support, that he finds difficult to ask for. In order to be efficient, the educational process must be based on the behaviourist approach, considering the observed phenomena of mass access to higher education and the organisation of the educational process, which does not support recognising the student's capabilities, or awakening his intellectual potential, as well as, building appropriate interpersonal relations. The results of the performed studies are a demonstration, that young person seek mentors on their career path, and in a world dehumanised by technology, they begin to appreciate direct relations and the ability to learn to benefit from the experiences and skills of the other person.

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# **EXPERIENCES OF PARENTS OF FIRST GRADERS IN CZECH REPUBLIC PERCEIVE EDUCATIONAL PROCESS OF READING AND WRITING DURING COVID-19 PANDEMIC**

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## **ABSTRACT**

The period of the covid pandemic changed day-to-day full-time teaching into distance learning. Teachers, but also parents without any prior training, had to react immediately. What has long been theoretically talked about professionally, namely the use of digitization of teaching in the online environment, has suddenly become a reality. Long discussions about the innovation of the curriculum for primary schools in terms of the scope and quality of educational content were suddenly solved by the teachers themselves using their professional skills and experience. Most of the surveys show [22], [15] that the teachers handled this situation very responsibly and that it can be stated that they managed it within the specific possibilities.

Teachers, parents, and especially first-year primary school pupils had a very specific role during the pandemic, and thus the transition to distance learning. It is for this reason that we focused on this group, in our opinion the most affected by pandemics.

The present study describes the experience of parents with distance learning reading and writing in the first grades of primary schools at the time of closing schools in the Czech Republic in the school year 2020/2021. The aim of the survey was to describe the effects of distance learning on the development of initial literacy, the differences between day-to-day and online teaching; problems, challenges, pros and cons that the distance learning period brought. The research was carried out as a multi-case study, in which interviews were conducted with six mothers of children - first-class pupils. The results showed that distance learning did not affect the quality of children's acquisition of reading and writing techniques, it only slowed it down. However, there was a decline in pupils' interest in reading and a disruption of their relationship with education in general. It was difficult for parents to motivate children to learn, to help them in case of difficulties with reading and writing techniques, and to evaluate their learning outcomes. On the other hand, distance learning has made it possible to further

individualize education with regard to the needs of children and has deepened cooperation between school and family. Distance learning placed increased demands (physical and mental), especially on mothers, when it was necessary for their intensive involvement in the teaching process. Based on the evaluation of the course of distance learning, the paper brings general recommendations applicable to both distance and full-time teaching reading and writing.

**Keywords:** *Covid-19 pandemic, online education, first grade, reading and writing, pupils and parents*

## INTRODUCTION

The Covid-19 pandemic affected the whole world and no branch of human life remained intact, including education. Pupils and their parents got into situations in a very short time that no one had to deal with until then. Most such situations have, of course, been associated with great stress, fear of the unknown, and uncertainty [5], [9], [12].

The sudden separation from peers and the breaking of all ties affected the psyche of the pupils, who suddenly had to cope with completely different conditions for learning [4], [17]. Parents could help their children with the new situation, as [10], point out, if they set good conditions for education in households (especially thanks to digital literacy), a positive climate and a supportive approach [19]

Many challenges also awaited teachers who were thrown into the world of online teaching overnight, with which they had little or no experience until then [23], [11]. Primary school teachers consider the availability of facilities, network and internetwork, planning and evaluation of the educational process, and cooperation with parents to be the greatest complications that distance education has brought to teachers [8], [20] mention the positives named by primary school teachers - teachers appreciate the possibility of flexibility in performing work tasks, time flexibility, non-existent problems with transport to schools, more free time. They see the negatives in the loss of motivation to teach students, in problems with security in the IT-sphere and in increased costs for electricity and internet connection. [1] examined the success of the nationwide 'School from Home' program in Indonesia through the views of primary school teachers. The survey showed that the project equipped teachers with technology and worked with them effectively, and ensured the cooperation and collaboration of all stakeholders - government, schools, teachers, parents and the whole community. Similar results are reported by three Chinese studies of the local project 'School's out, but the class's on' [15], [25], [28]. In his quantitative study, [24] considers another question - whether teachers, in general, should be prepared to teach in extreme situations (pandemics, wars, natural disasters) so as not to interrupt the educational process, and such teaching means online teaching. The study shows

that many teachers have had problems with online teaching, and therefore this form of education should be given increased attention.

Parents, their children, and teachers had to adapt to a diametrically different style of teaching almost overnight, which logically brought with it a number of problems. Starting with the often missing or poor quality technical equipment, the need for space in the household and a change in the daily and often biological rhythm of life. Each family coped differently, but in some regions, the differences between pupils deepened due to socioeconomic status [14], [24], [13], [18].

At the same time, materials were created to support families and schools [6], [21] but it is difficult to respond to rapidly evolving and changing situations, and so the ways offered to improve and streamline the educational process have not always been transferred into everyday reality.

The aspect of the transition from pre-primary to primary education is a major milestone for every child and marks a fundamental change in life. With the arrival of the first grade of primary school comes much more responsibility, more targeted work and the acquisition of core competencies, skills and knowledge. Pupils implement these with increasing time mainly through reading and writing. These basic skills are essential for functioning in society, and at the same time mastering them requires a lot of effort, time and help from adults, especially from parents and teachers. This concept was also significantly disrupted by the pandemic, making the earlier transition from kindergarten to primary school more difficult for all individuals, and even before the pandemic, pupils' reading and writing problems were addressed [7]. Of course, the crisis has exacerbated these difficulties.

The decline in skills and abilities associated with reading and writing, or with reading literacy and pre-literacy, manifested itself in pre-primary facilities as early as spring 2019 [2],[3]. Of course, parents and teachers also saw problems in areas other than reading literacy [26]

Pupils coming to the first grades of primary schools in September 2020 experienced the closure of kindergartens in the spring of 2019 at an important time in preparation for school, followed by unstable school year 2020/2021. Persistence and a regular regime in this critical period for children were completely lacking, as was contact with classmates. The difficult conditions certainly had an impact on the quality of the educational process in terms of teaching reading and writing, which may mean for the whole generation of children dealing with problems that no other generation had to face before them.

## **METHODOLOGY**

The aim of the survey was to find out what experiences parents of first-class pupils have with teaching initial reading and writing in the 1st grade of primary

school during the combined teaching during the school year 2020/2021. The intention was to describe the challenges, demands, risks and benefits of distance learning for first graders and to formulate recommendations for future practice in mainstream education. We also planned to find out whether and how distance learning can influence parents' access to their children's education and children's independence when learning in the 1st grade. The answers to the following research questions were monitored:

**Q1: How do parents evaluate the impact of the closure of kindergartens in spring 2020 on the preparation of children to start learning reading and writing?**

**Q2: How was conducted the distance teaching of reading and writing in the 1st grade and how did it differ from regular full-time teaching?**

**Q3: How do parents evaluate the impact of combined learning on educational outcomes in the field of reading and writing in the first grade of elementary school?**

**Q4: What demands did distance learning of reading and writing place on children's parents?**

The research was conducted using a qualitative approach. The design of a descriptive multi-case study was chosen, which allows a better understanding and description of the issue [27], [22]. The comparison of individual cases brought the diversity needed to answer the research questions. By case, we mean a first-grade pupil and his parents. The individual cases were selected sequentially using the snowball method to contrast with each other within a defined conceptual framework [22]. It was formed by the socio-economic status of the family, the education of the parents, the size of the family and the reader's background of the family. A total of 6 cases were monitored, involving pupils and families from two different cities, from different primary schools, from different socio-economic statuses and from a different reader's family background. Data were obtained during March 2021. Below is a brief description of each case.



<i>Case</i>	<i>Case characteristics</i>
<b>Case A</b>	Boy, complete family, parents with a university degree, reader-friendly environment, older sibling
<b>Case B</b>	Girl, complete family, parents with a high school degree, less stimulating reading environment, older sibling, different mother tongue
<b>Case C</b>	Girl, complete family, parents with a university degree, reader-friendly environment, only child
<b>Case D</b>	Boy, complete family, parents with a high school degree, reading-friendly environment, older sibling - dyslexic
<b>Case E</b>	Girl, single mother, parents with a high school education, less stimulating reading environment, older sibling
<b>Case F</b>	Boy, complete family, parents with a high school degree, reading-friendly environment, older and younger sibling, early reader

**Table 1.** *Characteristics of cases from the research sample*

As a research method, semi-structured interviews were conducted with mothers of children; the interviews were recorded, transcribed according to the transcription standard [16] and subsequently analyzed using MAXQDA software. First, open coding was used, the codes were created ad hoc. Subsequently, the individual codes were grouped into categories and thematically coded, the individual categories were compared and grouped according to criteria in compliance with the research questions. The following categories were monitored: children's readiness for school, teachers' approach to teaching, demands placed on parents, children's reactions to distance learning, children's educational results in the field of reading and writing.

## RESULTS

The interviews showed that parents of children and children faced similar challenges, although the initial starting situation of families was very different. It was possible to trace certain identical features in different stories. Parents differed in the evaluation of their children's educational results, which is due to the different dispositions and possibilities of the children. Nevertheless, their perception of distance education was in great agreement.

**Q1: How do parents evaluate the impact of the closure of kindergartens in spring 2020 on the preparation of children to start learning reading and writing?**

According to parents, the closure of kindergartens in the spring of 2020, at the time of preparing children from the research sample for school, did not have a negative effect on children's readiness, even in cases where kindergartens did not provide compulsory pre-school education at the time of kindergarten closing. It didn't even matter if the parents tried to prepare their children at home or if they left the child to its natural development. The parents agreed that their child was well prepared for school. According to the parents, the children's readiness was influenced by their previous long-term attendance at the kindergarten. The effect of the long-term development of the areas needed for the development of initial literacy was reflected in the fact that all monitored children before entering school recognized some letters, were able to distinguish the first vowel in the word, clap syllables, sign. Two children began to read spontaneously before entering school as they began to form words from letters.

**Q2: How was conducted the distance teaching of reading and writing in the 1st grade and how did it differ from regular full-time teaching?**

The answer to this question is related to the way schools approached distance learning. School approaches differed; some schools have only moved the whole teaching, including the timetable, to the online environment, while others have been looking for new ways to effectively teach children to read and write.

Parents greatly appreciated the approach of female teachers (there was no male teacher in the research sample). They praised the positive attitude towards children the most - they described the teachers as patient, kind and consistent (*"She is mild but consistent"*). They also appreciated their approach to teaching, which they characterized as diligent, honest and caring. Finally, the teacher's approach to parents was positively evaluated, when the teachers were willing to help and meet the parents' needs. *"Overall, the interest in the children and in us, and how we work, and if we need anything else, he tries to adapt us, his teaching, to burden us as little as possible so that it works. He finds out how the children did, what they enjoyed, they try to react to it."*

Parents' experiences of the quality of distance education varied; some did not notice a difference compared to full-time teaching, because in the online environment the teaching took place in the same way, ie for whole classes at once, using the same teaching materials (spelling books, copybooks, workbooks) and using the same educational methods. Other parents experienced that online education took place in smaller groups and that the organization of the whole education differed from full-time teaching. Some teachers responded operatively to the needs of children and parents by changing the organization of teaching over time.

Satisfaction of parents with distance learning varied, ranging from great satisfaction, through gratitude that at least *"it works like this, that the children are not completely without any opportunities to learn"*, to dissatisfaction due to overwork, excessive school demands and drill. *"As an overload of those children in the sense that I feel that what they get, what they have to process in that week, I think that if she worked with them at school, she couldn't do it with those children."*

In contrast to regular teaching, educational software was used in the form of interactive educational games or presentations. Furthermore, in the online lessons, the teachers explained the new subject matter (eg a new letter) and practiced with the children in the form of reading from the spelling book, where individual children were called out, writing on a personal board, dictations and completing tasks in workbooks. It is a standard content of full-time teaching, but not everything is suitable for an online environment. Reading from a spelling book is very problematic: *"In that hour, 5, 6, 7 children will be able to try reading. Not more, because when she asks someone to read a sentence and the child is slower, the time terribly flies."* As a result, the children do not have time to take turns and sometimes do not speak at all during the online class. This leads to a loss of interest, attention and loss of meaning in trying, or disruption by children, and *"it's incredibly wearisome"*. Furthermore, the deteriorating sound quality may reduce the ability to hear all of the child's errors when reading that the teacher does not correct. On the contrary, the organization of teaching in smaller groups, which alternate, has proved its worth. Thanks to the fact that *"it's in a smaller group, the children got involved more often"*.

Teaching reading and writing was a priority, most of the time was devoted to it, even more than compared to the usual schedule. The frequency of schooling varied; some children had it for one to two hours a day, others learned it three times a week in blocks, others an hour a day, but only in a small group where teaching was more intensive. In addition to reading and writing, time was devoted to mathematics; children did not have other subjects, or only marginally (English language). One child had a special classroom lesson once a week so that the children could talk to each other and share their experiences.

### **Q3: How do parents evaluate the impact of combined learning on educational outcomes in the field of reading and writing in the first grade of elementary school?**

According to the parents, the teaching of reading and writing was not significantly marked by distance learning, because the schools were mostly prepared for it. According to parents, the need for distance learning has slowed children's learning progress in reading and writing. Of the sample, two-thirds of children read with difficulty and slowly. There are also difficulties with writing. On the other hand, parents think that children manage the demands of the first

grade well and therefore it is not necessary to repeat it or provide summer schooling.

However, distance learning according to parents also made it possible to more individualize education according to the needs of children, because education at home made it possible to respect the different work paces of children. Parents gained an idea of the course of their children's education and were able to provide them with support. Some parents stated that they had more time and peace to practice reading at home, which led to faster development of reading skills. However, these positive effects could only occur with children whose parents were willing and able to participate in their children's education. From the research sample, for example, a single mother who, at the same time as teaching her daughter, had to manage to fulfill her work duties.

According to parents, the disruption of children's relationship to education is a more significant consequence of distance learning than slower mastery of reading and writing techniques. "I would say that the loss of that children's motivation for education, that it disrupts the relationship to education as such at all, because there are often unpleasant emotions in it, (...) so I think it can disrupt the relationship to education as such, that it just bothers those children that they no longer have such a desire to acquire new things, because they have it connected with those negative emotions". The loss of interest is also reflected in a lack of interest in reading, especially in children who are learning to read by the analytical-synthetic method. These children have not known all the letters of the alphabet for quite some time and have a limited selection of reading comprehension texts. With the genetic method, the selection of texts is easier, and, overall, reading skills develop faster. All parents whose children are learning to read using the genetic method have stated that their children read with understanding.

More than the results of children, parents are more concerned about the disruption of the relationship with education and the decline of the child's social contacts. Parents reported that children had lost interest in learning, had mental health problems (sadness, frustration, apathy), were poorly concentrated, and lacked social relationships.

#### **Q4: What demands did distance learning of reading and writing place on children's parents?**

It must be said at the outset that in our research sample, distance education concerned only mothers, fathers did not participate. Mothers agreed that high demands were placed on them and it was often difficult to handle everything ("I feel that there is much loaded on us parents"). Teaching reading and writing seemed much more difficult to them than, for example, teaching mathematics, "one easily teaches basic mathematics, but reading, for me it was hell, then". Mothers lacked the knowledge and skills to help children read and write.

Mothers felt helpless not only in the area of teaching but also in the area of motivating the child to learn and in the area of evaluating the child's performance. Distance education of children also placed demands on the psyche of parents, most often they reported a problem with patience and managing their emotions. Parents themselves often felt frustrated and lost motivation: "I feel that every day is the same day, and I also have trouble forcing myself to force those children to learn. It's annoying."

Another significant problem was the organizational provision of teaching. The difficulties were not the provision of the necessary equipment (families owned or lent from the school), but the organization of space and time. In order for everyone to have space for work and peace and not be disturbed. "So now we're at one dining table, that I occupy one-third of the table, I have to have two monitors to work, and my daughter is here for the other two-thirds, she needs space, unpacks her exercise books and she's on the tablet." This is especially problematic in small apartments or with a larger number of children in the family. The parents agreed that it was necessary to organize the daytime differently and establish certain routines; those who did not do it, rated it in the interview as something they thought was necessary but failed to secure it. From the material conditions, families often solved problems with an internet connection, which was not of sufficient quality. This required, among other things, their constant presence in online teaching so that they could solve technical problems.

Parents, and most mothers, had to solve several tasks - to ensure organizational conditions (regime, space for learning), material conditions (technology, internet connection, printing materials or picking them up at school), motivate children to learn, assist children online ("I'm always with him in that distance learning, I have to be somewhere nearby because he loses concentration. When I leave, I see him not concentrating, jumping next to a chair, or lying on a chair, so I'm always around to tell him to sit down, listen to the teacher, see what he does, what he says"). In addition, they work with the children on further home preparation, elaboration or control of tasks and reading together. Most parents read even further with their children before going to bed. According to the parents, these entitlements require the child to be educated for several hours a day.

## CONCLUSIONS

The results of a research survey generated a series of interesting communications, not only for school practice but also for the training of future teachers. Emphasizing the importance of the role of teachers and the need for universities of didactic erudition, professionalism, flexibility and creativity in the organization of teaching and optional educational methods. The research confirmed the role of parents as an important actor and partner of teachers in school as well as home teaching. Teachers and parents alike consider distance learning in the development of the beginnings of reading and writing to be a very demanding methodological-didactic, but also an organizational problem, in which

the solution is absolutely necessary for mutual cooperation. Teachers generally appreciate parents' efforts to motivate their children to learn, to maintain their interest, and to strengthen reading and writing at home using their recommendations. Parents especially appreciate the way in which teachers do distance learning together with pupils involved and methodically guided so that their joint action is effective, individualized and has a positive motivational effect. (Similar findings are evident from research conducted with primary school teachers.

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# IMAGE AS AN IMPORTANT TOOL IN THE WORK OF MANAGERS OF EDUCATIONAL INSTITUTIONS

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## ABSTRACT

The aim of the paper is to present the results of a survey focused on the image of an educational institution - a public university in the Czech Republic, which provides study programs for future teachers of vocational subjects at secondary schools. The image of an educational institution is an integral part of the management of educational institutions and at the same time, it should be a part of its regular self-evaluation. An image consists of objective and subjective, correct and incorrect ideas, attitudes and experiences of an individual or a certain group of people about a certain object or subject. Image affects opinions and behaviour and significantly influences them [1]. Each educational institution creates a certain image, through which it can be perceived not only by its surroundings or social partners, but mainly by current and future students. Particularly, the students were the respondents to this survey. The method of semantic differential (polarity profile), which is one of the most frequently used methods for image measurement, was used for data collection.

**Keywords:** *image, educational institution, evaluation, teacher, management*

## INTRODUCTION

Teaching is one of the oldest professions, perhaps even a mission, in the world. The role and position of teachers in society have been accompanied by many changes in recent years. The prestige of this profession shows a slightly declining tendency, however, it still appears in the leading positions in the ranking of the prestige of the profession [2]. It is very important that there are enough motivated and convinced candidates to join university teaching programs. However, universities that train future teachers must offer these applicants quality and attractive study programs. For many people, the idea of the school as a commercial entity is at least inappropriate, a comparison of a school with a company is unacceptable. However, in a deeper examination and comparison, many analogies of the problems of educational institutions with the problems of companies can be found. In a competitive environment, it is not only a question of prestige for educational institutions, but mainly a question of existence itself, so that there is a constant and even rising interest in its quality educational products. For this reason, it is important to pay attention to coordinated and systematic marketing, communication with practice, presentation of the educational offer and also the image of the school. No educational institution lives in isolation, but in its activities, it is influenced by the environment in which it

operates [3]. In the literature related to the topic of an image, we may encounter different conceptual definitions and ways of using this expression. In connection with its use, it can be stated that it emphasizes the image of reality, but it is also an empirical term that has measurable dimensions. Image has the nature of a generalized and simplified symbol based on a set of ideas, attitudes, opinions and experiences of a person in relation to a certain object [1]. It is usually stated that the first works dealing with images come from Gardner and Levy [4] or Boulding [5]. In these works, dealing with public awareness of the company, brand, product, institution claim that at a certain time they have their personality or image in public opinion, which is characterized by certain ideas, emotions, ideas or associations. Image is therefore the result of the interaction of individual elements of a corporate identity - design, communication, behaviour and product. In connection with the focus of this paper on the image of an educational institution, it is possible to mention the publication of Kotler and Andreasen [6], where the authors define the image as a summary of faith, ideas and impressions that a person has about a particular object. Bártoová [7]) then characterizes the image as a multi-component concept based on attitudes and divides it into three parts: cognitive (product knowledge and their intellectual processing), affective (emotional elements that are related to the brand) and conative (tendency to behaviour - to purchase, use, etc.).

## **IMAGE IN THE CONTEXT OF EDUCATIONAL INSTITUTION**

Based on demographic developments, it can be assumed that competition in the education market will increase in the future. For example, building an image as a factor that influences the behaviour of "consumers" can help it to ensure that the university does not have to make significant efforts to attract quality students. Image is created and maintained by all activities by which the organization manifests itself internally and externally, for example, it is influenced by the degree of knowledge of the organization, success, tradition and professionalism, performance, behaviour, level of service, approach to customers or external presentation.

It is important for educational institutions to know how the public and the clients view it, what ideas they have about it and what expectations are associated with its educational program and other offered services. The positive image of an educational institution is of great importance and it is also true that it has a relatively stable character and change is not easy and fast. Especially for secondary and higher education institutions, it is important to realize that by analyzing the image of the school, we can also determine the market position of the school when comparing the image of competing schools or the position the school occupies in the minds of its potential customers. The prestige of the school is one of the decisive factors for the decision-making of those interested in studying. A sufficient number of applicants is then a prerequisite for obtaining financial resources for the institution [8] [1].

Depending on the scope or prevalence, we usually divide the image into a *universal* one, valid basically all over the world without significant differences in individual countries or target groups, and *specific* emphasizing local peculiarities or specifics of individual target groups. Foret [9] also mentions three other types of image, namely the *internal* image, which creates the object about itself or about its product, the *external* image, by which the object resp. its producers strive to act on the public, a *real* image, shaped in the public consciousness. Image is affected by a number of factors. Kotler and Armstrong [10] consider the product (or service) and its features, marketing communication in all its forms, price, etc. to be the influencing factors. Image is also influenced by customer support, distribution and service. In addition to behaviour towards customers, the image is also influenced by the attitude and behaviour of the company (in this case educational institutions) to the environment - acting towards various partners, relationship with employees, willingness to participate in public projects (the so-called third role). There is also a very close relationship between the image and the strategy of the company (or educational institution). Factors influencing the company's image are summarized in, for example, Dowling [11]. To sum up, image is, therefore, an important communication tool with which we address the surrounding world or our target groups and which tells us who we are or who we want to be. For this reason, it is important for management to keep their institutions organized in terms of priorities and values, their sharing across the company, in understanding the impact of each action, etc.

## HOW TO ANALYZE THE IMAGE OF EDUCATIONAL INSTITUTIONS

The analysis of the opinions and attitudes of the target groups towards the educational institution is then very important for determining the strategy of the subsequent communication with the target group or groups. Repeated analysis can then capture changes in the image of the institution and serves to evaluate the strategy used and determine any changes [8]. It is clear from the above-mentioned characteristics of the image as a complex, dynamic and multifaceted concept, its analysis is not simple. There is not even one standard method for measuring an image. Overviews of quantitative and qualitative research methods are sufficiently described in the literature. Typical methods include individual or group interviews, focus groups, various modifications of psychological methods and techniques - association procedures, projective tests, colour and shape tests, or scaling procedures, but most often it is a polarity profile (semantic differential).

We evaluate the image with a polarity profile using various items, using a bipolar rating scale. At the opposite poles of the scale, there are evaluation items that create a basic dichotomous profile. The spontaneous evaluation of individual items by the respondents is quantified and the resulting average of individual dichotomous pairs is connected for better graphic expression and comprehensibility by a vertical line. The choice of bipolar adjectives is

determined by the goal of the survey, and opposing pairs of terms are usually arranged on a seven-point or five-point scale.

Image is quite a permanent phenomenon and may not correspond to the current state. It is recommended to perform the analysis at certain predetermined periods. Stable periods give educational institutions the opportunity to compare previous analysis results, and to respond to them adequately and in the shortest possible time and to establish a specific remedy [12]. For large university-type schools, the image may not be valid for the entire school. In connection with the term image, for example, only one part of the school or one of the several products offered by the school can be connected [13].

## METHODOLOGY

The aim of the following part of the paper is to present the results of a survey aimed at finding out the image of an educational institution that provides programs aimed at training future secondary school teachers. It is a part of a public university in the Czech Republic, which has a long tradition in this activity of about 50 years. To collect data in order to determine the current image of the educational institution, a method of questioning based on the method of polarity profile was chosen. Prior to the creation of the questionnaire, preliminary research was carried out in the form of personal interviews with students in order to obtain the attributes for its compilation. The results of these interviews implied a total of 22 attributes of the educational institution. The questionnaire was generally divided into two parts, where the first part was based on seven-point bipolar scales of specified attributes. The second part of the questionnaire consisted of questions focused on the socio-demographic characteristics of the respondents and the preference for the study focus, resp. future profession. The respondents were students of all years of the bachelor's study program focused on teaching vocational subjects for secondary schools. The survey was conducted in May 2018. A total of 79 students out of a total of 153 submitted an electronic questionnaire. A more detailed structure of the respondents is given in Table 1 below. The data obtained through the questionnaires were processed using Microsoft Excel and the absolute / relative frequencies and average values of the answers were calculated. Due to the number of respondents, a nonparametric test (Mann-Whitney) in the IBM SPSS program was used to calculate statistically significant differences in average values between the groups (gender, form of study).

**Table 1.** *The Respondents' Structure*

Gender	male	21	26,6 %
	female	58	73,4 %
Study form	full-time	32	40,5 %
	combined	47	59,5 %
Age	19-25 years	44	55,7 %
	26-35 years	15	19,0 %
	36 and more	20	25,3 %

*Source: Own source*

## RESULTS

Table 2 below shows the average scores achieved. The closer the average rating is to 1, the more positive the rating is. An increasing average means a greater tendency of the respondent to a more negative evaluation (7). The data in Table 2 is sorted according to the average overall score and it also contains the evaluation according to gender or form of study. Those attributes for which statistically significant differences were found within the groups are marked in grey. For example, we can learn that for women and students in the full-time form of study, the institution is more credible than for men, etc.

The data in Table 3 shows that the image of the educational institution in the respondents' consciousness is mostly positive. Based on the obtained results, it can be stated that the highest scores were achieved by the educational institution (or its specific component) in the area of credibility, activity and reputation. The assessment of development or stability is also at a high level. Among the attributes that were not evaluated completely favourably, it is possible to indicate, for example, size or familiarity. Respondents also believed that the educational institution is not very well-known and generally known both in the Czech Republic and abroad. In the area of quality assessment, the inconsistencies of respondents' opinions and perceptions are evident. The data in Table 3 are displayed using the relative response rates within a seven-point scale (in %). At the same time, they are sorted according to the best-rated attributes.

**Table 2.** Average values of individual attributes according to the socio-demographic characteristics of the respondents

	total	male	female	full-time study	combined study
Credibility	2,08	2,33	1,98	1,81	2,26
Quality	2,30	2,19	2,34	2,19	2,38
Reputation	2,32	2,95	2,09	2,00	2,53
Activity	2,35	2,48	2,31	2,34	2,36
Functionality	2,38	2,57	2,31	2,06	2,60
Development	2,47	2,86	2,33	2,25	2,62
Perspective	2,48	2,76	2,38	2,13	2,72
Personnel stability	2,49	2,33	2,55	2,31	2,62
Modernity	2,58	2,57	2,59	2,50	2,64
Organizational stability	2,72	2,52	2,79	2,31	3,00
Fun	2,73	3,05	2,62	2,50	2,89
Competitiveness	2,78	2,43	2,91	2,81	2,77
Attractiveness	2,85	2,95	2,81	2,44	3,13
Ambitiousness	3,03	2,81	3,10	3,16	2,94
Prestige	3,06	3,24	3,00	2,97	3,13
Flexibility	3,13	3,19	3,10	2,94	3,26
Recognition in the Czech Republic	3,48	3,57	3,45	3,56	3,43
Assertiveness	3,53	3,29	3,62	3,69	3,43
Dynamics	3,75	3,95	3,67	3,56	3,87
Recognition abroad	3,85	3,95	3,81	3,81	3,87
Acquaintance	3,99	4,00	3,98	4,75	3,47
Size	4,27	3,90	4,40	4,91	3,83

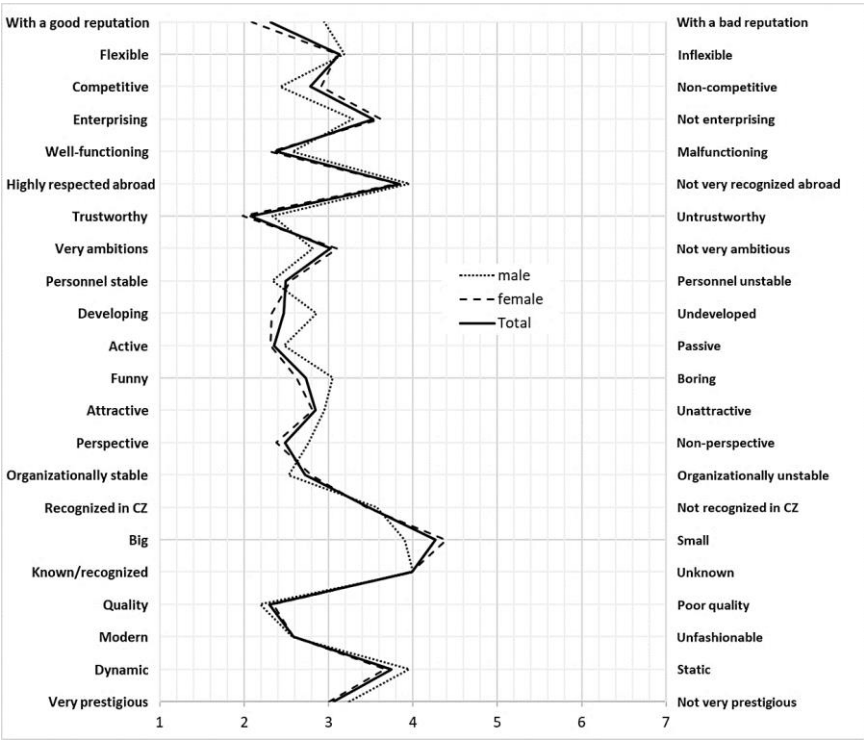
*Source: Own source*

**Table 3.** *Distribution of the frequency of answers of all respondents in %*

	1	2	3	4	5	6	7	
Trustworthy	33	43	13	9	0	3	0	Untrustworthy
Active	23	37	28	9	3	1	0	Passive
Perspective	22	30	32	14	1	0	1	Non-perspective
With a good reputation	30	34	20	6	6	3	0	With a bad reputation
Well-functioning	27	32	24	15	0	3	0	Malfunctioning
Developing	27	30	25	10	3	5	0	Undeveloped
Personnel stable	22	35	23	16	1	1	1	Personnel unstable
Modern	19	35	25	14	3	3	1	Unfashionable
Funny	18	29	29	14	8	1	1	Boring
Attractive	15	32	25	15	9	1	3	Unattractive
Competitive	20	29	23	13	10	5	0	Non-competitive
Organizationally stable	22	30	18	20	6	3	1	Organizationally unstable
Very ambitions	15	18	30	24	11	0	1	Not very ambitious
Very prestigious	14	25	23	22	13	3	1	Not very prestigious
Flexible	14	14	32	30	6	4	0	Inflexible
Recognized in CZ	8	20	22	28	15	5	3	Not recognized in CZ
Enterprising	9	14	25	28	16	6	1	Not enterprising
Quality	9	14	18	19	16	18	6	Poor quality
Known/recognized	9	14	18	19	16	18	6	Unknown
Dynamic	6	9	23	39	15	4	4	Static
Highly respected abroad	5	19	9	35	16	15	0	Not very recognized abroad
Big	11	4	15	20	20	24	5	Small

*Source: Own source*

**Fig. 1.** Polarity profile image of and educational institution



Source: Own source

Based on the research results, which are graphically represented in Chart 1, it can be said that the image of the educational institution is desirable with certain reserves in accordance with the image. The desired image of the educational institution in accordance with its strategic intention is to be attractive and prestigious both in the national and international context in the field of initial as well as further teacher education. The aim is to provide quality study programs based on a modern curriculum that relies on current results of science and research and at the same time responds to the requirements of practice. The aim is also to provide teaching by competent, erudite and positively motivated academic staff. Based on the values of average scores of perception of the image of our educational institution by students we can formulate strengths and weaknesses, while as strengths we can indicate the values with the lowest scores and as weaknesses the values with the highest scores.



## CONCLUSION

Students are a group for which the image of an educational institution is of great importance and it is important to continuously address their views in this area, as it is related not only to their interest in studying at a particular school, passing on information and references to peers, but also the future and sustainability of study programs or study fields. An image is therefore a collection of assumptions, thoughts and impressions that a person has of a certain object or matter. The researcher, therefore, measures the extent to which the image of the institution is known and positive and how certain groups evaluate the corresponding characteristics of the institution. Once it is determined how the institution is perceived, management must decide whether this image is positive and appropriate or whether it would be appropriate for the institution to take steps to correct the negative or erroneous image and implement changes [14]. Priorities in a marketing-driven school include strategic management of an educational institution, application of internal personnel marketing, improvement of interpersonal relationships, motivation of teachers, support of team cooperation, positive climate, application of relational marketing, systematic evaluation of educational institutions, analysis of factors influencing results and development. Strengths, weaknesses, opportunities and threats can be read from the image evaluation results. It is important to respond to the results of image evaluation and at the same time compare them with the strategy of the educational institution, its mission and internal values. It is important to perform image analysis on regular basis. Therefore, a similar survey implementation is planned for the end of 2021.

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# INTERNATIONAL COMPARISON OF READING PREFERENCES OF YOUNGER SCHOOL AGE READERS AT PRIMARY SCHOOL

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## ABSTRACT

The study presents the research findings from a comparison of younger school-aged readers from 3 countries – Slovakia, the Czech Republic and Poland. The research used a questionnaire of own design based on an initial exploration through focused interviews with readers. The research design was quantitative-qualitative in nature and those questions about preferred literary genres and literature content were semi-open. The research sample consisted of 693 Slovak, 254 Czech and 248 Polish younger-school readers. Respondents were divided according to reading levels into four groups. We searched for whether there were significant differences between the national groups. The research findings showed some similarities but also specific differences between national groups that were described in the research results. In the discussion, the authors present the importance of the research results in the context of pedagogical practice and undergraduate teacher preparation for students of primary education.

**Keywords:** *reading interest, reading preferences, younger school age reader*

## INTRODUCTION

Reading as a key phenomenon of intellectual-emotional education has a clear impact on individuals leading a successful and meaningful life, as well as the social, economic and cultural level of society. The aim of this study is to present international research findings in the preferences of literary genres among child readers aged 9-10 years and their content focus, including the targeted selection of an author and with a specific focus on book publication. The literary genre with valuable semantic content is one of the main indicators that contribute to the stimulation of a child's reading interest. The current book spectrum (ever-expanding) of literature available to child readers is extremely broad. Paradoxically, researches show that child readers read much less than in the past. "The reading crisis is global and is being watched with considerable attention around the world" [1]. It is important to prevent ways of influencing interest in reading, reading experience and reading habits from causing a reader's appetite from degrading into a reader's aversion. Creating a stimulating reading environment requires knowledge of changes in the current traits of child readers and their tastes with a focus on preferred topics and literary genres. For younger

school-aged readers, reading is based on the emotional experience evoked by the meaning of the content in the text. This presupposes a certain level of reading literacy as a complex of abilities and skills to decode the text and understand it at the horizontal and vertical level of meaning. Receptive-experiential processes are the main stimulus for creating a positive relationship or the internal motivation to read during free time. In terms of developmental psychology and learning theory, children repeat in their own lives those activities they associate with a feeling of pleasure, satisfaction, joy and appreciation. The reader's appetite is the key to form the reader's interest defined in 3 degrees of intensity: 1. neutral reading interest, 2. reading for pleasure presented 3. reading enthusiasm. Reading success is dependent upon the reader's interest [2]. The suitability of the meaning of content, topics, their artistic processing and the form of the literary genre are important factors in the structural concept of the reader's interest considering: the frequency of reading, the effect of reading, the typology of literature, a spectrum of specific literary genres, literary themes and literary heroes. The reader's interest reflects the reader's attitude to the reading process and its content-genre focus [3]. According to research findings [4], fiction, entertaining and adventure literature, as well as literature with elements of the paranormal and horror, dominate in terms of genre preference among younger and older school-age child readers. Theme preferences [5] are dominated by fun and funny themes, provoking reading imagination, mysterious plots and more difficult problems, a fictional story, instructive discovery, providing an escape from the real world, real stories with paranormal elements, childhood topics, love topics, and literary heroes depicting stories that resemble the readers themselves. Researches [6], [7] show that in the breakthrough age period of 10-11 years, readers (even enthusiastically attuned ones) show a significant decrease in reading appetite and a weakening of interest in reading. Research results from 2008 [8] show that if child readers masters reading skills well, then, at the age of 8-9 years, they enter the phase of enthusiastic reading. In contrast, the National Kids and Family Reading Report [9] states that a decline in reading interest occurs earlier, by 15% - 20% on average around the age of 8 to 9, and continues to decline over every two-year period as reading development continues towards the pubescent period.

## METHODS

The study brings partial findings from the VEGA quantitative-qualitative empirical research project 1/0455/18 Research and development of readership in younger school-aged students. This was conducted in three stages:

The 1st stage of initial exploration of the problem was implemented in the form of focus interviews with primary school-aged students. From the results of the interviews, we formulated the established theory that readership in children contains three determinants: a) a personality context, b) a social context and c) the reading preferences of the individual. Personality traits were then used to identify four levels of readers, which were designated A, I, G, N. *Enthusiastic readers* (A) are those who actively seek out books, knowingly select literature and prefer

reading in their free time. *Interested readers* (I) know how to select texts according to their own interests and can handle compulsory textbooks without trouble. They need advice, help, and to be motivated to read. *Non-readers without problems* (G) they are indifferent, they are not "illiterate", they know how to read, but they do not read voluntarily or out of interest. *Non-readers with problems* (N) have serious difficulty with literacy and reading is a burden and a hassle for them. They do not read when they are not forced to and, when they are, they struggle mightily" [10].

The 2nd stage involved designing and implementing a structured research instrument (a questionnaire and obtaining the research data. Basic testing was used to divide respondents into the four reading levels: A, I, G, N.

The 3rd stage was focused on: a) a comparison of responses from younger (9-10 years) and older (12-13 years) Slovak students, and b) an international comparison of responses from younger (9-10 years) students from the three countries. A self-designed questionnaire based on qualitative research, specifically focus interviews, was used as a research instrument. The first group of items was focused on the data on respondents and schools, while the second focused on the *personality traits* of readers. These items distributed respondents into four groups of readers according to reading levels: A, I, G, N. The third group monitored the *social context of readership* in respondents and the fourth their *reading preferences*. The focus in this study was on items monitoring the preferences of Slovak, Czech and Polish younger school-aged readers specifically for preferred literary genres and thematic content. Phenomena identified in the initial analysis of the research findings of a descriptive nature concerning the reading preferences of national groups were then subjected to detailed statistical testing. Given that these were categorical variables, the hypotheses were tested using Pearson's chi-quadrant test for fit. A comparison of all combinations of national triplets was completed. The statistical findings are reported where statistical significance was found. Extreme values were used for partial comparisons.

The research set (N 1195) was created on the basis of available selection initiated through direct contact with teachers of younger students. The limit was the willingness of Slovak, Czech and Polish teachers to participate in the research. We divided all three national groups of respondents according to how they classified their criteria from the second group of questionnaire items into reading levels A, I, G, N.

**Table 1.** *Characteristics of the Slovak, Czech and Polish ensemble*

4th grade	A enthusiastic readers		I interested readers		G non-readers without problems		N non- readers with problems		Total N %	
	n	%	n	%	n	%	n	%		
SK	309	44.59	268	38.67	110	15.87	6	0.87	693	100
CZ	76	29.97	120	47.24	54	21.26	4	1.58	254	100
PL	46	18.55	114	45.97	82	33.06	6	2.42	248	100
Total	431		502		246		16		1195	100

*The aim* of the study was to determine how reading preferences vary between Slovak, Czech and Polish younger school-aged children in terms of literary genre and content. We focused on specifying preferred literature titles for children that the children themselves identified in open questions. We evaluated the findings from two extensive sets of items from the questionnaire in detail. *The research questions* were as follows:

- What are the specifics of the national groups in terms of preferred literary genre?
- How do the national groups vary in terms of preferred thematic content in literature?
- What are the differences between the national groups in preferences for specific children's literature titles?
- What are the specific reading preferences in terms of the students' gender?

## RESULTS

In one of the items included in the questionnaire – “*I prefer to read*”: we determined the **preferred literary genres** among younger school-age children. Respondents could mark more than one answer or complete an open-ended answer. We wondered if there were significant differences between the triplets of national groups. We formulated three hypotheses. Due to the method of measurement in this item, three hypotheses were tested using Pearson's chi-squared test of suitability of fit.

*H1: We assume that there is a difference between Polish and Slovak respondents in the selection of literary genres.* The biggest difference was manifested in the overall comparison of the preferences of literary genres among Polish and Slovak students ( $\chi^2=66.95758$  df=6 p = 0.000000).

*H2: We assume that there is a difference between Polish and Czech respondents in the selection of literary genres.* There was also a significant, but

slightly smaller, difference between Polish and Czech students ( $\chi^2=23.07295$  df=6 p=0.000773).

*H3: We assume that there is a difference between Slovak and Czech respondents in preferred literary genres.* Comparison of the Slovak and Czech samples showed differences, but of lower significance ( $\chi^2=20.04246$  df=6 p=0.002722).

In the preferred genres, Polish students differed significantly to Czech and Slovak students. They read fewer *fairy tales* and significantly more *poems*, *short stories* and *novels*. Interestingly, Polish and Slovak readers with problems at the N level prefer to read fairy tales. Polish and Czech enthusiastic readers at the A level prefer to read short stories. Czech ones chose *poetry* the least of all groups. Slovak children preferred *encyclopaedias*. They read *short stories* much less than Czech and Polish children. (Table 2)

**Table 2.** Genre preferences

	Q I prefer to read							
genre	fairy tales %	short stories %	novels %	encyclopaedias %	poetry %	other %	write their names %	N /% in national groups
A	32.88	8.71	6.61	18.02	11.11	13.81	8.86	309
I	33.88	5.75	4.52	19.92	9.45	12.94	13.55	268
G	32.57	7.43	5.14	16.57	8.57	17.71	12.00	110
N	44.44	11.11	11.11	11.11	11.11	11.11	0.00	6
<b>SK</b>	<b>33.28</b>	<b>7.48</b>	<b>5.68</b>	<b>18.47</b>	<b>10.17</b>	<b>13.99</b>	<b>10.92</b>	<b>693/100</b>
A	28.57	18.05	9.77	9.77	5.26	15.79	12.78	76
I	33.16	14.74	6.32	8.42	6.84	18.42	12.11	120
G	32.84	8.96	4.48	5.97	4.48	31.34	11.94	54
N	28.57	0.00	0.00	14.29	14.29	28.57	14.29	4
<b>CZ</b>	<b>31.49</b>	<b>14.61</b>	<b>7.05</b>	<b>8.56</b>	<b>6.05</b>	<b>19.90</b>	<b>12.34</b>	<b>254/100</b>
A	14.81	19.44	15.74	5.56	16.67	17.59	10.19	46
I	20.67	22.60	11.54	4.81	17.79	14.42	8.17	114
G	21.37	15.38	5.13	2.56	22.22	17.95	15.38	82
N	30.00	20.00	10.00	10.00	10.00	20.00	0.00	6
<b>PL</b>	<b>19.64</b>	<b>19.86</b>	<b>10.84</b>	<b>4.51</b>	<b>18.51</b>	<b>16.25</b>	<b>10.38</b>	<b>248/100</b>

*A – enthusiastic reader, I – interested reader, G – non-reader without problems, N – non-reader with problems*

**Content categories** arose from categorization based on focus interviews. They were the basis for creating the structure in the item: “*What do I like to read about?*”. There were no statistically-significant differences in content preferences between national groups of respondents. Nevertheless, we can talk about some differences between Slovak, Czech and Polish students.

The most preferred content is *real-life stories*, slightly less mentioned by Polish students. *Fantasy and sci-fi* literature are most often chosen by Czech readers. *Detective stories and biographies* are read mostly by Slovak children. Czech students read the least *biographies* and Polish children read the least *articles in magazines*. Magazines are preferred by Slovak and Polish non-level N readers and Czech readers with interest - level I (Table 3).

**Table 3.** *Content preferences*

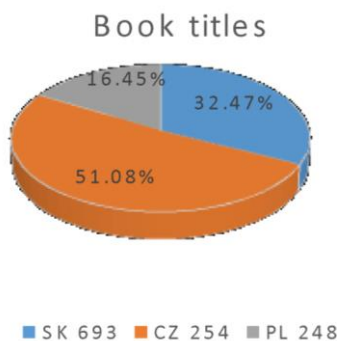
Q What I like to read about								
genre	real-life stories %	articles in magazines %	fantasy or sci-fi %	detective stories %	biographies %	other %	write their names %	N/% in national groups
A	25.32	9.84	22.10	19.19	11.61	8.39	3.55	309
I	28.79	9.67	19.78	14.95	11.65	9.01	6.15	268
G	25.71	12.00	17.14	13.71	17.71	9.14	4.57	110
N	42.86	14.29	0.00	0.00	28.57	14.29	0.00	6
<b>SK</b>	<b>26.73</b>	<b>10.10</b>	<b>20.45</b>	<b>16.79</b>	<b>12.57</b>	<b>8.75</b>	<b>4.61</b>	<b>693/100</b>
A	28.57	6.72	30.25	18.49	2.52	10.08	3.36	76
I	29.73	12.97	25.41	14.59	7.57	7.57	2.16	120
G	26.23	8.20	36.07	4.92	14.75	4.92	4.92	54
N	20.00	0.00	20.00	0.00	0.00	40.00	20.00	4
<b>CZ</b>	<b>28.65</b>	<b>10.00</b>	<b>28.65</b>	<b>14.05</b>	<b>7.03</b>	<b>8.38</b>	<b>3.24</b>	<b>254/100</b>
A	28.40	2.47	23.46	18.52	7.41	12.35	7.41	46
I	22.78	4.43	30.38	12.03	12.03	12.03	6.33	114
G	17.00	5.00	23.00	14.00	13.00	17.00	11.00	82
N	16.67	16.67	50.00	0.00	16.67	0.00	0.00	6
<b>PL</b>	<b>22.32</b>	<b>4.35</b>	<b>26.96</b>	<b>13.91</b>	<b>11.30</b>	<b>13.33</b>	<b>7.83</b>	<b>248/100</b>

*A – enthusiastic reader, I – interested reader, G – non-reader without problems, N – non-reader with problems*

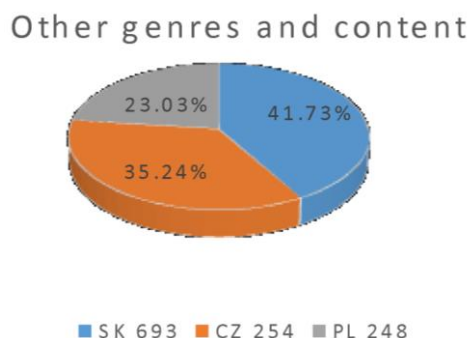
In both items, younger students had the opportunity to add an open-ended answer - which other genres or content they prefer to read and what are their titles or book titles. Of the national groups, 27% of Slovak, 22.8% of Czech and 14.9%



of Polish respondents used the opportunity to freely write down other genres and content, and 15% of Slovak, 23.6% of Czech and 7.6% of Polish respondents wrote a specific name of a preferred book. The willingness to answer freely was shown mostly by Czech students, the least by Polish students (Chart 1 and Chart 2).



**Fig. 1.** Percentage share of respondents



**Fig. 2.** Percentage share of respondents

Students were free to add other preferred genres and content. Slovak boys mainly mentioned war stories, action books, books with a criminal plot, encyclopedias cars, dinosaurs, and biographies about hockey players and football players. Polish boys mentioned historical stories, comics, books about the universe and YouTubers, and Czech boys reported adventure books and comics in particular. Slovak girls chose especially realistic stories, stories and encyclopedias about animals, especially horses and dogs. This selection aligns them closest to Polish girls, who also chose stories about animals, as well as various fantasy stories. Czech girls often provided responses along the lines of sad and happy stories. In the open-ended answers, poetry was only mentioned by Polish students, which is also confirmed by the result mentioned above in the item "I prefer to read". Legends and fables appeared very little in all three national groups among the preferred genres. The names of magazines were mentioned sporadically by Slovak, Czech and Polish students. Slovak students mentioned the entertaining magazine *Fľak* and Czech students mentioned the magazine *Čtyřlístek*. Czech research in the second half of the 20th and the beginning of the 21st Century showed that the largest number of students read literature intended for their age category [11], [12]. This is also the case in our research. Further evidence of this is the fact that the largest percentage of children from all three national groups prefer to read fairy tales. Polish children also like to read short stories. Many Slovak, Czech and Polish children reported stories from life and fantasy literature.

In our research, in contrast to previous research [12], it is surprising that Slovak, Czech and Polish students preferred books from foreign authors. Among the Slovak authors, the storyteller Pavol Dobšinský (*Slovenské rozprávky*) and

newer authors Branislav Jobus (*Muflón Anciadš*) and Alena Penzešová (*Prešibané dvojčatá*) appeared in the open-ended answers. Andrzej Maleszka (*Magioczne drzewo* - several parts) and the title of a series of children's books created by a Polish girl (2005) (*Nela Malá reporterka*) appeared among Polish works. Among Czech authors, children mentioned three: Martina Drijverová (*České pověsti pro malé děti*), Tereza Kramerová (*Dívka s havraními křídli*) and Jaroslav Foglar (*Rychlé šípy*). Children's literature from foreign authors dominated the answers of all children. The most common titles of books by foreign authors in free testimonies of students of all three national groups: *Harry Potter* by J. K. Rowling, *Diary of a Wimpy Kid* by Jeff Kinney, the [Tom Gates] series by Liz Pichon, the *Horrid Henry's Underpants* series by Francesca Simon, *Tiger Team* by Thomas Brezina, *Lord of the Rings* by J. R. R. Tolkien, *The Complete Chronicles of Narnia* by C. S. Lewis, *Miss Peregrine's Home for Peculiar Children* by Ransom Riggs, and *Gangsta Granny* by David Walliams. There were also stories with supernatural phenomena, mysteries and terrible secrets: *Die Knickerbocker Bande* by Thomas Brezina, *Pretty Little Liars* by Sara Shepard, the *Star Friends Series* by Linda Chapman, as well as classic children's stories: *Matilda* by Roald Dahl and *Mio, min Mio* by Astrid Lindgren, as well as *The Little Prince* by Antoine de Saint-Exupéry.

## DISCUSSION

The most significant finding is the difference of the Polish sample, which correlates to the better performance of Polish students in international measurements. In Poland, the concept of integrated curricular content has been deployed in primary education, which could also be reflected in the results in measuring literacy [13]. In Polish primary education, reading is incorporated into all subjects as a cross-cutting theme. In the new millennium after education reforms, Polish integrated teaching focuses on thematic integration, often based on a story close to children, but also on other types of art. The teaching focuses attention on the emotional experience of children [14]. Polish students chose short stories much more than their Slovak and Czech cohorts. They focus on artistic and experiential content. We explain this by the fact that in Poland the emphasis is on reading contemporary prose for children as well as prose from Polish history. Younger students have the opportunity to choose from a wide range of literary production [15]. Polish and Czech boys, unlike Slovak boys, very often preferred comics. This may be due to the fact that in Poland and the Czech Republic there is higher production and a broader range of this genre, and children have better access to it on the book market. Czech students chose fantasy and sci-fi literature, such as *The Chronicles of Narnia*, the most out of the three groups. Slovak children preferred encyclopedias. In our opinion, this is related to the excessive overemphasis of cognitive goals in Slovak pedagogical practice. In recent decades, the attention of Slovak teachers has increasingly focused on reading literacy (with the intention of improving students' performance in international measurements), which is related to the development of the cognitive side of the student's personality. They pay less attention to the socio-emotional goals of

reading, specifically fostering the joy of reading and forming a positive attitude towards it. We also noticed a preference for reading biographies among Slovak children. Their open testimonies showed that they were biographies of contemporary "celebrities" of pop culture, modelling and sports. We think that this choice is primarily influenced by the media, which are a serious competitor to students' reading.

## CONCLUSION

We found significant differences between younger Slovak, Czech and Polish students. The differences identified from the research certainly have a broader social and cultural context. There are significant differences in the preferences of literary genres. Polish students are more oriented towards short stories and novels, while Slovak students prefer encyclopaedias. Czech students gave the lowest level of preference towards the poetry of all the national groups. Research is particularly important in the context of international comparisons. The study of readership among students, include a perspective on the preference of literary genres and content, is a fundamental topic in innovations to the educational process along with leisure reading activities among students. Research findings are particularly important for teachers, who should fundamentally change their attitudes towards student reading. They should be interested in the reading preferences of their students and give them more time at school to read literary genres and content that they enjoy, not just in reading and literature classes.

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# **LANGUAGE AND CULTURE INTERFERENCE IN THE PROCESS OF PURSUING HIGHER PLURILINGUAL EDUCATION**

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## **ABSTRACT**

It is impossible to imagine a modern person with higher education who would have never studied one or several foreign languages and would not be familiar with the culture of different countries. Especially in the modern world, in which knowledge of languages serves not only as a way of cognition, but also as a key to self-realization both in one's own linguistic environment and beyond. The borders of countries are in many ways more and more transparent, means of transportation are available, which makes a modern person mobile and active in changing their place of residence and work. Knowledge of a foreign language and understanding of the cultural characteristics of other peoples further erases the barriers to temporary or long-term migration. Consequently, interest in the study of foreign languages grows in proportion to the growth of educational, scientific, commercial, cultural contacts, the desire of peoples and governments of different countries to develop cooperation and interaction. The study of linguistic and cultural contacts and the mutual enrichment of languages involves not only the study of specific socio-historical and cultural conditions of their development, but also the results of their mutual influence and interpenetration.

In the process of learning one or more foreign languages, the problem of linguistic and cultural interference arises. The focus of our article is the problem faced by students of language departments. Students, even with a good command of a foreign language, often make mistakes, the cause of which is interlanguage interference - the influence of the native language system on a foreign language or two or even more studied languages on each other. With prolonged «immersion» in the language, the languages being studied begin to influence each other, actively interacting with the native language. Interference can manifest itself in both oral and written speech, as well as at all linguistic levels. In addition, issues of cross-cultural interference play a significant role.

This article examines the reasons for the occurrence of language interference, describes its main characteristics and features, provides illustrative examples from European (English, Spanish and others), Slavic (Russian, Polish and others), as well as in the Eastern (Chinese) language. The authors pay special attention to the problem of linguistic interference of students of higher educational institutions

emitting two or more foreign languages. They are carriers of the cultural code of their country, their people, but at the same time their cultural characteristics are in close contact with the cultural values of the people whose language they are studying, and their native language enters into a complex interaction with the languages being studied. Any culture is national, its national character is expressed in language through a special vision of the world, respectively, these two phenomena are inextricably linked and it is possible to consider them within the framework of one study.

In the course of analyzing the above-described scientific linguistic and culturological problem, the authors come to the conclusion that the study of the culture of the people of the country of the target language is in many respects primary and serves as a superstructure over the study of a foreign language. This methodological approach allows students to avoid both cross-cultural and, in the future, linguistic interference. Teachers are required to be not only teachers of the language, who understand its origins of history and its evolution, but also specialists immersed in the culture and traditions of the country, the language they teach, who know its historical features, the mentality of the people and those key moments that influenced the formation of the linguistic features.

**Keywords:** *language interference, culture interference, higher education, linguistic education, language mistakes, cross-culture, foreign language*

## INTRODUCTION

The modern tasks of language education within the framework of the theories of bilingualism put in front of the researchers the problem of studying interference and transference. Linguocultural interference is an important factor influencing the formation of the language skills of a person who learns to combine in his consciousness several linguistic and cultural systems interacting with each other. The problem of language interference arises in the process of learning one or more foreign languages. The national character of culture is expressed in language, which entails the problem of not only linguistic but also cultural interference.

Interlanguage interference is the influence of the native language system on the foreign one. Students of language departments, even with a good command of a foreign language, often make mistakes, the cause of which is interlanguage interference - the influence of the native language system on the foreign language, and later, with a long «immersion» in the language, the studied language begins to influence the native one. A person learning a foreign language rarely avoids encountering the phenomenon of linguistic interference. This phenomenon arises as a result of the influence of one language on another. Usually, the native language affects the foreign one, this problem happens at an advanced stage of learning. Interference can manifest itself in both oral and written speech, as well as at all linguistic levels.

Interference, like positive transfer, can cover all levels of the language: phonetic, grammatical, lexical, spelling and significantly affect the development of speech activity in a new language. The types of interference are distinguished according to several criteria. Interference can be communicatively relevant, that is, it violates the mutual understanding of the interlocutors, and communicatively irrelevant, does not interfere with mutual understanding. Interference can be synchronous and dynamic. Synchronous interference is unchanged. It remains with the learner, for example, his accent. Dynamic interference precedes the first type chronologically, it reflects the process of the student's progressive movement in language acquisition and can be overcome.

According to the types associated with the specifics of speech activity, we can distinguish productive interference (the generation of speech) and receptive interference (understanding). Interference in productive types of speech activity is amenable to direct observation and is more pronounced than in receptive types of speech.

Successful learning of foreign languages requires researchers to analyze the phenomenon of language interference, and from teachers to understand its causes and search for approaches to interacting with this problem.

## **METHODS AND METHODOLOGY**

The authors used the following scientific research methods: synthesis, analysis, deduction, comparative method and observation method.

The synthesis method was applied in the course of generalizing data on the problem of interference, giving an overview of the elements most characteristic of the problem. The method of analysis was used to determine certain patterns of linguistic interference in order to analyze their features and to reflect the essence of the issue. Further, the authors moved from the method of analysis to a deduction. This method was used in the process of concretizing examples of linguistic interference, specific examples were singled out from the general patterns in this issue. The authors resorted to comparative studies in order to compare various manifestations of linguistic interference in oral and written speech, during translation, when changing language styles. A very important for the authors was the observation method, which allowed them to collect specific examples of linguistic and cultural interference from their students in real teaching conditions.

## **RESULTS**

The term interference was first used in the exact sciences, where it means interaction, mutual influence, the result of which can be both positive and negative. In linguistics, it was first introduced by the scientists of the Prague Linguistic Circle, implying by interference the process of deviation from the norm

of contacting languages. U. Weinreich calls the interference deviations from the norms of any of the languages, which occur as a result of proficiency in two or more languages, i.e. due to language contact. According to E. Haugen, interference is the deviation from the norms of a language that appear in the speech of bilingual speakers as a result of acquaintance with other languages. A. Klimov believes that interference is the result of the superposition of two systems in the process of speech. N.B. Mechkovskaya uses the term «interference» for errors in a speech in a foreign language, caused by the influence of the native language system [1]. Another definition proposed by V.A. Vinogradov, is formulated as follows: «Interference is the interaction of linguistic systems in conditions of bilingualism, which is formed either during linguistic contact, or with individual assimilation of a non-native language», deviations from the norm and systems of a non-native language caused by the influence of the native, he considers the expression of the process of interference [2].

Interference occurs when the same person regularly uses different languages. The speaker equates units of one language with units of another because of their similarity in form, in distribution, or both. The depth and amount of interference can vary. They depend on many subjective and objective factors. It is believed that the smaller the typological distance between the mother tongue and the target languages, the greater the degree of their similarity and the smaller the difference, the greater the likelihood of interference. If this distance is large, that is, the languages are not genetically related, then there will be fewer cases of automatic transfer, and, as a consequence, the mistakes made by the learners. However, there are some exceptions.

Let's consider examples of different types of interference in different language families: English, German (West Germanic language group), Spanish, Italian, French (Romance group), Polish, Ukrainian (Slavic group), Chinese (Sino-Tibetan language family).

#### Examples of language interference with English.

Sometimes the speaker incorrectly chooses a word from a number of stylistic synonyms, in connection with which the style of utterance changes, although the subject in question may remain the same. For example, the Russian word «talk» corresponds to two English verbs, differing in style: neutral «*speak*» and colloquial «*talk*». In the case of the wrong choice in relation to a specific speech situation, the phenomenon of stylistic interference can be observed. The word «*house*» is used for the place of residence, and «*home*» is used to designate the family and the social concept. One more example: *I am fat. (I'm full.) I have no ideas. (I've no idea.)*

Let's give some examples of interference with the French language. The example of lexical interference: *fontaine* (fr.) «*well, source*» is mistaken, because it is similar to the Russian word «*the fountain*». Lexical interference usually leads



to literalism. So, for example, the word «*journal*» (m.) is understood as «*journal*» (revue, f.), not «*newspaper*»; «*Magazine*» (m.) is «*shop*» (magasin, m.), not the «*picture magazine*».

There are words of Italian and Russian languages, similar in form, but different in meaning. For example, students try to use the word «*per favore*» («*please*» - in the meaning of a request) in response to «*grazie*» («*thank you*»), knowing that the answer should be «*prego*» (*please*, in the meaning of gratitude)...

One more typical mistake: «*Un amico vecchio*» (old friend) - «*un vecchio amico*» (old friend).

Some examples from Spanish.

Using the verb «*ser*» (to be). In Russian, the verb is not used in the present tense, while in Spanish a sentence without a verb cannot exist. But pronouns are often absent in sentences, since the verb in the correct form gives all the necessary information.

Incorrect: «*Yo arquitecto. Nosotros economistas*». Correct: «*Yo soy arquitecto. Nosotros somos economistas*». Quite right: «*Soy arquitecto. Somos economistas*».

It would seem that if languages are close in origin, such as two languages of the Slavic language family, Polish and Russian, then language interference is less likely, but the researchers of this problem show that interference is not only present, but due to the proximity of the two languages, it lasts longer and it is more difficult to overcome it. For example, in the use of the prepositions «*to*»: «*Poszedlem do kina*» and «*I went to the cinema*» in Russian, while in Russian students say «*to*» instead of Polish «*do*» (to). Or, for example, there are mistakes in vocabulary gender. Often, words that coincide in meaning and partly in form have a different genus: *zamsz* (m.) and *suede* (f.).

Although Russian and Polish languages belong to the Slavic family of languages, they represent different groups: the East Slavic group (Russian) and West Slavic (Polish). When studying the Ukrainian language, which is closely related to Russian, and which, like Russian, belongs to the East Slavic group of languages, various types of interference are no less frequent. So, Russians studying the Ukrainian language classify Ukrainian masculine nouns «*біль*», «*розпродаж*», «*посуд*», «*Сибір*», «*ярмарок*» (pain, sales, dishes, Siberia, fairs) to the feminine gender in accordance with the norm of the Russian language: pain, sale, dishes, Siberia, fair (*рус. боль, распродажа, посуда, Сибирь, ярмарка*).

From our personal teaching practice, we would like to cite a few more examples related to the Chinese language. In Russian, the preposition «*on*» is placed in front of the object, for example: a book is on the table. In Chinese, after

the object: 书在桌子上 (Shu zai zhuozi shang) . Russian students confuse the meaning and use of the preposition / verb 在 (zai), giving it the meaning «on», forgetting that in this type of sentences, the role of the place indicator «on» is taken by locative 上 (shang - on). They make a wrong sentence: 书在桌子.

There is, for example, the interference of Chinese and English. For example, Russian speakers who study these two languages at the same time often confuse the pronunciation of certain sounds. Thus, the phonetic unit of the Chinese language «q» / q / (qi) is often pronounced as is customary in English, that is / kju /. And, for example, instead of the English soft-pronounced «she», they use the hard-pronounced variant, as is customary in Chinese, sound «shi».

It is interesting that the interference itself can be not only linguistic, but also intra-linguistic. Here are some examples from Chinese. When studying two aspects of language at the same time: oral (spoken) and written (business), students often make the mistake of breaking the required style. So, for example, in colloquial speech, describing the finding of an object, instead of the verb 在 (zai (located) at; (to be) in; to exist), they use the written verb 位于 (wei yu) with the same meaning. Another example: instead of the conjunction 和 (he - and, with) they use the conjunction of the written language 与 (yu). Such examples can certainly be cited from many languages.

Among the examples of interference, we would like to note an example of intonational interference, since linguistic interference at the level of intonation prevents the correct personal and social assessment of the speaker. A speaker who is fluent in the language at the lexical and grammatical levels, making intonation mistakes, risks destroying the correct perception of his level of language training. For example: in Chinese, to the question: 你是大夫吗? (are you a doctor?) students respond with a neutral intonation 是, 我是大夫 (yes, I am a doctor), emphasizing the word «doctor», but for Chinese language is more typical to make a semantic emphasis on the verb 是 (shi - to be).

Linguistic and cultural interference is the misunderstanding of background vocabulary.

Of course, there are many other examples related to various types of interference, which it is impossible to list all within the framework of this article.

The authors identify several main reasons for the occurrence of language interference, which can be associated with both the characteristics of the languages being studied and the immaturity of students, their inexperience in learning languages, or the fact that they are at the initial stage of learning. The situation of linguistic contact leads to the emergence of bilingualism, to possession of two or more languages and their use, depending on the conditions

of verbal communication. Since the speech of students is not yet perfect, it is noted to one degree or another «reliance» on the native language in the process of communication is inevitable, which ultimately leads to violations of the system and norms of the second language, to the appearance of so-called interference. The primary system is considered as a source of interference, the secondary - as an object of interference. The primary system can also be represented by a previously studied non-native language, when the features of the system of a previously studied foreign language, in which a person's speech activity was carried out, is transferred to the newly studied language, thus, a distortion occurs under the simultaneous influence of the system of the native language and other previously studied languages.

The linguist N.S. Trubetsky wrote that when listening to someone else's speech, when analyzing what we hear, we involuntarily use the «phonological sieve» of our native language that is familiar to us. And since our «sieve» is not suitable for a foreign language, numerous errors and misunderstandings arise. The sounds of a foreign language also receive an incorrect phonological interpretation from us. N.S. Trubetsky believed that a foreign accent depends not on the fact that a foreigner cannot pronounce this or that sound, but on the fact that he «judges this sound incorrectly|», which is due to the difference between the phonological systems of a foreign and native language. S.I. Bernstein identified the main reason for difficulties in mastering foreign language pronunciation by the fact that students perceive someone else's speech through the prism of the phonetic system of their native language. Possessing stable skills in listening and pronouncing the sounds of their native language, they use these templates in the perception and reproduction of unusual sounds of foreign speech. It is no coincidence that at the initial stage of training, students imagine the sounds of their native language instead of foreign language sounds. The nature of the interaction of sound systems in teaching a non-native language has its own specific features [3].

Interference can also be caused by the divergence of typical grammatical patterns in different languages. The norms characteristic of their language are transferred into a foreign language. Lexical interference can be associated with a mismatch in the amount of meanings of words in different languages. Interference is observed during the assimilation of linguistic forms of various levels (sounds, words, sentences) and its degree depends on the degree of similarity of linguistic forms, if linguistic forms are similar, then the interference is easily overcome. Interference can be easily overcome even with a complete divergence of linguistic forms. The greatest difficulties in overcoming interference are observed in those cases. When they collide, the phenomena are partially similar. In this case, the oppositions of one language are replaced by the corresponding oppositions of another language. Such phenomena include the phenomena of the syntactic level, that is, interference in the construction of a sentence. Interference is especially difficult to overcome when mastering the rules for the arrangement of words in a sentence of a foreign language.

When teaching foreign languages to students, sound interference can be regarded as «poor» and «mediocre» pronunciation in the target language. In this case, there is no interaction between the two language systems - the «speech» of students sounds mainly in the classroom. Achieving good pronunciation in a foreign language, the teacher primarily pursues general linguistic goals, since mastering the mechanisms of sounding speech is the key to mastering all the riches of a foreign language. Under conditions of interference, «poor» speech quality in a non-native language does not exclude good understanding, and in case of poor discrimination of sounds of a non-native language, pronunciation errors are unnecessary. When teaching students languages, the «Russian accent» especially «betrays» the speaker. Errors in the placement of phrasal stress, in the choice of the intonation center in a phrase, the appearance of «calque», that is, a literal translation from the Russian language, are very obvious.

Overcoming or reducing language interference when teaching a foreign language to students is a very difficult task, but the use of authentic teaching materials, audio media, newspapers, magazines, etc., as well as the correct organization of the educational process, contributing to «immersion in the language», as well as teaching students working on the features of the target language, leads to its significant decrease.

The creation of a holistic methodology for solving the problem of such errors would contribute to an increase in the level and intensification of the development of foreign languages, would help to make it more accessible to study more than one foreign language and avoid overlaying them on each other, and would solve the problem of «switching» from one language to another, give new approaches to understanding bilingualism and polylinguism, when linguistic interference is an inevitable consequence of the parallel use of two or more languages, especially among children from an interethnic family or children-immigrants.

The efforts of the teacher should be aimed at more quickly overcoming the interference of native language systems in the system of a foreign one. It is necessary to draw the attention of students to the fixed variants of a foreign language.

Cultural interference is not caused by the language system itself, but by the culture that the language reflects. Interference can be caused by realities, phenomena, norms of behavior similar in different cultures, for example, unequal forms of speech etiquette.

## CONCLUSION

The article examines the problem of linguistic and interlanguage interference, provides examples from different languages, reflecting the fact that this problem is typical for different languages and does not depend on how close or distant the languages are. The authors consider a number of reasons leading to linguistic

interference and speak about the relationship between culture and language. The condition for the occurrence of linguistic interference is linguistic contact. There is an influence of the native language system on a foreign one and studied languages one on another.

The authors come to the conclusion that the solution to the problem of linguistic and cultural interference lies in the area of one of the main pedagogical tasks for teachers, and for students, overcoming the manifestations of interference should be based on a deeper knowledge of the culture of the people of the country of the language being studied and greater memorization of linguistic elements for their use there where translation can be dispensed with, thus avoiding interference errors.

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# **PARANORMAL EXPERIENCE RELATED TO IMPROVING ACADEMIC MOTIVATION OF SLOVAK UNIVERSITY STUDENTS**

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## **ABSTRACT**

Currently, at the beginning of the 21st century's third decade, scientific attention must be focused on modern topics. These challenges include also the paranormal experience of university students. However, many of university executives either downplay it or even reject it. With this behavior, they fail to reveal the important potentials that are contained in the intra-motivational system of each student. In this way, they lose the opportunity to properly target the university's motivational efforts and programs aimed at strengthening academic motivation. The aim of paper is to fulfill this gap. It analyzes, compares and synthesizes theoretical views in the field, and completes them in terms of positive and negative impacts on intrapsychic balance and motivation of the student. In an effort to increase the scientific relevance of paper, two hypotheses are set. H1: There exist relevant relations among searched paranormal phenomena, H2: Occurrence of paranormal phenomena depends on the gender. The empirical part presents the results of a unique survey participated by Slovak HE students. With the use of frequency analysis,  $\chi^2$  test and Product-Moment Correlation, the most important findings include that among paranormal events, students experience the most especially déjà vu, presentiment, and 6th sense belief. The most frequently un-experienced events are: out of body experience, telepathy, and signs of ghosts. Almost half of the phenomena show significant relationships. Also, the statistical significance of gender dependence was approved for 4 of 8 searched phenomena: déjà vu, telepathy, 6th sense belief, and signs of ghosts. Confirming both hypotheses, it can be deduced that consider for anomalousness could be a great inspiration for academic motivation increase. Several ways for improvement of motivation are suggested, and recommendations for the university management with regard to master the negative impacts of these phenomena are formulated in the conclusion.

**Keywords:** *Paranormal experience, higher education, motivation, students, survey*

## INTRODUCTION

The Intra-motivational system of higher education student contains various drives and phenomena that call up, orientate and sustain an academic effort. In this view, academic motivation is the complicated system of internal motivational events and dynamics focused on planning, balancing and achieving the pre-determined life, academic and career ambition. Currently, many various forces and elements affect academic motivation. One of the non-traditional, but inspirational from the viewpoint of scientific research, is the anomalous, i.e. paranormal experience.

The psychology of the paranormal has always reflected wider themes about nature [1]. Anomalistic psychologists attempt to understand their subject of matter by considering the phenomena to be explained from the varying perspectives of all of the traditional sub-disciplines of psychology [2]. Thus, parapsychology is concerned with states of consciousness that have traditionally been considered supernatural or paranormal [3], and as a permanently discussed discipline, deals with paranormal experiences. It attracts the attention and fascinates people, it searches “extrasensory perception (ESP) and other phenomena which cannot be explained by existing scientific principles” [4]. On the other hand, “it is possible that a scientific explanation might one day be found for these claims” [5]. This paper tries to contribute partially in such an effort.

Although the paranormal experience is “difficult to operationalize, there has been a scholarly consensus that it is a multidimensional construct” [6]. The paper uses the terms paranormal experience rather than paranormal belief. “Having a belief in the paranormal does not necessarily mean having experienced the paranormal” [7]. In other words, an experience that might be described as paranormal or anomalous is one that is in some way ‘out-of-the-ordinary’ [8].

In the paper, the paranormal experience can be defined as the conviction in the peculiar, non-standard or unusual psycho-physiological experiences of individuals. Such unusual ‘events’ are often the culmination and transformed ‘message/link’ of their subconscious and/or the result of their unique cerebral synopsis. It is important to emphasize that the subject itself, i.e. student is sure that s/he experienced the unusual, and the daily reality distant event. The essence is the intra-personal certainty of the student that s/he experienced such unexplained situation.

Although the topic of paranormal experience should be considered absolutely natural at the beginning of the third decade of the 21st century, many theorists, but especially university executives, either downplay it or even openly reject it. The paradox is that many of them often rely on their intuition in their management decisions. At the same time, intuition is often identified with one of the most frequently experienced abnormal experiences, i.e. with the sixth sense. Intuition/sixth sense is usually a reflection of feeling for the situation and the



ability to connect many rational elements or fragments of experience into absolutely new, often unexpected solutions. In other words, these unique experiences in modern higher education deserve their deeper scientific attention.

Based on the aforementioned, the paper's research goal is defined in this way: Theoretically and empirically search the higher education students' anomalous experience. These characteristics will be examined from the viewpoint of their matter-of-fact, but also, from the perspective of both positive and negative relations to academic motivation. With an intention to overcome an existing knowledge-relation gap in this area, an empirical part will present the results of a questionnaire survey, attended by  $n = 443$  university students in the Slovak Republic, Europe. The survey was focused on investigating the existence of paranormal experiences and disclosing potential dependencies and relations between them. With respect to basic scientific principles, the empirical effort will consist in testing relations among paranormal experiences (H1), potential gender dependencies with regard to paranormal experiences (H2). The conclusive parts will discuss and generalize the obtained results, and recommend some of the prior suggestions in the field.

## **PARANORMAL EXPERIENCE AND EXTRASENSORY PERCEPTION**

Although Swets pointed out in 1990 that Commission for Searching Extrasensory Perception did not find any scientific evidence for the existence of the ESP in researches performed over the past 130 years [9], paradoxically, psychological scientists not only reject certain claims but also construct both their opponents as unscientific and, in the process, themselves as scientific [1].

With the use of primary psychology classification, it is possible to experience unusual events through the five basic senses (sight, hearing, touch, smell, taste) or without these ones (e.g. [2,5]). Based on this, the chosen anomalous categories could be structured into two groups: a) paranormal experiences, b) extrasensory perception. Déjà vu, sleep paralysis, out-of-body experience and signs of a ghost could be ranked into the first group. Further searched phenomena, i.e. presentiment, telepathy, clairvoyance, 6th sense belief, could be ranked into the second group.

### **Paranormal Experience**

Accepting presented ideas, the characteristic point of this paper's survey is focused on paranormal experience (with 6th-sense belief). Of course, an answer (yes/no) in the survey means "I remember (or not remember) that I have experienced." There is a possibility that many students have forgotten their experiences although it is difficult to confirm it. Thus, the answer (yes/no) can be also considered as a kind of expression of occurrence.

First of anomalous experiences, searched in the paper, i.e. *déjà vu*, can be described as an individual's sureness that s/he has already found him/herself in the same situation, either as a direct participant or at least as a witness, and s/he perceived the situation extremely intensely. Based on knowledge of neurology, functions of the brain, disclosing various cerebral connections, etc., Brown considers *déjà vu* as a specific cognitive illusion which may result from: "(a) a brief change in normal neural transmission speed causing a slightly longer separation between identical messages received from two separate pathways, (b) a brief split in a continuous perceptual experience that is caused by distractions and gives the impression of two separate perceptual events, and (c) the activation of implicit familiarity for some portion of the present experience without an accompanying conscious recollection of the prior encounter" [10].

Sleep paralysis represents one of the most unfavourable anomalous events. It can be characterized as a disabling of movement, as a temporary palsy, numbness of limbs or whole body during sleep and loss of control over one's physiological reactions. It is often associated with great psychological and physiological discomfort. „People felt paralyzed, could not speak, felt helpless, and were overwhelmed by extreme fear“ [11]. It is often described as a terror in the night (e.g. [12]). Worse sleep quality was found in multiple studies to be associated with increased odds of sleep paralysis occurrence [13]. Sleep insufficiency can have a negative impact on the physical and mental health of university students and be detrimental to cognitive skills for learning [14].

Third of searched anomalous is a sign of a ghost. The ghost may have a quasi-imaginary-optical form, and may soon be lost. However, the 'existence' of ghosts is often documented in graphical form – as repeatedly appearing inscriptions on the walls and the like. Ghosts consist of a pattern of information residing in a low energy, high energy, negative energy (or whatever) conformation [15]. Similarly, as sleep paralysis, the fear of ghosts may be a cause of intense discomfort, poor sleep, and socio-occupational impairment [16] while hard or intensive types demand thorough clinical attention and psychiatric help. On the other hand, the belief in ghosts functions sometimes as a catalyst for spiritual transformation [17], or gifts individuals a warning [18] pointed out that these ones are a reflection of conventional wisdom alteration.

The last of the examined paranormal is out-of-body experience (OBE). The individual feels as if s/he has temporarily left his or her physical body and watched everything happening from above, 'through a veil' of an unrelated, independent person. It could be explained as depersonalization, "often is associated with feelings of loss of control over one's own body, actions, or thoughts" [19]. It is "coupled with a corresponding relocation of near-personal space and the origin of the body-centred reference frames" [20]. As all of the mentioned above anomalous, also the out-of-body experience can be explained by neuropsychological science. In such a view, OBE is related to "interference with the temporo-parietal junction (TPJ) of the brain" [21].

## Extrasensory Perception

The first of examined extrasensory perception is presentiment (PSE). This can be described as an ability to predict the unpredictable future. [22] suggested the presentiment “may be one way that the time-symmetries pervading fundamental physics manifest in human experience”. From the academic perspective, if student beliefs in his or her presentiment-ability, a positive precognition (e.g. regarding the result of exam) can lead a student to decrease in learning effort or, on the contrary, motivate a student to learn more hardly with the intention to confirm or over-achieve such expected result. In a negative presentiment, the student can stop any learning effort (because s/he beliefs in fail).

Telepathy demonstrates that the mind is also transpersonal [23]. Logically it also may mirror the mutual understanding, an identical view of the world, or a ‘harmony of souls’. The longer and deeper the students know each other and the greater the trust between them, the greater the resulting ability to understand without words is. Such reciprocity can underpin mutual cooperation and joint of individual learning. On the other hand, “telepathic experiences are disturbing because they threaten the integrity of the self” [23].

Clairvoyance can be described as seeing the distant events or things simultaneously with their occurrence [24]. This one is usually defined in three classes: (1) Simple clairvoyance, (2) clairvoyance in space, (3) clairvoyance in time [25]. It can lead the student to increase his or her ability of imagination. The student can visualize the curriculum and make it easier to remember.

Sixth sense belief, as the last of searched extrasensory perception, can be defined as a complex phenomenon. It draws from knowledge stored in the individual’s subconscious and is rooted in past experience [26]. It refers to the perception of input through some channel other than the five main senses, where a person appears to pick up information from other people by some unknown mechanism or transmission [5]. Because of this, parallel to student motivation and confidence can be used again.

Supported by a performed theoretical analysis, comparison, and synthesis of both phenomena groups, i.e. paranormal experience and extrasensory perception together, it makes it possible to assume that the occurrence of one is associated with the occurrence of another phenomenon. Therefore, assuming also a potential correlation of the incidence of anomalous depending on gender, two hypotheses can be established.

H1: There exist relevant relations among searched paranormal phenomena.

H2: Occurrence of paranormal phenomena depends on the gender.

## METHODOLOGY

Inspired by a research effort done by McClennon (Elizabeth City University, USA) and later completed by Kohri (Japan) [27], Kokubo (Japan) [28] extended the content of the questionnaire sheet. In the current version, there are searched déjà vu, sleep paralysis, presentiment, telepathy, clairvoyance, out-of-body experience, 6th sense belief, signs of ghost, and other experiences in the questionnaire.

Japan version of the questionnaire sheet was translated to Slovak. Then, the quality of translation and semantics were discussed between Japanese and Slovak researchers. Subsequently, the pilot survey was performed at a sample of 10 Slovak students. All items were explained and small changes were done. After this, the final version of the questionnaire was distributed to the respondents.

The sample is relevant because it consisted of Slovak students, with 95% confidence level and 5% error. The respondents were students of the University of Žilina. Concretely, they attended following study programs: 1) Management, 2) Informatics, 3) Information Management, and 4) Computer Engineering. There were males and females. The average age of the respondents was 21.

## RESULTS

The task of respondents consisted in expressing the opinion of what of listed 9 paranormal phenomena does he or she experience. The list of phenomena included: déjà vu, sleep paralysis, presentiment, telepathy, clairvoyance, out-of-body experience, 6th sense belief, signs of ghost, other experiences. In addition to the simple quantification of frequencies, the interdependencies of paranormal experience and their dependence on the age of the respondents were also examined for the possibility of in-depth research.

As it flows from Table 1, the most frequently experienced events were: déjà vu, presentiment, and 6th sense belief. On the other hand, the most frequently un-experienced events were: out of body experience, telepathy, and signs of ghost.

**Table 1.** *Paranormal experience of respondents*

Experience	(a) Yes		(b) No	
	Freq.	[%]	Freq.	[%]
Déjà vu	389	87.81	54	12.19
Sleep paralysis	182	41.08	261	58.92
Presentiment	324	73.14	119	26.86
Telepathy	127	28.67	316	71.33
Clairvoyance	191	43.12	252	56.88
OBE	117	26.41	326	73.59
6th sense belief	305	68.85	138	31.15
Signs of ghosts	135	30.47	308	69.53

*Source: Own source*

#### Data Analysis and Testing Hypotheses

The investigation of the respondents' responses frequency was followed by the evaluation of their relations. The analysis focused not only on identifying the significance of relations between phenomena, but also on relations between the experience and respondents' gender. Dependences' findings were examined through the  $\chi^2$  Test, the results of which were subsequently confirmed by the Product-Moment Correlation (PMC), referring to the option 'yes'.

$\chi^2$  Test:  $C=1.96$ , admissible error = 5%, confidence interval = 95%, if:  $z>C \Rightarrow$  not independent, if:  $z<C \Rightarrow$  independent. Product-Moment Correlation:  $C=0.093$ , admissible error = 5%, confidence interval = 95%, if:  $r>C \Rightarrow$  not independent, if:  $r<C \Rightarrow$  independent.

A significant correlation was demonstrated in 15 cases (Table 2). Specifically, there exist links between following issues: déjà vu and presentiment, sleep paralysis and sign of ghosts, presentiment and telepathy, presentiment and clairvoyance, presentiment and 6th sense belief, presentiment and sign of ghosts, telepathy and clairvoyance, clairvoyance and sign of ghosts, out-of-body experience and sign of ghosts, 6th sense belief and sign of ghosts. Obtained results are interesting and contribute to the validity of hypothesis H1 (existence of relevant relations among searched paranormal experiences).

**Table 2.** *Confirmed correlations between experiences (15 positive correlations).*

Combinations analyzed	$\chi^2$ Test		Product-Moment Correlation	
	z	P-value	r	P-value
Déjà vu and presentiment	6.715	<0.001	0.319	<0.001
Déjà vu and telepathy	2.723	0.006	0.129	0.006
Déjà vu and clairvoyance	3.308	<0.001	0.157	<0.001
Sleep paralysis and OBE	6.995	<0.001	0.332	<0.001
Sleep paralysis and signs of ghosts	2.001	0.045	0.095	0.046
Presentiment and telepathy	4.057	<0.001	0.193	<0.001
Presentiment and clairvoyance	5.261	<0.001	0.250	<0.001
Presentiment and 6th sense belief	3.224	0.001	0.153	0.001
Presentiment and signs of ghosts	2.157	0.031	0.102	0.031
Telepathy and clairvoyance	5.143	<0.001	0.244	<0.001
Clairvoyance and OBE	6.214	<0.001	0.295	<0.001
Clairvoyance and 6 <sup>th</sup> sense belief	2.175	0.030	0.103	0.030
Clairvoyance and signs of ghosts	3.084	0.002	0.147	0.002
OBE and sings of ghosts	3.125	0.002	0.148	0.002
6 <sup>th</sup> sense belief and signs of ghosts	5.584	<0.001	0.265	<0.001

*Source: Own source*

As aforementioned, the interrelations were also examined between phenomena and gender of respondents (Table 3).  $\chi^2$  Test: C = 1.96, admissible error = 5%, confidence interval = 95%, if:  $z > C \Rightarrow$  not independent, if:  $z < C \Rightarrow$  independent. The statistical significance of dependence was approved for 4 of 8 searched phenomena: déjà vu, telepathy, 6th sense belief and signs of ghosts. For example, statistically significantly more women (93.71%) when compared to men (85%) claim to have experienced déjà vu. Up to 85.31% of the interviewed Slovak female say they believe in the sixth sense.

In the case of telepathy and signs of ghosts, more than half of the male surveyed (telepathy = 76.67%, signs of ghosts = 72.67%) and female (telepathy = 60.14%, signs of ghosts = 62.94%) expressed a negative answer. Thus, most of the respondents did not feel either of these phenomena. However, there was a statistically significant difference in the area of telepathy and sings of ghosts

between males and females. Negative answers in both questions were mostly cited by a male. This means the validity of hypothesis H2 can be partially confirmed.

**Table 3.** *Correlations of paranormal experience and gender*

Phenomena	$\chi^2$ Test for gender dependence		Significance
	z	P-value:	
Déjà vu	2.619	0.009	yes
Sleep paralysis	0.361	0.718	no
Presentiment	0.324	0.746	no
Telepathy	3.596	<0.001	yes
Clairvoyance	1.302	0.193	no
OBE	0.054	0.957	no
6th sense belief	5.167	<0.001	yes
Signs of ghosts	2.080	0.038	yes

*Source: Own source*

## DISCUSSION

According to [5], recent surveys in Britain have reported that about 50% of the population believes in extra-sensory perception. It is in accordance with the results obtained in the survey presented in this paper (Table 1).

Results in Table 2 are consistent with results by [7], done on the sample of 361 respondents, which confirmed that the telepathy belief and clairvoyance belief were highly correlated. “Many beliefs were moderately correlated with experiences” [7]. A study of [29], participated by 720 Spanish university students, related sustainable behaviour to various beliefs, spirituality, transpersonal and transcendental experiences. There was confirmed an independence of sustainable behaviour from paranormal [29].

Therefore, when respecting the results presented in Table 3 (confirmed gender-dependence in 4 of 8 paranormal phenomena) and is supported by studies mentioned above, the hypothesis H1 and H2 can be considered relevant. This complexly leads to an important conclusion: paranormal phenomena should be viewed as a great inspiration for improving academic motivation. It is needed to remove negative forms of behaviour because these ones could call-up distrust, unfair and unhelping behaviour of students. Thereto, to achieve the state in which students will attract their study and will be motivated, and with regard to providing quantitative and qualitative characteristics of human potential, the relevance of searching the modern problems in education is increasing [30].

## CONCLUSIONS AND RECOMMENDATIONS

Presented above results, comments and opinions lead to the conclusion that the experience or belief of students in their paranormal abilities should not be dismissed. On the contrary, modern universities should consider such phenomena and use them to improve and sustain motivation for science and learning. It is because of some paranormal experiences are caused by disturbance of psychological balance or sociological imperfections. Dis-balance can be caused by a long-term sense of self-inadequacy, a deep fear of self-failure, too high demands of university studies, allowed freedom versus the perceived family separation in campus, taking responsibility for own studies and personality cultivation, etc. It may adversely affect the functionality of the student's own self-regulation system. For this reason, when new students start their studies, it is necessary to thoroughly explain them the expected course of the studies, their duties, rights, differences from secondary education, and below. Particular attention should be paid to the question of trust and readiness of the university, faculty and all teaching and administrative staff to help students solve any problem.

Despite the fact that de facto and de jure university students are adults and require full respect, they also need a unique mixture of expressed trust, accepted autonomy and, at the same time, belonging together. In terms of psychological as well as sociological development, students are undergoing the hyper-specific intrapersonal and interpersonal changes. They increasingly assume influence and personal consequential responsibility for the selection of factors and influences shaping their personal development and their societal and professionally orientated profile. It is therefore important to alert students to possible feelings of failure, disappointment, deceptive euphoria, the danger of establishing untrustworthy relationships and contacts, succumbing to various 'releasing' substances. Such feelings are natural and are also part of university studies. It is useful to warn in advance of possible dangers and traps. And that is why it is also important to remind students that they can seek not only administrative but also psychological aid if necessary. It is imperative that faculty officials explain these questions to the students in an absolutely correct way, with full seriousness, while emphasizing the normality of such problems. Guaranteeing anonymity must be plausible.

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# PROFESSIONAL BURNOUT OF TEACHERS AT HIGHER EDUCATIONAL INSTITUTIONS

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## ABSTRACT

The study deals with the problems of emotional burnout, concerning the work of teachers in the field of education. In psychological studies, the phenomenon of emotional burnout was first mentioned at the end of the twentieth century. In 1974, Herbert J. Freudenberger first used this term. He used it to describe the negative psychological state of any psychosocial occupation - a state of demoralization, exhaustion, frustration that occurs in a healthy person, who has close contact with patients in psychological clinics and crisis centers. The methodology of «Psychological burnout questionnaire for teachers» created by V.C. Rukavishnikov and the methodology of C. D. Spielberg «Determination of level of anxiety» (adaptation of Y.L. Hanin), «Scale of psych diagnostics stress PSM-25» were applied during an investigation.

**Keywords:** *burnout, stress, emotional, psychology, professional*

## INTRODUCTION

The response of our psyche and body to intensive, constantly acting work stress is called “burnout syndrome”. The phenomenon of burnout is a set of negative psychological experiences that affect a person's mental and physical condition, health, well-being and performance [8]. Such experiences lead to the same behavior. This step was taken by Herbert J. Freudenberger (1926-1999), a Jewish psychoanalyst of German origin. Immediately after the definition of such a state, scientists began to investigate the content of this phenomenon. In the 1980s, the first experimental research on emotional burnout appeared in the United States.

Firstly, it was interesting for the researchers: the study of the causes and structure underlying burnout, its symptoms and manifestations, as well as the dependence of employee well-being and activity on burnout syndrome. Several works by psychologist C. Maslach and his colleagues, released in 1981, were interesting. These studies became the basis for further research into the phenomenon of emotional burnout. The burnout model built by his team made it possible to interpret the data. These studies consider “emotional burnout as a three-component symptom complex consisting of emotional exhaustion, depersonalization, and reduction of personal achievements” [1]. Work stress has

become correlated with the concept of emotional burnout, which can be associated with work satisfaction.

In studying the problem of emotional burnout, R. Schwab (1984) argued that burnout syndrome occurs in professionals who are involved in prolonged, close, and emotionally intense contact with other people. Emotional burnout syndrome develops in working life, as Pines. A (1982) noticed. It refers to a wide range of professionals experiencing burnout syndrome - counselors, psychologists, psychiatrists, social workers, police, prison staff, teachers, medical workers, etc. [2].

In the mid-90s, the study of such a phenomenon as burnout has reached a new level in the world of Western psychology. The status of the independent syndrome appeared at burnout, it is no longer reduced to the states in professional activity such as stress, fatigue and depression. Such notions as stress and burnout are similar, but they are independent phenomena that differ in that burnout is the result of long-term stress experienced by employees working with people. In Ananyev's works he discusses negative phenomena that appear in professional life related to interpersonal relationships among professionals working in human-people occupations. Only in the late 90's burnout became an independent object of scientific research. [3]

It is possible to note several approaches in understanding of the phenomenon of emotional burnout conducting the analysis of works. An interactive approach to the essence of emotional burnout was suggested by C. Maslach together with his colleagues. This team of psychologists draws attention to the importance of interpersonal contacts in the emergence of burnout. In 1981, a pair of psychologists, K. Maslach and S. Jackson defined the concept of burnout as a syndrome associated with emotional exhaustion, feelings of inefficiency in the professional sphere, acting as the body's response to chronic and interpersonal stress in the work [1]. They proposed to consider emotional burnout as a syndrome consisting of three components, which includes three types of symptoms: emotional or physical exhaustion, depersonalization and reduction of personal achievements. In order to reveal the content of these symptoms, researchers define emotional exhaustion as a feeling associated with emotional stress and emptiness, the end of their emotional resources, which appears when an employee can no longer devote himself to work with the same diligence as before. Communication with them becomes formal, faceless. The emergence of negative feelings may be latent and manifest itself in the form of restrained aggression, which over time leads to conflicts and tensions in relationships.

## **THE DEFINITION OF EMOTIONAL BURNOUT SYNDROME.**

A division of burnout into two groups was suggested by V.E. Oryol - it is a process approach and a result approach. [7]. The first one means burnout as a

process that unfolds in time, takes place during a person's professional development and proceeds in the form of phases. [6].

According to the stages, the procession character of burnout is clearly described in the concept of M. Burish [9] who singled out 6 phases of burnout formation. The stage-procedural character of a burnout is well described and singles out 6 phases of a burnout formation:

1. A preliminary phase, by which he meant an excessive involvement of a subject in professional activity.
2. The phase of decrease in the level of own participation in the work activity, when a specialist exhausts his resources and cannot work with the same dedication.
3. The phase of emotional reactions, when there is a loss of interest in the work performed and negative emotional feelings about work begin to emerge.
4. The destructive behavior phase, when the professional begins to protect him or herself from negative emotional experiences by walking away, avoiding the activity, distancing him or herself from clients, etc.
5. The phase of psychosomatic reactions - the peak of psych emotional and physical exhaustion.
6. The last phase - complete disappointment in the performed activity.

### **Peculiarities of emotional burnout syndrome manifestation in teachers of higher educational institutions.**

Emotional burnout syndrome is a professional phenomenon that occurs in representatives of social professions, connected with necessary intensive communication. This phenomenon is most typical for workers of such professions as teachers, kindergarten teachers, doctors, medical personnel, service workers, managers, executives, sellers. Modern scientific literature presents a sufficient number of studies showing burnout syndrome prevalence in education employees.

Borisova M. V. identifies 3 main groups of burnout factors: individual psychological: high level of neuroticism, lack of self-regulation skills, a discrepancy between significant values and activity values; social-psychological factor: emotional component; organizational factor: lack of opportunities for professional growth [4]. The professional activity of such employees is described by a high level of communicative tension. In the work of specialists of pedagogical professions, there is a large number of emotion-genic factors that contribute to constant tension and lead to burnout syndrome development. Situations of stress in the work of pedagogical workers are diverse, working conditions impose higher requirements for professional and personal qualities of people who have decided to devote themselves to this profession.

The unfavorable factors of teacher's work include: the necessary constant involvement in the process and, accordingly, a high load on the cognitive processes. We study such a group of pedagogical employees as teachers of higher educational institutions from the point of view of emotional burnout expression. The professional category is united by the specificity of professional activity, namely work with people, communicative tension, the activity of subjects of activity, multifaceted tasks and many other things. The activity of the teacher as a whole is aimed at working with people of different ages, it is manifested in the work with the personality of the person [10].

## METHODOLOGY

Due to the fact that burnout syndrome causes such negative consequences for a professional's life activity, the question of developing measures of prevention and correction of this syndrome arises sharply. A signal function in the development of burnout syndrome is played by symptoms that draw a worker's attention to the fact that there is a so-called failure in work relations and activity. Thus, D.G. Trunov writes that "To some extent, they are the professional's friends, helping him to know what is going on with him. The perception of these signals as enemies means the rejection of the imagined possibility of a deeper understanding of oneself and one's activity" [5]. These signals give the professional an opportunity to understand what is going on with him/her and based on the symptoms to decide what to do next, possibly to retrain or to start correcting the syndrome and its manifestations. Trunov D.G. suggests four different courses of action to fight burnout syndrome. [5]

As an example, he cites the work with psychologists-consultants:

1. To adapt oneself to work. By this action, it means the process of professional adaptation, which is expressed in the development of professional qualities of the psychologist-consultant's personality. These are the qualities as empathy, understanding of another person, empathy and improvement of one's abilities to perceive and analyze information related to another person.
2. The adaption work. This direction consists of change and reorganization of professional and organizational conditions of activity, as well as adaptation to one's own features. These changes are usually expressed externally - the place, time and conditions of work, and practically do not concern the content of the work performed.

### **Analysis of empirical data on emotional burnout of teachers in higher educational institutions.**

The research base was Ala-Too International University, Bishkek, Kyrgyzstan. The aim of the research: to reveal features of emotional burnout of teachers of higher educational institutions. The objectives of research:

1. To carry out the analysis of theoretical data on the problem of emotional burnout.
  2. To investigate the features of emotional burnout of teachers of higher educational institutions and give qualitative and quantitative analysis of empirical data on studying teachers' emotional burnout.
- The hypothesis of the research: the teachers of higher educational institutions susceptible to emotional burnout may have a high level of anxiety and low level of stress resistance.

The sample: the teachers with more than three years of work experience at the age from 22 to 65 years old participated in the research. The number of respondents was 32 people. The study consisted of three stages.

### **METHODS**

In the course of the experiment, the methodology of V. Rukavishnikov «Questionnaire of psychological burn-out for teachers» was applied; the methodology of C. D. Spielberg «Determination of level of anxiety» (adaptation of Y.L. Hanin), «Scale of psychodiagnostics stress PSM-25» was used.

In the first stage, we set goals and objectives for the study. We conducted a theoretical analysis of the literature on the problem of research, selected the methodological apparatus and selected research methods. We also chose the subjects for the empirical research of the problem of emotional burnout in teachers.

At the second stage of the research, the diagnostics of the level of emotional burnout, anxiety and stress expression in the teachers of comprehensive higher educational institutions was carried out with the help of the research methods chosen by us. The third stage was devoted to the analysis and interpretation of the data we obtained, mathematical processing of the data using the Spearman rank correlation method. Also, at the third stage we developed a number of recommendations for correction of the emotional burnout level.

### **Comparative analysis of the data obtained using “Spearman rank correlation method”.**

At the third stage of our study, we also conducted a correlation analysis of the dependence of the variables using the "Spearman rank correlation method". This method is designed to identify the existence of a relationship between 2 or more random variables, as well as its strength. The empirical value was calculated using the formula:

$$p = 1 - 6 \frac{\sum d^2}{n^3 - n}$$

where  $d^2$  is the squares of the differences between the ranks;  $N$  is the number of traits involved in the ranking.

From our analysis of two techniques, we can say, that the connection between a trait  $Y$  (situational anxiety) and a factor  $X$  (burnout) is weak and direct. That is the higher the anxiety, the higher the level of teachers' burnout.

In order to test the null hypothesis at significance level  $\alpha$  the Spearman general correlation rank correlation coefficient is equal to zero under the competing hypothesis  $H_1$ .  $p \neq 0$ , we calculated the critical point:

$$T_{kp} = t(\alpha, k) \sqrt{\frac{1-p^2}{n-2}}$$

where  $n$  is the sample size;  $p$  is the sample Spearman rank correlation coefficient:  $t(\alpha, k)$  is the critical point of the two-sided critical region, which is found from the Student's distribution critical points table, by the significance level  $\alpha$  and the number of degrees of freedom  $k = n-2$ . There is a significant rank correlation between qualitative traits.

Using Student's table we found  $t(\alpha/2, k) = (0.05/2; 30) = 2.042$

$$T_{kp} = 2.042 \sqrt{\frac{1-0.116^2}{32-2}} = 0.37$$

Since  $T_{kp} > p$ , we accepted the hypothesis that Spearman's rank correlation coefficient is 0. We can say that the rank correlation coefficient is statistically - insignificant and the rank correlation relationship between the scores of the two tests is insignificant. From this we conclude that our hypothesis that teachers of higher educational institutions have a high level of anxiety was partially confirmed. Teachers do have anxiety, but in our sample, this factor does not depend on the degree of burnout of particular teachers.



Next, in the third stage of our study, we identified a correlation between the level of teachers' burnout and their level of stress. The data obtained by Spearman correlation analysis in relation to two techniques: "Mental Burnout Questionnaire for Teachers" and "Psychological Stress Scale PSM-25".

From our analysis of the two techniques, we can say that the relationship between feature Y (stress level) and factor X (burnout) is weak and inverse. That is the lower the stress level, the higher the level of teachers' burnout.

In order to test the null hypothesis at the significance level  $\alpha$  the Spearman's general correlation rank correlation coefficient is equal to zero under the competing hypothesis  $H_1$ .  $p \neq 0$ , we calculated the critical point:

$$T_{kp} = t(\alpha, k) \sqrt{\frac{1-p^2}{n-2}}$$

where  $n$  is the sample size;  $p$  is the sample Spearman rank correlation coefficient:  $t(\alpha, k)$  is the critical point of the two-sided critical region, which is found from the Student's distribution critical points table, by the significance level  $\alpha$  and the number of degrees of freedom  $k = n-2$ .

Using Student's table we found  $t(\alpha/2, k) = (0.05/2; 30) = 2.042$

Since  $T_{kp} > p$ , we accept the hypothesis that the Spearman rank correlation coefficient is 0. In other words, the rank correlation coefficient is statistically insignificant and the rank correlation relationship between the scores of the two tests is insignificant.

## CONCLUSION

Emotional burnout is directly connected with the health preservation, mental stability, reliability and professional longevity of the specialists involved in long-term interpersonal communications. Emotional burnout is an acquired stereotype of emotional, most often professional behavior. As a result of diagnostics of a level of professional burnout among teachers, the following was revealed:

In the group of teachers, the average level of emotional burnout symptoms expression was revealed. These are such symptoms as: psycho-emotional exhaustion, depersonalization and self-assessment of professional efficiency. The absence of a high level of burnout showed that in teachers the influence of stressogenic factors is lower than in other social professions, but in spite of this high level of stress was detected in teachers from rapidly changing demands at work. We got an average level of anxiety and a high level of stress, depending on many factors such as extensive experience, inability to change the situation, humility and detachment from the work situation.

Thus, the hypothesis that: the teachers of higher educational institutions are subjected to emotional burnout syndrome has a high level of anxiety and elevated stress level was partially confirmed. The received data can also depend on the chosen research base: specific teachers and administration.

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# SCHOOL EDUCATION AND SCHOOL TEACHERS' WELL-BEING IN KYRGYZSTAN

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## ABSTRACT

Teachers' motivation and encouragement are considered as one of the priority areas in the Education Development Strategy of Kyrgyz Republic Ministry of Education and Science. At the same time, teachers claim that the specified salary structure, benefits, and working conditions do not meet their basic needs. In this study, we've tried to determine the extent to which teachers' expectations and needs correspond to their constructive, organizational, and communicative components of professional activity and their implementation.

The results of the study revealed that the teachers in schools are not happy with the distribution of responsibilities among them. Apart from these facts, the teachers express overall satisfaction with their work. For instance, they are satisfied with the working conditions, teaching load, and professional development opportunities proposed by the administration. Moreover, many teachers expressed their respect for the profession itself. The insights of the study can be further researched in detail.

**Keywords:** *teacher well-being, teacher job satisfaction, school teachers, scheduling program*

## INTRODUCTION

Each part of the educational system is greatly influenced by economic and social changes [3] and has a direct impact on the overall trajectory of a country's socio-historical development [2]. The school teachers' quality work results are in well-educated graduates who contribute to the development of the country and plays an important role in ensuring a high level of education in the country. Many researchers note that one of the factors influencing the professional performance of teachers is their professional well-being.

The Education Development Strategy of Kyrgyzstan for 2012-2020 of the Ministry of Education and Science of the Kyrgyz Republic shows that teachers have increasingly become objects of managerial approaches brought about by international donors. The language "what must be done with and for teachers" is used rather than "what teachers can do for education reform based on their practical experience" [10]. However, there are very few articles by Kyrgyz

researchers identifying factors affecting the well-being of school teachers. And there is an urgent need for research in this area of education in Kyrgyzstan. The work is conducted directly with school teachers to find out their emotional state, well-being, and how satisfied they are with their work. And this would help us reveal how effectively the state-created working conditions contribute to their work.

## **Literature Review**

A variety of factors can influence teachers' well-being and job satisfaction: the quality of the relationship with their supervisors, the quality of the physical environment in which they work, and the degree of fulfillment in their work [1]. Teacher's job satisfaction is a very important issue as it greatly affects a number of important workplace behaviors such as productivity and efficiency, systematic absenteeism, long-term mobility, and job rotation [13]. Job rotation is the administrative control of employee engagement to minimize employee exposure to hazards (D. Baker, 2020), which can reduce feelings of inequality among employees.

Shafer (2019) considers the main factors of teachers' satisfaction with their activities are working conditions (wages, the nature of relationships with the administration and colleagues, the possibility of professional growth, the prestige of the profession, etc.), the content of work (the creative nature of work, interaction with all participants in the education process, etc.), work results (positive dynamics of the student, gaining of pedagogical experience, etc.). Russian professor Zinchenko (2016) substantiates the degree of teachers job satisfaction and their well-being as an important influencing factor on the educational process in general. It is also interesting that researchers (Davydova, Mitina, Danzanov) propose to consider well-being with professional performance as one of the significant criteria for the professional development of a teacher. For example, Danzanov (2010) notes that job satisfaction and well-being are the necessary factors in the effectiveness of a teacher's work and an important qualitative characteristic of the subject of his / her professional performance. According to the researcher, satisfaction with professional performance is one of the conditions for a teacher to fulfill his/her professional duties in educational institutions. A better performance from a teacher can only be expected if they are satisfied with their job (Ali, 2011). Along with other factors influencing teacher satisfaction, the researchers also consider administrative support, since administrative support plays an important role in the efficiency of any kind of organization with an administrative structure (Ali, 2011) be it governmental or non-governmental institution, or a commercial private sector organization. The researcher S. Anastasiou.(2014) states that the teachers` performance is influenced by several factors including the creation and maintenance of a healthy and creative work environment. Such an environment for the teachers should be the aim of educational managers all over the world.

It appears that school organizational climate may be one of the key factors in making the teachers feel satisfied and, accordingly, make their job performance more productive, functional, and desirable. Afshin (2019) suggests taking steps to assess the climate of schools and identify the dimensions which are critical for the health of schools, proving the findings of Zahoor (2011) where it was stated that in order to help teachers feel satisfied with their job it should be constructed in a favorable organizational climate at schools. Parlar et al. (2017) indicated in their research that professional cooperation, school administrator's support and the level of having a supportive working environment at schools and teacher leadership give positive and significant relationships. In addition to this, the results of the study show that professional cooperation and supportive working environments at schools are important variables explaining teacher professionalism.

A good level of life satisfaction could bring out good work performances. The teachers with a high level of life satisfaction could be better educational agents and their work could be more useful for child development [8]. Matyash & Pavlova (2015), conducting a survey among teachers, found that material security continues to be a serious problem, which was also revealed by Komarova (2001). These researchers stated that one of the most important factors in the unsatisfactory performance of teachers from a practical point of view is the low level of material remuneration. The findings of Marinette (2018) revealed that low salary, poor working environment, lack of job satisfaction and bad principal leadership style contribute greatly to teacher attrition. Having studied the impact of working conditions on teachers' attrition in secondary schools in the South West Region of Cameroon the researcher found that teacher's attrition has an impact on the quality of education. The researcher's findings revealed that teachers low salaries influence their attrition to a high degree. Secondary school teachers are one of the occupational groups presenting the highest levels of sick leave due to stress in the workplace. This form of stress can cause burnout syndrome, which is characterized by emotional exhaustion, depersonalization, and low levels of personal accomplishment [9]. Work-related stress and emotional distress among schoolteachers are considered a serious concern in the educational context. According to Vincenza Capone's research (2019) the planning development programs to reduce teachers' malaise and improve their evaluation methods involves taking into account the buffering effect of efficacy beliefs, school climate, and organizational justice against burnout and depression. Also, she points that the fairness in the distribution of incentives (material and moral) among colleagues also affects teacher job satisfaction. The next thing she points out as one of the main factors in a teacher's satisfaction is the status in the society the teacher, he/she has earned throughout his /her own career. Nyarko et al., (2014) found that when a teacher feels that he or she is earning a reasonable amount of money or he or she is making use of skills and abilities then that teacher will be satisfied. These researchers also consider that on the other hand, when a teacher feels that he/she is not earning enough or is not making use of abilities, then that teacher will not be satisfied. They came to the conclusion that the

provision of the internal and external needs of employees serves as a catalyst that triggers their satisfaction with their jobs. Khora (2008) examined the role of social support in teachers' careers, and it was found that motivated teachers differ from unmotivated teachers in two respects - their value orientation - educational beliefs or curricular ideologies that appear to influence programmatic decisions (Ennis, C. D., & Chen, A. 1995) and the social support they receive. Research by Bentea et.al. (2012) recommends that school leaders focus on the social environment of their organization and encourage teamwork and positive interpersonal relationships, explaining that a teaching degree should become a professional position that teachers in the education system can pursue as their teaching career progresses. The professional position means promoting, and recognizing their teaching ability, as well as raising salaries after promotion. The research found the salary and good relationship between the employees as one of the most important factors influencing well – being of a person.

### **Kyrgyz Republic Governmental Measures to support the school teachers**

The Law "The Status of Teachers" was adopted in 2001, 10 years after the country received independence status. The Law provides a legal basis in the regulation of relations to the labour activity and social status of teachers, as well as their social status. [11]

This law provides guarantees for the allocation of land to teachers without housing, an annual free medical examination of each teacher, the issuance of an interest-free loan for housing construction, and an additional payment from the local budget. But in reality, teachers do not have such social benefits (Bulan inst. Report, 2018).

On June 22, 2019, at an international conference in Bishkek, the Ministry of Education and Science announced that Kyrgyzstan had achieved the result which shows 73% of graduates from pedagogical institutes go to school to work, although earlier only about 40-50% of them worked in schools ([www.akipress.org](http://www.akipress.org), 2019). But a UNESCO study in 2012 "General Basic Secondary Education by 2015" [7] showed that only 14% of graduates from pedagogy faculties go to work in schools. In their study, the authors noted a serious shortage of teachers, and that many teachers should leave for retirement and be replaced by young teachers. Also, they noted that in addition to low salaries, there are other factors that lead to a shortage of teaching staff - these are meager social packages, poor conditions, and low prestige of the teaching profession (kg.akipress.org. 2012). According to the statistical data by UNESCO "Education Sector Analysis 2007-2017" the overall unemployment rate in Kyrgyzstan was 7.6% in 2015. The low level of teacher salaries, which remain below the national average, remains a serious disincentive for recruiting high-quality candidates into the profession. In recent years, teacher salaries have increased but they are still low and many teachers have to take additional hours

to earn more money [4]. This discrepancy in numbers is a very interesting fact for research. It is also interesting what the success of teachers in schools is if they go to work in the hope of being realized as a professional because the decline in the quality of education since the independence of the country is a widely debated topic in civil society and government. Out-dated curricula, lack of linkages between the labour market and the education system, low teacher salaries and high levels of plagiarism are cited as the causes of this phenomenon [5].

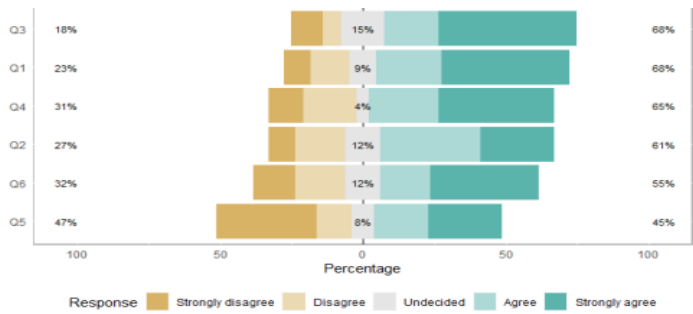
The Education Development Strategy of the Ministry of Education and Science of the Kyrgyz Republic [12] considers the motivation and encouragement of teachers who systematically improve students' achievement as one of the priority areas. At the same time, the teacher community in Kyrgyzstan sees a problem in the government's position regarding the effectiveness of teachers' work; they accuse teachers of the low quality of education, even if they do not claim, then by their attitude, they show their position which almost says that the level of efficiency and effectiveness of teachers does not require a constant request for higher wages, encouragement and improvement of working conditions. For their part, teachers argue (unofficially) that the specified wage structure, benefits, and working conditions do not satisfy their basic needs, since in other sectors of the economy the wage structure is higher, motivation and working conditions are higher. It is most likely that public school teachers cannot provide quality education when there is a gap between the Government and teachers. Having studied all sorts of factors that affect the attitude of teachers to their work and how satisfied they are with this or the services provided by the state, it will be possible to draw conclusions.

This study aimed to examine various factors that affect teachers' self-esteem in secondary schools in Kyrgyzstan. It includes the identification of factors that affect the self-esteem of teachers with more than 5 years of experience and the teachers with less than 5 years of experience and their attitude to their professional activities. This will probably help us to determine the extent to which teachers' expectations and needs do not correspond to their constructive, organizational, and communicative components of professional activity and their implementation.

## **METHODS AND METHODOLOGY**

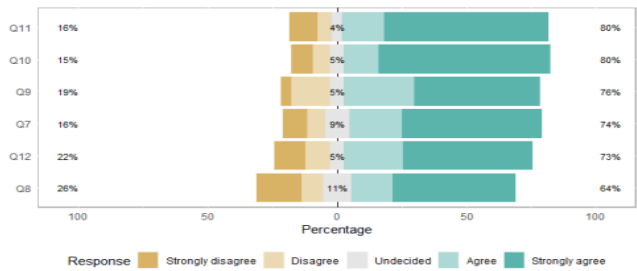
This is a descriptive survey-based study. A mixed research approach was used to obtain quantitative and qualitative information and the 5-point Likert - type - scale was used to analyze data using descriptive and logical statistics. Descriptive statistics were used to describe the overall results of the responses. The purpose of using the mixed method was mainly to get more detailed information from respondents. A simple random sample was used to select the respondents.

**Table 1.** Responses of teachers on working conditions [14]. Own source.



According to the results in table 1 which is with the responses on working conditions the statement “I would like to see clearer rules and procedures for all activities at our school’ (Q3) gets 68% of agreement. This result means that the rules and procedures for organized activities at schools are not clear for many teachers. We also see that the majority of teachers agree with the statement about a convenient workload (Q1), once again it asserts that the teaching load in schools is distributed correctly. The overall picture for statements about working conditions shows more positive responses. 12% of teachers were undecided with the statements but more “*Strongly agree*” answers were given than “*Strongly disagree*” scales to the statement “The work of a teacher consists of routine activities (Q2). This result proves the statements by Budi Utomo [6] and Zinchenko (2016) who discussed much the factors influencing teacher’s motivation and personal expectations, and proved that teachers may lose their motivation to work because of the monotony of work. The hesitation to the statement “The large number of students in the classroom has a negative impact on my methodology” (Q6) may be caused by the fact that the teachers do not (or are not able to) monitor the overall level of their student`s achievements and the results of their own teaching methods.

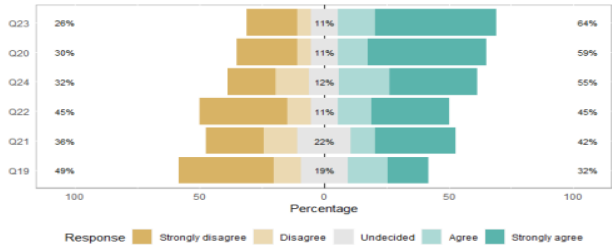
**Table 2.** Responses of teachers on professional development [14]. Own source





This part includes items on teachers’ attitude towards the teaching profession itself: “Teaching encourages me to be creative; “Teaching turned out to be more interesting than I expected, and all these items are given in the positive form. As we see most of the responses are positive; the statement ‘I am pleased with the opportunities for professional development offered by my work’ (Q7) gets 74% of “Agree” and in comparison, with other statements this is the least percentage. This result shows that the professional development policy at schools needs some improvement. Teachers show their positive attitude towards their profession giving mostly positive answers to the statements

**Table 3.** Responses of teachers on school financial remuneration [14]. Own source



Looking at the ratio of the responses to the statement on teacher remuneration we see that the most “*Strongly disagree*” answers (49%) get the statement “The teacher's income is sufficient for ordinary expenses” (Q19). 19% of the respondents were undecided with this statement and 32% (which is the least percentage) of them agreed with the statement. 64% of the respondents pointed out that they need to constantly take out a loan due to lack of salary, 11% of them were undecided with the statement though we can assume that they would agree with it too, just hesitated to say “yes”. 59% percentage of the respondents do not strongly agree with the statement (Q20) that they are well paid in proportion to their efforts, 30% of them think that their effort is appreciated appropriately. 45% of the respondents do not know what the calculation of their salary is (Q22- I understand what the calculation of my salary consists of) so, we find that not all teachers are informed about the calculation of their salary. Thus, there is a need to inform teachers about their salary calculation so that they would be able to stick up for their own rights. An interesting fact that 22% of the respondents were undecided with the statement “Insufficient income prevents me from living the way I want” (Q 21), and 36% of the respondents disagreed with the statement. Thus, we can assume that the teachers' life is not as bad as it is discussed by society (unofficial) and they do not consider their income level preventing things from living the way they want. At worst they might not imagine the way of better living or they get used to their current way of living and don't want to change it. We also see that 55% of the respondents need to work part-time elsewhere to cover all their expenses (Q24). Taking into consideration this fact, we can assume that teachers work hard trying to earn more to provide themselves

with a comfortable life. Overall results on remuneration statements show that the public-school teachers of Bishkek city are not satisfied with their income, and they need more information about the calculation of their salary.

## RESULTS

The teaching profession is one of the most important ones in society. A teacher is the only person who, most of his or her time, is professionally engaged in the upbringing and education of children. We see they adapt to the conditions created for them.

Most of the respondents have shown positive attitudes towards their work. They are satisfied with the conditions created for work, teaching load, and the proposed by the administration the professional development opportunities (to a certain degree). Also, many teachers expressed their respect for the profession itself. They reacted positively to the statement that teaching children turned out more interesting than they expected. They believe that they have a lot in common with their colleagues out of their work.

Regarding finances and remuneration, it seems that teachers in Kyrgyzstan have come to terms with the fact that they almost always have low salaries that only a few teachers with extensive work experience expressed their dissatisfaction and mostly these are the teachers with long experience. But we do not exclude the fact that most of the teachers work part - timely in other places and try to cover their daily expenses, also they regularly need to take loans because of insufficient salary. We do not blame school administrations for not giving due attention to their teachers, but we encourage them to be open to them, to study and develop programs taking into account the government's capabilities that support teachers morally and financially. The research results can become the main object of future research and a topic for further detailed study.

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## **STUDENTS' MOTIVATION AT DIFFERENT PHASES OF GETTING HIGHER EDUCATION (THE CASE OF RUSSIA)**

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### **ABSTRACT**

The problem of motivation is one of the most important in determining the driving mechanisms that force a person to learn, work, master something new. Motivation to work is one of the key elements of challenging yourself on the way to self-development. Motivation has deep psychological and moral roots and is a complex multifaceted phenomenon that often defies logical comprehension. In addition, it is an ephemeral, elusive thing; it is not a permanent feature of a person in one or another area of his activity. Accordingly, it is the problem of origin, retention, and in a good scenario of strengthening the motivation that is in one of the first place among the tasks that modern teachers face.

Rapid scientific and technological development and progress in various fields of knowledge, new scientific and technical discoveries and the need for new high-tech developments require specialists with a high level of education and high-quality professional training. This applies not only to scientific and technical spheres, but also to natural-applied and humanitarian areas. All this makes higher education today a prestigious and extremely attractive goal for most young people, making young people use their studies at a university as a social lift for further personal development and career development. At the same time, a situation is observed when entering universities, many young people are faced with a serious problem of lack of motivation to learn, or they are demotivated in the learning process, which often leads to a very low level of quality of their studies, and sometimes makes them interrupt study for academic leave or give it up completely.

Pedagogical science has accumulated a wealth of experience in studying this problem, however, the modern challenges of a changing world require pedagogy to constantly monitor changes and search for new approaches to solving the problems that students have in the course of obtaining higher education.

The authors study this problem, taking as an example Russia, which is a country at the crossroads of Europe and Asia, where features of European and Eastern culture are combined in people. The authors approached the issue from several important angles. The article analyzes the socio-economic and political characteristics that affect the motivation for learning among young people. Particular attention is paid to the state of the current Russian society, spiritual and

moral guidelines of young people, their goals and views on life and their own future. The authors emphasize the importance of family, religion and spiritual and moral development in the issue of motivation to work and study.

The authors come to the conclusion that the problem of lack of motivation is based on a combination of reasons, but its root is primarily in the family upbringing of the student, as well as in his moral component and emotional and psychological maturity of the individual. The article provides an overview and some of the changes in student motivation associated with the COVID-19 pandemic and online learning.

It is important to note that in the course of their research, the authors relied on their many years of experience in teaching at higher educational institutions in Russia.

**Keywords:** *motivation for learning, psychological and pedagogical problems, pedagogical process, higher education, modern youth, problems of education in Russia*

## INTRODUCTION

Motivation is an engine for human action and an integral part of any professional and personal growth. This impulse is especially important in the process of obtaining education, which is inseparable from many difficulties and constant overcoming. Overcoming lies in the development and formation of the personality, however, despite the euphony of this postulate, not every personality is able to develop in the course of receiving education.

In this article, the authors primarily talk about higher education as a process of voluntary conscious intellectual labor of an adult (mature) person.

Obtaining higher education is a complex, difficult, time-consuming, financial and energy-consuming activity, through which mainly young people who want to acquire professional skills and receive a higher education diploma are forced to go.

For a young person, the decision on the need for higher education is often born under the influence of parents, family, close circle and school. It is good if this decision coincides with the young person's very need for self-development and obtaining new professional knowledge. However, often such a decision comes from the outside and is imposed, and for young people 17-18 years old - the age of admission to universities, it is quite difficult to figure out whether he really wants to get a higher education and what profession to choose.

In addition, modern world trends, characterized by rapid scientific and technological development and progress in various fields of knowledge, also have

a great influence. The latest scientific and technical discoveries and the need for new high-tech developments require specialists with a high level of education and high-quality professional training. This applies not only to scientific and technical spheres, but also to natural-applied and humanitarian areas. It is these areas that attract young professionals and serve as an incentive for obtaining high-quality higher education. Prestigious areas of work are an attractive target for students and graduates, providing a social lift for further career development.

However, finding themselves within the walls of the university, young people realize that they still have a long way to a successful career, and in the coming years they have to work hard, gaining knowledge, and not receiving a salary. When entering universities, many young people face a serious problem of lack of motivation to learn, or are demotivated in the process of study, which often leads to a very low level of quality of their studies, and sometimes makes them interrupt their studies.

## **METHODS AND METHODOLOGY**

The authors applied the following methods: synthesis, analysis, abstraction, observation, case study.

With the help of such general scientific methods as synthesis and analysis, the general state of the issue is studied, and its main features are also highlighted.

The abstraction method helped the authors to consider the subject, during which they identified the essential sides and properties (while abstraction of other signs) of the problem raised. The observation method was used for a retrospective study of the general situation in Russian society and education, which in turn led to the fact that the authors, using the case-study method appropriate in this case, considered the issue of motivation to study in universities in relation to a particular country.

## **RESULTS**

The problem of motivation has more than a century-long of history. The works of such scientists as A. Pfender (Pfänder A. «Motive und Motivation», 1911), P.T. Young («Motivation and Behavior», 1936) and others are devoted to this problem. There are different approaches, theories and methods of studying it, though, the problem is still very actual at it comes along with new challenges and modern questions.

Among the main approaches to the problem of motivation, the following three main approaches can be distinguished: the first approach is based on the theory of instinct. The founder of this trend are considered W. McDougall and his followers - Konrad Lorenz and Niko Tinbergen. According to this theory, human behavior is based on instincts and impulses [1].

The second area of study of motivation is based on a theoretical and personal approach. Here we can trace the line of personality psychology (motivation is the key to describing and understanding personality and individual differences), or the line of the psychology of motivation (motivation is a process that explains actual behavior). The founders of this trend are considered W. Wundt, A. Maslow, C. Darwin, S. Freud, who argued that a person's ability to draw conclusions from acquired experience allows him to quickly adapt to changing conditions and thereby preserve his appearance [1].

The third direction is associated with an interest in changing the associations between stimulus and response, i.e. based on an associative-theoretic approach. Here we should highlight such scientists as J. Watson, E. Thorndike, I. Pavlov, who believed that human consciousness is the result of the development of the nervous system. According to this theory, the main role in human behavior is played by situational factors, a person's control of external and internal stimuli, for example, attraction [1].

Motivation can be divided into two types: external and internal. However, the second type cannot be formed without the first: an internal need can appear only due to external influences. The question is how much this «need» becomes really the student's one. It depends both on the personality of the student and on the way of teaching [2].

The problem of motivation acquires an important role when we talk about motivation in a learning activities. The educational activity of students is characterized by a combination of different motivations and depends on: the choice of the educational institution by the educational system, on the basis of which educational activity is implemented; organization of the educational process; the subjective characteristics of the student (age, gender, intellectual development, abilities, level of aspirations, self-esteem, etc.); the subjective characteristics of the teacher and, first of all, the system of his relationship to the student and his professional activities; the specifics of the subject, student motivation, etc. The motivation of students is an important structural component of learning activities. A disdainful attitude towards taking into account the age and psychological characteristics of students, the inability to combine the principles of teaching and upbringing in teaching - these are the factors that play a negative role in building effective teaching in universities.

The current situation in the system of higher education in Russia shows that its restructuring primarily means a more differentiated, purposeful impact on each student as a subject of educational activity, a partner of pedagogical communication. This formulation of the question presupposes the need for a deeper understanding of the student's psychology, knowledge of his age and personality characteristics.



The current system, formed in the industrial era, has long been out of tune with the present. Today it is not enough to have a certain set of knowledge and competencies - a person needs to be able to learn, find the necessary information and use it for his own purposes. There are many sources of knowledge now: school and institute are just a few of them, not even the most important ones. At the same time, reading books is no longer perceived as one of the ways to form a full-fledged personality. The priorities are shifting towards obtaining information of a different kind and type, first of all - entertaining. The stream of TV programs, Internet sites has firmly conquered modern man. It is easier to find the information you need on the Internet than to pick up a good book and set yourself up for a long thought process, which should become a starting point in the formation of a personality. A natural question arises: do we need a reading or well-informed graduate of an educational institution now? [2]

The state of the education system in modern Russia bears the imprint of a general spiritual crisis caused by the systemic reforms of the late twentieth century. The transition to market principles of the functioning of the economy caused the commercialization of educational activities as well, which manifested itself in the discrepancy between teaching and upbringing of young people.

The Covid 19 pandemic has created new challenges for educators and students, as well as everyone involved in the education process. It is in the context of a pandemic and ubiquitous distance learning, when the fragile connection between the teacher and the student is tested by the remote form of work and the remoteness of two actors from each other, that the question arises of how much the teacher is able to maintain and develop the involvement of students in the educational process, even in correspondence form, and how much the student is interested in his own studies, how deep is his motivation to stay in the learning process in a distance format. On the one hand, online and distance learning opened additional loopholes for students, led to an increase in poor-quality work, on the other hand, this situation reflected the existing problem of lack of motivation. Most of the students have shown their inadequacy to overcome new difficulties or use the current situation for good. The Russian people have a wonderful opposite example. Russian poet A.S. Pushkin in 1830 went to his estate in the village of Boldino to solve some financial issues. He was not going to stay there for long, but the outbreak of a cholera epidemic forced him to stay in the village for three months. During this time, about 30 poems were created, the novel in verse «Eugene Onegin» was completed, the cycles «Little Tragedies» and «The Tales of Belkin» were written, as well as two cycles of critical articles. During Boldinskaya autumn (Autumn in Boldino), the poet mastered English on his own.

Learning activities do not bring satisfaction to modern students. Even successful students go to classes reluctantly, because they receive educational services, and do not learn to live. The younger generation remains the «generation of viewers». Students view learning outside of spiritual guidelines and interconnections - as a process of passing the formal institutions necessary for

success in life, and not as a path to spiritual and professional self-realization. Thus, the relationship «teacher - student» has ceased to be a cultural model, highly significant and valued by society in the past. The decline in the rank of creative professional labor as a value was reflected in the massive unwillingness to learn and the resulting general decline in the quality of education at all levels. The curtailment of the spiritual and educational component in educational activities largely contributes to the fact that the traditional for domestic culture ideas about the unity and close relationship of knowledge and spirituality are becoming a thing of the past. As a result, a significant part of today's youth turned out to be incapable of self-determination in life in the new harsh modern conditions of society, without rejecting universal human values.

In the Russian Empire, education, and especially higher education, was the highest gift of people of wealthy, noble origin, access to it was also available to the poor, who distinguished themselves with a special talent and had the support of respected persons. At the same time, higher education was a blessing of the elite and was valued on a par with nobility and social status. It would seem that after the Revolution of 1917 and during the Soviet period, access to higher education was provided to all Soviet citizens without exception. However, it is necessary to take into account the fact that with the change of the political and socio-political system, the most basic values have not changed. The desire for education, especially higher education, has increased. The Soviet republic needed new educated specialists to solve the problems of industrialization and modernization. Against this background, the formation of the Soviet education system was observed, inheriting the best from the education system of the Russian Empire, and bringing a lot of new things into this system, which strengthened it and made it very interesting and original. At the same time, the formation of the so-called «Soviet man» was going on, it was a type of personality that included the moral and ethical norms of the communist code. Reading scientific and fictional literature, drama theater, creative meetings with persons of science, culture and art have become an integral part of the life of Soviet people. Poets and writers became the voice of society and set spiritual guidelines. Famous people of art, science and education laid the foundation of the social environment in which a person was formed from childhood. The teacher was a guide to the world of professional qualifications, and most importantly, he introduced students to the best examples of spiritual culture. His authority, on an equal footing with the authority of the older generation of the family, was indisputable. The teacher was more than a knowledge holder. He was a patron, a mentor, a model of behavior. The educational institution was actually a second home, where the student was constantly surrounded by educated people who devoted themselves to pedagogical activities, the atmosphere was filled with intellectual exchange, creativity and mutual assistance. Due to the Pioneer and Komsomol organizations, any student was a part of a large social project to create a Soviet society, a participant in the improvement of the country and a creator in his area. And most importantly, education was free, and only those who passed the most difficult

exams and were able to take the maximum from education were worthy of higher education.

We see that over the course of Russian history, a cultural tradition of the unity of spirituality and education has developed.

After the collapse of the Soviet Union and the thoughtless imposition of capitalist values, the ideal of an educated person's service to his people was devalued. The teacher has lost his high social status. It is extremely important that each teacher is aware of himself not as a downtrodden personality, but as a holder of one of the world's greatest pedagogical cultures and is worthy of this culture. And for this he needs to rise to the ideals inherent in Russian education, to see and accept the origins of his humanism in the traditions and rules of folklife. Can this be done by a teacher who is himself a product of modern society?

And here we come to the main point. A teacher deprived of the highest status, transformed by a modern education system borrowed from the West into a service staff who provides educational services to all who paid is not able to become the example that would motivate students. The system itself, devoid of elitism, selectivity, and the elimination of those who do not want and cannot study, is not capable of making higher education a significant human achievement. Modern Russian society, where people of education and science receive less pay than people of business and commerce, cannot serve as an example for their students. Looking around, students see that the lack of education is not an obstacle to finding a job, and education itself has little effect on their personality and only teaches them how to get out and cope with tasks in the course of the educational process according to the principle «it'll do» in order to get the coveted diploma and forget about studying as a wasted time.

The role of the family cannot be underestimated either. If back in Soviet times, parents were most often the first or second generation with higher education and it served them as the highest value, which was instilled in children, then after the reforms of the 1990s, a whole generation of people was formed who are used to living by material values, which they are in turn instill in their children. People whose values lie only in the material plane, accustomed to the quick acquisition, quick consumption, spiritual fast food are not able to appreciate the spiritual and moral values, are not able to accumulate knowledge step by step, are not inclined to deep thinking and analytical activity. They want to snatch, but real knowledge accumulates slowly, requires comprehension and a deep serious approach, it does not tolerate fuss. But can a modern student work like that? As soon as he realizes the difficulty and slowness of the process, he sees that he needs to put in a lot of effort and he is not used to work, since he gets everything ready-made, he loses motivation to study, to obtain a professional university degree.

It should be noted that since Russia is both a European and Asian country, the Russian people have absorbed the features of both European and Eastern

characters. European traits are manifested in Russian students in their desire to have their own opinion, independence, liberal views, and a certain pragmatism in their work. At the same time, certain oriental (Asian or traditional Russian) features are also inherent in the Russian person. This is mainly laziness and the hope that everything will somehow be resolved by itself, without making any efforts of its own.

So, the main directions of the reform of Russian education should be a turn to the person, an appeal to his spirituality, the revival of the prestige of education. It is impossible to remake people and turn the family into a place where the child's most important moral guidelines are laid, value attitudes are formed without the formation of a certain moral and ethical code, which would be based on Christian views, humanism, respect for elders, mutual respect and freedom from material shackles...

Russia and Russian education today, first of all, need a state policy to revive spirituality in its true sense. The authors would like to propose such methods as reading classical literature (the idea that a modern young person is too far from reading the classics and from its content is pernicious), such subjects as the history of Christianity (without taking into account the ethnic composition classes), ethics, art history are needed in schools. The continuity of generations also plays an important role, therefore, emphasis should be placed on national history. It is necessary to create youth volunteer organizations engaged in charitable and social projects, where schoolchildren would be accustomed to work and responsibility to themselves and others. All these steps should be carried out flexibly, unobtrusively, generating interest, and not generating rejection.

A student who is accustomed to comprehending knowledge and working on himself is able to continue his studies at the university. Such a student will be aware of the importance and necessity of higher education, which leads him to obtain a profession, and will in itself become the main motivation for learning. Not money, not a potential salary, but an interest in learning and the excitement of overcoming oneself should be motivated to study.

## CONCLUSION

The article deals with the problem of motivation in learning, mainly in universities. Since motivation is one of the most important impulses for self-development through study, the authors believe that it is necessary to look for ways to solve this problem. The authors focused on the consideration of the psychological and moral reasons for the lack of motivation, which are a consequence of the manifestation of the crisis in Russian education, which is directly dependent on the crisis phenomena in society.

The problem of motivation was studied using the example of Russian university students. The article mentions the socio-economic and political

transformations that have influenced the motivation for learning among young people. The authors came to the conclusion that the state of the current Russian society has led to the loss of the spiritual and moral guidelines of young people, the erosion of their goals and the distortion of their views on life and their own future. The authors see that certain elements of solving the problem lie in the plane of improving the moral foundations of the Russian family, increasing interest in the Christian religion and moral development, which would have a beneficial effect on motivation to work and study. Pandemic Covid 19 and online learning have played an important role in uncovering existing problems.

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# THE PROBLEMS OF EDUCATION AND SOCIALIZATION OF LEARNING YOUTH IN THE CONDITIONS OF THE CORONAVIRUS PANDEMIC

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## ABSTRACT

The article discusses the issue of the impact of the coronavirus pandemic on the choice of methods and forms of educational activities and socialization of young people in the current difficult situation of society development, the issue of the peculiarities of the formation in these conditions of a new type of culture - digital culture and the need to develop new scientifically based approaches to modernizing the education system in accordance with the risks and challenges of our time, as well as the implementation of communication practices in the context of the requirements of the epidemiological situation in the world. When carrying out the research, the following scientific methods of cognition were used: the method of comparative analysis, which made it possible to identify the advantages and disadvantages of the distant form of education in the context of the coronavirus pandemic; the method of quantitative analysis, allowed the authors of the article to better orient themselves in the general pile of facts, as well as to model the existing social processes in the field of education and society as a whole during the coronavirus pandemic; the use of the systemic method in the study of the subject of research made it possible to single out the determining factors influencing the reproduction of social experience in order to streamline and stabilize the spiritual and moral foundations, communication processes as the most important condition for the socialization of the individual; the formal legal method was used in the study of various legal documents; content analysis was used to study a set of statements on a specific topic.

**Keywords:** *coronavirus pandemic, education, socialization, digital culture, distance learning, language, cultural codes, communication*

## INTRODUCTION

The problems of education and socialization of young people have acquired particular relevance in modern conditions. The processes of the formation of a

new world order, the aggravation of international relations and the difficulties and contradictions associated with their implementation are aggravated by the epidemiological situation caused by the coronavirus pandemic. Analysing the consequences of the latter, the President of the Russian Federation V.V. Putin, in a speech at the Economic Forum in Davos in January 2021, outlined the problems arising in this regard, influencing the processes that are directly related to the education and socialization of student youth. First of all, the President of the Russian Federation noted the aggravation of the imbalances in the socio-economic development of society caused by the coronavirus pandemic. In this regard, he notes that in the past, that is, in 2020, "the decline in the global economy became the maximum since the Second World War." By July 2020 alone, the labour market losses were equal to almost 500 million jobs. And although by the end of the year, half of them were restored, but almost 250 million jobs were lost. In terms of loss of labour income, "in the first nine months of last year in the world, they amounted to \$ 3.5 trillion," which is the most important reason for the growing social tension. As for the cost of education and healthcare services, over the past 30 years, as noted by the President of the Russian Federation, in a number of developed countries they have tripled [1]. Moreover, the epidemiological situation in the country and the world as a whole, in the context of a significant civilizational shift associated with the formation of a new digital world, has made significant adjustments to the organization of the activities of educational institutions, had a significant impact on the processes of socialization of youth.

The coronavirus pandemic, which was the reason for the fastest possible transition to the online mode of operation of both educational systems and a number of various industries, significantly accelerated the formation of a new type of culture - digital culture, as well as the widespread use of "artificial intelligence", automated and robotic solutions [2]. These phenomena caused the interest of the group of authors of the article to study their influence on the modernization of the mechanisms of socialization of the growing generations, as well as on the formation of new priorities in the education system, determined by such features of digital (electronic) culture as the mediation of communication processes by technical means, as well as the replacement of the diversity of natural social links by links technologically programmable, artificial [3].

The purpose of the work is to develop a new model of education and socialization of the individual, focused on high professionalism, business qualities, on the preservation of historical memory, the foundations of civil and ethnocultural identity.

## RESULTS

The transformation caused by the pandemic of the communicative space, «objectively expanded virtual reality» [4], set before modern science and education the task of developing a new model of education and socialization of the individual, focused both on high professionalism and business qualities, and



on the preservation of historical memory, as well as the foundations of civil and ethnocultural identity [5].

In the course of the study, it was found that mastering the possibilities of using various digital resources in education turned out to be associated with the forced processes of widespread use of distance learning techniques (in the online learning system), based on a variety of modern information and communication technologies, primarily new media.

A noticeable influence on the transformation of modern communication processes, including in the education system, is also exerted by the processes of changing the linguistic picture of the world that has been formed for centuries, which absorbs new forms of speech culture, displacing traditional symbolic codes of national languages with template messengers and emoji language units - emoticons, nickname -names, etc. [6], minimizing the socio-cultural significance and historical and cultural meanings of real human relations [7].

The destruction of the traditional forms of collectivity and cultural and moral regulation of relations between people brought by the hard-to-control processes of the spread of the pandemic, creating in the new world order a situation of uncertainty in ordering and ensuring the stability of communication processes, fixing in them the necessary moral normativeness and historical and cultural continuity. In ensuring the connection between times and generations in the process of social development, language plays a special role. As a special sign system, language reveals meanings that preserve the spiritual content that provides links between the present with the past and the future, affects the past on the present, creating the foundations, that is, the matrix of the contours of the development of cultural processes in the future. As a special form of sociality and the preservation of historical and cultural meanings, speech culture is the most important means of ensuring the connection between times and generations.

The historicism of speech culture as a mechanism for preserving historical memory explains the reason for the monstrous struggle against the Russian language that is being waged in Ukraine. As a cultural code and a mechanism for preserving the uniqueness of the historical and cultural traditions of the Russian super-ethnos, the Russian language is an indispensable condition for the possibility of preserving and reproducing the defining features of Russian civilization, Russian national culture [8], a multinational Russian state bordering between the West and the East, which has a millennium of existence.

In the context of studying the features of the processes of destruction of traditional forms of collectivity and cultural and moral regulation that have united people for centuries, we consider language as a means and condition for ordering and ensuring the stability of communication processes, fixing the necessary moral normativeness in them. Obviously, language as a symbolic system incorporates all varieties of social experience that is formed under the influence of the changing

circumstances of everyday life. The degree of stability of linguistic norms and habits determines the possibility of preserving ethnocultural individuality, which is locked primarily in family and group relations, in which communication is ideally focused on understanding, dialogue and cultural factors.

The meanings and meanings expressed in language, introduced into everyday communication, are fixed in memory, in life assessments and landmarks, in the value orientations of generations. New meanings and meanings arising under the influence of new civilizational and cultural-communicative processes are fixed in the linguistic picture of the world, the preservation and reproduction of which is ensured by the richness of the speech culture of the interacting subjects of communication. Pronouncing the meanings and meanings of problems expressed in linguistic forms, people strive to achieve mutual understanding and agreement, to minimize emotional stress and aggression. In other words, the establishment of a dialogue between the interacting subjects of communication is a prerequisite for the social organization of the communicative space and the reproduction of social experience to streamline and stabilize the spiritual and moral foundations of communicative processes as the most important factor in the socialization of the individual.

Thus, the linguistic aspect of the problem of distance learning is of great theoretical and practical importance. The fact is that the implementation of training in the format of online communication, in general, in conditions of uncertainty (minimization of direct dialogue communication, a decrease in the level of the student's desire and interest in the problem under discussion, his focus on self-development and professional interest, etc.) makes it difficult for the student to integrate in the process of socialization and reduces the effectiveness of his vocational training. In this regard, it becomes more and more obvious that the problem of distance learning (online learning) under consideration in modern conditions of the modern stage of civilizational development of society, multiplies the load on educational institutions in their complex impact on spiritual processes in the life of society, on the spiritual and moral formation of the individual, to obtain and practical use of knowledge. The processes of socialization of the younger generations in the context of the formation of a new digital culture and the development of a set of measures to overcome the consequences of the coronavirus pandemic are aimed at creating a model for the sustainable development of the education system and upbringing of the younger generations. In the context of the acceleration of the pace of social development [5], as well as the transformation of the system of cultural codes and communication processes in connection with the virtualization of the cultural and communicative space and the complex epidemiological situation in the world, the creation of such a model needs a clear definition of the ultimate goal and the corresponding mechanisms of socialization of the emerging personality, taking into account all age groups. stages of its development.

The strength of the impact and the socio-cultural significance of educational institutions in the proposed context is explained by the fact that, firstly, the phenomenon under consideration is the most important factor in the development of civilization, the preservation and reproduction of cultural values throughout the centuries-old history of mankind. The processes of knowledge accumulation and its transmission to new generations have always been of paramount importance in the upbringing and education of young people, the preservation of ethnocultural codes and the foundations of ethnocultural and civic identity, which ensured the stability of the defining characteristics of national cultures, contributed to spiritual, moral and political continuity in a number of generations. The accumulation of knowledge in the course of the historical and cultural development of society thanks to educational institutions expanded the possibilities and prospects for the development of science as a process of comprehending the surrounding reality, creating a scientific picture of the world and improving technologies for the practical use and reproduction of accumulated knowledge [9]. The success of social development was largely determined and determined by the level of development of education, its inclusion in the socio-cultural and production processes of society, its civilizational and humanistic characteristics.

The relevance of developing new theoretical and practical approaches to the problems of education and socialization of young students in modern conditions is dictated not only by the peculiarities of mastering new digital technologies, but also by the need to minimize the spiritual, moral and socio-cultural consequences of the coronavirus pandemic. Natural disasters, the crisis of traditional family values that broke out in many EU countries, coinciding in time with the processes of the stable spread of the coronavirus pandemic, made it necessary to search for such a form of institutionalization of the social organization of social processes, which, due to its historically formed characteristics, is able to achieve the desired result without the use of violent measures. ... The social mechanisms of soft power used for this purpose by the special services of the United States and some European countries, and the numerous practically tested concepts of ways to form protest moods in the youth environment, which are being developed in practice, create a fairly stable foundation for the socialization of certain youth groups of the population of certain countries, against which a purposeful ideological struggle is being waged. The latter clearly manifested itself on the example of the ideological attitudes of the political ruling elite of Ukrainian politicians who passed the school of training according to the methods of D. Sharp and other representatives of the American special services [10].

The transformation of the value attitudes of the mass, primarily youth consciousness, due to a number of circumstances that determine the specific features of the modern stage of civilizational development of society, multiply increases the load on educational institutions in their complex impact on spiritual processes in the life of society and the spiritual and moral formation of the individual. The education system as the most important social institution has the

greatest impact on the formation of collective value consciousness and the motivation of the behavior of masses of people, especially young people. It is obvious that the processes of socialization of the younger generations in the context of the formation of a new digital culture and the development of a set of measures to overcome the consequences of the coronavirus pandemic are aimed at creating a model for the sustainable development of the education system and upbringing of the younger generations. In the context of the acceleration of the pace of social development [5], as well as the transformation of the system of cultural codes and communication processes in connection with the virtualization of the cultural and communicative space and the complex epidemiological situation in the world, the creation of such a model needs a clear definition of the ultimate goal and the corresponding mechanisms of socialization of the emerging personality, taking into account all age groups, stages of its development.

The strength of the impact and the socio-cultural significance of educational institutions in the proposed context is explained by the fact that, firstly, the phenomenon under consideration is the most important factor in the development of civilization, the preservation and reproduction of cultural values throughout the centuries-old history of mankind. The processes of knowledge accumulation and its transmission to new generations have always been of paramount importance in the upbringing and education of young people, the preservation of ethnocultural codes and the foundations of ethnocultural and civic identity, which ensured the stability of the defining characteristics of national cultures, contributed to spiritual, moral and political continuity in a number of generations. The accumulation of knowledge in the course of the historical and cultural development of society thanks to educational institutions expanded the possibilities and prospects for the development of science as a process of comprehending the surrounding reality, creating a scientific picture of the world and improving technologies for the practical use and reproduction of accumulated knowledge [9]. The success of social development was largely determined and determined by the level of development of education, its inclusion in the socio-cultural and production processes of society, its civilizational and humanistic characteristics, which is of paramount importance in terms of the country's national security [11].

Secondly, the functioning of educational institutions ensured and ensures the systematization, structuring and contextualization of the acquired knowledge. These processes provide opportunities for the effective use of the system of existing knowledge in relation not only to the specific conditions of natural, social and virtual reality, but also on their basis to predict the further development of science, put forward hypotheses, and develop new technologies for the practical use of the knowledge gained as mechanisms of socialization of the younger generations. In the problematic field of the education system, however, there is always the problem of the influence of the existing in the education system contradictions between the established, customary traditional forms of obtaining and using intellectual knowledge capital, on the one hand, and, on the other,

innovative processes associated with new forms of cognitive and practical activities, the formation of new forms of culture, the emergence of new knowledge and new directions in science.

For example, in the context of the coronavirus pandemic, the transfer of the educational process to distance learning coincided in time with the need to master new knowledge related to the development of new digital technologies, the formation of a new digital culture, a new digital world [12]. In other words, the development of new knowledge and the possibilities of their practical use is completely dependent on the artificially created virtual communicative situation, which minimizes the possibilities of direct spiritual, moral and emotional impact-interaction of the subjects of the educational process. Obviously, in these conditions, the subjectivity of the communication process is lost, giving way to an artificially created communicative situation, due to which the possibilities of emotional and psychological interaction are minimized. In other words, a new form of social loneliness is being formed, in its socio-psychological and moral consequences, akin to the traditional models of the phenomenon under consideration [13]. The peculiarity of the new type of social loneliness is determined by the lack of direct interaction of subjects in the communicative space (teacher - student, student A - student B), and therefore the effectiveness of communicative action falls [14].

## CONCLUSION

Summing up the above, it should be noted that in the modern conditions of the globalization crisis caused not only by civilization processes but also by the consequences of the coronavirus pandemic, it is necessary to develop a new education model, maximally focused on the features of the new digital culture and global epidemiological conditions, considered in the context of the Russian Federation national security [15].

The proposed model of organizing educational activities focused on the technologies of the new digital world revealed the advantages and disadvantages of the online education system. The practice of implementing distance education has shown that the remote format of organizing educational and educational activities has a sufficient number of advantages that contribute to an increase in the level of involvement of young people in socially significant processes related both to their professional interests and competencies, and focused on civic engagement. The remote format of the organization of educational and educational activities concretizes the goal and tasks of the work performed in the process of virtual communication, allows you to clearly define the boundaries and contours of knowledge indicators of mastery of the studied material, as well as the level of the student's proficiency in new technologies. The format under consideration contributes to the development of creative, professionally oriented thinking, offering to analyse the proposed problem on the basis of a competence-based approach. Moreover, by offering the student a situation for analysis, both

in professional and spiritual and moral terms, the teacher not only assesses the level of knowledge of the student, but also contributes to the formation of a humanitarian culture and an increase in the level of moral responsibility in a young person.

However, in our opinion, the distance learning format has a number of significant drawbacks, the presence of which indicates that this format is acceptable only in limited doses, interspersed with the programs of the studied subjects. In this regard, in our opinion, a number of points should be kept in mind that reduce the effect of distance learning. What do we mean? First, a decrease in the level of the teacher's direct spiritual impact on the student. Secondly, the possibilities of speaking out the issues under discussion, establishing dialogue communication are minimized, and therefore, the threshold for achieving understanding and agreement of interaction and mutual understanding of the participants in the educational process is reduced. Thirdly, the effectiveness of socialization, achieved, first of all, in acts of combustion, is ensured by the simultaneous coexistence of behavioural norms and language models, which contributes to the sustainable preservation of the images of the world that have developed in the course of historical development, which keep the experience of previous generations in an active state, synchronizing it in joint activities native speakers of this language and representatives of other linguistic communities who understand codes and meanings specific to subjects of speech activity [16]. In this regard, as E. Sapir notes, the real world is largely unconsciously "built on the basis of the language habits" of certain social groups [17]. Fourthly, distance learning minimizes the opportunities for the formation of skills in project activities, the ability to work in a team.

In connection with the problems under consideration, which have arisen in the context of the current epidemiological situation that unfolded in the formation of a new digital world, the study of the peculiarities of the mutual influence of the new digital culture, the pandemic and the need to preserve the values of Russian education as the most important basis for the socialization of the individual acquires special socio-cultural significance.

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# **TRUST, LEARNING AND ANOMALOUS EXPERIENCE OF JAPAN AND SLOVAK UNIVERSITY STUDENTS**

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## **ABSTRACT**

Trust is an important element of the learning processes and overall academic achievement of university students. It represents the highly sensitive domain of the intrapsychic life of each student. The paper states the original premise that trust or distrust respectively can be specifically related to anomalous psychical experience. As some paranormal experiences can be evoked by physical or chemical stimuli such as electric pulse to the brain and mental drugs, for example, DMT (N, N-dimethyltryptamine), paranormal experiences are based on people's physiological system chiefly, not only psychological factors such as belief. In this view, trust can be considered as one of the most important impulses as well as a consequence of the perceived anomalous experience of the student. But trust as one of the crucial sub-elements of higher education is not related to paranormal phenomena. Trying to face this challenge, the paper has the ambition to enrich the scientific basis of higher education through performing research supported by relevant hypotheses and an empirical survey. Based on the analysis, synthesis, comparison, generalization, induction and deduction of theory, completed by results of the quantitative survey, the aim of the paper is to search and confirm potential relations between the trust and unusual psychic experience of higher education students. Targeted experiences are specifically examined in two geographically different countries: Japan as a representative of specific Asian countries, and Slovakia as a representative of specific (Slavic) Central Europe countries. For the paper, two hypotheses are formulated: H1: Paranormal experiences have not relevant influence on the student distrust; H2: There exist only small differences between Japan and Slovak respondents' expressions in the field. The survey, participated by 405 Japan and 443 Slovak university students, confirms that the most frequent experience in both countries is *dějà vu* (76.79% of Japan and 87.84% of Slovak respondents). Applied Chi-Square Test and Product-Moment Correlation reveal that the searched forms of paranormal experiences do not call-up the negative form of trust, i.e. distrust. Also, only unimportant differences in perceived anomalousness exist between university students of chosen two countries. In this way, both hypotheses are considered to be confirmed. From the perspective of recommendations, assistance and belonging, providing anonymous psychological consulting, applying motivational

educational methods and techniques can encouragingly act on student trust and learning.

**Keywords:** *Trust, distrust, anomalous/paranormal experience, learning, students*

## INTRODUCTION

University as the brightest representative of higher education, must adequately respond to the needs of society, and at the same time form the scientific and cultural potential of the regional and national elites independently [1]. Processes, intended to sustainably keep all serious opportunities and challenges arise in higher education and development of science, demand new and deeper knowledge of various aspects of the university. Especially, such knowledge is important which could be viewed as socially sensitive or even sophisticated and which describe “students’ current characteristics, traits, changed expectations, i.e. their motivation, satisfaction, and trust” [2].

Trust can be considered as the confidence that one party has in another because of the honesty and reliability of his or her partner [3]. It is the individual’s general belief in the honesty and cooperative intentions of others [4] while it increases the speed at which the individuals are able to accomplish tasks [5]. Trust is the personal tendency that applies across various circumstances; it is the behavior determined by certain conditions; and simultaneously, it is the process that goes through stages and evolves over time [6]. Recently, trust is often discussed and explained in the relation to distrust. “Trust and distrust as paired notions exist in a dynamic interim zone between the deal clear cases of trust and ideal clear cases of distrust” [7]. Discussions comparing trust versus distrust are important in creating conditions that are necessary for the qualification of trust. In such view, it is needed to differ between a ‘bad’ or ‘paranoid’ distrust and a ‘good’ or ‘prudent’ distrust [8] because when realizing sensitive nuances between them, the cooperation and higher level of self-acceptation and acceptance of others can be developed easier. Because the “trust is cognitive, that it is de facto an assessment of the trustworthiness of the potentially trusted person or group or institution” [9], it can be assumed there exist a lot of various elements, circumstances, and experiences that affect the trust, both in a positive or negative way. These influences flow out and can act on all decisions taken by the individuals; they can be conscious as well unconscious in nature. They may spring from absolutely real and objective facts confirmed by other individuals or groups. However, they can also arise on the basis of a purely subjective nature, and although they cannot be testified by others, the individual him/herself is completely self-certain about their existence. This creates an opportunity to consider the impact of abnormal experiences too [10].

There are many scientific works and sociological studies dealing with the trust of university students. But trust as one of the crucial sub-elements of higher

education is not related to paranormal phenomena. Trying to face this challenge, the paper has the ambition to enrich the scientific basis of higher education through performing research supported by relevant hypotheses and an empirical survey.

As some paranormal experiences can be evoked by physical or chemical stimuli such as electric pulse to the brain and mental drugs, for example, DMT (N, N-dimethyltryptamine), paranormal experiences are based on people's physiological system chiefly, not only psychological factors such as belief. In this view, trust can be considered as one of the most important impulses as well as a consequence of the perceived anomalous experience of the student. This untraditional approach enables to link of the psychological perceptions and mental anomalous (i.e. psychological phenomena) with the recognized and re-evaluated relationship and/or attitude towards other social beings (i.e. sociological phenomena). The specific situation is a connection of anomalous experience with a unique form of psycho-sociological un/acceptance of oneself, i.e. self-trust and self-distrust respectively.

However, as mentioned above, studies which search the student trust to other individuals in relation to the students' anomalous experience, are still rare in the literature. Also, there is a lack of studies that are focused on links between academic trust, anomalous experience, motivation and learning. Within this perspective, investigation of trust, when compared to some forms of imaginative psychical experiences of university students (e.g. déjà vu, sixth sense belief, presentiment, etc.), and mutually related to learning motivation, might be considered contributive.

Based on the aforementioned, the paper's research goal is defined in this way: Theoretically and empirically relate the higher education students' trust, learning motivation, and anomalous experience. With use of theoretical and empirical analysis and synthesis, survey results will be statistically investigated, compared and deduced, with an intention to disclose potential links between trust, learning motivation, and unusual psychic experience. The empirical part will present questionnaire surveys performed in two different countries: Japan ( university students; Asia) and Slovakia ( university students; Europe). To achieve the paper's research goal, two hypotheses will be tested: links of dis/trust and paranormal experiences (H1); results comparison in both participated countries (H2).

## **TRUST, MOTIVATION, LEARNING AND ANOMALOUS EXPERIENCE**

In higher education institutions, it is not intellect that makes a great teacher, but rather, a character which includes trust and openness [11], [12] consider as the most important personality traits especially repressive defensiveness, trust, emotional stability, desire for control, hardiness, positive affectivity, etc.

Therefore, the search for finding the optimal level of the student's trust in oneself and/or in others is really important; if the idealization of trust or distrust occurs in the individual's intra-psychical processes, this can lead to choosing ineffective strategies as well as applying negative destructive behavior [13]. The importance of mentioned warning is emphasized especially by the existence of all forms of university students' trust, i.e. trust towards the study subjects, trust towards oneself, trust towards the peers and friends, trust towards the teachers, trust towards the university, and trust towards the society [2]. Unfortunately, under the specific (mainly negative) circumstances and pressures, these forms of trust could be potentially transformed in distrust.

### Trust and Setting the Hypotheses

Academic trust significantly influences the sustainable academic motivation and performance of students [14], [15], [16]. Sustainable academic motivation can be defined as a proactive interconnection of basic ideas of sustainability and basic characteristics of academic motivation. In this view, students' trust and motivation can be consistently increased and sustained through many of modern educational methods and approaches, or their harmonized combination. For example, through an integrative learning [17], in-service training [18], flipped learning [19], meta-learning [20], learning from mistakes [21], student coaching [22], etc.

As it flows from the previous section, trust is the highly sensitive domain of each student's intrapsychic life. There are many different and time-varying elements that affect it. At the same time, trust affects conscious decision-making, learning and "providing help or manifesting fair behavior to others" [2]. It acts on the human subconscious, and vice versa, the subconscious is induced, corrected, attenuated, etc. through it. It can be reflected in unusual 'dreamy' experiences, of both positive and negative nature. Full trust gives inner energy and personality-analytical-cognitive certainty to the individual. It can potentially lead to a strong intuition or can support a sixth sense which is considered very important in the academic effort.

Confused trust can cause the subconscious signs leading to a reminder of the importance and consequences of different situations, and the possible 'replenishment' of confidence lack (e.g. déjà vu or clairvoyance). An unsatisfied level of trust can evoke subconscious fear of perceived loneliness, feared failure and the like. Such subconscious psychological processes can be reflected in negative feelings, e.g. sleep paralysis or nightmares of the students. However, the paper does not agree with the opposite effect in this field. On the contrary, it supposes that occurred paranormal experiences do not increase the distrust. Based on the aforementioned, two hypotheses of the paper can be defined:

H1: Paranormal experiences have no relevant influence on student distrust.

H2: There exist only small differences between Japanese and Slovak respondents in the field.

It is assumed that in most of the studied anomalous experiences (*déjà vu*, sleep paralysis, out-of-body experience, a sign of ghost, presentiment, telepathy, clairvoyance and 6th sense belief) it will be refused their significant negative impact on trust. It is also expected that, despite different cultural, social, political and continental conditions, there will be shown only small differences between Japanese and Slovak respondents in existing links of trust and paranormal experience.

### Anomalous Experience and ESP versus Trust and Motivation

*Déjà vu* alerts the individual to a discrepancy between his or her feeling of familiarity and knowledge of novelty [23]. This means *déjà vu* can inspire students to fulfill their need or desire for disclose a matter-of-fact of such 'questionably re-repeated situation' and find a satisfactory answer in the science; learning process and found correct answer can move students to other challenges, relying on their high inner certainty.

When experiencing sleep paralysis, the student can feel oneself tired and with decreased energy/motivation for any action, not only for learning, but for trusting too. [24] used the third of searched phenomena, i.e. signs of ghost in the education process, with intention the students could understand these signs as "clues to memory and the past". However, if ghost takes a negative, fear-evoking form, it can adversely affect the psychological balance of students and impair the ability to focus on learning. In such a situation, "question-based learning methods instead of collecting information" [25] could strengthen both the student's self-trust and self-motivation, and remove his or her doubts about own mental health.

Although out-of-body experience (OBE) can bring uplifting, discovering and joyful feelings, positively affecting motivation and trust, they may also induce some distress and concern. I.e., they may rather hinder full concentration on the learning process. Furtherly, from the viewpoint of self-trust and learning motivation, if the student is sure of his or her presentiment-ability, with an intention to overcome his own fate, the student can find a strong motivation inside him/herself for responsible learning. However, if s/he beliefs in own 'attractive vision of future success, this can decrease his or her learning enthusiasm.

Telepathy demonstrates that the mind is also transpersonal [26]. I.e., a student can rely on others to a much greater extent than is appropriate and then dampen his or her conscious behavior. On a positive note, clairvoyance can strengthen student's self-confidence and self-motivation. On the other hand, if a student overestimates his or her 'clairvoyance', its failure at a critical moment can cause the student's inconvenience e.g. on the exam, project presentation, etc.

If a student believes that s/he has the sixth sense (s/he has repeatedly confirmed this fact in previous situations), he or she may relieve the learning process and caution in the area of trust, hoping that the situation itself will tell him or her the 'optimal answer'. In the case of a student with the opposite motivation, 'learning sixth sense' can lead to an even stronger academic enthusiasm – believing that an honest study is the most proper way in study.

## METHODOLOGY

The intention to focus research attention on the underlying anomalous experience was inspired by a questionnaire sheet of McClennon (Elizabeth City University, USA) that [27] later completed by additional questions for medical staff and transformed to a Japanese questionnaire sheet. Kokubo [10] substantially modified the original Japanese questionnaire and extended the attention on nine areas of paranormal beliefs: déjà vu; sleep paralysis; presentiment; telepathy; clairvoyance; out-of-body experience; 6th sense belief; signs of a ghost; other experiences.

Kokubo's most important decision was to conduct a survey on university students and add an entirely new research domain to the questionnaire: trust. Thus, in the current version, the questionnaire examines, on the one hand, the students' views on trust, and on the other hand, examines the occurrence of student paranormal experiences. This allows to focus the research in this paper on acquiring unique knowledge about the thinking and preferences of contemporary university students and, in addition, link them to potential anomalous phenomena. Moreover, the paper's authors decided to carry out the survey in two absolutely different countries: Japan (an Asian country, with unique history and culture) and Slovakia (A central European country, belonging to Slavic countries, also with unique historical and cultural specifics).

The sample of respondents consisted of  $n = 405$  Japanese students and  $n = 443$  Slovak students can be considered relevant (95% confidence level). The Japanese respondents were students from three universities, namely: 1. Atomi University, 2. Meiji University, and 3. Wako University. There were  $n = 144$  males and  $n = 261$  females, with an average age of 19 years. The Slovak respondents were students of the University of Žilina, Faculty of Management Science and Informatics. Concretely, they attended the following study programs: 1. Management, 2. Informatics, 3. Information management, and 4. Computer engineering. There were  $n = 300$  males and  $n = 143$  females, with an average age of 21. In contrast between the countries, there was a higher number of females in the group of Japanese respondents.

## RESULTS

The primary role of respondents was to select the subjectively correct dichotomous response (yes/no) to all the selected paranormal experiences: déjà

vu; sleep paralysis; presentiment; telepathy; clairvoyance; out-of-body experience; 6th sense belief; signs of a ghost; other experiences. The data collected were primarily examined on the basis of quantification of frequency.

### Data Analysis and Testing Hypotheses

As flows from Table 1, most respondents in both countries experience déjà vu (76.79% of Japan and up to 87.81% of Slovak respondents) and sixth sense (57.78% of Japanese and 68.85% of Slovak students). The basic mismatch was revealed in the third item, where the Slovak respondents, unlike the Japanese, in the absolute majority (73.14%) indicated that they are experiencing presentiment. For questions about sleep paralysis, telepathy, clairvoyance, OBE and signs of ghosts, most respondents in both countries tended not to meet (they chose answer 'no'). Japanese respondents have the least belief of clairvoyance (95.80%) and telepathy (93.33%). The least experience among Slovak students was OBE (73.59%) and telepathy (71.33%).

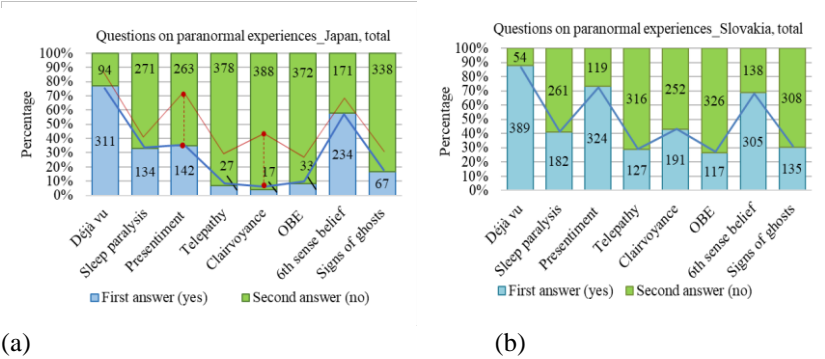
**Table 1.** *Anomalous experience and belief of Japan and Slovak respondents.*

Experience	Option	Japan (n=405)		Slovakia (n=443)	
		Freq.	[%]	Freq.	[%]
1. Déjà vu	(a) yes	311	76.79	389	87.81
	(b) no	94	23.21	54	12.19
2. Sleep paralysis	(a) yes	134	33.09	182	41.08
	(b) no	271	66.91	261	58.92
3. Presentiment	(a) yes	142	35.06	324	73.14
	(b) no	263	64.94	119	26.86
4. Telepathy	(a) yes	27	6.67	127	28.67
	(b) no	378	93.33	316	71.33
5. Clairvoyance	(a) yes	17	4.20	191	43.12
	(b) no	388	95.80	252	56.88
6. OBE	(a) yes	33	8.15	117	26.41
	(b) no	372	91.85	326	73.59
7. 6th sense belief	(a) yes	234	57.78	305	68.85
	(b) no	171	42.22	138	31.15
8. Signs of ghosts	(a) yes	67	16.54	135	30.47
	(b) no	338	83.46	308	69.53

*Source: Own source*

The frequencies shown in Table 1 were also illustrated by Figures 1a and 1b which show the similarity of the responses in both countries (blue curves). The red curve in Figure 1a represents the quantified difference in respondent responses between the countries.

These results indicate that hypothesis H2 (there exist only small differences between Japan and Slovak respondents in the field) can be considered as confirmed (first time). The results in several of the following subsections will also support the validity of this hypothesis.



**Fig. 1.** (a) Paranormal experience – Japan; (b) Paranormal experience – Slovakia

Source: Own source

Subsequently, the analysis was focused on searching possible links between students' opinions on their trust and paranormal. The independent variable can change itself, regardless of other factors; the dependent variable depends on the investigated situation [14]. In this survey, trust is put as the dependent variable and anomalous phenomena as an independent. Hypothesis H1 excludes the negative impact of paranormal experience on perceived trust, i.e. presumes that paranormal experience has not relevant influence on the students' distrust. Table 2 shows the results of the dependence testing between examined items. The first relationship concerned the option of 'cannot be trusted' and all eight items on paranormal experiences. The statistical significance of none of the relationships was confirmed in the data of Japanese respondents. Only one result was an exception in Slovakia: dependence was confirmed between opinions on distrust and clairvoyance. Of the 297 Slovak respondents who think that people cannot be trusted, 46.46% said they have experienced clairvoyance. On the other hand, only 36.30% of 146, who think people can be trusted, experienced clairvoyance. Therefore, in addition to hypothesis H1, also hypothesis H2 can be accepted.



**Table 2.** *Correlations of trust (cannot be trusted) and paranormal experiences – Japan and Slovakia.*

Combinations analyzed	Japan				Slovakia			
	Chi-Square Test		Product-Moment Correlation		Chi-Square Test		Product-Moment Correlation	
	z	P-value	r	P-value	z	P-value	r	P-value
Cannot be trusted and <i>déjà vu</i>	1.718	0.086	0.850	0.86	0.555	0.579	- 0.026	0.580
Cannot be trusted and <i>sleep paralysis</i>	0.157	0.875	0.008	0.876	0.818	0.413	0.039	0.414
Cannot be trusted and <i>presentiment</i>	0.185	0.853	- 0.009	0.854	0.734	0.463	- 0.035	0.464
Cannot be trusted and <i>telepathy</i>	0.688	0.491	- 0.034	0.492	0.191	0.848	0.009	0.849
Cannot be trusted and <i>clairvoyance</i>	1.452	0.147	- 0.072	0.147	2.03	0.042*	0.096	0.042*
Cannot be trusted and <i>OBE</i>	0.105	0.917	0.005	0.917	1.045	0.296	0.050	0.297
Cannot be trusted and <i>6th sense belief</i>	0.391	0.696	0.019	0.697	0.113	0.910	0.005	0.910
Cannot be trusted and <i>signs of ghosts</i>	0.244	0.807	0.012	0.808	1.429	0.153	- 0.068	0.154

*Source: Own source*

## DISCUSSION

An examination of the latter area of paranormal phenomena also pointed to the considerable similarity of relatively different countries. Many colleagues from European partner universities (e.g. in Poland, Czech Republic, Lithuania) expected diametric differences when mentioning such a focus of this study (Japan as an advanced Asian country versus Slovakia as a country long stopped by Russian influence). However, the authors of this study hoped that the parapsychological elements were 'regionally independent' and rather influenced by the current dynamism of economic processes and ever-increasing demands for future careers and performance. With considerable scientific satisfaction, the results confirmed this assumption and supported the validity of the H2 hypothesis several times.

A study of [28] performed on 286 respondents, analysed the effect of various external and internal factors on student trust: "There is a positive and significant effect on the quality of service on student trust; there is a positive and significant effect on the image of the institution on student trust, and there is a positive and significant quality of service to student trust through the image of the institution". In line with this, results confirming the relevance of hypothesis H1 that was shown in Table 2 confirmed the interdependence only between the negative form of trust, i.e. distrust and clairvoyance. This leads to the conclusion that, if these external-internal university elements are positive, they can foster student confidence and, to some extent, 'mitigate' the impact of negative paranormal student experiences. Respectively, a reversed impact can also be considered: if students' paranormal experiences stimulate their sophistication, zeal, and the effort to uncover the essence of phenomena and things, they promote student trust, both student trust in themselves and trust in the university. Dissemination of the prevailing student satisfaction and trust will consequently positively influence the image of the university and thus promote the trust of other students and the public.

With the use of the above deductive ideas, the opinion of [29], flowing from the survey performed on 451 people, can be agreed: illusory beliefs have an important role in the behavioural choices of individuals. In a similar perspective, the study of [30] searched relations of perceived stress, thinking style (rational and experiential), and paranormal belief. Results collected from 82 participants revealed that "perceived stress alone was not a prominent predictor of belief, but the combination of stress and thinking style, significantly predicted greater global paranormal belief" [30].

From the participated sample, 76.79% of Japan and 87.81% of Slovak respondents express their experience with *déjà vu*; 57.78% and 68.85% express their belief in the sixth sense. Altogether, listed above studies and results support the relevance of hypothesis H2 about only small differences in university students' anomalous between countries.

All presented discussion complexly leads to an important conclusion: paranormal phenomena should be viewed either as a great inspiration.

## CONCLUSIONS

Although the study addressed a relatively unconventional topic and even included a comparison of two countries that had never been compared in the area under study, all four hypotheses were valid. Specifically, paranormal experiences have not relevant influence on student distrust (H1); there exist only small differences between university students of examined Asian country (Japan) and Central European country (Slovakia) (H2). The most important contributions, findings and recommendations of the paper include mainly following:

1. Theoretical disputation was opened on paranormal experiences of university students in relation to academic motivation and learning.

2. In general, it can be summarized that although Japanese culture and Slovak culture have diametrically different roots, the participated university students show relatively similar results due to their anomalous experience. The difference was shown in presentiment and clairvoyance.

3. Moreover, the interdependences among all of the searched anomalous prevail in both of searched countries. In detail, from 28 potential dependences, 16 were documented in the group of Japanese respondents and 15 in Slovak respondents. From the viewpoint of gender, the correlations were positive in 4 from 8 beliefs of Slovak participants and in 2 from 8 beliefs of Japanese participants (i.e. clairvoyance and sixth sense belief).

4. When relating trust to paranormal experience, identical features between countries have not been achieved numerically. However, except the opinions on trust versus anomalous experience in of Japan respondents, some of the dependences were proven partially for each country.

It is necessary to encourage students conscientiously, strengthen their self-trust and trust in others, positively influence their motivation, and inspire them for academic life. The joy and possibilities of progress should balance and inevitably exceed all potential discomfort. In this way, anomalous experience (i.e. déjà vu, presentiment, clairvoyance, sixth sense, and telepathy) can be exploited at least partially positively. At the same time, appropriate and encouraging learning methods can alleviate the burdensome aspects of sleep paralysis, a sign of ghosts and an out-of-body experience.

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## **Section**

# LANGUAGE AND LINGUISTICS



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This section includes papers which have gone under double blind peer-review. It covers papers related to theoretical, literary and historical linguistics as well as stylistics and philology.



# ANTICIPATORY LITERARY PLAGIARISM AS PHENOMENON CHANGING COPYRIGHT PARADIGM

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## ABSTRACT

The contribution introduces the theory of anticipatory or foreseen plagiarism which should prompt us to reexamine the existing copyright paradigm. The literary anticipation theory creates a hypothesis that some authors to outlive their time due to their literary style or thematic vision and in the process, allegedly “robbing the literary treasury” of authors living and writing centuries later. The foreseen plagiarism theory transcends time and space which allows for an understanding of the mechanisms responsible for the overflow of the literary gene among authors living in different centuries. This article contrasts anticipatory plagiarism with the plagiarism concept of unauthorized and deliberate copying of a work in the past. The article morally assesses different types of plagiarism, therefore explaining the nature of copyright consequences. The legal definition of the concept of plagiarism and its depiction as a social offense the legal consequences of which may affect various areas of the private law, have, in the context of this work, a platform function providing space for developing the hypothesis on the possible existence of another literary phenomenon defined as anticipatory plagiarism. The anticipatory plagiarism theory destroys the inflexible conception of temporal impact which serves as a symbolic key to decoding the context of the development of a number of important but controversial (in terms of authorship) works of world literary heritage. This contribution focuses on clarifying the possible nature of the phenomenon in question while demonstrating the need for reexamination of the existing concept of literary history and the plagiarism phenomenon (in terms of copyright) through the introduction of circumstances discovered. The topic of literary plagiarism is presented in a historical, legal, psychological and economic contexts. The author further develops the anticipatory plagiarism theory described by the French literature professor Pierre Bayard and adds an additional attribute, thus constructing a new legal doctrine with the potential to confirm the nature of the investigated phenomenon. Anticipatory plagiarism is described as a phenomenon on the edge of paranormal phenomena while providing empirical evidence of its existence. The text takes into account the critical approach to the issue in question offering ideal conditions for factual debate and approaching the topic at hand as objective and comprehensively incorporated.

**Keywords:** *anticipatory plagiarism, authorship, literary work, copyright law, unfair competition*

## INTRODUCTION

For centuries, the literary world has been afflicted by a “disease of civilization,” the symptoms of which involve appropriating copyright work of other people. Due to its historical rootedness and topicality, literary plagiarism is a controversial issue that evokes more questions than answers. Moreover, researchers are occupied with a new psychological phenomenon discussed in this article, which changes the existing concept of plagiarism. A new theory has been introduced in the scientific world which postulates the existence of anticipatory plagiarism created unwittingly by anticipating a future work. Theories acknowledging the existence of anticipatory plagiarism destroy the existing paradigm of negatively defined plagiarism, which is based on the intentional plundering of literary texts written in the past. By contrast, anticipatory plagiarism draws upon works which have not been created yet at a given time, therefore the immoral aspect characteristic of classic plagiarism is eliminated, and such a work is divested of copyright liability for stealing a work that does not exist in a formalized form, written or verbal, at that time.

The concept of anticipatory plagiarism proceeds from the assumption that works are created on the basis of blending of the literary energy outside of time and space. Biographical data of authors or the time when their works were created are of no importance in terms of their potential copying. According to this theory, writers draw upon literary vibrations, and as a result of that, many of them can be on the same literary wave regardless of the era in which individual authors lived. Unlike classic plagiarism, when authors appropriately formally express the works of other authors without their authorization, there is no unauthorized drawing upon existing works in the case of anticipatory plagiarism, only linking literary threads among authors from various eras and parts of the world. The writing style of linked authors is then weaved with the same literary thread, even though the authors have no idea of the literary activities of others.

The “black and white” concept of plagiarism is intentionally “blurred” in the theory of anticipatory plagiarism, which encourages the possibility to reassess the existing concept of the literary history describing literature in terms of the formation of literary works on the timeline, from antiquity towards the present time. In fact, according to the theory presented, the history of literature takes place in an environment where no rules of chronology apply. The existence of anticipatory plagiarism in the world’s literature is illustrated with examples of works anticipating writing styles of authors living centuries later, while earlier works include facts and techniques uncharacteristic of the period, which indirectly confirms the theory since the criterion confirming anticipation of literary texts from the future is met. There is still no methodology to provide direct evidence. Another obstacle to direct confirmation of the anticipated mechanism is the society that is insufficiently philosophically sophisticated and unable to accept the principles of the theory, which they do not understand due to the lack of their knowledge.

## ESSENCE OF NEGATIVELY DEFINED PLAGIARISM

Plagiarism can be defined as a copy of an artistic or literary work the authorship of which is attributed to the plagiarist instead of the original author. Plagiarism activities mean copying or paraphrasing a copyrighted work or part thereof without the express consent of the copyright holder. In the formation of plagiarism, another author's name is used while the original work's author is intentionally, in some cases unintentionally, concealed. It is often difficult to determine and prove to what extent the work is plagiarism. In practice, this is addressed via the interpretation of copyright. To prove the authorship of a work is very complicated. When proving the authorship, expert opinions from the field of literary science, including comparative analyses of existing works of the author and the plagiarist, are of great importance. [1] Plagiarism is perceived as an activity consisting in the appropriation of the outcome of mental work which is presented as an original work. Considering that the liability for plagiarism of another author's work is a strict liability under copyright, which does not require any fault, in addition to intentional stealing of another author's work, also negligent quoting or inadvertent omission of references or unprofessional working with the original text, whether in the form of inadequate paraphrasing or compilation of the original text, are considered plagiarism. Plagiarism can be described as copying content (whether in part or full) while concealing its original author. Passing ideas of another author as one's own means stealing of intellectual property and a number of sanctions will be imposed against the plagiarist, which is further discussed below.

## HISTORY OF LITERARY PLAGIARISM

The history of literary plagiarism in the context of the mass expansion of this ancient phenomenon started to be written with printing ink already in the early modern period. The Guttenberg's invention of the printing press is a milestone in the evolution of mankind which laid the foundations of global literary plagiarism and generally the issue of literary property, which is a narrower definition of intellectual property. As already indicated, the origins of literary plagiarism in its genuine form date back to remote history. Literature has been afflicted by plagiarism from its very beginning. Considerable evidence of this vice can be found already in the literature of the Roman civilization (even though not on a mass scale). The foregoing shall apply both to the negatively defined plagiarism, the nature of which consists in copying historically older works and the unauthorized appropriation thereof by a younger plagiarist, and to anticipatory plagiarism, which is characterized by drawing upon works written in the future. According to many academics researching this phenomenon, the history of anticipatory plagiarism dates back to the very beginning of the world's literature. In this context, the professor of French literature and psychoanalyst, Pierre Bayard, points out the relationship between the Sophocles' work *Oedipus Rex* and Freud's psychoanalysis in terms of composition and thematic anchoring. Bayard points to the fact that the ancient Greek Athenian playwright apparently

“borrowed” the topic and the structure of the fictional story from the famous European psychoanalyst living about two millennia later. With regard to the fact that the ancient dramatist lived and created a half millennium BC, once his plagiarism is proved, it can be stated that it is a phenomenon which dates back to the origins of mankind. In the context of the topic hereof, it is necessary to address the question of what the relationship between copyright and plagiarism is from the historical perspective. If the relationship is examined in terms of originality and derivativeness, two characteristic concepts of copyright, we come to the conclusion that the originality agrees with plagiarism practices, although it sounds immoral, and it is immoral from today’s point of view without any doubt. However, the past cannot be perceived from the present perspective, so there is nothing else to do but to try to understand the phenomenon of plagiarism in its historical context. We should be particularly cautious when passing moral judgments over plagiarism practices used in times of absence of authorship law and almost zero public awareness of copyright potentiality. Behavior standards reflect the state of the society and law development at that time and this premise should be built on when trying to understand and explain the conduct of plagiarism in the context of a given time. The issue of plagiarism cannot be viewed only from the perspective of the 21st century. When examining this phenomenon, it is necessary to consider the social environment and legal framework of individual eras. Probing this issue shows that due to its multi-layer nature, plagiarism cannot be defined only negatively. This opinion is based on the fact that literary works were initially very often published anonymously. They were legally rewritten and the authors were honored that their works spread. It was perceived as evidence of success of the works and therefore the success of their creative abilities. The viability of works was more important to authors than indicating the author of the work. It is important to mention that plagiarism cannot be regarded as a separate phenomenon. Lawyers and legislators agree that it is a derived phenomenon, since literary piracy reflects the expansion of the concept of intellectual property. [2] Plagiarism activities are simply responses to possibilities that can be very easily, although illegally, drawn upon in the ever-expanding market of copyright works. This idea answers the question why plagiarism is such a prominent issue in the early 21st century. Only a small percentage of people are morally at such a high level that they would resist such temptation. There are only a few commodities in the world which are so attractive and at the same time readily available due to the development of information technology such as literary works. Therefore, the economic factor is of some significance in the case of plagiarism activities.

## **THEORY OF ANTICIPATORY PLAGIARISM**

In terms of the spiritual development of mankind, the history of literature parallels the history of plagiarism. If this statement seems to be bold to the readers, they may be surprised by the elaboration of this thesis, which results in the elucidation of the phenomenon of anticipatory plagiarism. Although literary plagiarism is a priori labeled as a morally despicable phenomenon by society, one



component should be pointed out which makes this phenomenon more attractive. The formula which has been triggering plagiarism activities for millennia is the inspiration in its purest form. If inspiration is seen as an incentive to creation, then it can be inferred that such an incentive instigates more creative ideas, which is very closely related to the development and enrichment of society. Works created by plagiarism may be often of greater value than the original works, which also confirms the hypothesis of a positive impact of plagiarism practices on the overall social progress. At this point, the author would like to mention that this passage talks about plagiarism activities that are not performed to cause harm to the original author and benefit from the simple copying of the work. In fact, there are motives for plagiarism that arise unwittingly and the plagiarist is unaware of them. To intentionally appropriate another author's work and pass it off as one's own work is a completely different situation.

This article presents the phenomenon of plagiarism from another perspective. The mentioned literary phenomenon should be analyzed and subsequently put into a broader context, particularly because it is currently very often "lynched" by academics. Actually, literature offers numerous examples when plagiarism of works of a mediocre artistic value resulted in literary gems holding a place of honor in the chronicle of mankind. Using the modern rhetoric, these plagiarism techniques can be described as a transformation of the original work into a literary work of a higher artistic level. Such an argument would probably stand up to defending plagiarism in the context of following the current trend of social pardoning of those practices of unfair competition and plagiarism which result in social progress. [3] When formulating this idea, the author hereof relies on the belief that inspiration provided by the original work is a trigger for further creation in literature and generally a completely natural and desirable phenomenon from the social point of view. To understand the paradigm, it is necessary to free from the negatively defined perspective on plagiarism. If one is able to do so, he/she witnesses an unexpected finding. The detachment gained from leaving old dogmas behind enables him/her to see literary plagiarism in its plasticity.

When looking more deeply into the issue of plagiarism, one cannot fail to notice a phenomenon which could be a subject of extensive research in the field of parapsychology. It is a phenomenon which destroys the existing simplified notions about the nature of plagiarism and opens the door to an unexplored and for many unsuspected chambers called "anticipatory plagiarism". In its imaginary bookcase, there are valuable literary works, the content and literary form of which seem to be few centuries ahead of the plagiarized work. Even though this phenomenon appears to fall under science-fiction, there is evidence of its existence. This phenomenon which is difficult to understand is already explained by the literary theory. Anticipatory plagiarism arises within a circular process which rediscovers certain themes and literary forms, which have already been discovered and just seem innovatory, in certain cycles. The original work seems to be copying a work created tens or hundreds of years later. The original work is therefore ahead of its time. How is it possible? To find the answer, it is necessary

to free from the linear perception of time. In fact, the history of literature takes place in an environment where no rules of chronology apply. It is formed in certain cycles. As fashion trends recur, the literature also rediscovers long-forgotten themes and forms in certain waves, which thanks to their innovation overshadow similar works created chronologically much earlier. In comparison with common plagiarism, when a historically older work is copied, anticipatory plagiarism is able to “plunder” works before they are created. Anticipatory plagiarism can be therefore recognized only with the benefit of hindsight. Writers who created such anticipatory works can be regarded as visionaries.

The fascinating world of anticipatory plagiarism is revealed to readers by Pierre Bayard, the French psychoanalyst and university literature professor, in his *Le Plagiat par anticipation* (Plagiat by anticipation). [4] The author, who is respected by both readership and the professional community, describes the theory of anticipatory plagiarism which, as premised, had been discovered by many literary theorists before him. However, the Bayard’s study cuts much deeper and puts the topic into a broader context. The author destroys the existing ways of studying literary theory. In his work, he draws the attention to the big mistake consisting in interpreting literature using a timeline directed from the past to the future. On the contrary, according to his theory, it is necessary to disregard the chronology when examining literary phenomena. Bayard’s provocative propositions are directed at an extraordinary idea, namely to examine and interpret literature not only via the usual method, i.e. from the emergence of literature up to its presence, but to assess and classify works regardless of the chronology of their creation and authors irrespective of their biographical data. [5] His work leads to a reassessment of the perspective on literature and, in this context, on the essence and importance of plagiarism.

The author hereof presumes to expand Bayard’s theory with a component that may help to clarify the essence of anticipatory plagiarism. The component, which brings yet another dimension of the issue, is the inspiration in the design phase of the work. A literary work matures in the minds of “literary architects”, often at different times and in different places, and once the work, which is usually marked by a “flash of genius”, comes to light, it is so literary mature that it is ahead of its time. These writers are able to use their writing skills to reach a higher level than their contemporaries and intuitively anticipate the literary style and form for the adaptation of a story published in the future. The “trick” is that only a limited number of genius writers. That is why it does not matter when and where their works were created. What matters is the authors’ ability to tune, even accidentally, the same intellectual and literary-artistic wave. This hypothesis could explain the fact that the literary giant has predecessors in different time periods scattered around the world, whose literary style seems to be copied from the author’s brain, even though these predecessors obviously have not had the possibility to get acquainted with or draw on each other’s work. Basically, it is a spillover of literary energy outside of time and space. The secret of this phenomenon gives a signal to human thinking that it is inevitable to change the view on the issue examined.

A literary work arises from the author's creative activities the essential element of which is originality. With regard to the fact that the author put his/her creativity into his/her work, each copyrighted work shows signs of uniqueness. The current theory of the originality of a copyrighted work is based on the idea that for the above-mentioned reason, it is not possible for two authors to create an identical work independently of each other. The essence of plagiarism is founded on the assumption that if there are two quite similar works of two different "authors", then the newer work is most likely plagiarism of the older one, which has the status of an original copyright work. In the literary history "archive", there are a number of conspicuously similar works of authors who created in different eras, whose works use the same literary language, while they are not plagiarism according to the above-described copyright approach. On the basis of this finding, literary historians came up with a revolutionary idea which is based on an assumption that literary works are formed in a creative workshop outside time and space. This could explain the fact that authors, whose works were created hundreds or even thousands of years apart, have produced literary works of the same literary substance.

As already mentioned, to understand the theory of anticipation of future literary themes, it is necessary to free from the common perception of time impact. The concept implied works in an environment disregarding the time and space, which allows authors from different eras to communicate with each other through literary waves in the eternal presence. Josef Piaček, the Slovak philosopher and founder of the first original Slovak philosophical concept called syncriticism, offers an explanation to the world that transcends the passage of time through the concept of perichronosofy, a philosophical theory of timelessness. [6] Piaček uses the term perichronosofy, referring to timelessness, eternity, infinity or timeless experience, to describe the basic ontology layer of syncriticism as a philosophical theory. In fact, it is based on the Heidegger's idea that time passes in a timeless manner. Piaček's thoughts related to perichronosofy are directed at timeless characteristics of the historical correlation between a human and the world. Piaček's implied the ability of the human mind to step out of the time frame, which could help to clarify the principles of experience transmitting across eras causing the effects of anticipatory plagiarism.

The theory of anticipatory plagiarism is based on nonconformist hypotheses which are difficult to prove. First scientific attempts to verify these hypotheses, however, use a relatively sophisticated methodology. Bayard is very consistent in proving the functionality of the theory of anticipatory plagiarism. Anticipated plagiarism is subject to a four-criteria test. He claims that to constitute anticipatory plagiarism, the compared works must have these features: resemblance, dissimulation, reversed temporal order meaning that the earlier author copies the later one, and dissonance indicating the transfer of the work within the meaning of plagiarism. The extent of resemblance is determined by a comparative text analysis of works of the plagiarist and the original work's author. The dissimulation factor points to concealing the fact that the plagiarist has used the

theme from other people's resources. To prove the opposite chronological order of the copied and original texts (as opposed to common plagiarism, when the plagiarist copies a work created in the past) is quite a challenging process, which requires a profound knowledge of facts from eras in which individual works were formed. Anticipatory plagiarism is detected when it is discovered that the earlier literary text uses methods and knowledge which were unknown at the time of the work. The aforementioned dissonance, referred to as the fourth feature of anticipatory plagiarism, is an essential element which can be easily revealed by literary theorists. The earlier author who "borrows" the literary material from the later author works with the text tentatively, whether in terms of its form, style or thematic anchoring, since he/she only "pulls the captured literary thread" without knowing exactly how to weave a magnificent work from it. In fact, the author has gained (stolen) the literary material but does not know the instructions for its forming, which mostly results in unskillful improvising. In some cases, however, the anticipating plagiarist may qualitatively surpass the original work. This may happen thanks to the mentioned inspiration or a flash of the author's literary genius. When comparing the works, vigilant literary historians mostly know that there is "something going on", since the plagiarism (even though it is historically older than the original) shows a contextual disparateness.

According to Bayard, a prime example of anticipatory plagiarism is Voltaire's novel *Zadig* predicting the deduction method, which was introduced by Conan Doyle through his private detective Sherlock Holmes more than a century later. In one of his detective stories, Voltaire used an investigative method which was not known at that time. Bayard brings further evidence of plagiarism of future works by proving that Sophocles copied the Oedipus complex from Sigmund Freud about two millennia before the renowned psychoanalyst described this phenomenon. The plagiarism of one of the most important ancient playwrights is demonstrated by the fact that the psychological phenomenon related to sexual relations between a son and his mother was not recognized at the time of Sophocles' life. Bayard is an expert in the field of world's literature and draws lines on an imaginary canvas leading to the paradoxical finding that historically older works plagiarize later works. He claims that the surprising line connects famous predecessors with even more famous successors. For example, Bayard claims that Voltaire plagiarized from Conan, Racine copied from Victor Hugo, and Maupassant drew upon the Proust's work so convincingly that his work presents the Proust's literary world better than works of the French novelist himself. After the existence of all the above-mentioned components is proved, the transfer of work as plagiarism from the future to the author's or plagiarist's presence is evident.

## **TOWARDS LIABILITY FOR PLAGIARISM**

A plagiarist violates the copyright of the original work's author. At the same time, the person makes a personal or financial profit from plagiarism activities to which he/she is not entitled. There is a risk of penalty for the illegal action

pursuant to a number of laws and regulations. The liability for plagiarism may result in legal consequences in the civil, criminal and administrative sphere. Under copyright, the liability for plagiarism is a strict liability which does not require any fault. The issue of liability for plagiarism should be viewed from the perspective of published and unpublished plagiarism. While the liability for unpublished plagiarism is held only by the plagiarist, in the case of published plagiarism, the publisher and other entities that were involved in the publication of the plagiarism may be also liable for the plagiarism apart from the author.

### ***Plagiarist's Liability for Appropriation of Another Author's Work***

The liability for an unauthorized appropriation of another author's work is in the case of an unpublished work held by the person who appropriated the authorship. The plagiarist may be sanctioned on the basis of civil liability under Section 40 of the Czech Copyright Act through exercising the right for compensation and surrender of unjust enrichment under the Czech Civil Code. Under the new administrative sanctions of the Copyright Act, the plagiarist is imposed with offense liability for committing an offense or an administrative offense under Sections 105a and 105b of the Czech Copyright Act, and may be also imposed with administrative liability under Section 32 of the Czech act on offenses. In particularly serious cases, the plagiarist may be imposed with criminal liability under Section 152 of the Czech Criminal Code. According to this blanket norm, any unauthorized interference into legally protected copyright is considered an intentional crime.

In this context, it should be noted that these criminal sanctions for copyright infringement in the form of plagiarism may also apply to persons who were knowingly and thus willfully involved in the crime. Such a person may be a publisher carrying on business as a natural person if it published plagiarism and was aware that the person passing himself/herself off as the author is not the author. In addition to Section 152 of the Criminal Code above, the plagiarist may be prosecuted under other provisions of this legal regulation, depending on the nature of damage incurred. If the damage inflicted on the author of the plagiarized text is only of a non-material nature, the plagiarist may be prosecuted under Section 209 of the Czech Criminal Code (infringement on other people's rights). However, if the plagiarist inflicts material damage to the author, which is classified as fraud, the plagiarist may be also prosecuted under Section 250 of the Czech Criminal Code.

### ***Publisher's Liability for Publishing Plagiarism***

If plagiarism is published, not only the plagiarist is liable for the unauthorized interference in copyright but also the publisher and other entities involved in the plagiarism publication. In the Czech Republic, the publishing of periodicals, its distribution and the publishers' position is regulated by the Press Act. [7] Under Section 4 of the Press Act, the publisher is responsible for the content of

periodicals. The liability for the content of periodicals is a strict liability, i.e. it does not require the fault on the part of the publisher. The publisher is responsible for its content not only in the journalistic articles representing the opinions of the medium and its editor but also in the articles that do not represent such opinions. [8] The publisher's strict liability has also an impact on the false attribution of authorship or co-authorship. In the event of a false indication of authorship, a publisher's liability for publishing the plagiarism arises and the fact that the publisher did not know about the plagiarist's dishonest conduct is of no legal significance. Any publisher's objections that it was not obliged to verify whether the person claiming his/her exclusive authorship is really the exclusive author and that it did not know about the co-authorship of such person with another person is legally insignificant. [9] This author thus concludes that on account of strict liability, the primary liability for the published work shall be borne by the publisher who may subsequently sue the plagiarist's author, while exercising a whole range of claims and cumulating individual suits.

## **COPYRIGHT AND UNFAIR COMPETITION ASPECTS OF PLAGIARISM**

In the context of the reflection on legal liability for anticipatory plagiarism, it should be mentioned that from the perspective of the current law, the plagiarist's liability has consequences in terms of both authorship and unfair competition. The Copyright Act provides a number of claims which a person who has the standing to bring an action may demand to protect his/her rights to a literary work. The author or another authorized person may choose any of the below claims or cumulate individual claims in the action. It is also possible to assert claims on the basis of copyright and unfair competition through actions applicable by virtue of the two legal areas. In this context, the second sentence of Section 105 is material, which reads as follows: *"Protection of works under copyright shall not exclude the protection stipulated by special legislation."*

## **CLAIMS ARISING FROM UNAUTHORIZED INTERFERENCE IN COPYRIGHT**

Statutory legal means of authorship protection are based on strict liability in the Czech Republic. It follows that the liability does not require any fault. The general clause of copyright is contained in Section 40 of the Czech Copyright Act. However, this section does not contain special merits as they are known from unfair competition. Unauthorized interference in authorship may have the character of a threat to or violation of this right. The author whose rights are interfered with without authorization can defend themselves against already incurred offenses and also against imminent actions. They can demand a whole range of claims under this provision. The Czech Copyright Act provides a demonstrative list of claims against the violation of and threat to this right. In addition to traditional claims, such as claims seeking a prohibitory injunction, the removal of consequences and satisfaction, the Copyright Act stipulates

particularly the claims for determining the authorship, for disclosure and for the publication of the judgment.

The literary work, which is often a subject of disputes in the matter of plagiarism, is negotiable. Claims arising from the law against unfair competition may be asserted to protect the market aspects of the literary work. Legal means of protection against unfair competition include all legal means which may be used by entities affected by unfair competition to defend themselves. The Civil Code, under which unfair competition is defined in the Czech Republic, is private law and for this reason, its provisions can regulate only civil sanctions. However, unfair competition is also addressed in some public law regulations, under which a person engaged in unfair competition may be punished with sanctions of a criminal nature (pursuant the Criminal Code) or administrative sanctions (e.g. pursuant the Consumer Protection Act or the Advertising Regulation Act etc.). Also, non-legal means of protection, i.e. self-regulation measures, may be used against the potential unfair competition. [10] Sanctions related to unfair competition are regulated in Section 2988 of the new Civil Code. The scope of claims is adopted from the Commercial Code. Persons affected by a violation of or a threat to their rights as a result of unfair competition may ask the infringer to abstain from such conduct or remove the irregular situation. They can also demand reasonable compensation, either in monetary or non-monetary form. Moreover, they can claim damages and surrender of unjust enrichment. For the purposes of claiming damages by virtue of protection against unfair competition, the fact that the claim for damages is newly based on a subjective principle is particularly essential. It is grounded in the fact that the liability to compensate for any damage caused by unfair competition is subject to the infringer's fault. In the antecedent legislation, the compensation was based on an objective principle. With regard to the fact that it was difficult to assert the claim for compensation in the field of unfair competition, it can be assumed that the principle of subjective liability in respect of the claim for compensation in connection with unfair competition will be in practice even more problematic than asserting this claim under the previous legislation. The principle of subjective liability is to be applied only to the claim for compensation and for surrender of unjust enrichment, and therefore cannot be generally applied to legal liability for unfair competition. As with copyright lawsuits, the court may also confer the right to disclose the judgment at the losing party's expense and determine the extent and scope of its disclosure when it comes to actions applied under the law against unfair competition. Individual sanctions may be applied simultaneously.

## **CONCURRENCE OF THE COPYRIGHT AND UNFAIR COMPETITION PROTECTION OF A LITERARY WORK**

It is clear from the previous chapters that legal means of protection against copyright infringement are largely identical with legal means of protection against unfair competition. With respect to the fact that the authorship protection and protection against unfair competition of literary work overlap, the person who has

the standing to bring an action is entitled to assert the claims under both legal areas. If and to what extent the injured person uses legal possibilities under his/her rights falls fully within his/her authority. Civil proceedings are actually based on the disposition principle, when it is the parties (plaintiff, defendant) that dispose of the proceedings and its subject, not the court. *“It means that it depends on the acts of the party (plaintiff) whether the proceedings will be initiated and whether it will continue (disposition of proceedings), and on what issues the court will decide (what rights and to what extent – disposition of the subject).”* (The citation was translated from Czech to English by author.) [11] It should be reminded that the court is obliged to act only within the scope of the demand for relief.

## **MORAL AND LEGAL ASPECTS OF ANTICIPATORY PLAGIARISM**

Many questions arise in connection with the above-defined theory. Is anticipatory plagiarism intentional in the sense of willful stealing of a literary technique, style, theme and formulation method? And if so, can be the plagiarist stealing a work which does not exist at a given time legally responsible for such conduct? The answer to the first question is not entirely definite. Even writers themselves do not know the exact source of the plagiarized material, although they suspect that the work they create does not proceed only from their own literary sources. Many authors agree that in the course of creating a significant and literary valuable work, they were driven by an intensive creative power and felt to be mere intermediaries of a literary statement. [12] As if somebody whispered the text in their ears. The above-mentioned fact implies that these authors knew that their works were not created solely thanks to their literary creativity, but could not identify the source of their inspiration. They could not copy an already written text, as is typical for common plagiarism, because the anticipated work did not exist at that time. They were mere intermediaries of the anticipated, yet not existing, literary text to readers. This gives rise to a theory that anticipating plagiarists had been creating under the influence of creative inspiration or vision, which became real in the future. Another fact aggravating the examination of the case of plagiarism is the complicated provability of the intention to steal a non-existing work, since it is a very non-standard and currently unknown phenomenon.

With regard to the nature of the issue, the answer to the question concerning the legal liability of the plagiarist stealing a work created in the future should be perceived from two perspectives – timelessness and time designation. If the time impact is disregarded and the literature is perceived from the perspective of eternal presence, when all works are created in a certain universe, then the writer anticipating another author's work may be theoretically legally liable for the act because he/she stole an already existing work (since there is no future in timelessness), even though the work will be physically created in the future.



However, the situation is complicated by the fact that while literature takes place outside of time and space according to the theory of anticipatory plagiarism, the authors live in the world where the law of time applies and its linearity prevents the author of the historically older work from being legally responsible for plagiarizing a later work which does not exist at the time of plagiarizing and therefore is not protected by copyright. In the majority of cases, parties to a notional legal relationship do not live in the same time period, that is why the legal relationship cannot be really established. It follows that no claims arising from the unauthorized use of the anticipated work can be asserted. The situation is complicated due to the gap between the time of the creation of the plagiarism and the original work, hence due to different eras in which parties to the dispute lived and created. The legal liability of the author arises already in the initial stage of the formation of a plagiarized work, however, the liability ceases to exist upon the author's death. However, in most cases, the original work which served as the plagiarist's inspiration is yet not created at the time of the plagiarist's life, i.e. in the period of the author's potential liability for unauthorized interference in the original work. That is why we cannot talk about stealing the work because of the chronological flow of time, since the work does not exist at that time. In fact, it would be impossible to prove the theft at the time of anticipatory plagiarism. It is possible with hindsight, but no sooner than at the time of creation of the plagiarized work.

One of the reasons why it is not easy to determine the time definition of anticipatory plagiarism in terms legal liability is that we perceive the issue from the perspective of the 21<sup>st</sup> century, even though the plagiarism practices were performed several hundred years ago. Under the applicable law, the legal regulation may not be applied retroactively because the genuine retroactivity is considered an inadmissible legislative technique on the ground that it is contrary to the requirement of legitimate expectations and legal certainty. The principle *lex retro non agit* (law is not retroactive) means that only law which is codified at the time, i.e. effective law, is applicable at the time. [13] Legal standards which come into existence in the future are therefore excluded from the applicable law. Moreover, reflections on the legal liability of plagiarism practices which are hundreds of years old may be entirely theoretical because the persons involved have deceased and therefore cannot be judged. Additionally, the status of the copyright at the time of the plagiarized work should be taken into account. It is known that in antiquity, copyright was not regulated by legislation, that is why anticipatory plagiarism created in this period cannot have any legal consequences and the plagiarist of the anticipated text cannot be legally liable for this conduct. Plagiarism activities mean copying or paraphrasing a copyrighted work or part thereof without the express consent of the copyright holder. The author who anticipates a work that does not yet exist at the time does not commit plagiarism under the current conception of copyright in the sense of copyright infringement (related to a historically younger work), because the work has not been created yet, so it is not protected by copyright.

If many literary historians point to the fact that there is a literary connection between a number of authors writing in various eras and in different parts of the world, without being able to influence each other, but their works are almost identical, an organized technique of anticipatory plagiarism may be then considered. In this case, the moral and legal liability for the plagiarism practices is even more difficult to prove and clarify. The fact confirms the Bayard's proposition that the course of the literary world is cyclic and one literary phenomenon or motive may be reflected in works of various authors in certain cycles. The specific reason is unknown. The author hereof believes that it happens under the influence of unwritten laws with the aim to reinstate and restore themes which are fundamental for the society. The subjects of anticipatory plagiarism are usually high-quality literary works, which may serve as a confirmation of the hypothesis. A detailed literary-historical research has to be performed to prove the hypothesis, which may be the subject of a separate scientific research project.

## **ANTICIPATORY PLAGIARISM AS A CONTROVERSIAL PHENOMENON**

The concept of anticipatory plagiarism has both supporters and opponents. The supporters perform a thorough analysis in the scope of their professional orientation in the fields of literary theory, literary history, literary interpretation, psychoanalysis, philosophy and cultural studies, while Bayard transforms the concept into a better definable form and creates an umbrella concept. However, it is still not sufficient to reach a common consensus within the scientific community. The opponents of this extraordinary concept criticize that the theory cannot be supported by empirical evidence. Many of them consider it mistaken. Vernay, for example, described the Bayard's book *Le plagiat par anticipation* as absurd and very funny. [14] By contrast, psychoanalytic philosopher Slavoj Žižek considers the work wonderful. Žižek provides an equally interesting insight into the issue of anticipatory plagiarism, which is also perceived from an unconventional perspective. Žižek also concludes that the existence of anticipatory plagiarism is possible, but he examines the concept using a stricter methodology. Žižek follows the Bayard's dissonance line and develops it into a more sophisticated context. What is scientifically beneficial are the Žižek's objections to insufficiently practiced methodology in the Bayard's work, which may lead to a re-evaluation of certain hypotheses. [15] Žižek's insights, however, points to a number of other related literary works which show signs of anticipatory plagiarism, which may also be perceived as an indirect confirmation of its existence. Žižek sends a peaceful message to the opponents that they should not dismiss the concept only for its provocative tone because it at least contains a certain hidden teleology in which the presence refers to the anticipated future. On the other hand, he believes that the idea is deeply anti-teleological and materialistic and the only thing missing is the key to the concept of retroactivity. [16]

## CONCLUSION

Literary plagiarism is a phenomenon that has been accompanying mankind from time immemorial. The issue of literary plagiarism is very controversial in its nature. On one hand, the imitation of already existing works triggers further creativity, on the other hand, this activity often balances on the edge of the law since it involves unauthorized interference in copyright. The idea of the complete elimination of piracy is utopian. Plagiarism has been rooted deeply in society for centuries. The phenomenon of plagiarism is even more controversial due to the fact that it is possible to plagiarize a historically newer work which does not exist at the given time under the influence of literary vibrations. The plagiarist anticipates the work and draws from the future. The fact that literary works which have been created centuries apart could be unwittingly linked with the same writing style, without the possibility to be influenced by a later author who has not been born yet at the time, leads to a re-evaluation of the concept of literary history and the phenomenon of plagiarism. Examining the world of literature from the chronological historical perspective seems to be obsolete. What makes the complexity even greater is the multidimensional nature of the phenomenon which proves the immortality of this conduct. The phenomenon of plagiarism is kept alive by two independent forces – immoral practices of plagiarists are symbolically sanctified by the silent consent of the users (readers) who are indifferent to the origin of the work. The attractiveness of a literary work is more important to readers than the fact whether it is attributed to the real author or a plagiarist. In such situations, the applicability of the standards of copyright and unfair competition in the environment of a social movement against the moral standing of copyright is rather problematic. This proves that plagiarism a serious societal problem and the path to its solution is very complex.

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# **CORONAVIRUS REPORTING AND FAKE NEWS ABOUT THE PANDEMIC IN SLOVAK ONLINE MEDIA**

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## **ABSTRACT**

Many people use the digital space as a primary source of information, which has undoubtedly been reinforced by the global pandemic caused by the coronavirus COVID-19. Restrictive measures to prevent the spread of the coronavirus and the subsequent lockdown have caused people to limit their social contacts and to work and learn from their homes. News disseminated in the online space, on the web, social media or social networks, became their primary sources of information, not only about the coronavirus, but also about social events at home and abroad. The online media and social networks have been flooded with information on the subject of the coronavirus, which has also been exploited by the spreaders of fake news. During the pandemic, we witnessed a massive wave of disinformation, and the identification of fake news and hoaxes by recipients became a serious problem. The aim of this paper is to use the theoretical background and research results to identify differences in reporting on the topic of coronavirus in the typologically different online media Denník N and Zem & Vek. We focused on the form in which the selected websites report on the topic of coronavirus and whether there is a suspicion of the presence of false information and hoaxes in the published journalistic speeches.

**Keywords:** *fake news, hoax, COVID-19 pandemic, online news, online portal*

## **INTRODUCTION**

We live in an era of a digital revolution, characterized by easy access to both the acquisition and dissemination of information in a global context. In addition to the large media houses, alternative or opposition media are trying to gain the attention of the audience. While, on the one hand, there is constitutionally guaranteed freedom of expression and the right to information in developed democracies, in today's primarily online media and social networks, we are faced with a phenomenon that threatens fundamental human rights and freedoms [1]. This is the dissemination of fake news, disinformation, hoaxes and hate speech, particularly in the environment of the Internet and social networks. The emergence of the global digital space is shaping the world of information and bringing with it numerous challenges, but also risks. In September 2019, twenty countries around the world endorsed an initiative by Reporters Without Borders

to stop the spread of fake news and to make internet providers more accountable in terms of content credibility and information plurality, with the aim of avoiding information chaos. In the fight against fake news, the spread of disinformation and propaganda on social networks, Twitter and Facebook have also joined the fight by shutting down thousands of fake accounts in China, Egypt and the United Arab Emirates. The authorities of the European Union and its Member States, non-governmental organisations and other actors are also taking their own initiatives and actions.

Whereas in the past the world was influenced by the industrial revolution, we are now witnessing an information revolution. A specific feature of today's times is the ubiquitous information overload [2]. This makes it easy for the recipients of news to obtain information, but difficult for them to filter it, interpret it and draw conclusions from it. This phenomenon is reinforced by the use of multimedia devices, especially smartphones and tablets with internet connection, which allow the previously passive recipient to engage in the creation and publication of media content. The passive recipient has thus become an active recipient.

## **FAKE NEWS, HOAXES AND JOURNALISM**

When the phrase 'fake news' was declared the word of the year in 2017 by the *Collins English Dictionary*, it referred primarily to the public statements and statuses of the US ex-president Donald Trump, who used the term with particular popularity and very frequently in his tweets [3]. Although we were already familiar with the term fake news, due to Trump's efforts to label unfavourable, usually critical reactions to his statuses with fake news, as well as the very presence of fake news and half-truths in his presidential campaign, the phrase was particularly resonant in the media space and in the public sphere. According to the *Collins English Dictionary*, use of the phrase fake news in the media has increased by more than 365% since 2016. However, it cannot be said to have disappeared from contemporary public discourse. It is no less frequently heard from the lips of politicians and is also heard in statements by national and supranational institutions or non-profit organisations.

According to T. Škarba, fake news is published information that mimics news and other journalistic formats. Fake news is deliberately and demonstrably untrue and is intended to manipulate, mislead, gain financial profit or entertain the recipient. Fake news does not include unintentional reporting errors that have been published as a result of human error [4]. Fake news, like hoaxes, also focuses extensively on health topics. Their aim is usually to sell alternative medicine products or to gain advertising revenue. In order to reduce the income of the end-users of the benefits of the disinformation scene, an initiative [www.konspiratori.sk](http://www.konspiratori.sk) was set up in Slovakia, which has created a list of websites with disinformation and questionable content. It warns advertisers to be careful where their advertising is displayed, not to support the creation of misinformation with their funding and not to associate their brand with questionable content.

When the SARS-CoV-2 coronavirus pandemic hit the world in 2020, society and media discourse also began to talk about a pandemic of misinformation, hoaxes, half-truths and propaganda. The Dutch media theorist M. Deuze stated: “It is perhaps also not surprising, from this point of view, that most of the debates and discussions about the pandemic do not just concern the virus and its impact, but focus especially on the roles of expert information provision, news coverage, government communications, and social media. It is clear that the coronavirus pandemic is a mediatized event as much as it is a virus that infects millions of people around the world.” [5] On the other hand, as J. Višňovský and J. Radošinská stated, “the moment when the COVID-19 pandemic became a global problem can be seen as a breaking point – suddenly, journalists and other media professionals realised it was necessary to seek new heroes and create new types of stories; all that while trying to process what was happening in a comprehensible manner. Of course, their not-so-professional counterparts, while still making their profit by spreading fake news and disinformation, started to explore the quickly worsening situation in accordance with their own agendas. As a result, a COVID-19 'infodemic' was born.” [6].

One of the first fake news stories regarding the coronavirus that spread on social media was that wearing protective gear such as face shields and respirators slowed reflexes and dulled the senses due to inhaling carbon dioxide. Another unconfirmed piece of information was that the virus was artificially created in laboratories. The United States blamed China for its escape from the laboratories, while Russian and Iranian officials in turn blamed the Americans. Other hoaxes have claimed that the coronavirus is spread by 5G networks and killed by alcohol, or that testing is a covert method of creating a gateway of infection to the brain, or that the coronavirus does not exist at all. There are hundreds of misinformation and hoaxes about the coronavirus. Similarly, the development of the coronavirus vaccine and its application has triggered another wave of misinformation, spread primarily through social networks, which has resulted in a lower uptake of vaccination in some countries. Back in January 2021, the Ministry of Health of the Slovak Republic set up a web portal [www.slovenskoproticovidu.sk](http://www.slovenskoproticovidu.sk) to provide information on vaccination, vaccines, their benefits, but also possible side effects. The website also features personalities who have decided to support the information campaign with the central theme “vaccine is freedom” [7]. Publicly known authorities, including the President of the Slovak Republic, Zuzana Čaputová, are taking part in the campaign. The Ministry of Health of the Slovak Republic has also joined the fight against vaccination-related hoaxes through its Facebook account, which has more than 185 000 followers to date.

Social media, especially social networks, are an extremely effective means of spreading disinformation and hoaxes and a prerequisite for their further spread [8]. There are several reasons for this. Social networks are an extremely popular medium for the young and middle generation, who use them not only as a tool for disseminating information, but also as an information source. The level of critical thinking and the willingness to verify information from multiple sources are

relatively low, which makes the recipient prone to trust misinformation and conspiracies and spread them – either consciously or unconsciously further. In his research, P. Krajčovič focused on whether Slovak Internet users had encountered hoaxes related to COVID-19, whether they were able to identify these messages and how they affected them. The results showed that almost 80% of the 429 respondents had encountered fake news about the coronavirus. According to the survey, only half of the respondents (52%) were able to detect the hoaxes, 38% of the respondents did not know that they were reading a fake news report and 10% of the respondents did not know that they were reading a hoax at all. They only found out later. The survey also showed that almost half of the respondents (47%) were concerned after reading the hoax. Based on the results of the survey, we can assess that Internet users have a problem deciphering fake news in the digital space, and we expect this situation to get worse [9].

During the pandemic, interest in online and television news increased; on the other hand, the weaknesses of media organizations were revealed during this time. For example, incompetence and unpreparedness in reporting on medical issues due to the absence of specialised reporters, as well as the publication of misinformation and hoaxes, which have contributed to a decline in the credibility of the news media as a whole. According to the Reuters Institute – Digital News Report 2020 survey, 28% of respondents in Slovakia trust the news, with trust falling by 5% year-on-year. This was not only the case in Slovakia, but also in other European countries [10].

## GOALS AND METHODOLOGY

Based on theoretical background and empirical findings, the aim of the research was to investigate differences in reporting on coronavirus in selected online media. We were interested in the extent to which and in what way the topic of COVID-19 was reported in the online media *www.dennikn.sk* compared to the website *www.zemavek.sk* in the selected time period.

The daily *Denník N* was established in 2014. Its establishment was preceded by the departure of disgruntled journalists from the daily *SME* following the entry of the financial group Penta into the ownership structure of the publishing house Petit Press, a. s., which also publishes the national daily *SME*. and of which the portal *www.dennikn.sk* was visited by 1,763,131 real users in March 2021 [11].

*Zem & Vek* is a Slovak magazine published at monthly intervals. It was founded in 2013 under the publishing house Sofian s. r. o. and the editor-in-chief is Tibor Rostás. Both the magazine and the portal, together with its editor-in-chief, have been repeatedly criticised for spreading conspiracy theories, Russian propaganda, factual misrepresentation, unfair use of sources, as well as subliminal incitement to hatred against minorities. The portal *www.konspiratori.sk* included the online version of the *Zem & Vek* magazine in the ranking of sites with questionable content, with *www.zemavek.sk* ranking thirteenth [12]. It is therefore



not a traditional news portal, but we dare to assume that there is an awareness of it in society and that it has a spectrum of readers.

We have chosen the time period of February 1, 2021 to February 28, 2021 for our research. This is an available purposive sample. The two media outlets studied published 363 journalistic speeches related to the topic of COVID-19 during this interval. The portal *www.dennikn.sk* published 218 journalistic reports during this period, while the online media outlet *www.zemavek.sk* published 145 journalistic reports related to the topic of coronavirus.

We analyzed the published journalistic reports of the selected media in the specified time period through quantitative-qualitative content analysis. We recorded the following analytical categories:

- coronavirus-related press coverage and numbers,
- authorship of the journalistic report,
- the length of the headline (number of words) and the length of the journalistic report (number of words),
- the tone of the journalist's report - positive, negative, neutral,
- the presence of information graphics and audiovisual material on the websites studied,
- and the presence of fake news, misinformation or hoaxes.

We subjected all articles published during the period under study to the C.R.A.A.P test. We focused on five categories – timeliness, reliability, authority, intention and accuracy. The Czech portal for verifying facts and detecting fake news considers the “C.R.A.A.P test” as one of the simplest tools for verifying the objectivity of information [13].

## RESULTS

Based on the results of our research, we can conclude that the news website *www.dennikn.sk* takes a more objective approach to information about the coronavirus pandemic and provides a greater amount of sources and information than the digital website *www.zemavek.sk*. The *Denník N* portal published more stories than *www.zemavek.sk* in the period under study. The outputs of *www.dennikn.sk* were also more credible because of the fact that, out of 218 published articles, only 22 outputs were recorded in which the author of the journalist's report was not mentioned. Of these 22 reports, 21 were published in the *Minute by Minute* section of the website, where the portal publishes short agency reports (TASR, SITA, CTK, AP). One report cited the US portal *www.washingtonpost.com* as the source. A considerably bigger problem regarding the attribution of journalistic reports was observed in the case of the digital website *www.zemavek.sk*. Out of 145 journalistic speeches, as many as 77 had no attribution, which is almost 50%.

Regarding the length of headlines, *www.dennikn.sk* had headlines with an average length of 14.5 words and *www.zemavek.sk* published headlines with an average length of 10.4 words in the period under review. Thus, *Denník N* published longer headlines. The same was the case for the total length of the published journalistic reports. The average length of all published reports from the news website *www.dennikn.sk* was 1,753 words, while the average length of the journalistic reports from the digital website *www.zemavek.sk* was 672 words. Thus, the daily *Denník N* published more journalistic reports in terms of scope than the *www.zemavek.sk* website.

In the research, we also focused on whether the author of the journalistic report focused on publishing positive, neutral, or negative information (the perception of the journalistic output) in relation to the topic of coronavirus. After evaluating the results, we found that the news website *www.dennikn.sk* published 100 journalistic reports with negative information related to the coronavirus, 79 with neutral information, and in 39 cases, the journalistic report was an attempt to deliver a positive message related to the topic of the coronavirus. The proportion of negative news out of the total was 46%. In the case of the website *www.zemavek.sk*, we found that out of a total of 145 journalistic reports, 99 were negative, 38 had neutral information, and only 8 were news stories that aimed to bring positive information on the topic of COVID-19. The proportion of negative news stories out of the total number of published stories was 68%.

Web publishing is characterised by the visualisation of information, in various forms. Whether it is photographs, illustrations, statistics or interactive information graphics. Audiovisual material and podcasts are no exception. In the case of *www.dennikn.sk*, one of the above-mentioned forms of graphical representation of information appeared in almost all the outputs examined. Only one journalistic report was published without any visual or audiovisual material. 210 journalistic outputs included a photograph, 65 included a graph and 6 pieces in the period under review included a table or statistics. Audiovisual material was included in 48 journalistic reports out of a total of 218, with 47 of the reports accompanied by a video and in one case the journalistic report was accompanied by a podcast. The digital website *www.zemavek.sk* published all the journalistic reports in the period under review, together with visual material, while out of 145 contributions, 143 included a photograph, in 6 cases a graph and only in one case did they use visual material in the form of a table. 15 journalistic reports were accompanied by a video. The podcast was not in any of the journalistic reports.

We subjected journalistic reports in the time period under study to the C.R.A.A.P test, which is one of the tools for identifying fake news. Based on the results, we found that the news website *www.dennikn.sk* erred in 74 cases out of a total of 218. These were journalistic reports where we found a problem in at least one of the five categories examined, which were timeliness, reliability, authority, intent, and accuracy. We did not find any doubt in the category of timeliness, as the media published up-to-date information regarding the

coronavirus pandemic in Slovakia and abroad. In 22 cases, there was a fault in the reliability category, with a lack of balance and plurality of opinion in the journalistic statements. In 22 cases, the stories did not mention the author. In 34 cases, we noted a problem in the category of intention, with the publication of a subjective opinion in the news report. In 10 journalistic reports we found doubt in the category of accuracy, when emotions appeared in the stories. We also subjected the digital website *www.zemavek.sk* to the same C.R.A.A.P test. According to the results, we can conclude that we found flaws in the different categories examined in a total of 140 journalistic reports out of a total of 145. In one case, up-to-date information was not published (it should be noted, however, that *www.zemavek.sk* is not a standard news website), in 82 journalistic reports we found doubts in the reliability category, while the articles lacked balance and plurality of opinion. In 77 cases, the posts did not include the name of the author. We found the highest level of misconduct in the category of intention, with 94 journalistic reports containing subjective opinions. In 90 cases, in the case of the *www.zemavek.sk* website, we registered a problem in the attribute of accuracy, when the contributions contained emotional lexis and grammatical errors. During the period under study, the digital website *www.zemavek.sk* published 11 journalistic reports in the Czech language.

## CONCLUSION

The results of the research showed that the media studied approached reporting on the topic of coronavirus differently. The portal *www.dennikn.sk* published a larger number of journalistic reports with a larger scope and longer headlines than the website *www.zemavek.sk*. At the same time, *Denník N*'s outputs included more photographs, information graphics and audiovisual material than the texts published on *www.zemavek.sk*. As regards the evaluation of the C.R.A.A.P test, it can be concluded that the threat of fake news and misinformation is significantly higher in the outputs of the *www.zemavek.sk* portal than those of the *www.dennikn.sk* website. The news website *Denník N*, as one of many digital media outlets, reported on the ongoing COVID-19 pandemic on a daily basis. It provided its recipients with news and journalism through agency reports, extended reports, commentaries, interviews and reports related to the coronavirus pandemic, while making longer journalistic reports available to readers only upon payment of a subscription fee. At the end of the day, a comprehensive journalistic speech emerged from the *Minute by Minute* service.

The topic of the coronavirus is also covered by the typologically different digital website *www.zemavek.sk*, which published significantly fewer journalistic reports compared to the news website *Denník N*. Based on the results of our research, we have to conclude that in most cases the digital site listed *Zem & Vek* as the author and we do not know the author's exact identity. Our analysis also revealed that there is a suspicion of fake information in the case of published articles during the period under study. Doubts about the veracity of the information in the case of this digital website are also held by the portal

*www.konspiratori.sk*, other media, institutions, civil society associations and NGOs.

After the outbreak of the COVID-19 pandemic, we were forced to isolate ourselves in our own homes and limit our contacts, while education, work and communication with loved ones moved online. Many people use social networks and digital media as their main source of information, where the threat of false information spreading is increasing. During the COVID-19 pandemic, we encountered a massive wave of misinformation, which in some cases can be very dangerous. With the increasing number of fake news and the more sophisticated methods used by those spreading disinformation, the average recipient has difficulty navigating the information and discerning whether it is fake news or not [14].

It is essential that Internet users are aware of the risk of fake news in the digital space and seek out verified sources of information for important topics. As stated by A. Kačincová Predmerská, in the case of the COVID-19 pandemic, we can consider the Ministry of Health of the Slovak Republic, the Office of Public Health of the Slovak Republic, the portal *www.corona.gov.sk* as relevant sources, or we can trust scientists, doctors and state institutions [15]. Additionally, we should obtain information from reputable media that we believe are drawing on relevant sources. At the same time, it is essential that Internet users develop critical thinking skills and are able to detect fake news, or at least to assess where fake news, disinformation or hoaxes are suspected.

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# ICONOGRAPHIC DEPICTION AND LITERARY PORTRAYING IN BERNARD BERENSON'S DIARY AND EPISTOLARY WRITING

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## ABSTRACT

The paper focuses on the interlacement of literary and iconographic elements by displaying an innovatory philological and stylistic approach, from a comparative perspective, in thematizing multilingual translational and adaptive aspects, ranging across Bernard Berenson's diaristic and epistolary corpus, in conjunction with his works on Italian visual culture. This interweaving gives occasion to the elaboration of multilinguistic textual influences and their verbo-visual artistic representations deduced from his innovative interpretative readings in the domain of world literature in modern times. Such analysis of the discourse of theoretical and literary nature, and of the pictoricity, refers to Bernard Berenson's multilingual considerations about canonical authors in English, Italian, French, German language, belonging to the Neoclassical and Romantic period, as well as to the contemporary era, as conceptualized in his autobiographical works, in correlation with his writings on Italian figurative art. The scope of this presentation is to discern and articulate Berenson's aesthetic ideas evoking literary and artistic modernity, that are infused with crucial notions of translational theory and conveyed through the methodology of close reading and comprising at the same time, in an omnicomprehensive manner, a plurality of tendencies intrinsic to social paradigms of cultural studies. Unexplored premises reflecting Berenson's vision of Italian culture, most notably of a visual stamp, will be analyzed through author's understandings of such adaptive translations or volumes to be subsequently translated in Italian, and through their intertwined intertextual applications, significantly contributing to further critical and hermeneutic reception thereof. Particular attention is drawn to its instancing in the field of Romantic literary production (Emerson, Byron), originally underscoring the specificities of each literary genre and expressive mode, of the narrative, lyric or theatrical nature, as well as concomitantly involving parallel notions as adapted variants within visual arts, and in such a way expressing theoretical views pertaining to Italian artworks too. Other analogous elements relevant to literary expression in the most varied cultural sectors such as philosophy, music, civilisational history (Goethe, Hegel, Kant, Wagner, Chateaubriand, Rousseau, Mme de Staël, Taine) are furnished, as well as the examples of the resonances of non-western cultures, with the objective of exploring the effect among readership bringing also to the renewal of Italian tradition.

**Keywords:** *Bernard Berenson, visual figurativity, diaries, epistolary writing, interdisciplinarity*

## INTRODUCTION

Throughout Bernard Berenson's personal writings of a diaristic and epistolary stamp, of thematically arborescent, interdisciplinary nature, emerges his perception and understanding of literary and interartistic modernity, in correlation with his practice of contemplation of the paintings and other artworks, as well as his consecutive writings on Italian figurative art, made a topic of this paper. So it will also be shown how his artistic critique is reminiscent of his literary and cultural readings emerging from his personal writings, parallel to art criticism, in a double movement.

The purpose of the present paper is therefore to furnish a critical argumentation and develop a theoretical articulation thereof, showing the modalities according to which the two arts, figurative and literary, remain intimately correlated in Berenson's interpretation of modernity. It is through the visual arts that he seeks to reach the essence of literature since he considers poetry to be the initial, underlying motivation for his studies in iconography [15].

Introductorily, let me observe that iconographic phenomena and authorial impressions are thus narrated with internal poeticity and such speculative and emotional resonance. Berenson's poetical instinct is maintained even when his style is predominantly expository, like in his artistic narrative texts wherein he recreates the atmosphere in which the artist moves and operates, by interlacing art-historical aspects with psychological elements, and establishing an essayistical verve.

## RESULT

Universal cognition of things becomes associated with conversational tendency and the writing aptitude [15]. To write for Berenson is an exercise similar to that of the trampoline, organizing and coordinating movements of individual thought [15], like can be read in *Colloqui con Berenson* (Talks with Berenson), that I am presenting you in my translation, "writing has this importance, that it makes ideas clear, ordines them into words, into propositions" [15]. This is even more so for journal entries [5] [6] [11], and epistolary writing, allowing him to highlight his inner necessities, beliefs, and understandings that are correlated with artistry.

Berenson, whose writing is occasionally anecdotal, for the immediacy of the discourse, arrives to an orchestrated sound of his voice also in his personal writings, as a result of cultural considerations, and that involves the surrounding atmosphere. As an epistolographer, by giving attention to his interlocutors, he creates copious collections of letters, as documented for instance in the volumes *The Berenson Archive*. *An Inventory of Correspondence* [13], and *The Selected Letters of Bernard Berenson* [14].



Taking the word as a form of life, explicating emotionality, makes his own understanding of the role of the critic as such as to illuminate [15]. The study of epistolary production is conducted in the present research with the methodology and aims similar to those set up for a series of his diary manuscripts, the latter texts ranging from 1881 to 1958, with the aim of elucidating their contentistic and formal characteristics, also analyzing the typical schemes and common traits, as well as the procedures that lead to the assumption of the literary tone. In such a light, my detailed study of Berenson's non-fiction which directly has literature as its object, highlighting and elaborating the parallels with the domain of figurative arts drawn by the author, has the aim to considerably deepen the knowledge about it.

The multiple facets and aspects will be addressed by referring immediately not only to the materials of the Berenson Library but also to the documentation available in the archive of the Fund "Bernard and Mary Berenson. The Writings", which can be found at I Tatti, Florence, Italy – Harvard University Center for Italian Renaissance Studies.

Concomitantly, in the present paper, the attention is placed on a multitude of Berenson's publicistic texts, applying a methodological approach similar to that used for diaristic and epistolary literature, in order to also draw generalizing conclusions valid for all of his writings on literature, besides arriving to philological insights specific to a particular genre, as well as to express views concerning the intertextual interpretations of others of his work. In those genres of literature directly intrinsic to the aspects of reality, Berenson further comments in a literary vein on artistic creations. He deliberately undertakes therein interart studies of literature and visuality, because certain pieces of literature are considered most idoneous for explications of descriptive characteristics of artworks, as well as aesthetic and spiritual emotionality implied by them, but also his own intentionality in that regard.

Symbolic tropology of poetry, predilected by the author among literary genres, is therefore particularly significant [15]. It is through a suggestion of the written word, with the means of poetic transfiguration and comparativism, that visual arts can be most thoroughly explained, according to Berenson. Since it is most complexly articulated, literary expression can be of utmost help in understanding intelligibly, as well as emotionally, the phenomenal universe, in connection with works of art, also because the sensitive aspect is for Berenson connected with knowledge. Exemplarily, such intent is displayed in the title of his book *Seeing and Knowing* [7].

In Berenson's optics, artcritical assertions find therefore their completeness in the literary field. While commenting on painters' artistic genius and attitudes implied therein, especially in figure-painting, instead of formal characteristics he uses the expression 'feeling for tactile values': "I prefer to the word 'form' to use the expression 'tactile values', for form in the figure arts gives us pleasure because

it has extracted and presented to us the corporeal and structural significance of objects more quickly and more completely than we – unless, indeed, we also be great artists, or see as they see – could have grasped them by ourselves" [4].

At the same time, tactile values, considered essential qualities in the figurative arts, are conveyed through stories, which is to say that they are rendered in such a way because they consist in narrative patterns, just like literary values of stylistic, but also speculative nature, include a worldview: "[...] and no figure-painting is real, – has a value of its own apart from the story it has to tell, the ideal it has to present, – unless it conveys ideated sensations of touch and movement" [4]. And that is also a reason through which can be explained Berenson's predilection for representational visual arts. In an analogue spirit he notes in the same volume: "Instead of painting indiscriminately everything that appeals to him, the great artist, as if with deliberate intention, selects from among the mass of visual impressions only those elements that combine to produce a picture in which each part of the design conveys tactile values, communicates movement, and uplifts with space composition. Not every figure is suited for conveying tactile values, not every attitude is fitted for communicating movement, and not every space is uplifting" [3].

Berenson, who in his connoisseurship also dealt with the arts of drawing and sculpture, expanding areas of his interest in a global perspective to resonances of non-western cultures such as the oriental context [15], takes as a theoretical premise, connecting two artistic fields of visibility and literature, the fact that they contain within their syntax an idea of narrativity, which is due to their representational nature. Such representations, respectively of iconographic and literary nature, can be interpreted as a narrative because they are based on the figural aspect.

The aesthetic principle is laid as a foundation in Berenson's account. His depiction in artistic manner reflects at times modernistic epistemological standpoints also due to the fact that he expresses aestheticized views governing his approach [12], wherein he remains more romantically oriented. Noticeable aestheticism can therefore also be perceived as a modernist view.

Besides Berenson's theoretical articulation and critical-publicistic discourse nowadays associable with modernist studies and ascribable to such ideational aesthetic aura, emerges his strong penchant for Romanticism. Berenson holds a particular interest towards the horizon of Romantic poeticity, admiring the great British and American poets of the early nineteenth century in a series of his writings, such as John Keats, Percy Bysshe Shelley, William Wordsworth, George Gordon Byron, Ralph Waldo Emerson. Among them he considers the authors of German provenance to be anticipatory in regard to English Romanticism, as interpreted in a diary remark [10]. Displaying a knowledgeable attitude on these topics, he comments on interartistic climate of Neoclassicism and Pre-Romanticism: "the glorious galaxy of poets, philosophers, musicians, men of

learning, men of science, men of creative enterprise that Germany has produced" (Schiller, Hölderlin, Hegel, Mozart, Haydn, Wagner etc.) [6].

In such a sense, he considers Keats' ode *To Autumn* (1820) to be maybe the most beautiful poem of all time, and a marvelous example of 'significant detail'. In more general terms, the latter poetical tool makes part most recurrently of his critical usage too. It is a value that is no longer auditory and semantic, but linear, chromatic in the sense of tactile, and speculative-emotional [15]. While analyzing the poetic language of Romantic lyricism and its figurative reverberations, he finds that these reflections are rarely asynchronously transmitted in time. Keats' poems and atmosphere of the Romanticism are considered synecdochal particularly to the figurative painting of Jacopo Tintoretto from the previous Renaissance-Mannerist period [15].

Berenson here alludes to intervisual and intertextual polysemic context instaurated by Tintoretto's allegorical artistic cycle dedicated to four meteorological Seasons (ca. 1575-1585), and more specifically to the artwork in which the motif of Autumn is personified, on the traces of Giorgio Vasari who depicted alike, at such intersection. In such a way Berenson re-elaborates also in the literary light his preference for Venetian painters, considering Tintoretto's inventiveness and pictorial ingenuity to be "poetically interpretative", and adding about him to be, again in his own words, "not only as the most pictural but as the most classical" in the article published under the title *From "A Venetian Diary"* [8].

From Berenson's perspective, the literature serves as a mediator consecrating values. On this resemblance he further writes, for example, the following: "It happens that the English poets afford striking parallels to the Italian painters. [...] But centuries had to elapse before emotions so intense as those Correggio felt found expression in literature – in Shelley when he is at his best, and in Keats when he is perfect" [2].

Concomitantly, hermeneutic ontological element permeates Berenson's aesthetic considerations. A reader of Kant and Nietzsche in his autobiographical writings, Berenson however not rarely remains personal, subjective in his thoughts, considering there is an additional, supplementary element in knowledge or interpretation with respect to objectivity, like can be noted in his reflections in the text *From "A Roman Diary"* [9].

Berenson is guided by the aim to better understand as well, as the epitome of French Pre-Romanticist and Romanticist spirit but also of its dichotomous Positivist current, the works of François-René de Chateaubriand, Jean Jacques Rousseau, Mme de Staël, Hippolyte Taine and others.

Constant cross-cultural comparison is present within Berenson's reflection on the arts of visual representation. From a theoretical-critical perspective, he also

expresses himself on the translations that, according to his belief, can sometimes manage to surpass the original [6].

## CONCLUSION

Two types of artistic expression, that of visual and that of literary nature are initially united at the structural level by the evocative power of mythical elements as understood by Berenson. Literature instaures mythical components since the figures transcend into myth, whereas these mythical structures are narratively represented more plastically in the realm of visual arts, with figurations transformed into images, which might have constituted originally the reason of his interest. He also goes on to claim on the analogue premises that literary and humanistic studies can therefore prepare for an understanding of painting. And through the study of mythical in the paintings can also be perceived the essence of the poetry, the first aim he aspired to. Mythology understood in an aesthetic and historical sense constitute as well a commonplace of English Romanticism.

To conclude, Berenson's interest to thematize art is a civilization making and producing act. According to the author, the vital value of the art consists in its life-enhancing character, in an intellectual pursuit that prior to him occupied, exemplarily, Johann Wolfgang von Goethe [1]. He thus considers his own methodology to be also psychological and empirical, as thematized in a diary note of his volume *Rumor and Reflection* [6]. Through autobiographical diaristic stance, guided by his narrative instinct and stylistic know-how, Berenson frequently expresses transtemporal ideas. Diaristic production and collections of letters as a form of experimental literature that allows, due to the factional component, openness, and major permeability to reality, is, therefore, a fundamental literary aspect constituting modernity of Berenson's writings and viewpoints.

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# IMPACT OF THE COVID-19 PANDEMIC ON REGIONAL AND LOCAL MEDIA – CASE STUDY

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## ABSTRACT

COVID-19 pandemic, and its several waves with different intensity, and also stronger or weaker restrictions, has influenced the everyday life of people all around the world. Pandemic hit media indeed. People needed the newest information about the evolution of the SARS-CoV-2 virus, which is the virus that causes COVID-19. Organisations, events and businesses were stopped or closed, so media content was directed to outbreak info. And if organisations, events and businesses were stopped, creators, event managers and business makers didn't even need advertising or other propagation of their activities. It wasn't happening on a global scale only, but also in the local. So the local and regional media, financially dependent on advertising, was hardly hit by the outage of this type of income. This paper explores how COVID-19 pandemic impacted the functioning of smaller local and regional media. The paper looks at the content of regional media, impacted by the pandemic, at the amount of advertising and covers the other changes, which the coronavirus outbreak made.

**Keywords:** *advertising, business model, COVID-19 pandemic, local and regional media*

## INTRODUCTION

When in January 2020 the first information about the outbreak of a new coronavirus in China began to reach Slovakia, at that time official institutions reported only a few hundred cases of infection. Initial information was initially briefly reported by the Slovak national media, which, however, devoted more and more space to the topic day by day. The reasons for this were the increasing number of infected people and the spread of the virus beyond the borders of both China and Asia. February 2020 was the month when all Slovak national media were already reporting on the epidemic, later reclassified by the World Health Organisation as a pandemic. Regional media gradually began to cover the new coronavirus at a time when the first suspicions were being raised in the Slovak regions and laboratories were testing potentially infected people. Intensive coverage of the coronavirus began in early March 2020, due to the nationwide anti-pandemic measures, which, logically, affected the population of each region.

It is as if the world stopped and, from one day to the next, the topics that originally formed the content of the local periodical press or broadcasts simply disappeared.

The coronavirus pandemic has affected different media in different ways. While the recipients noticed it primarily on the thematic level, when it began to fill the front pages of newspapers and dominate radio and television coverage, not excluding online, as early as the end of March 2020, F. Struhárik, in his article, drew attention to other impacts of the pandemic on the print media and the print journalism industry. He reported that Penta Publishing would lay off roughly a quarter of the editorial staff of the weekly *Trend*, which switched to a bi-weekly frequency. The coronavirus also caused problems with the distribution of print titles. *Hospodárske noviny* had to change its format and move its printing from Olomouc, Czech Republic, to Bratislava in a short time. Similar, perhaps even more radical, interventions in the functioning of editorial offices came from abroad. In Ukraine, national daily newspapers temporarily ceased publication, and journalists in the US and the UK warned that many local media outlets would not survive, of these especially the free ones that depend on advertising [1]. On the other hand, television viewership and web traffic increased radically at the time of the pandemic, both nationally and globally, as declared by several studies [2].

## **REGIONAL AND LOCAL MEDIA, THEIR POSITION AND THEIR FUNCTIONS IN THE MEDIA SYSTEM**

The role of the periodical press and other news formats is primarily to report on current events in the context of the focus of the product. In particular, the periodical press is conceived in the form of a certain coexistence of journalistic and non-journalistic expressions, of which the journalistic ones make up the bulk of the content of a given medium. This is also true for the regional and local press, which, however, works with certain specificities. By default, the regional or local press covers all topics, i.e. it reports on all areas that are wholly or partially relevant to a given region, which is why the concept of such press is very diverse and varied. A. Tušer divides regional and local press in terms of the proximity of the event being reported. By local media he means municipal or city media, by regional media he means those that report on a district, region or specific area. He also says that the local media in particular, and only after that the regional media, has the ability to integrate, orient and specifically inform the recipient. With regional and local media, the integrative function of the media is strongly manifested, which is due to the philosophy of the regional and local area. This is because everyday life is felt by the citizen primarily on the regional and local area, while on the national level he can judge the results rather virtually [3]. The media, and thus also the periodical press in the Slovak Republic, is legally covered by the Ministry of Culture of the Slovak Republic, which also maintains a publicly accessible register of the periodical press. According to its territorial jurisdiction, the Ministry divides the press into national, regional and outside the territory of the Slovak Republic. There are 642 titles registered in Slovakia, of which 561 are published in the Slovak language. Two regional daily newspapers are registered



in the Slovak language – *Prešovský večerník* and *Korzár*. There are 24 regional weekly newspapers, but these include privately-owned newspapers as well as newspapers published by local authorities and advertising newspapers. There are 19 bi-weeklies and 97 monthly magazines, but only 16 of these are either advertising titles or privately owned newspapers. Regional newspapers with a lower frequency are usually published by local governments, which do not sell the resulting periodicals but distribute them free of charge to the population. There are 42 bi-monthly newspapers under the territorial jurisdiction of the regional authorities, 120 quarterly newspapers, 56 titles published twice a year, and 201 titles registered as being published with a so-called other periodicity. There are 30 regional television broadcasters registered in the Slovak Republic that broadcast digitally. There are 83 registered local digital broadcasters. Four multi-regional broadcasters broadcast via satellite, 5 broadcast regionally via cable distribution systems and 22 broadcasts locally.

The regional press and broadcasters report on municipal politics, municipal issues, as well as local culture, social events and sport, which form an integral part of the resulting media products. The anti-pandemic measures, which radically reduced the functioning of most regional and local activities, closed schools, institutions, and sports venues, can also be seen as limiting the source of topics for local periodicals. H. Bakičová and S. Ruß-Mohl in their publication *Journalism* also outline the principle of functioning of regional editors and reporters, who do not just sit in a newsroom or office, but regularly go out among the people [4]. The reality is that, despite the age of social networking and the expansion of electronic media, the best source of local issues is interpersonal contact with the local people concerned, which is why many issues are outlined at receptions - the relaxed part of formal gatherings, or in cafes, pubs or other events. In this context, it is clear that if the population stays at home from one day to the next, there is not enough communication about the problems, which have not disappeared by depopulating the streets - they have just gone quiet for a while.

## **IMPACT OF THE PANDEMIC ON LOCAL MEDIA – A CASE STUDY OF SELECTED SLOVAK LOCAL NEWSPAPERS**

The impact of the pandemic was felt in all areas of the world, not excluding the journalistic community. While large daily newspapers, which have a stable market position and also work with payment gateways and subscriptions for readers, have seen significant growth in subscription interest since the beginning of the pandemic, other media have rather faced problems of lack of funding. The director of Petit Press, a.s., which publishes Slovakia's most widely read opinion daily and dozens of other titles, says that the first spring wave of the 2020 pandemic threatened to wipe out up to 30% of sales and advertising revenues. But that trend lasted only a few weeks, he says, and then there was a reversal. The publisher's print and digital subscription sales grew, but newsstand sales were down 4%. He added, however, that revenues at *SME*, the largest opinion daily, were performing better than other parts of the publishing business, with *SME*

down only 5% year-on-year in print advertising revenues, but the regional part of the publishing business approached the 20% decline threshold. Petit Press publishes regional weeklies and in the east the daily *Korzár* [5]. On this basis, we can conclude that it is the smaller media, regional and local periodicals, which, although they have an established readership, have been much more affected by the pandemic, but they are dependent on advertising from smaller businesses, shops, restaurants, etc., which themselves struggled to survive during the pandemic. The national media are attractive to advertisers such as large supermarket chains, operators, etc., which did not have to cease operations after the onset of the coronavirus but, on the contrary, supermarket chains, for example, saw record sales.

The most affected media segment was, therefore, the smaller media, which, however, as we have already mentioned, play an irreplaceable role in the market, as they inform the population about activities, news and other important events that directly affect them and come into contact with them on a daily basis. However, various types of these smaller media entities have reacted in their own ways to the reduction in the amount of advertising, the reduction in 'non-controversial' content. If we look at municipal newspapers published by local governments, the reduction in the frequency of newspaper publication is evident. An example is the municipal bi-weekly *Hlas Vrbového* (*Voice of Vrbové*), which in normal years was published regularly every two weeks, but as a bi-weekly it was only published during the summer holiday months or during the Easter and Christmas holidays. Since the beginning of the pandemic, however, the periodical has been published only in the form of double issues, i.e. the frequency of publication is monthly in 2020 and monthly in 2021. In terms of content, the periodical has, from the beginning, provided information on regulations and recommendations concerning the coronavirus, but it has also alerted the population to the closure of establishments and institutions and, where appropriate, indicated the form of contact that is currently preferred. In the *Hlas Vrbového*, logically, there was no substantial information about the events that took place, and so the town hall publishes a double issue with the original number of pages for a single issue, i.e. on eight pages [6].

A similar situation can be observed with the periodical *Novinky spod Bradla* (*News from under Bradlo*). This monthly newsletter of the town of Brezová pod Bradlom is published by the local town hall on eight or twelve pages. Since the beginning of the coronary crisis, however, the newspaper has been published as a bi-monthly issue, i.e. once every two months, mostly on twelve pages, rarely on eight. In the case of *Novinky spod Bradla*, however, it was not the case that all the previous content was replaced by information about the coronavirus and the measures taken, but even though the pandemic situation was referred to several times in the texts, the periodical continued to stick to the line of reporting on other activities related to life in the city. The content of the newspaper did not consist of information about closed institutions or other restrictions, but continued to

cover municipal issues of all kinds, and the social section and other sections were also part of the content [7].

The weekly newspaper published by the municipal government, Banská Štiavnica, which bore the name *Štiavnické noviny*, reacted to the coronacrisis by increasing the price of the issue. The previous 40 cents was changed to 50 cents from April 2020, while the number of pages was maintained. The content of the *Štiavnické noviny* has also changed, because since the pandemic, the editorial board has tried to inform via the newspaper about the latest measures, restrictions, as well as the disease itself and the possible consequences with the content of the newspaper. Such content was the main focus of the newspaper, especially in the first weeks after the pandemic, but after some time the editorial board returned to reporting on all topics, not least coronavirus. The weekly continues to be published regularly, once a week, on 12 pages. However, the changed price of the periodical has become established and has remained at the now increased 50 cents [8].

In the Slovak Republic, not only municipalities and towns are publishers of periodicals, but also private individuals can be owners of publishing houses. In the regional sphere, there are fewer periodicals published by private owners because, especially due to the emergence of new media, the spread of the internet and internet news, regional print periodicals have become a product that does not make a profit or makes only a minimal profit, but on the contrary, it is often necessary to subsidise such an entity. Therefore, not many entrepreneurs are interested in owning smaller media outlets, which bring with them a number of problems, such as accountability, direct confrontation with the objects of journalistic output, and others. One of the regional weeklies that have emerged since the fall of the socialist regime back in the former Czechoslovak Republic, and after the possibility of private ownership of the media emerged, is the weekly *Piešťanský týždeň* (*Piešťanský Weekly*). Published since 1991, it has changed format several times and is currently published in A3 format. While before March 2020 this privately owned regional weekly *Piešťanský týždeň* was published on 24 pages at a price of 80 cents, the pandemic changed this. As of February 2021, in an effort to reduce printing costs and staffing, the publishing house reduced the number of pages by 4. The size of the periodical dropped to twenty newspaper pages, while its price remained the same. Shortly thereafter, just one month later, the publishing house also proceeded to change the price, with the amount per copy, 80 cents, remaining the same for subscribers, but the on-sale price increasing to 99 cents. Another reason is the content of the newspaper, as social events and the activities of many local authorities have ceased due to the pandemic, filling the periodical with quality content every week and not slipping into repetition or the use of more non-newspeak seems to be a difficult task in this case. The volume of advertising and publicity has also been considerably reduced [9]. Whereas in April 2019, on average, display advertising took up three pages plus one or two small ads on the front page of the edition, in April 2020, after the onset of the pandemic, it was only two pages and rarely one small ad on the front

page. However, of those two pages, one and a half pages were just cross-advertising for the publisher's other products, which meant that the standard advertisement only averaged half a page. Nor did the big increase come year-on-year, i.e., as of April 2021. At that time, flat advertising covered an average of two-and-a-half newspaper pages, but still one-and-a-half newspaper pages were taken up by cross-page advertising. At this time, Slovakia was experiencing the second wave of the pandemic.

Other publishers describe a similar situation, including Reed Anfinson, a publisher and actively writing editor. “While there's more news to fill the pages of Anfinson's papers this year, his publications have had to shrink to survive as cash-strapped businesses have pulled ads, forcing the papers to shed pages and cut staff positions and hours.” [10]

Local and regional newspapers have also changed in terms of content, as they have mostly reported on pandemic-related issues. The first edition of the newspaper *Piešťanský týždeň*, which was published after the declaration of the state of emergency, already reflected society-wide events. Not only the cover photo, but also the introductory text and almost the entire front pages were concerned with the coronavirus outbreak and the impact on local institutions. The pages devoted to social events were still processing the latest cultural and social events, but they were already talking about the possibilities of visitors planning to return tickets and dealing with missed events. What developed over the following weeks of the pandemic was the reduced participation of the region's residents in content creation. While during the open editorial period recipients would come to the editorial office with suggestions, small advertisements, memories of deceased relatives and congratulations to jubilarians, also mothers after giving birth at the local hospital would have their photographs taken for the periodical, the measures have radically reduced or altered altogether.

However, there has also been a change in social media traffic. Several hundred percent increases in reach and recipient interactions spoke to a strong interest in the freshest information, but because of the low need for businesses to advertise new products or event invitations, social traffic numbers did not translate into financial revenue. *Piešťanský Týždeň's Facebook* page recorded a reach of 318 thousand users in March 2020, which represented a 100% increase from February 2020. The increase in traffic or readership of media is also confirmed by Rachael Jolley at The Conversation. “Hundreds of thousands of people have turned to their local newspaper websites during the pandemic for a clearer understanding of the local implications of this national crisis,” the author reports, adding that, for example, the Bishop's Stortford Independent, a weekly newspaper in Hertfordshire, has seen an increase in readership from 260,000 in January to 360,000 in October (2020) [11]. He explains this by the fact that people who stayed at home from one day to the next needed information about changes, precautions, where they could get tested for COVID-19, or where they could still buy toilet paper, which was one of the scarce commodities of the first

wave of the pandemic. The Welsh Parliament reports, for example, talk about the huge interest of recipients in journalistic content, but also mentions the issue of keeping the periodical financially fit, due to the challenging business environment during the pandemic [12].

From this perspective, the most important observation is that although the first and second waves of the pandemic have passed and the republic has almost returned to normal, the changes it caused in the segment of small regional and local media still remain in force and have not returned to their original form. Just as the *Štiavnické noviny* remains with its new price of 0.80 cents, the *Piešťanský týždeň* is still published in twenty pages. The *Hlas Vrbového* and *Novinky spod Bradla* are still published as double issues at a lower frequency.

## CONCLUSION

It is clear that while some business areas benefited during the coronavirus pandemic, the payment gateway systems of the large media outlets were more widely accepted by people and subscriptions were bought much more readily, smaller media outlets, due to the lack of need for small businesses to advertise, suffered significant losses. Even after more than a year and a half, they have not been able to recover from these losses, but it is evident that most media still see their mission to inform as important and are not giving up the fight. Regional journalism is important and forms an essential part not only of the mass media world, but is also an indispensable source of information for the people who inhabit a given locality [13]. Despite the wide range of media products available, it continues to be popular with recipients, precisely because of its concreteness and high degree of specificity. With central media and central themes, recipients often cope with abstraction - they have never seen the people described, they have never been to the places, and they have never visited the institutions. In contrast, regional or local press and broadcasting contain content that recipients know well and can thus more easily identify with, understand and possibly identify with the issue. It is therefore in the interest of the recipients themselves that regional journalism is preserved and 'survives' the coronavirus crisis. In particular, those that are privately run and do more than just PR for the local authority that publishes them are important for maintaining objectivity in the local area. This is because it can create a control mechanism for the activities of local government, it helps to solve civic problems, and it uses the power of the media to speed up the resolution of long-standing problems.

On the other hand, the pandemic has also highlighted the shortcomings of the journalistic profession when it comes to covering the issue of the coronavirus, both globally and at a regional and local level. Increasingly, not only the pandemic but also the infodemic of fake news, half-news and hoaxes [14] are being discussed, but they have a rather large impact on society and individuals. Examples include the proliferation of myths about the coronavirus and its cure or the strong anti-vaxxer campaign spread primarily through social media [15]. It is

therefore important for media and content creators to be aware of their influence and to be guided by the principles of professional journalism and journalistic ethics.

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# PROPER NAMES AS TERMINOLOGY IN SOCIAL SCIENCE

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## ABSTRACT

Proper names reflect the interaction between society and language. They identify unique entities and are used to refer to them. At the same time, it is not uncommon for proper names to serve as a source for word-formation. It should be noted, however, that while in a natural language (notably English) proper names mostly give rise to denominal verbs or adjectives, terminologies are different. Most units that count as terms are nouns, which makes their semantics somewhat special. The paper originates as one of a series towards a typology of sociological terminology and endeavors to analyze the terms whose etymology refers to a proper name (that is, eponymic terms). The research poses the following questions: whether this type of terms is common in Social Science, what are their structural and semantic distinctions as well as mechanisms behind their motivation, whether they are culture specific. The terms were manually retrieved from a set of data of 2500 terminological units extracted from a number of dictionaries and other sources. They were further grouped by structural criteria and the nature of eponymous components and made subject to morphological and semantic analyses. The research shows that structurally eponymic terms are morphological derivatives or two-(or more)-word compounds, with their prevalence estimated at 2%. The authors come to conclusion that terms of this type feature substantial diversity with regard to their eponymous components; they are motivated through the combination of encyclopedic knowledge of the entity, represented by the eponym, and the semantics of derivational morphemes or appellative components. Mythology-based eponymous terminology is represented by two groups, the first tracing back to Antiquity or biblical tradition, and the second of later origin, which requires a specific cultural experience for the meaning to be retrieved. Further analysis shows that the latter type along with toponym-based terminology is culture-specific in relation to American culture.

**Keywords:** *Proper names, sociological terminology, eponymic terms, terminological transparency, motivation, cultural specificity*

## INTRODUCTION

Proper names reflect the interaction between society and language. They identify unique entities and are used to refer to them, as distinct from common nouns that refer to a class of entities. According to the lexicographer Peter Hanks,

they constitute a special type of words and are governed by special rules in their role as conventional units of a language. [2]. Proper names regularly come in the focus of research within the framework of the theory of reference, due to their complex nature. The Russian linguist A. Superanskaya for one sees them as counter-intuitive elements whose study may contribute to the development of new comprehensive linguistic concepts.

The central problem about proper names is that of their meaning. Theoretical background will be discussed below, in the Theory section. This paper builds on the assumption that the mere ability of proper names to form meaningful derivatives evidences the existence of some kind of meaning, in line with Stekauer's opinion [13]. The potential of proper names to form derivatives varies across languages with different word-classes coming into play. In the English language of special interest are denominal converted verbs and proper nouns. With the former, the meaning is based on a cooperative principle and determined by regular semantic patterns involving metonymy [4]. Proper adjectives, i.e. those formed from proper nouns, may also have direct (e.g. of a particular place, period or style) and transferred meaning (like *Dickensian* – poverty-stricken) [6]. Moreover, it is statistically common of proper names themselves to be used metaphorically [1].

Quite another case of proper name usage with more emphasis on their individuating capacity is found in terminologies – groups of specialized words or meanings relating to a particular field inextricably linked with specialist knowledge. Eponym-based terminology of such subject areas as medicine, mathematics, natural sciences, sports, as well as some other applied fields is quite well studied, while that of social sciences and humanities has not yet received sufficient coverage, not least due to the fact that this type of word-formation in creating new terms across various fields of knowledge and technology is employed unevenly, which leads to a higher or lesser occurrence of such terms within a particular subject area. The paper endeavors to analyze eponym-based terms in the domain of sociology with regard to their semantics and morphology. Note that the research is confined to English sociological terminology in recognition of the fact that most sociological terms originate from works of English-speaking authors.

## MATERIAL AND METHODS

The paper originates as one of a series towards typology of sociological terminology, terminological consistency and standardization and centers upon eponym-based terms, their occurrence, structural and semantic distinctions, cultural specificity, and mechanisms behind their motivation.

The terms were manually retrieved from a set of data of 2500 terminological units extracted from a number of dictionaries and other sources. (The Penguin Dictionary of Sociology by N. Abercrombie, S. Hill and B. S. Turner, A Critical

Dictionary of Sociology by R. Boudon and F. Bourricaud, Dictionary of the Social Science by C. Calhoun, Glossary of the Social Sciences by F.W Elwell, Concise Encyclopaedia of Sociology by G. Ritzer and J. Ryanhe, The Cambridge Dictionary of Sociology B.S Turner) They were further grouped by structural criteria and the nature of eponymous component and made subject to morphological and semantic analyses. Judgments on their transparency were made after their entries were carefully studied and, in some cases, a semantic analysis was carried out.

## **THEORY**

As stated before, the central question about proper names is that of their meaning. Researchers distinguish between two main opposite theses: the ‘meaninglessness thesis’ and the “maximum meaningfulness thesis’. The ‘meaninglessness thesis’ goes back to the works of John Stuart John Mill, who maintained that proper names connote nothing, i.e. imply no characteristics of the object they refer to and hence are meaningless. The ‘maximum meaningfulness thesis’ was first developed by Otto Jespersen. According to him, while a proper name is used in a sentence to designate a unique referent, its content provides for it to intrinsically convey some of the referent’s characteristics. This paper builds on Stekauer’s assumption that “existence of converted proper names ... is the best evidence of the existence of a meaning of proper names” and that “knowledge of a language is always conditioned by the knowledge of facts [13].” Following A. Heois’ ideas [4], proper names are seen here as both linguistic and cultural units that refer to a unique referent and convey a meaning that refers to some idiosyncratic characteristics of the referent.

Another problem relevant to this study is that of metaphor in Sociology. As Swedberg [14] asserts, metaphor as an instrument of cognition plays an important role in social thought but as part of research design is used unevenly at different stages of the study. At the creative stage of research, metaphors might become an important heuristic tool, suggesting different hypotheses and ideas to work with, while at the stage when the results are finally formulated, metaphors should play much less of a role, since the hypotheses and ideas that evolved from the metaphor are already tested and, if possible, reformulated in non-metaphorical language.

## **RESULTS AND DISCUSSION**

Unlike other social disciplines (e.g. Economics), sociology features relatively few eponym-based terms within its terminology. According to the data analyzed, their occurrence is 52 in 2,500, i.e. slightly more than two percent. Nevertheless, they feature vivid distinctions, which make them interesting to study.

In general, eponym-based terms within sociological terminology designate a broad variety of concepts and feature considerable heterogeneity with regard to their basic components of nomination. Primarily, these are terms based on the

names of people – prominent figures in sociology and other disciplines who first discovered a principle, described a phenomenon or suggested a research design (*Gini coefficient*, *Guttman scale*, *Fordism*, *Halevy Thesis*, *social Keynesianism*). Less common are those based on geographical names (*the Hawthorne Effect*, after the Hawthorne Works, where the study was conducted; *the Abilene paradox*, after the city) or general cultural and culture-specific knowledge (*the Mathew Effect*, *the John Henry Effect*). Terms eponymously formed in honor or memory of a person other than the author (e.g. *Fabianism*) are uncommon in sociological terminology in general. As for their occurrence, the main body of eponymous sociological terminology is represented by terms derived from personal names (84.5%), much less common are those based on myths (11%) or geographical names (4.5%).

**Structural Distinctions.** As it is commonly understood, terms are nominative units that designate specific concepts in science or technology and are associated with particular areas of specialist knowledge. New terminology accompanies progress in science and is as a rule coined by researchers and practitioners on the basis of their natural language along its word-building models, with eponym-based terminology being no exception. Structurally, eponymous terms can be divided into single-word terms and terminological compounds. Single-word terminology is commonly formed through semantic derivation, or through morphological change that takes the form of affixation or blending. [5]. The semantic derivation is a phenomenon when the word comes to designate a new concept without any change in its form (like *hertz* or *ampere*). The research showed that semantic derivation is quite uncommon of sociological terminology, with zero occurrences of this type of derivation in the dataset under study. A more promising result was obtained for affixation, when an affix is added to a proper name. In this case affixation employs suffixes *-ism* (9), *-tion* (4), *-ite* (1), and prefixes *post-* (1) and *neo-* (1) in combination with the above-mentioned suffixes. Note that the *-ism* suffix was in some cases preceded by the suffix *-an* (e.g. *Malthusianism*), i.e. formed via eponymous adjectives. A singular occurrence of blends in the dataset under study is represented by the term *Cocacolonization*, formed of two partially overlapping words *Coca-Cola* and *colonization*. Such a way of word-formation makes the term particularly conspicuous.

A much larger proportion of eponymous terminology in the dataset under study (37 units) is represented by terminological compounds, The units of this type of are made up of two structural elements – a common noun and a proper name (eponym). Various terminological elements might serve as common-noun components, the most frequent in Sociology being *effect* (8), *experiment* (4), *law* (2), *paradox* (2), *theory* (2), *goods* (2), less frequent – *space* (1), *theorem* (1), *slope* (1), *grid* (1). As it might be observed, these are general scientific or interdisciplinary terms, whose meaning in the case under study is only specified by eponymous adjuncts (adjective or noun). The heuristic potential of affixation, blending as well as of terminological compounds will be further discussed below.

As for their syntactic structure, most eponymous terminological compounds follow the model *Npr. + Ncom.* (*Chayanov slope, Bogardus scale*) or *Npr.-Npr. + Ncom.* (+ *Ncom.*) (*Davis-Moore theory of stratification*), with the genitive case being explicitly rare. Its singular usage (*Arrow's paradox, Gibrat's law, Engel's Law*) might be justified, in our opinion, by euphony or pragmatic reasons. Thus, the term *Arrow's paradox*, if used as non-possessive, can be accidentally taken for *Zeno's arrow paradox*, a philosophical and mathematical term where arrow is not at all a proper name. Apart from the above-mentioned two, there is a third rather unproductive model *Adpr + Ncom.* (+ *Ncom.*), where the adjective is a morphological derivative of the eponym (*Keynesian welfare state, Malthusian theory*). Another model for two-word eponymous terms is *social+Npr.*(derivative) (*social Darwinism, social Keynesianism*).

**Transparency.** Whether eponym-based terms are motivated (transparent) i.e. exhibit interdependence of meaning and form is still a matter of debate. According to Sonneveld and Loenning [12] “a term is motivated when a language user is able to deduce, at least partly, the meaning of the term from the analysis of its components”. Lejchik [9] regards eponymic terms as non-motivated, arguing that the term is motivated if its meaning might be inferred from the meaning of the natural language sign underlying the term and from the concept within the conceptual system of the theory where the term belongs.

N. Novinskaya refers to various forms of semantic motivation of eponym-based terms, such as encyclopedic meaning of its eponymous component, the fact of inclusion of a particular nominative unit within the scope of a strictly defined category of concepts, etc. [11].

Novinskaya further assumes that in case of morphologically formed terms their meaning is a composite of semantically specialized derivational morphemes and encyclopedic information about the entity represented by the proper name. According to the Merriam-Webster Dictionary, the *-ism* suffix is that of a noun, its presence may signify one of the following: act, practice or process; manner of action or behavior characteristic of a specified person or thing; prejudice or discrimination on the basis of a specified attribute; state, condition or property; abnormal state or condition resulting from excess of a specified thing or marked by resemblance to such a person or thing; doctrine, theory or religion; adherence to a system or a class of principles; characteristic or peculiar feature or trait. The ones that come into play in the dataset under study are doctrine (e.g. *Malthusianism*) and practice (e.g. *Fordism*). Note that the examples illustrate two ways of eponymous word-formation common of sociological terminology: when the suffix is attached directly to the proper name (70% of occurrences), and when it is added to the proper name derivative through the suffix *-an* (30%).

Of interest is also the group-suffix *-tion* (*Disneyfication, Cocacolonization, McDonaldization*). It forms nouns out of verbs and has the meaning of process, state, or action. The terms are formed on the basis of either a verb (*disneyfy*,

*Dysney+fy*) or through the verbal suffix *-ize* (*McDonald+iz(e)+ation*). The case of Cocacolonization is somewhat different. It is a morphological blend in which the constituents partially overlap (*Coca-cola+colonization*). The resulting terms, based on metaphorical transposition, take on the meaning of the process by which an entity acquires the features commonly attributed to the object represented by the eponym.

The above-mentioned terms may also be regarded as an example of ‘tertiary nomination’ – a term coined by A. Kunin [8] – since they are based on the name of a company that includes a personal name. This can be represented as a chain: *Walt Disney* (personal name) – *Walt Disney World* (entertainment complex) – *Disneyfication* (transformation of something, usually society at large, to resemble a theme parks, where the environment is basically designed to stimulate consumption). That is, the meaning of tertiary nomination is not inferred from whatever is known about Walt Disney as a person or professional, but through a reference to the image evoked by the secondary nomination. Another example of tertiary nomination is the chain: *McDonald* (personal name) – *McDonald's* (fast-food restaurant) – *McDonaldization* (adaptation of society and its institutions to have such characteristics of fast-food chains as efficiency, calculability, predictability, standardization, and control).

Broadly, it might be assumed that single-word eponymous terms are motivated by a combination of encyclopedic knowledge of the phenomenon represented by the onym and the semantic meaning of the derivational morpheme. Eponym-based terminological compounds are motivated in a similar way, with the categorical information expressed by the appellative component and differentiation related to the encyclopedic meaning of the eponym.

**Cultural Specificity.** It should be noted that the encyclopedic meaning of a proper name includes diverse information, which makes it possible to regard eponym-based terminology as a reflection of national and cultural component of terminological representation of the world, i.e. a complex system of images that reflects reality in the public consciousness. Science-based worldview operates with terms and is based on practical and theoretical knowledge of a given nation, while the naive worldview is more dialectical and allows for contradictory definitions of things. O.A. Kornilov defines scientific worldview as "an idea of reality, which exists outside any separate scientific discipline (but on their basis in aggregate) and is characterized by a universal character and global coverage of all areas of knowledge concerning the world, man and society." Kornilov further regards it as a synergy of culture-specific (or national) scientific worldviews, i.e. invariants of scientific knowledge in the linguistic shell of a particular natural language and national culture [7]. Since proper names are both linguistic and cultural items, eponym-based terms are expressly influenced by the culture in which they are coined.

Thus, further look at mythology-based terms in the dataset under study reveals that they are represented by both universal cultural and culture-specific terminology. It should be noted that those of a universal cultural nature are derived from myths and ideas going back to the Bible or Antiquity, while those underlying culture-specific terms are of relatively recent origin. The authors count the latter among mythology due to the fact that they are names of persons and entities that never existed in reality or refer to events that never took place. The use of names of fictitious persons in terminology is not uncommon. Such cases are described, for example, for mathematical discourse.

In sociological terminology mythology-based eponymous components or mythonyms are quite rare. The meaning of those based on a universal cultural mythonym is to a certain degree transparent, since they represent the elements of culturally shared knowledge (e.g. the term *Janus Effect*, based on the name of the Roman two-faced deity Janus, that refers to the ability to interact with people both in a powerful and dependent role).

On the contrary, the meaning of those formed on the basis of culture-specific mythonyms cannot be retrieved without resorting to background knowledge peculiar of those who belong to the generating culture, which may be illustrated by the following examples. The term *Abilene Paradox* refers to a common breakdown of group communication and is based on an anecdote about a family trip to the US city of Abilene, which no one desired but raised no objections to, in order not to disappoint the others. Another example of such kind is the term *John Henry Effect* that refers to a bias in social experiment brought about by responsive behavior of the control group. The term is based on the name of a legendary road construction worker who, when told that his output was being compared to that of a steam engine, made every effort to win, and dropped dead of overexertion. The term might be perceived as quite transparent by those familiar with US popular culture, the others may need further reference.

**Metaphorical Use.** Metaphor is understood here as a mechanism that helps understand and experience one thing in terms of another, as deep-seated ways of thinking about one domain through another. While metaphor as a cognitive tool does play an important role in sociological thought, the research shows that metaphoric use of eponyms in terminology is relatively rare, though not totally uncommon of the domain of sociology.

When used metaphorically, a proper name brings into play a certain subset of properties associated with its referent. The authors assume that such use includes mythology-based terms (see above), those formed under the model *social+Npr+ism*, and the cases of ‘tertiary nomination’. Added *social*, for one thing, represents a productive way of term-formation in sociology and in case of eponym-based terminology rests upon an application to society of concepts and doctrines that emerged across various scientific domains (notably Biology, like the largely discredited *Social Darwinism*).

Of interest is also a metaphoric use of proper nouns as opposed to proper names. Huddleston and Payne refer to proper nouns as word-level units that belong to the category noun while “proper names are expressions which have been conventionally adopted as the name of a particular entity” [3]. In other words proper nouns have but a potential to designate a specific entity. Mishkevich describes them as poly-referential names that “presuppose a variety of referents sharing the same name, with a specific reference only possible in a specific act of speech” [10]. One example of this is the term *average Joe* in which the eponym has no specific referent with the inferred meaning ‘average resident’.

## CONCLUSION

In the English-language terminology of sociology, eponym-based terms are quite rare and account for approximately 2% of the total terminological domain and feature considerable diversity with regard to their proprietary components. Morphologically eponym-based terms are represented by single-word derivatives as well as by terminological compounds. The former are motivated through a combination of encyclopedic knowledge about the entity referred to by the eponym and the semantics of the derivational morpheme; the latter are motivated in a similar way, with the categorical information expressed by the appellative component and differentiation related to the encyclopedic information associated with the eponym.

Mythology-based eponymous terminology feature an uneven level of transparency – while those originating from ancient or biblical tradition are comparatively transparent, those of later origin require specific cultural knowledge for the meaning to be retrieved. Further linguocultural analysis reveals that most eponym-based terms of sociology are culture-bound elements in relation to American culture.

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# **SECOND FOREIGN LANGUAGE ACQUISITION: THE INFLUENCE OF STUDENTS' FIRST FOREIGN LANGUAGE ON LEXICAL SKILLS DEVELOPMENT IN ENGLISH FOR SPECIAL PURPOSES**

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## **ABSTRACT**

Globalization and intercultural communication are stepping up the demands for modern specialists' linguistic competencies. To provide successful professional communication, competitiveness and mobility, the graduates of higher education are to master two or more foreign languages. In this regard, it seems important to study the features of multilingual education, identify the difficulties that arise in multilingual teaching and outline the ways to overcome them. Although, there is a number of studies devoted to the impact of the native language on foreign language acquisition, the issue of learners' first and second foreign language interaction seems to be inadequately treated and there is a lack of research on factors that increase learners' second foreign language proficiency in three-language contact (i.e., their native, first and second foreign language). In particular, little attention is paid to cross-linguistic skills transfer or to lexical interference patterns that arise among students mastering their second foreign language.

This paper is devoted to lexical interference that occurs when English for Special Purposes (ESP) is taught as the second foreign language to university students studying French or Spanish as their first foreign language. The purpose of the work is to identify which language(-s) are the source of interference through analyzing students' errors. The hypotheses of the study are as follows: in case of receptive activity (reading) the language which is closely related to the target language will serve as the source of positive transfer. In productive activity (writing and speaking) lexical interference will arise and play a significant role. The source of interference will be learners' first foreign language. To test the hypotheses, a pilot study was conducted, during which typical lexical errors of Russian-speaking students studying ESP as their second foreign language and French or Spanish as their first foreign language were identified. The control group were students with native Russian language and English as their first foreign language. The research methodology included questionnaires, testing and interviews. The research participants were RUDN University students. The results of the study confirm the presence of positive transfer and lexical interference in

ESP terminology acquisition, the source of which is learners' first foreign language. Learners' typical mistakes are associated with the use of articles, prepositions, adjective order, fully and partially assimilated cognates, depend on their language experience and are due to their first foreign language interference.

**Keywords:** *multilingualism, lexical interference, foreign language, English for Special Purposes, error analysis*

## INTRODUCTION

Globalization, the growth of intercultural communication and the expansion of international contacts set out the demands for modern specialists' linguistic skills development. The growing multilingualism of the modern society puts the issues of foreign language learning as a part of polylingual education on the global agenda. To provide successful professional communication, competitiveness and mobility, higher education graduates are to master two or more foreign languages. In this regard, it seems important to study foreign language teaching in a multilingual classroom, to identify the difficulties that arise in a multilingual environment and to outline the ways to overcome them.

One of the challenges to language learning is language transfer (also known as interference or cross-language influence). As T. Odlin puts it, "Transfer is the impact caused by the similarities and differences between the target language and any other language which has been acquired" [1]. Such transfer can be positive and negative, it can benefit teachers and learners or be an obstacle for them.

Language transfer is not limited to the influence of the native language (L1), it refers to the impact of any language that the learner of the target language has acquired (or is acquiring) in the course of multilingual acquisition, i.e., "the acquisition of languages other than the first or the second" [2].

Current research indicates that, apart from the impact of L1, an intricate set of interactions between multiple languages should be considered due to the great diversity and complexity in multilingual acquisition [3]. On the one hand, such multilingual dynamics might create certain difficulties in case of negative language transfer which occurs when learners' previously learned language patterns complicate the performance of the learning task. On the other hand, it can contribute to efficient language learning through positive transfer if learners' prior knowledge supports the performance of learning activities. Thus, in case of second foreign language acquisition (FL2) a positive transfer of skills and competencies obtained in the first foreign language (FL1) learning might be observed. In addition, students' proficiency increases as their speech and cognitive skills (memory, perception, and speech production) necessary to learn FL2 have been already formed in the process of FL1 acquisition.

Although, there have been numerous studies devoted to the role of L1 in FL1 learning and the follow-up language transfer (both negative and positive) [4], [5], several questions regarding language transfer in the context of multilingual contact (L1, FL1 and FL2) and factors (linguistic and extralinguistic) contributing to the efficiency of FL2 learning remain to be addressed. In particular, the research on lexical and grammatical transfer in learning English for Special Purposes (ESP) as FL2 in multilingual environments where learners study two or more foreign languages remains limited.

As a rule, two methodological approaches are applied to study cross-linguistic influence in the context of FL2 learning: contrastive analysis and error analysis. The contrastive analysis hypothesis [6], [7] postulates positive transfer between FL1 and FL2 in case of their similarity and negative transfer (language interference) caused by language differences. Despite several limitations, this theory can be conveniently applied to predict learners' potential errors in multilingual context. Error analysis theory [8], [9], [10] is used to find out how errors are made by learners and to reveal the sources of errors to correct and prevent them.

A pivotal issue in learning English in the sphere of professional communication (ESP) is subject-specific vocabulary and professional terminology acquisition [11]. Lexical skills development in ESP implies learners' mastering general, interdisciplinary, and special vocabulary as well as their ability to apply it into speech practice. The general requirements of the Common European Framework of Reference for Languages in the sphere of subject-specific vocabulary and terminology for ESP learners provide the following criteria for foreign language vocabulary skills: vocabulary size, vocabulary range, vocabulary control and the delimitation between language learning for receptive and productive use [12].

## **MATERIAL AND METHOD**

The study focuses on language transfer in a multilingual environment, where students (with the Russian language as L1), learn two foreign languages: English as the language for professional communication (ESP) as FL2 and French (or Spanish) as FL1.

An important issue to be considered in multiple language learning is the factors determining the source language of transfer in multilingual environment. The main factors mentioned by the scholars are the order of language acquisition, the age of acquisition, speaker's level of proficiency, the degree of typological similarity between the languages and language distance [3]. The research is inconclusive, but most scholars agree that linguistic transfer is more likely to occur when the circumstances of learning two languages are similar and they are closely related [13], [14]. This is certainly the case when the English language is learned as FL2 alongside the French (or Spanish) language as FL1, which are

quite far from learners' mother tongue, Russian, in terms of a writing system and pronunciation.

The content analysis of "A Dictionary of Diplomacy" [11], [15] shows that more than 80 percent of English diplomatic terminology is of French and Latin origin. Typologically, English is a German language but historically it has acquired many loan words from Latin and the French language [3]. That is why learners of English for professional communication in International Relations as FL2 whose FL1 belongs to the Romance language group can benefit from the low linguistic distance between the languages. We do not differentiate here between the Spanish language and French as both languages are abundant in words of Latin origin as far as diplomatic terminology is concerned and are closely related. The native language of students is Russian, which is linguistically distant from the English language and can hardly be a source of negative interference.

The purpose of the study is to show that there is lexical interference and positive transfer in multilingual environment in case of teaching ESP as the language of professional communication (in International Relations) as FL2 to students with French or the Spanish language as their FL1 and the Russian language as L1 and to reveal the sources of lexical and lexical-grammatical interference.

Based on the above considerations we put forward the following expectations:

Hypothesis 1 (H1): in the case of receptive activity (reading) the language which is closely related to the target language (English) will serve as the source of positive transfer in a multilingual environment.

Hypothesis 2 (H2): in productive activity (writing and speaking) negative transfer (lexical interference) will arise and play a significant role. The source of negative interference will be learners' FL1.

To test the hypotheses, a pilot study was carried out during which typical lexical errors of Russian-speaking students studying ESP as their FL2 and French or the Spanish language as their FL1 were identified.

We collected the data using a mixed-method approach: quantitative research methods (reading comprehension and vocabulary tests, questionnaires) and qualitative research (observation, interviews).

The participants of the study were 40 Russian-speaking students who enrolled at Peoples' Friendship University of Russia in Master's Program in International Relations (IR), which envisages studying ESP for International Relations and offers elective module of FL2 studies.

The ESP language course prerequisite is B1/B2 level in English, that is, learners have obtained necessary fluency in main language skills and competencies (phonetical, grammar, word-building and communicative). The language course is aimed at using language flexibly and effectively for academic and professional purposes, mastering professional vocabulary and word-formation patterns, developing grammar and vocabulary skills for academic literacy.

Two groups of participants were chosen: the experimental one and the control one. The experimental group were students with the native Russian language, who studied the French (or Spanish) language as their FL1 and ESP in the sphere of IR as FL2. The control group were students with the native Russian language who studied the English language as their FL1 and did not have experience in studying a Romance language. The participants, all of them 19 to 22 years old, were selected based on their skills in the English language (B2). Each group included 20 students.

## RESULTS AND DISCUSSION

Firstly, to test Hypothesis 1, both groups were offered reading comprehension test designed by the authors, which comprised a subject-specific text and multiple-choice questions. Mean grade points (out of 100) and mean time required to complete the tasks for both groups are shown in Table 1.

**Table 1.** *Reading comprehension test: mean grade points and mean time.*

	Groups	N	Mean	Std. Deviation	DF	T observed
Mean grade points	Group A1	20	72,90	9,84	19	T=1,728
	Group A2	20	67,55	9,74	19	F=1,020
Mean time	Group A1	20	31,4 min.	4,03	19	T=4,514
	Group A2	20	38,0 min.	5,18	19	F=1,656

Table 1 shows T-statistics for mean grade points earned by students of Group A1 and A2 and the mean time to complete the test. It is worth mentioning that the Student's t-test is relevant here because the variances in all cases are equal considering the F-statistic for standard deviations at a standard significance level  $\alpha = 0.05$ .

The mean time required to complete the tasks for Group A1 (multilinguals with French or Spanish as FL1) was 31,4 minutes, the mean time for Group A2 was 38 minutes, T observed = 4,514. As T observed is above T critical (2,024), there is statistically significant difference between the two groups.

The mean grade point in reading comprehension test for Group A1 is 72,9 (out of 100), which is higher than the mean grade point of Group A2 (67,55). Since  $T_{\text{observed}} (1,728)$  is less than its critical value (2,024), no statistically significant difference is observed between the two groups.

Thus, the results obtained clearly show statistically significant differences in mean time spent by students of A1 and A2 to complete reading comprehension tasks, but no differences altogether are observed in mean grade points.

Hypothesis 1, which states that in case of receptive activity (reading) in multilingual environment the language which is closely related to the target language will serve as the source of positive transfer, is proved. There is a positive transfer, and the source of transfer is FL1 (French or Spanish).

The results obtained indicate that there is positive interference in multilingual environment and its source is learners' FL1. Multilingual students of the experimental group understand academic texts on IR abundant with the terminology of Latin and Greek origin better than their counterparts from the control group and they have developed cognitive abilities for language learning from their FL1 course. That is why they need less time to answer the questions and to complete the tasks. Their grade points are also somewhat higher while no statistical difference is observed. One possible explanation is that the students of the control group might take their time and fulfil the test correctly being industrious and motivated learners of ESP. The other possible interpretation is that multilingual students are more effective in FL2 learning as they successfully apply cognitive strategies previously acquired in the course of FL1 to master FL2 grammar and vocabulary.

Next, to test Hypothesis 2 (ESP productive skills of multilinguals studying French or Spanish as FL1 are influenced by negative transfer, the source of which is FL1) both groups of participants were offered a test on subject-specific diplomatic vocabulary and lexical skills in IR designed by the authors, which comprised two parts.

A qualitative analysis of potential errors of multilinguals with the French (or Spanish) language as FL1 was carried out before testing. The analysis revealed that the sources of potential errors could be cognate terms, words of Latin origin, "false friends" (words similar in form but different in meaning) and multicomponent compound terms derived according to the models "Adjective plus Noun", "Noun plus Noun". In the first part of the test students were presented cards with English definitions of partly or fully assimilated cognate diplomatic terms and they were expected to pronounce the required term in English. The second part of the text comprised compound terms which might cause difficulties with word order. Students were presented cards with definitions of international organizations, and they were to provide the correct name or acronym of the organization.



The test results of Group A1 and Group A2 and mean grade points (out of 100) for each part of the test are listed in Table 2. As shown in Table 2, mean grade points of the experimental group for both parts of the test are less than those of the control group.

**Table 2.** *Diplomatic vocabulary test: mean grade points.*

	Groups	N	Mean grade points	Std. Deviation	DF	T observed
Part 1 (cognates, false friends, etc.)	Group A1	20	56,70	10,21	19	T=4,794
	Group A2	20	70,30	7,53	19	F=1,842
Part 2 (word order, "N+A", "N+N" combinations)	Group A1	20	62,30	10,95	19	T=1,823
	Group A2	20	67,95	8,51	19	F=1,655

Table 2 shows the T-statistics for mean grade points gained by students of Group A1 and A2 for two parts of the test. The Student's t-test is feasible because the variances in all cases are equal considering the F-statistic for standard deviations at a standard significance level of 0.05. Here, the results clearly show statistically significant differences in grade points gained by students in Part 1 of the test. The mean value for Group A1 in Part 1 is 56.7 points (of 100 possible) with the mean-square deviation of 10.21. The mean value for Group A2 in Part 1 is 70.3 points (of 100 possible), with the mean-square deviation of 7.53.

The results of T-statistics application (T observed 4,794 is higher than T critical 2,024) show that there is statistically significant difference between mean grade points of the two groups in Part 1 (fully or partly assimilated cognates) which indicates negative transfer in learners' productive activity (speaking). Hypothesis 2 is proved. There is negative lexical interference, the source of which is FL1. One of the main "soft targets" of negative lexical transfer in ESP is fully or partially assimilated cognates.

In Part 2 of the test (multicomponent terms and international organizations) no statistically significant differences were observed in mean grade points. T1 observed = 1,728 is less than T critical = 2,024. A possible explanation for this is that the phenomenon of "Noun plus Noun" word combination typical for English language is quite rare both in the French (or Spanish) language and in Russian and the word order (i.e., adjective placement before or after noun) is different for the three languages: in the Russian language the word order is rather flexible, in English an adjective is usually in preposition, while the pattern typical for both French and Spanish is "an adjective in postposition"). There are also some exceptions from typical word order in diplomatic terminology of ESP derived from French (e.g., *ambassador extraordinary and plenipotentiary* with an

adjective in postposition uncommon for the English language but typical for French) which may be a source of intralingual transfer or overgeneralization.

## **CONCLUSION**

In our study we analysed positive and negative transfer that occurs in case of multilingual education when learners study two foreign languages and provided the application of language transfer theory to pedagogical practice.

The results of the study confirm the presence and significance of positive transfer and negative lexical interference in ESP subject-specific vocabulary and terminology acquisition, the source of which is learners' FL1 (French or Spanish).

The first hypothesis which states that in case of receptive activity (reading) the language which is closely related to learners' target language will serve as the source of positive transfer is proved. There is positive transfer, and the source of transfer is FL1 (French or Spanish).

The second hypothesis which states that there is negative transfer in ESP productive skills (speaking) of multilinguals studying the French (or Spanish) language as FL1 and ESP as FL2 is proved. There is negative lexical transfer, and the source of interference is FL1. Learners' typical lexical mistakes are associated with the use of articles, prepositions, adjective order, fully and partially assimilated cognates, "false friends", depend on language experience and are due to FL1 interference. One of the main sources of lexical errors in ESP is fully or partially assimilated cognates.

During the study, the authors concluded that a special set of learning activities combined with intensive reading practice and innovated pedagogical techniques should be developed to improve the lexical skills of multilingual students considering their language experience.

The results obtained can be applied in further research of lexical transfer in a multilingual environments, to improve pedagogical techniques for lexical skills development in ESP classrooms, textbooks, teaching aids and manuals in FL2 learning.

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# TO THE PSYCHOLOGICAL ASPECTS OF LANGUAGE TEACHING IN 3D MULTI-USER VIRTUAL ENVIRONMENT

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## ABSTRACT

This article focuses on the use of a 3D multi-user virtual environment in language teaching and presents the results of four-year research at the Palacky University Olomouc Faculty of Education (Czech Republic). Language teaching was conducted in an experimental form in the 3D virtual worlds of Second Life and Kately (experimental group) and, in parallel to this, there was also traditional teaching conducted on identical topics in the form of lectures using a textbook (control group). The didactic test, which was presented to both of the groups in an identical form before the start of teaching and after its implementation, verified the effect of teaching in the experimental group by comparing the achieved results of both groups. Out of the three components of mother tongue teaching (grammar, literature, style and communication education) students achieved partial better results (in the case of points focused on the visualization of the subject matter, these were statistically significant) in literature. Students from the control group performed better in grammar and style and communication education. Based on the achieved results, we discuss the selected psychological implications of these results and can state the most appropriate use of MUVE in teaching those topics that have the possibility of role playing, dramatization and group cooperation.

**Keywords:** *3D virtual reality, multi user virtual environments, online education, language education, psychological aspects*

## INTRODUCTION

As a result of the global Covid-19 pandemic, the education sector is currently facing the challenge of rapidly implementing online educational tools into teaching, often in the form of a complete transition to purely online teaching due to imposed hygiene restrictions. Educational institutions at all levels of schooling as well as lifelong learning institutions were not sufficiently prepared for such a quick organisational shift – some of them face problems of insufficient digital competencies of teachers or the lack of knowledge of specific online educational tools that could benefit their pupils and students. In addition to a number of online

communication tools (such as ZOOM, MS Teams, Skype, etc.), there are also various Learning Management Systems and 3D virtual reality environments.

Despite the fact that much has been written about 3D virtual reality, there have been significantly fewer research studies mapping the effect of education through MUVES – which in addition to three-dimensional simulation of reality also allow for direct social contact with teachers and classmates. Nevertheless, such research is necessary to ensure that these environments are not included in the learning process without knowing what effects (whether positive or negative) teaching in this environment can have on the learning outcomes of students as well as on psychosocial aspects of educational reality.

A literary review of studies mapping the effect of virtual reality learning between 2004 and 2019 (before coronavirus appearance) was conducted by Mistakidis et al. [1] who focused on e-learning effectiveness along with the factors and conditions leading to deep and meaningful learning when using social virtual reality environments in distance mode of higher education. They searched for the cognitive, social, and affective aspects. The findings suggest that the use of MUVE can provide authentic, simulated, cognitively challenging experiences in engaging, motivating environments for open-ended social and collaborative interactions and intentional, personalized learning. Their findings also indicate that educators need to place more emphasis on the socio-cultural semiotics and emotional aspects of e-learning and ethical issues such as privacy and security. Improvement recommendations include meaningful contexts, purposeful activation, learner agency, intrinsic emotional engagement, holistic social integration, and meticulous user obstacle removal.

From the other authors, we can mention the results of Heaney and Arroll's study [2], which explored, in a qualitative investigation of Second Life educators, their attitudes towards MUVE, e.g. the practicalities of dealing with a student who is unable to attend a class for various reasons, whether due to illness, transport problems or bad weather. On the other hand, the positives mentioned in this study were decreased by the disadvantages that the educators saw in particular in the lack of real physical contact with the students or in the fear of unpredictable situations in the virtual environment and the related possible embarrassment in front of the students when they would not be able to resolve these situations. S. Hornik [3] conducted a longitudinal study based on data analysis and interview feedback from students between 2007 and 2010 as part of the implementation of a financial management course at the University of Central Florida. He worked with different sized groups (200 to 800 students) and found that only 1/3 of the students work in Second Life because they enjoy learning in this environment, while the remaining 2/3 have a negative attitude towards Second Life or work in it only because it is part of the assignment given to them in the course. However, his analysis of the data showed that the longer students worked in Second Life, the more they grew to feel that this MUVE was an effective learning tool for them. In 2007, when Hornik started using Second Life for teaching, only 17.3% of the

students reported that Second Life helped them to understand basic concepts in financial accounting, whereas in 2009, after 3 years of systematic teaching, the figure was already 40.7%. behavioural, affective and cognitive engagement and achievement.

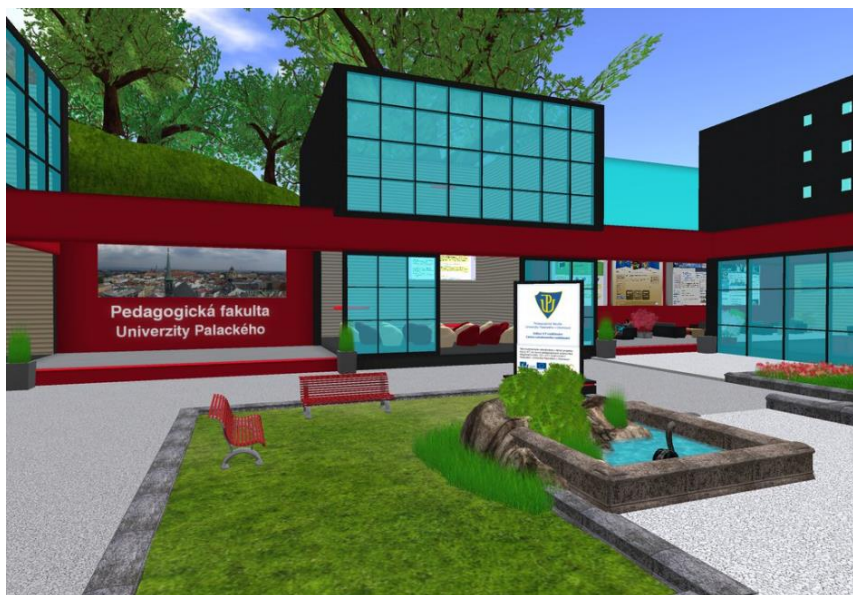
## METHODOLOGY

In our research, we focused on the use of MUVES in language teaching. At the Palacky University Olomouc Faculty of Education, we have been teaching through MUVES for over 10 years and have gradually moved from using the Second Life environment to building our own virtual faculty building in the OpenSim environment Kately, in which we gradually create our own 3D objects for language teaching [4]. We use this environment both for teaching the mother tongue and its individual components (grammar, literature, style and communication education) and for teaching Czech as a foreign language (environments simulating various conversational environments).

Our research focuses on examining the impact of teaching in MUVES on learning outcomes in language teaching. As part of our inquiry, we posed the following research questions:

1. Does teaching in MUVES lead to better results in memorising concepts when compared to traditional teaching?
2. Is there a significant difference in learning outcomes when comparing MUVE teaching with traditional teaching?
3. Is there a difference between the results of men and women when comparing teaching through MUVES and traditional teaching?

To answer these questions, we have produced several environments in MUVE that can be used for teaching individual components of the mother tongue (grammar, literature, style and communication education) and for teaching Czech as a foreign language.



**Fig. 1.** *Virtual building of the Palacký University Faculty of Education in Kitley.*

The research survey was carried out over a period of 4 years using the method of mixed research design based on a combination of quantitative and qualitative approaches. From the point of view of quantitative research, there was the comparative analysis of the input and output didactic test in the experimental group taught through MUVE and the control group taught in the traditional way (teacher's lecture supplemented by a textbook). In terms the qualitative approach, there was a semi-structured written survey to determine the views of students of the experimental group on teaching through MUVE, processed via the method of grounded theory [5]. By dividing the answers according to certain criteria, the views of students were easier to sort through, determine where the strengths and weaknesses of teaching in a virtual environment were, and identify what could be the biggest issues with its use in practice. Semi-structured questioning was always carried following the completion all the teaching units (i.e., after teaching all components of the mother tongue).

Teaching through MUVE was implemented for 3 basic components of mother tongue teaching – grammar, literature and style and communication education. For each of these components, 3D virtual objects for the various taught topics were created and as well as an input and output didactic test, which was identical for the experimental and control groups. The didactic test was evaluated statistically according to predetermined criteria, the validity and reliability of individual tests were verified. Validity was determined by the assessment of a relevant expert, reliability was verified via the Kuder-Richardson reliability



coefficient and the halving method using the Spearman-Brown formula [6]. The reliability of the didactic test was calculated using the Kuder-Richardson reliability coefficient after the first grammar test. The reliability coefficient can take values from 0 (= complete inaccuracy and unreliability of the test) to 1 (= maximum accuracy and reliability of the test). For the purposes of pedagogical research, it is necessary to reach a value of at least 0.8 [6]. After substituting the values, we obtained a reliability coefficient of 0.803, so the test could be considered sufficiently reliable for testing students. To compare the effectiveness of both teaching approaches, we also used Student's t-test, which verified whether the differences in the results are statistically significant [6]. Sensitivity was assessed based on the results of calculating the ULI coefficient.

The test results for each area were described using mean, standard deviation (SD), and median values. In addition to the point score, we also calculated the percentage of success in the test, where the total gross score was compared to the maximum achievable gross score for the given area of testing. The overall success in the test was calculated as the sum of the results in the test before and after the course. IBM SPSS Statistics version 22 was used to validate the hypotheses. Test results achieved in the control and experimental group as well as the results obtained in the group of men and women were compared using the Mann-Whitney U test. A non-parametric test was chosen due to the non-normal distribution of score values. Normal distribution was verified using the Shapiro-Wilk test. All tests were conducted at a significance level of 0.05.

The research group consisted of a total of 303 respondents – 160 of them participated in virtual teaching, 143 in theoretical teaching. The group of respondents consisted of students of the Czech language and literature at the Department of Czech Language and Literature of Palacký University Olomouc. The average age of the survey respondents was 21.6 ( $\pm 0.3$ ) years. All respondents participated in a quantitative survey through didactic tests before and after teaching. Students included in the experimental group – who were taught through MUVE – were also included in the qualitative research through semi-structured questioning.

In all teaching units, respondents received the same information, all participated in teaching in all three components of their mother tongue, all were assigned on the basis of predefined and described categories to a specific user level for working with information technologies – the criteria for this were determined through the international concept of standardised computer skills by the ECDL (<http://www.ecdl.cz>). A total of 48.1% of students reached the basic level according to ECDL and 51.9% were intermediate according to the ECDL. The advanced user category was not represented in the research, as it could represent a contamination of better results due to the greater ability of these respondents to manage the virtual reality environment. As a result, one respondent who was determined as an advanced user was excluded from the group. At the

same time, we maintained the homogeneity of the experimental and control groups.

RESULTS

In the overall performance in the implementation of teaching units in the experiment, the overall average performance was better in the control group, which achieved an 8.3% better result (the total average performance of the experimental group was 43.8%, for the control group it was 48.1%,  $p = 0.006$ ), the following table summarises the details:

Table 1. Overall performance in the test.

Components of the mother tongue teaching	Experimental group	Control group	Statistically significant difference
Grammar	27.8%	33.9%	+
Literature	60%	54.5%	YES
Style and communication education	42.6%	51.5%	YES

Source: Own source

The differences in the results between the experimental and control groups in the individual components of the mother tongue teaching were statistically significant, an overview is provided in the following table:

Table 2. Performance in individual components of mother tongue teaching.

	Experimental group average + SD	Experimental group median	Control group average + SD	Control group median	P
Grammar 1 (before) points	24.5 ± 8.2	24.0	29.7 ± 10.1	28.0	0,0001
Grammar 2 (after) % of success	27.8 ± 9.3	27.3	33.9 ± 11.3	31.8	
Literature 1 (before) points	26.1 ± 6.0	21.0	19.6 ± 4.8	20.0	0,01
Literature 2 (after) % of success	60.0 ± 16.7	58.3	54.5 ± 13.4	55.6	
Style and communication education 1 (before) points	13.6 ± 4.7	11.5	16.5 ± 3.9	16.0	0,002
Style and communication education 2 (after) % of success	42.6 ± 14.6	40.6	51.5 ± 12.3	53.1	

Source: Own source

Prior to teaching, the results in the area of a grammar of the experimental and control groups were comparable. After teaching, there was a more significant improvement compared to the results before teaching in the control group – improvement by 18.7%. The experimental group improved by 7.8% after teaching. This difference was statistically significant ( $p < 0.0001$ ). In the field of literature, there was the same average improvement after teaching in both groups – in the experimental group it was an improvement of 28.5%, in the control group there was an improvement of 29.5%. The difference in improvement results after teaching between the two groups was not significant ( $p = 0.551$ ). In the area of style and communication education, the results of both groups prior teaching were comparable, after teaching there was a greater improvement in the control group. The improvement in the control group was 39.5%, in the experimental group there was an improvement of 16.4% after teaching. This difference was statistically significant ( $p < 0.0001$ ).

## DISCUSSION

The results of our research did not show a significantly higher success rate of students in the experimental group. However, one reason for this could be the novelty of the MUVE environment in which they moved, so part of their attention was focused mainly on the ability to control their avatar, move in the environment and also explore individual details of the environment. For the control group, which was taught through a traditional method to which they have been accustomed to for years, there was no such mental distraction. Therefore, future research is needed that would be focused on longer-term (e.g., one-year) teaching through MUVE, during which students would already be able to move in the environment with confidence.

Firstly, we can conclude that if teaching takes place in this environment, it is more appropriate to employ the method of **mutual cooperation** – in the case where the manipulation of 3D objects was controlled by the teacher and students had to agree on where the objects will go and how, they subsequently achieved better results than if they were left to their own devices and their work could lead to partial problems that teachers or other students were not even aware of. We, therefore, recommend that teaching through MUVE be based mainly on guided teaching and a collaborative approach, leaving the student alone in solving tasks seems to not be very effective.

However, there may have been other variables that affected the end results. The respondent set itself represents a certain limitation, as it was composed only of students of humanities – it is likely that students from technical fields (or IT fields specifically) would have achieved different results. The level of the students' computer skills therefore played a role here, which is why we recommend that sufficient training time be devoted to learning how to work in a MUVE – potentially even performing simple tasks – and only start the course once students are sufficiently confident in navigating the environment.

In interpreting the above results, we are working from the assumption that the involvement of multiple sensory perceptions and the **emotional component** leads to a better memorisation of knowledge. According to Dale's [7] cone of experience, individuals should remember up to 90% of what they do (that is, they learn from experience). This section of the experience cone also includes participation in virtual teaching in the form of a virtual reality simulation. Similarly, Kalhous et al. [8] state that the more senses are involved in cognition, the more knowledge the learner should remember. We saw this reflected in the teaching of literature, but not in the teaching of grammar and style and communication education.

From a psychological point of view, it is necessary to take into account that a person's personality differs significantly in real and virtual space. O'Driscoll [9] defined several characteristics of 3D MUVE that influence the behaviour of an individual in a 3D virtual environment – it is mainly the sense of self in the other space, **identification with the avatar**. When creating a virtual avatar, the user can create a persona into whose appearance or behaviour he/she can project his/her desires or, on the contrary, suppress negative aspects of his/her personality that bring complications in real situations. This can lead to more open communication with others, as those appearance or personality characteristics that make a person feel an inferiority complex or a certain handicap in the real world disappear in the virtual world.

Regarding the method of **problem-based learning**, which we used for style and communication education when teaching how to write a news report, we found that this method was not entirely suitable for MUVEs, because students were distracted by many side activities and elements, which were described mainly in the analysis and description of the results of a qualitative research survey (the need to control the avatar, complex control of the camera, etc.). MUVE is also not a suitable tool for topics where the focus is more on memorisation, because the need to divide one's mental attention between the topic itself and controlling one's avatar in the environment reduces the overall concentration of the students and, by extension, their ability to commit things to memory. This was also confirmed by the results of the qualitative part of our research, where the semi-structured questioning of the respondents of the experimental group showed that they felt overwhelmed by the programme's controls.

## CONCLUSION

MUVE is currently one of the most important online tools used worldwide, especially for language teaching, as it enables synchronous online communication in real-time independent of physical space and, unlike other online tools (ZOOM, Skype, etc.). It virtually simulates the non-verbal components of communication (e.g., proximity, facial expressions, gestures, etc.), which are as essential to

language communication as verbal communication. However, it is not always entirely suitable for language teaching.

Based on our results, we can say that the most appropriate use of MUVE can be seen in teaching topics that have the potential for role playing, dramatization, experiential learning, involvement and mutual cooperation of the group. In contrast, due to the need to divide one's attention between the subject matter and controlling one's virtual reality avatar, it is less suitable for teaching topics that lean more heavily on learning through memorisation or terminology (e.g., vocabulary, categorisation of grammatical phenomena, etc.). MUVE, therefore, seems to be the most suitable for the use of simulation of conversational situations (foreign language teaching through role-playing), literary topics (role-playing, dramatisation) and for group teaching that requires participants to work together.

## ACKNOWLEDGEMENTS

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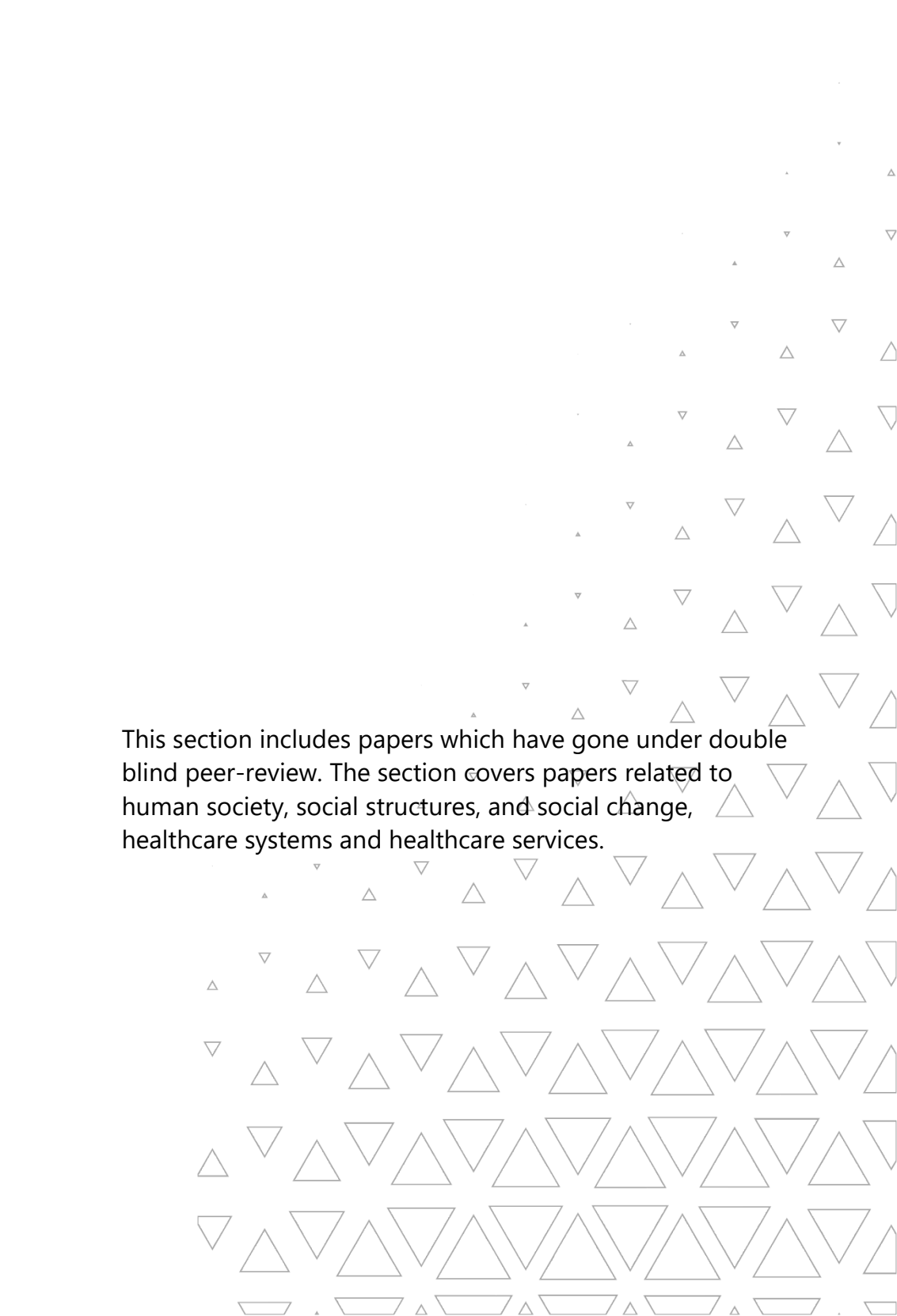




## **Section**

# SOCIOLOGY AND HEALTHCARE



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This section includes papers which have gone under double blind peer-review. The section covers papers related to human society, social structures, and social change, healthcare systems and healthcare services.



# AGE AND GENDER PATTERNS OF SELF-ESTEEM AMONG YOUTH IN KOSOVO

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## ABSTRACT

Self-esteem is a widely investigated variable, across different countries and cultures. Levels of self-esteem seem to vary across cultures, and also cultural similarities and differences have been reported in several studies. Some aspects of age and gender differences seem to be universal across cultures. The aim of the present study was to assess age and gender patterns of self-esteem among Kosovo youth. The study sample included 4303 participants (four subsamples), 45.5% male and 54% female. The mean age of participants was 16.57 years ( $SD=2.99$ ). The measuring instrument was the Rosenberg Self-Esteem Scale Albanian translation. Results indicated a slightly but not significantly higher level of self-esteem for men. The gender difference reached significance only for the age groups 18 to 22 years old and 23-29-years old. The study revealed developmental trajectories of self-esteem and gender patterns which are comparable to findings from other countries, although with some slight differences. Findings requires further investigation, particularly as regards the presence of any cohort effects in the findings. The study represents an important contribution to the investigation of self-esteem in Kosovo, and provides several directions for further research particularly as regards gender or developmental studies.

**Keywords:** *self-esteem, age, gender, youth, Kosovo*

## INTRODUCTION

Tracing of the literature shows that self-esteem is a widely investigated variable, across different countries and cultures. A recent Google scholar search with the key-word “self-esteem” brought up over 2,160,000 results. Despite the extensive scientific research involving this variable, several scholars have argued on the need for further research especially due to inconsistencies in terms of operational definitions, measurement, demographic patterns, socio-cultural differences, or developmental trends [1], [2].

Self-esteem researchers consider this construct as a basic human need with different levels including global, and situational self-esteem. Also, self-esteem is considered as an indicator of how valued and accepted people feel or as an

indicator of the state of our relationships with others. One of the most widely accepted definitions of self-esteem refers to the way individuals feel about themselves, as well as their overall value or attitude toward themselves [1]. In recent years, the emphasis has shifted to various aspects of self-esteem, as several efforts have been made to further break down and categorize this variable [2]. For instance, contingent self-esteem [3] refers to feelings about the self as related to external sources of perceived standards and expectations.

Tafarodi and colleagues (2002) have proposed a self-esteem model including self-competence and self-liking; self-competence is mainly cognitive and refers to self-efficacy beliefs of the individual (beliefs of being good at certain tasks) while self-liking refers to the emotional pathway, i.e., internal feelings, mostly affected by social relevance [4], [5]. Tafarodi and colleagues reported cultural differences in the two dimensions; self-competence was higher in individualistic cultures while self-liking was higher in collectivistic cultures [5]. From a quick review of the literature for the needs of this paper we find that levels of self-esteem seem to vary across cultures, and also cultural similarities and differences have been reported in several studies. A well-known international study by Schmit & Allik (2005) reported that although positive self-esteem is culturally universal, self-esteem scores seem to be generally higher in Western cultures (individualistic) as compared to Eastern cultures (collectivistic) [5].

As regards measuring instruments, probably the most widely used across different countries and cultures is the Rosenberg's (1965) Self-Esteem Scale. The scale has been used in comparative studies and meta-analyses. The Rosenberg Self-Esteem Scale [6] allows for positive versus negative classification within the global score [4], [5]. This two-factor model has been supported by Kaplan and Pokorny (1969) who classified negatively worded items as self-derogation and positively worded items as self-enhancement [7]. The two-factor model has been largely criticized and several researchers claim that positive and negative self-esteem are merely an artifact of item wording and therefore the classification is artificial. Even so, the scale has been widely used for describing age or gender patterns from a developmental approach across different cultures; findings have not always been coherent and some contradictory results have been also reported [8].

Research investigating patterns of self-esteem by age, has produced developmental trajectories which show higher levels of self-esteem in early adolescence, and the trend significantly changing after age 15. The drop in self-esteem after age 15 reaches the lowest scores between 18-22 years old particularly for girls (see [9], [10]). Similarly, Bleidorn et al (2016) have reported that self-esteem is relatively high in childhood, before dropping during adolescence and increasing once more during young adulthood before declining in old age [11].

As regards gender, research studies generally agree on self-esteem levels being higher among men as compared to women, but the trend varies with age.

The meta-analysis of Kling and colleagues (1999) found that the gender gap was more pronounced in adolescence, and gradually seemed to fade away with age [12]. Similar findings have been reported by Bleidorn et al. (2016) who reported that the trajectories emerging in adolescence persist throughout early and middle adulthood before narrowing down and even disappearing in old age [11]. Helwig and Ruprecht (2017) reported a small gender gap in self-esteem in young adulthood which completely disappeared by old age [8]. Other studies have reported on a relatively small gender gap in self-esteem from the end of adolescence to middle adulthood [11] or even no significant gender differences at all [13]. A more recent study (Ogihara,2020) concluded that that developmental gender differences in self-esteem appear to be small or absent but clearly more important among women than men [14].

Some aspects of age and gender differences seem to be universal across cultures (e.g., the universal gender gap in adolescence has been found in all 171 countries investigated by Helwig & Ruprecht (2017) [8]. Nonetheless, there are also cultural specificities such as baselines, typical levels of self-esteem, or life span trajectories which seem to differ across countries [8]. Explanations were provided in terms of socio-economic, socio-demographic factors, gender equality issues, cultural values etc.

To summarize together with eminent experts in the field, it might be argued that although self-esteem has been widely investigated there is still a need for a better understanding of factors that explain individual differences in self-esteem during the life span.

A systematic literature review on self-esteem and well-being in Kosovo (Fanaj & Melonashi,2014) concluded that self-esteem values were comparable to other Balkan countries [15]. As regards gender differences, only one of the reviewed studies reported higher self-esteem for boys as compared to girls; other studies have reported no gender differences. Nonetheless, research focusing on developmental trends of self-esteem in Kosovo is missing. Therefore, the aim of the present study was to assess age and gender patterns of self-esteem among Kosovo youth, Research questions included: 1. What are self-esteem levels among youth, 10-29 years old in Kosovo? 2. What are the age and gender patterns across the different dimensions of self-esteem among youth in Kosovo?3. What is the developmental trajectory of self-esteem and what gender patterns can be identified? 4. How do the findings on self-esteem compare to other countries (are there any cultural differences)?

## **METHODOLOGY**

### **Sample**

The study sample included 4303 participants, 45.5% male and 54% female. The mean age of participants was 16.57 years (SD=2.99). Composition by age

group was as follows: 3.7% 10-12 years old, 66.4 % 13-17 years old, 25.8 % 18-22 years old and 2.8 % 23-29 years old (1.3 % information on age was missing). The division into age groups is done based on the division proposed in the study by Helvig & Ruprecht (2017). The sample includes four different subsamples including: 41 participants from a youth center in Lipjan, 3436 participants from middle and high schools, 641 participants from public and private universities and, 185 participants from the Mental Healthcare unit for children and adolescents in Prizren.

### **Measuring instrument**

The measuring instrument was the Rosenberg Self-Esteem Scale [6]. This is the most widely used scale in self-esteem studies, across different countries and cultures. The scale includes 10 items assessing self-respect and self-acceptance and all items are rated on a Likert Scale [1- strongly agree; 2- agree; 3-disagree; 4- strongly disagree] [6]. Five items are reversely scored and the sum score for global self-esteem ranges from 10 to 40. A higher total score indicates higher global self-esteem. Scores below 25 indicate low self-esteem [6].

### **Procedure**

In the 3 subsamples involving children and adolescents informed consent was asked from their parents prior to the administration of the questionnaire. In the subsample involving schools, approval was asked from the school directors too, who held subsequent briefings with teachers. In the subsample involving university students, participants provided informed consent themselves. The paper and pencil questionnaire were administered to participants in the classrooms and sufficient time was allowed for answering. Research assistants were present during the whole process, in order to answer any questions, provide clarification and finally collect the questionnaires.

## **RESULTS**

Results showed that the mean value for self-esteem in the study samples was 26.72 (SD=4.53). 28.3 % of the sample (29.3 % of men and 27.5 % of women) were classified with low self-esteem. In terms of age groups, only 16.3% of 10-12-year-old had low self-esteem, as compared to 28.2% of 13-17-year-olds, 29.9% of 18-22-year-olds and 33.3% of 23-29-year-olds (see Table.1).

Despite findings that men report slightly higher scores as compared to women, Mann-Whitney test revealed no significant gender differences in self-esteem scores ( $M_{\text{females}}=27$ ,  $N=2303$ ;  $M_{\text{males}}=27$ ,  $N=1957$ ;  $Z=-1.393$ ,  $p<.16$ ).

Kruskal-Wallis analysis revealed significant differences by age groups  $X^2(3, n=4243) = 42.226$ ,  $p<.00$ ; whereas scores were higher in the early adolescence



group (Md=29) as compared to the middle adolescence group (Md=27), late adolescence group (Md=26) and youth group (Md=27).

Mann-Whitney test revealed significant gender differences in self-esteem scores in the age group 18-22 years old ( $Md_{\text{females}}=26$ ,  $N=612$ ;  $Md_{\text{males}}=27$ ,  $N=484$ ;  $Z=-2.057$ ,  $p<.04$ ) and 23- 29 years old ( $Md_{\text{females}}=45$ ,  $N=2303$ ;  $Md_{\text{males}}=27$ ,  $N=75$ ;  $Z=-2.900$ ,  $p<.00$ ); whereas males scored significantly higher.

**Table 1.** Sample characteristics - number, percentages, total self-esteem and dimensions mean (author survey, own source)

	No.	%	SRES Mean	Positive	Negative	Self- competence	Self – liking
Gender							
Male	1960	45.5	26.82	14.69	12.13	13.69	13.13
Female	2304	53.5	26.63	14.86	11.77	13.56	13.06
Age- groups							
10 -12	160	3.7	29.01	15.64	13.37	14.94	14.07
13-17	2858	66.4	26.59	15.03	11.56	13.57	13.00
18-22	1109	25.8	26.72	14.17	12.56	13.58	13.14
23-29	120	2.8	26.65	14.04	12.61	13.53	13.11
Cut-off self- esteem level							
Low self- esteem	1218	28.3	21.38	10.34	11.04	10.79	10.59
Normal self- esteem	3081	71.6	28.84	16.55	12.29	14.75	14.09

### Positive-negative dimensionality of self-esteem among youth

As regards the positive-negative dimensions, results showed that the mean value for the positive dimension was 14.79 (SD=4.23) while the mean value for the negative dimension 11.93 (SD=3.52) (see Table.2). There was a significant negative correlation between the two dimensions ( $r=-.314$ ,  $p<.00$ ) which did not differ depending on gender. However, some differences were found in terms of age groups. More specifically, a significant positive correlation was found between the two dimensions in the 10-12-year-old group ( $r=.239$ ,  $p<.00$ ). However, the correlation was negative in the 13-17-year-old group, and non-significant in the 23-29-year-old group.

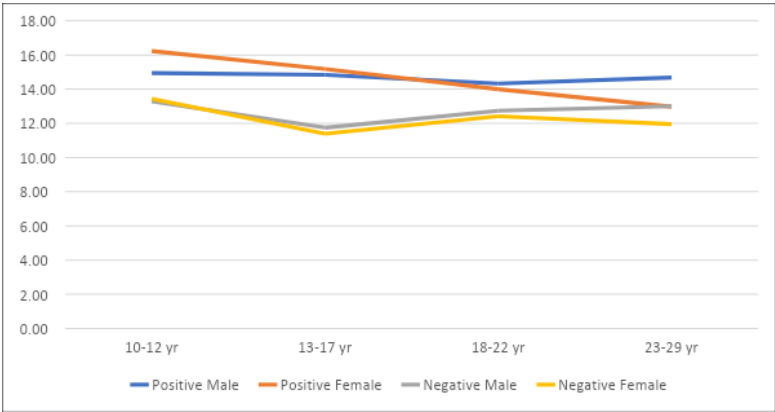
Mann-Whitney test revealed significant gender differences in negative dimension scores ( $Md_{\text{females}}=27$ ,  $N=2304$ ;  $Md_{\text{males}}=27$ ,  $N=1958$ ;  $Z=-3.049$ ,  $p<.00$ )

with males having higher mean ranks but no significant gender differences in positive dimension scores. Kruskal-Wallis analysis revealed significant differences in positive scores by age group  $X^2(3, n=4245) = 52.960, p < .00$ ; as the early adolescence group scored higher ( $Md=16$ ) than all other groups. Kruskal-Wallis analysis also revealed significant differences in negativity by age groups  $X^2(3, n=4245) = 108.992, p < .00$ ; as the age group of early adolescence scored higher ( $Md=14$ ) than middle adolescence group ( $Md=11$ ), late adolescence group ( $Md=12$ ) and youth group ( $Md=13$ ).

Mann-Whitney test revealed significant gender differences in positivity scores in a) age group 10 to 12 year old ( $Md_{females}=16, N=87; Md_{males}=15, N=73; Z=-2.339, p < .01$ ), whereas females scored significantly higher; b) age-group 13 to 17 year old ( $Md_{females}=16, N=1534; Md_{males}=16, N=1299; Z=-2.247, p < .02$ ) whereas females scored significantly higher and c) age group 23 to 30 year old ( $Md_{females}=12, N=45; Md_{males}=16, N=75; Z=-2.517, p < .01$ ; whereas males scored significantly higher. Mann-Whitney test revealed significant gender differences in negativity scores by age group 13 to 17 years ( $Md_{females}=11, N=1534; Md_{males}=12, N=1299; Z=-2.819, p < .00$ ) whereas males scored significantly higher.

**Table 2.** Positive-Negative dimensionality of self-esteem among youth based on gender and age group (author survey, own source)

Age-groups	Positive		Negative	
	Male	Female	Male	Female
10-12 yr	14.95	16.23	13.29	13.44
13-17 yr	14.84	15.18	11.75	11.40
18-22 yr	14.32	14.00	12.74	12.42
23-29 yr	14.68	12.98	13.00	11.96



**Fig. 1.** Graphical display of Positive-Negative dimensionality of self-esteem among youth based on gender and age group (author survey, own source)

### Self-competence/self-liking dimensionality of self-esteem among youth

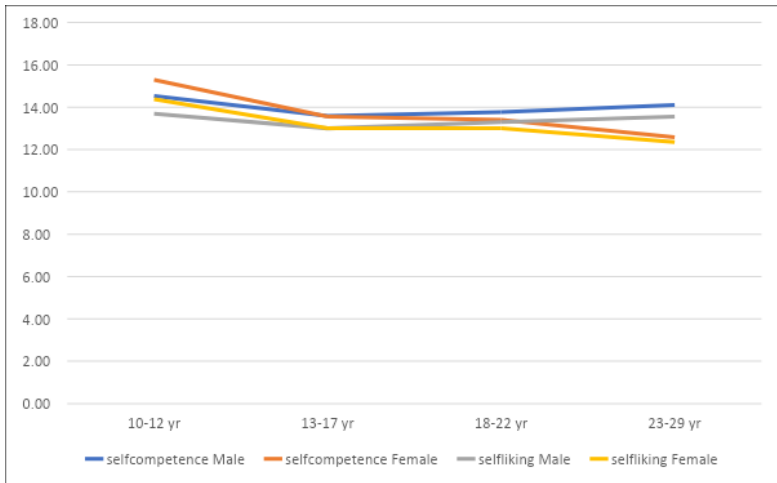
As regards the self-competence/self-liking dimensions results showed that the mean value for self-competence was  $M=13.62$  ( $SD=2.64$ ) while that for self-liking was  $M=13.09$  ( $SD=2.63$ ) (see Table.3). The two dimensions correlate positively ( $r=.47$ ,  $p<.00$ ) and correlations were found for both genders and across all age-groups. Mann-Whitney test revealed no significant gender differences in self-competence and self-liking dimensions. Kruskal-Wallis analysis revealed significant differences by age group in self-competence,  $X^2(3, n=4244)=39.293$ ,  $p<.00$ ; whereas 10–12-year-old ( $Md=15$ ) had the highest scores). Kruskal-Wallis analysis revealed significant differences by age group in self-liking,  $X^2(3, n=4246)=29.924$ ,  $p<.00$ ; whereas 10–12-year-old ( $Md=14$ ) had the highest scores as compared to the other age groups.

Mann-Whitney test revealed significant gender differences in self-competence scores in the age group 18 to 22 years ( $Md_{females}=14$ ,  $N=612$ ;  $Md_{males}=14$ ,  $N=484$ ;  $Z=-2.032$ ,  $p<.01$ ) and 23 to 30 year old ( $Md_{females}=13$ ,  $N=45$ ;  $Md_{males}=14$ ,  $N=75$ ;  $Z=-2.417$ ,  $p<.04$ ; whereas males scored significantly higher.

Mann-Whitney test revealed significant gender differences in self-liking scores in the age group 23 to 30 year old ( $Md_{females}=13$ ,  $N=45$ ;  $Md_{males}=14$ ,  $N=75$ ;  $Z=-2.189$ ,  $p<.02$ ; whereas males scored significantly higher.

**Table. 3.** *Self-competence/self-liking dimensionality of self-esteem among youth based on gender and age group (author survey, own source)*

Age groups	Self-competence		Self-liking	
	Male	Female	Male	Female
10-12 yr	14.53	15.29	13.70	14.38
13-17 yr	13.59	13.55	13.00	13.00
18-22 yr	13.77	13.41	13.29	13.01
23-29 yr	14.11	12.58	13.56	12.36



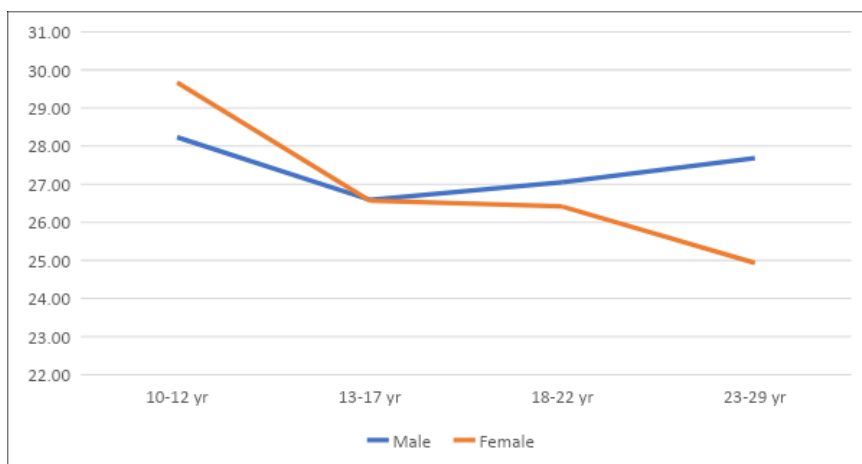
**Fig. 2.** Graphical display of self-competence/self-liking dimensionality of self-esteem among youth based on gender and age group (author survey, own source)

**Developmental patterns of self-esteem**

Results showed that the mean value for self-esteem in early adolescence (10-12 year olds) is 27.64 (SD=4.39), that is higher than middle adolescence (13-17 years) 26.28 (SD=4.46), late adolescence (18-22 years) 26.68 (SD=4.74) and young adults (23-29 years) 27.37 (SD=4.77) (see Table.4 and 5). Kruskal-Wallis analysis confirmed significant differences by age groups  $X^2(3, n=4243) = 42.226$ ,  $p < .00$ ; as early adolescence group scored higher ( $Md=29$ ) than middle adolescence group ( $Md=27$ ), late adolescence group ( $Md=26$ ) and youth group ( $Md=27$ ) (see Table.4). Therefore, self-esteem tends to decrease from early to mid-adolescence, and then increase again from late adolescence towards young adulthood. This developmental pattern was present even when the analysis was performed separately by gender. However, gender comparisons revealed significant differences in self-esteem only in the age group 18-22 years old and 23-29 years old, as men had significantly higher scores than women  $Md=27$  while females  $Md=26$  (18-22 yrs.) and  $Md=24$  (23-29 yrs.). As might be noted, the self-esteem decrease is more pronounced among women even in late adolescence and early adulthood, where men are clearly in advantage.

**Table 4.** Self-esteem among youth based on gender and age group (author survey, own source)

Age -groups	Male	Female	Sig.
10-12 yr	28.23	29.67	.060
13-17 yr	26.59	26.57	.795
18-22 yr	27.05	26.42	.040
23-29 yr	27.68	24.93	.004



**Fig. 3.** Graphical display of self-esteem among youth based on gender and age group (author survey, own source)

**Table 5.** Total self-esteem and positivity/negativity dimensions based on gender, age groups (author survey, own source)

	RSES	SD	Positivity	Negativity	Pos-Neg	rPosNeg
Total sample	26.72	4.58	14.79	11.93	2.86	-.31*
Male	26.81	4.76	14.68	12.13	2.55	-.24*
Female	26.62	4.41	14.85	11.77	3.08	-.35*
10-12 yrs	29.01	4.96	15.64	13.36	2.28	.23*
13-17 yrs	26.59	4.42	15.03	11.56	3.47	-.36*
18 - 22 yrs	26.72	4.75	14.17	12.56	1.61	-.21*
23 -29 yrs	26.65	4.97	14.04	12.61	1.43	.09

*Sig.*=significance (*p*)

*Pos-Neg*= difference between two dimensions

*rPosNeg*=Correlations

**Table 6.** *Total self-esteem and self-competence/self-liking dimensions based on gender, age groups (author survey, own source)*

	Self-Competence means	Self-Competence SD	Self-liking means	Self-Liking SD	r
Total sample	13.62	2.64	13.09	2.63	.47*
Male	13.68	2.73	13.13	2.7	.51*
Female	13.56	2.56	13.05	2.57	.43*
10-12 yrs	14.94	2.79	14.07	2.77	.58*
13-17 yrs	13.57	2.55	13.00	2.56	.46*
18 - 22 yrs	13.58	2.74	13.14	2.74	.46*
23 -29 yrs	13.53	3.09	13.11	2.79	.42*

*Sig.*

*r=coefficient*

**Cross country comparisons of self-esteem**

The findings of the present study were compared with those reported by Schmitt & Allik, (2005) and are provided in tables 7 and 8. Mean values for self-esteem in the present sample are lower as compared to other countries, except for Japan. In terms of comparisons by age group, mean values for self-esteem were higher in the present sample for almost all age groups, except for 18-22-year-old men and 23-29-year-old women for Europe/Central Asia (see Table. 9).

Regarding dimensionality, the positive-negative difference index in the present sample is the highest as compared to other countries and also the correlation between the dimensions is negative, while all other countries had positive correlations (see Table.7). As regards self-competence and self-liking scores, as can be noted in table 8 only Japan revealed slightly lower scores than Kosovo. However, correlations between dimensions were moderate, and comparable to other countries, apart from Turkey (weak correlation) (see Table. 8).

**Table 7.** *Total self-esteem and positivity/negativity dimensions / cross country comparisons Source: own source & Schmitt & Allik, (2005) [5]*

Country	RSES	SD	Pos	Neg	Pos-Neg	rPosNeg
Kosovo	26.72	4.58	14.79	11.93	2.86	-.31
Austria	31.78	4.68	16	15.8	0.3	.63
Croatia	31.94	4.12	16.6	15.4	1.2	.61
Greece	31.29	4.76	16.4	14.9	1.6	.65
Serbia	33.59	4.99	17.4	16.2	1.3	.57
Slovenia	31.74	4.72	16.8	14.9	1.9	.59
Turkey	32.14	4.97	17	15.2	1.8	.65
Japan	25.5	4.37	13.1	12.4	0.8	.60

**Table 8.** *Self-competence/self-liking self-esteem dimensions / cross-country comparisons Source: own source & Schmitt & Allik, (2005) [5] & Bleidorn et al (2016) [11]*

Country	Self-Competence means	Self-Competence SD	Self-liking means	Self-Liking SD	r	IND
Kosovo	13.62	2.64	13.09	2.63	.47	
Austria	16.04	2.55	15.76	2.67	.61	55
Croatia	16.93	2.02	15.07	2.62	.57	33
Greece	16.81	2.24	14.34	3.06	.61	35
Serbia	17.6	2.18	16.05	3.32	.63	25
Slovenia	17.13	2.37	14.6	2.88	.62	27
Turkey	17.09	2.58	14.4	2.19	.37	37
Japan	13.33	2.51	12.3	2.36	.61	46
Albania						20

**Table 9.** *Total self-esteem by age-group:Kosovo vs.Europa/Central Asia. Source: own source & Helvig & Ruprecht (2017) [8]*

Age groups	10-12 year		13-17 year		18-22 year		23-29 year	
Gender	Female	Male	Female	Male	Female	Male	Female	Male
Europa/Central Asia	29.2	NA	22.82	25.69	25.31	27.26	26.91	26.89
Kosovo	29.66	28.23	26.57	26.59	26.42	27.05	24.93	27.68

## DISCUSSION AND CONCLUSIONS

The aim of the present study was to assess age and gender patterns of self-esteem in adolescents and young adults in Kosovo. The study revealed developmental trajectories of self-esteem and gender patterns which are comparable to findings from other countries, although with some slight differences.

As regards gender patterns, results indicated a slightly but not significantly higher level of self-esteem for men. Although these findings are not in line with most existing research in the field [12] there have been some studies also reporting no significant differences [13]. The gender difference reached significance only for the age groups 18 to 22 years old and 23-29-years old. Indeed, one of the most important findings of the present study is the pattern of decreasing self-esteem with increasing age (highest rates in the category 10-12-year old's and dropping with age). This finding is in line with existing research (see Chung et al, 2017; Robins & Trzesniewski, 2005) [9], [10]. However, there is a clear gender pattern for this result, appearing very differently for men and women. Men and women in the age group 13-17 years old both report lower self-esteem as compared to the 10-12-year-old group. However, among men there is no further drop in self-esteem beyond this age; indeed, both age groups 18-22-year old's and 23-29-year old's report higher self-esteem as compared to 13-17-year olds. Conversely among females, the drop-in self-esteem starting in 13-17-year-old group, continues further, as 18-22-year old's and 23-29-year old's report lower levels of self-esteem. These findings indicate a very different trajectory from that reported in robust studies such as that by Bleidorn et al (2016) [11]. Helvig & Ruprecht (2017) explain such 'unconventional findings' through cultural elements, which influence lifespan trajectories [8]. However, it should be mentioned that even in the Helvig & Ruprecht (2017) study self-esteem scores for women increase before age 20, while in the present study there is no such evidence at least until age 29 [8]. This finding might be explained in terms of the gender specific developmental pressure and tasks in late adolescence and early adulthood, e.g., it is not uncommon that women leave high school before graduation, or get married and start a family at this age. It might be speculated that cultural pressure might negatively influence both self-competence and self-liking components of self-esteem, as women struggle to meet social expectations for their gender role. Nonetheless, this interpretation requires further investigation, through qualitative studies which might focus on women's perceptions of their identities within the specific cultural context.

As regards cross-country comparisons, the study showed that mean values for self-esteem in the present sample were lower as compared to other countries, except for Japan. However, this comparison should be carefully considered, because of the methodological differences between the studies (i.e., Schmitt & Allik, 2005) [5]. Even so the mean reported value for self-esteem, might be considered above the theoretical average, i.e., positive self-esteem value which has been replicated across cultures (Schmitt & Allik, 2005) [5].

In terms of country comparisons by age group, results of the present study are slightly higher across all categories as compared to a similar study with the same age groups by Helwig & Ruprecht (2017) [8]. An interesting finding is that mean values for self-esteem were higher in the present sample for almost all age groups (except for 18-22-year-old men and 23-29-year-old women for Europe/Central Asia). Regarding dimensionality, the positive-negative difference



index in the present sample is the highest as compared to other countries and also the correlation between the dimensions is negative (all other countries reported positive correlations). Schmitt and Allik (2005) explain such contradictory findings by cautioning against direct cross-cultural comparisons, particularly because negatively word items might be interpreted differently across nations [5].

Although Kosovo mostly holds collectivistic values, self-competence scores are higher than self-liking scores and only Japan revealed slightly lower scores than Kosovo. This finding requires further investigation, particularly as regards the presence of any cohort effects in the findings. Indeed, authors caution the interpretation of findings strictly in developmental terms due to the cross-sectional and not longitudinal character of the study. Moreover, other limitations include sample selection procedures, and subsampling diversity due to context. Despite these limitations, the present study represents an important contribution to the investigation of self-esteem in Kosovo and provides several directions for further research particularly as regards gender or developmental studies.

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# AQUAMAN THE MOVIE AS A LATE MODERN FAIRY TALE

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## ABSTRACT

The feature film *Aquaman* (2018, directed by James Wan) is the most commercially successful superhero movie belonging to the DC Extended Universe. Produced by DC Films and Warner Bros. Pictures, the motion picture portrays a rebellious superhero with an extraordinary physical presence. The paper aims to reflect on the movie *Aquaman* and its ability to function as a late modern fairy tale. *Aquaman*'s genre structure includes elements of fantasy, science-fiction and action film. However, the authors work with the assumption that the story is, in its nature, a fairy tale involving late modern means of expression. The first part of the text is largely theoretical, outlining the movie's importance and defining the genre of a fairy tale in the context of late modern culture. Following the given line of thought, the second part of the paper presents a narrative analysis of the film in question, which is based on Propp's morphology of fairy tales.

**Keywords:** *Aquaman, DC Extended Universe, fairy tale, late modern culture, Propp's morphology of the folktale*

## INTRODUCTION

*Aquaman*, also known as Arthur Curry or "the King of the Seven Seas", has been an important character in the DC Comics' portfolio since his debut appearance in 1941. R. Duncan and M. J. Smith emphasize that probably no other major comic book character created by DC has appeared in so many comic book titles or undergone so many revisions and reinterpretations. *Aquaman*'s ability to survive both on the surface and underwater allows him to battle dangerous enemies who walk the Earth, as well as those who reside within our planet's vast oceanic expanses. The character was originally created by the writer Mort Weisinger and the artist Paul Norris.[1] As a comic book character, *Aquaman* has existed and thrived for more than seven decades. This unconventional superhero may have appeared in a number of audiovisual media products (most of which were animated and some even direct-to-DVD), but his live-action breakthrough came along much later, with the media franchise known as the DC Extended Universe, alongside *Superman* (or *Man of Steel*), *Batman*, *Wonder Woman*, *Flash* and other DC superheroes. Mainstream Hollywood cinema has changed this fair-

haired superhero into a tall, exotic and overly masculine man with the instantly recognizable face of the American actor Jason Momoa.

The movie Aquaman was released in 2018. Inspired by the commercial success of their competitors – producers of the Marvel Cinematic Universe (MCU), media professionals responsible for establishing the DC Extended Universe (DCEU) loosely based Arthur Curry's live-action adventure on a range of comic book narratives, transforming them in a manner that defines 21<sup>st</sup> century blockbusters with superheroic protagonists. We might say that the feature film is a spin-off associated with the previous DCEU movies *Batman v Superman: Dawn of Justice* and *Justice League* (2016, 2017, both directed by Zack Snyder). Aquaman's presence in these movies was not too prominent, as he was only a supporting character. However, his brief appearances in the above-mentioned film projects can also be seen as starting points for the consequent production of Aquaman's origin story. Aquaman is the most commercially successful product of the DCEU, as the motion picture's worldwide box office grosses exceeded 1.1 billion USD. Surprisingly enough, the movie's remarkable profit was achieved mostly thanks to non-American cinemagoers, who generated more than 70% of its worldwide revenues.[2] It is necessary to note that in 2018, no other feature film produced by Warner Bros. Pictures was able to accomplish box office performance like this.

The paper's objective is to discuss Aquaman the movie in terms of its ability to convey both late modern cultural elements and components found in traditional fairy tales. The basic assumption is that even though Aquaman's story should primarily be perceived as a science-fiction movie, given that its main protagonist is a comic book superhero, the film's genre determination is, in fact, much more complex. Since our ambition is to point out that Aquaman the movie is rather a result of extensive genre hybridization involving elements of science-fiction, fantasy (especially fairy tale) and action movies, we apply the principles of narrative analysis in order to identify the different genre components. The analysis is largely based on V. Propp's Morphology of the Folk Tale [3] and complemented by procedures typical for discourse analysis. The main research question leads towards identifying which genre elements can be identified within the movie's narrative structure. According to L. Rusňáková, narrative analysis is closely related to genre studies. Each media product has obvious genre indicators that guide us, letting us know how we should approach its story. We understand "genre" as a set of formal and content elements of a specific work. It also determines the communication's target audiences. While talking about genres, we refer to stable, recurring types or categories of media products characterized by their common features (thematic, compositional, formal elements).[4] Following this line of thought, we pose three research questions:

**RQ1:** Which genres can be identified in Aquaman?

**RQ2:** To what extent the film corresponds with Propp's morphology of the folk tale?

**RQ3:** Which aspects of late modern culture are communicated via the movie's storyline?

## **AQUAMAN: HOLLYWOOD'S MOST SUCCESSFUL "METAHUMAN"**

As noted above, Aquaman's main protagonist is, predictably enough, Arthur Curry, a young man nicknamed "Aquaman" by social media. Curry is thought to be a so-called metahuman, in other words, a superhero ("metahumans" are present in all movies comprising the DC Extended Universe). The hero is a hyper-individualist. As the audience can see, he often helps people in distress, especially if the threats they are facing are related to the aquatic element. He grew up with his father Tom in the coastal area of Maine, the easternmost state of the USA. Curry bears strong Polynesian facial features of his father and he sometimes uses expressions corresponding to the Maori language. The tattoos that cover large parts of his chest and arms are also Maori. Although his father's Maori ancestry is obvious, both men act as regular Americans stereotyped by decades of Hollywood production, driving a pick-up truck and spending their free time in a local pub. The main character's parents named their son Arthur with an explicit reference to King Arthur, the legendary figure of Anglo-Saxon culture, which only underlines Aquaman's strong mythological framework. In addition, at the time of his birth, local television reported on the Tropical Storm "Arthur". The hero differs significantly from the numerous comic book versions of himself, especially due to his exotic appearance. Curry is not blond with pale skin (these features, paradoxically, fully apply to Orm, his half-brother and main opponent), but rather a heavily muscled, dark-haired man.

It is reasonable to presume that the movie's international success is partly associated with the "global" nature of the depicted events. The prologue portrays the past, mainly the circumstances preceding Arthur Curry's birth. These events occurred in 1985, in a fictitious coastal town called Amnesty Bay, Maine. This is an important location associated with the superhero's personal history, as the narrative repeatedly goes back in time, highlighting key moments of Aquaman's childhood and adolescence. A romantic subplot involving his parents is located within the premises of the local lighthouse. Arthur Curry's parents have been separated for a long time, although not voluntarily. Now an adult, Curry irregularly returns to Amnesty Bay to visit his father. However, the visually and narratively dominant environment is represented by the fictitious underwater empire of Atlantis, which is an important part of ancient mythology. The spectacular portrayal of the Atlantis is, in many ways, inspired by similar locations included in blockbuster films produced by different companies. As it seems, the Atlantis can be accessed only via a rainbow-like bridge (a similar visual interpretation of a bridge is also present in the film trilogy centering on the

superhero Thor, released by Marvel Studios), and some districts of the underwater city have similar design of lighting and flora as the planet Pandora (depicted in the feature film *Avatar* released by 20<sup>th</sup> Century Fox in 2009). The moment the protagonist (as a child) reveals a part of his superhuman abilities takes place in Boston's "water world" called the New England Aquarium. Much later, while searching for a magical object (Atlant's Sacred Trident), Aquaman travels across the Sahara Desert and then visits architectural monuments in Sicily. Some action elements of the story (the battle with a sea monster, the rescue of a Russian submarine) occur in unspecified places below the ocean's surface. The individual locations are mostly fictitious (the exceptions being the Sahara Desert, the Boston Aquarium and the island of Sicily).

## **BORN TO RULE THE ATLANTIS: AQUAMAN AS A FAIRY TALE**

The basic assumption we work with is that Aquaman the movie functions as a late modern fairy tale. "Fairy tale" is often defined as a subgenre of fantasy. C. Baldick explains that "fantasy" is most often seen as a general term for any kind of fictional work, which is not devoted to realistic representation of the known world; at least not primarily. Fantasy tends to portray imagined worlds, in which magical powers and other impossibilities are accepted or rather expected to appear. When talking about "fairy tale", the author argues that it is a traditional folktale adapted and written down for the entertainment of (mostly) children. It features marvelous events and characters – e.g., princesses, talking animals or witches.[5] Our aim is to interpret Aquaman's narrative with emphasis on the movie's genre structure, which is, as we believe, dominated by fantasy (fairy tale). However, other genres are included as well. We might even point out that the film in question is based on science fantasy. According to T. Mierlees, science fantasy is probably the most effective genre hybrid of today. This specific combination of science-fiction and fantasy is so successful thanks to its ability to fulfil the expectations of young viewers, visual formability (such a genre hybrid can be effortlessly transformed into a digital game or a toy collection) and tendency to arouse fan interest in "esoteric knowledge" about the work itself (the audience is interested to learn more about this engaging, fascinating fictional world, to get to know it better).[6] The mentioned combination of genres allows producers to use the means of expression of the individual film types (the magical aspect of fantasy, the tendency of science-fiction to depict the future or other planets, and the spectacular scenes of destruction typical for action films).[7]

E. Branigan comments on V. Propp's approach to the developmental logic of narrative organization by saying that its point lies in identifying various actions that are present in storylines. Although they might differ, they fulfill the same functions. Propp actually found that in a hundred Russian folktales, there were only thirty-one functions. Some of them might have been omitted in particular cases, but they mostly occurred in the same order in all the stories.[8] Aquaman's movie story is, of course, made in Hollywood, on basis of American cultural

values and universally entertaining topics suitable for international distribution. And yet we can observe that the analyzed motion picture's narrative structure largely corresponds with Propp's morphology of a fairy tale.[3] The following analysis thus merges Propp's approach towards fairy tales and their narrative structure with discourse elements that establish connections between traditional fantastic stories and late modern cultural phenomena.

Aquaman's story begins with the phase of **absence**. Most of his later actions are driven by the need to cope with the moment when his mother decided to leave her husband and son to keep them safe. This forced division of his family provides the storyline with certain tension. As an adult, Arthur Curry expresses his anger due to the fact that Atlanna, former Queen of the Atlantis and his mother, is now missing and presumably dead just because she left her realm, loved Arthur's father and bore him a son. **Interdiction**, i.e., the moment Curry's story complicates occurs when he rescues a Russian submarine under a pirate attack, leaving the two ruthless mercenaries who planned the attack, a father and his adult son, to die inside the sinking vessel. However, David Kane, younger of the two, survives and he will later become Black Manta, one of Aquaman's most dangerous enemies. Aquaman thus **violates the interdiction**, which means that Jesse Kane dies. The viewer then finds out that the Kanes work for Orm, Arthur Curry's stepbrother, the current emperor of the Atlantis. Orm plans to openly attack the "surface-dwellers", meaning people who live on the Earth's surface. The Kanes were not able to defeat Aquaman, but David Kane still delivers Orm the submarine. During the phase of **reconnaissance**, Orm stages a triumphant arrival to the underwater kingdom of Xebel, seeking allies who would support his war efforts. Xebel's king, Nereus, reminds Orm that he has an older half-brother Arthur that may make a claim to the throne (**delivery**; the villain now focuses on eliminating his intended victim). Following this moment, Orm earns Nereus' trust through arranging and seemingly stopping an attack of the dysfunctional Russian submarine against Xebel. This means that he uses **trickery** to acquire something he values – Nereus' loyalty and army.

The above-mentioned military alliance allows Orm to inflict a massive tsunami wave, i.e., to directly endanger Arthur Curry's remaining family and all people living in coastal areas, which are now flooded by toxic waste (**complicity**). By doing so, the villain harms Tom Curry – Aquaman's father barely survives the tsunami, almost drowning after his car is hit by the water and debris (**villainy**). The phase of **mediation** closely introduces another important character – an Atlantean Princess named Mera, Nereus' daughter. Mera saves Tom Curry's life and warns Aquaman that Orm is assembling a huge army to attack and eventually exterminate the "surface-dwellers". Considering this information and the previous events, Arthur decides to act (**counteraction**). The hero agrees to join Mera, which also means that he is reminded of his royal heritage. They leave together and the main protagonist prepares for his first visit of the Atlantis (**departure**). **The first function of the donor** is depicted via a flashback uncovering crucial moments of Arthur's teenage defiance. His helper is Vulko,

Atlanna's trusted ally who tries to teach him how to live, fight and think like a true Atlantean, although with no success. This moment is used to better explain Arthur's ability to "understand" all sea animals and extraordinary invulnerability when it comes to conventional weapons such as guns or knives.

Secretly entering the Atlantis, Aquaman meets Vulko again and acquires information on Orm's skills and powers. He also learns about the mythical Trident of Atlan, an ultimate weapon made of Poseidon's steel that would allow the one who wields it to rule the Atlantis (**hero's reaction**). The map leading to the lost Trident should be acquired thanks to an ancient recording provided by Vulko (**receipt of a magical agent**). However, the hero's presence in this hostile environment is uncovered and he is transferred against his will – to face Orm for the first time (**guidance**). Captured and chained, the main protagonist expresses his stubbornness and self-confidence by challenging Orm, demanding the Combat of the Kings (**struggle**). Arthur is also insulted because of his lineage – Orm calls him a "half-breed", since his father is just a "surface-dweller". While waiting for the Combat to begin, Aquaman refuses Vulko's reasonable arguments. He is **branded** (marked) by wearing Atlantean armor. The phase of **victory** is replaced by **defeat**, because Arthur is not strong enough to prevail. However, Mera's intervention allows him to escape from captivity (**liquidation**). Both of them are presumed dead.

Aquaman is now supposed to **return** (go back home). He does return, in a sense; however, it is still necessary to find the Trident, because without it, Arthur will not be able to face Orm again. However, Orm soon finds out that both Arthur and Mera are alive and looking for the Trident. Orm contacts David Kane, providing him with Atlantean armor and technology. Kane now becomes Black Manta and seeks to kill Aquaman and his associate (**pursuit**). Arthur is once again **rescued** by Mera – even though he defeats Black Manta, his wounds are quite severe and he would not be able to travel without her help. The couple's **unrecognized arrival** to the Trench (where Arthur's mother was executed for high treason and where the Trident should be) transfers Aquaman and Mera to a mythical world. The hero finds out that his mother Atlanna is actually alive and strives to obtain the Trident so all of them can have a chance to return. No clear **unfounded claims** occur.

The hero faces a **difficult task** once again. In order to acquire the Trident, he has to defeat a mythical creature called Karathen, the guardian of Atlan's body and the weapon itself. Arthur proves that he is worthy of wielding the Trident not by using his physical strength, but rather by his ability to understand the creature and communicate with it (as the first man since Atlan, the original owner of the artifact). Since the hero is deemed worthy, he succeeds and rips the Trident from Atlan's hand (**solution**). Based on these actions, Aquaman becomes "the one true King of the Atlantis" (**recognition**). Arthur thus saves both Mera and Atlanna, returning back to the Atlantis to challenge Orm. He does so at the moment when Orm is trying to gain another important alliance by attacking the Brine Kingdom.



Arthur's interference leads to Orm's defeat (**exposure**). Wielding the Trident, Aquaman not only eliminates the attacking military force, but also uses this opportunity to demonstrate his true power – the ability to command all creatures living in the ocean. Aquaman's **transfiguration** actually happened before, when he obtained the Trident – he now wears golden armor fit for a King. The story arc closes by two essential concluding aspects – Orm's **punishment** (he is defeated and imprisoned) and "**wedding**". Arthur neither marries Mera nor he proposes to her, but he does become the King of the Atlantis.

## CONCLUSION

Answering the first research question (RQ1), we may conclude that Aquaman the movie is primarily a fantasy feature film. Its narrative structure suggests that the work is not too different from classic fairy tales. The motion picture's main plot is obviously dominated by late modern fantasy centered on the past. Elements of fantasy can be identified within the circumstances leading to the hero's birth (Queen Atlanna refused a forced marriage and escaped the Atlantis, eventually falling in love with a lighthouse keeper). Another point worth mentioning is the Atlantis itself – the mythical "lost" underwater realm filled with knowledge, riches and technologies that are inaccessible and unknown to those who live on the solid ground. Arthur Curry or rather Aquaman finds its feminine counterpart in the stubborn Atlantean Princess Mera. Personalizing distinctively late modern character traits, Mera is no damsel in distress; on the contrary, her role is assertive, because she saves Arthur's life more than once, provides him with the necessary knowledge and stands by his side while facing their common enemies.

The previous analysis shows that Aquaman the movie does not follow Propp's morphology to the smallest detail (RQ2), but it does function as a late modern fantasy story inspired by classic fairy tales. For example, the phase of **interdiction** (someone trying to warn the hero against some action) is outlined only implicitly. Arthur's father does not try to stop him, he only suggests that the hero's tendency to interfere and help is a logical consequence of his mother's temperament and character. Moreover, when trying to defeat the villain (**victory**), Aquaman does not prevail and has to accept Mera's help to escape and survive. Furthermore, there are no **unfounded claims** and Arthur's **transfiguration** occurs prior to defeating Orm (**exposure** and **punishment**) – at the moment when he obtains the Trident.

The massive military conflict between hostile underwater kingdoms is largely fantastic as well. The presence of magical artifacts is evident and important, especially in the case of Atlan's Trident, allegedly the creation of the Greek God Poseidon. However, the movie's visual elements are dynamic thanks to the used genre conventions of action films. We may mention the moments when the main protagonist rescues a submarine attacked by modern-day pirates, escapes a tsunami in his car or fights against a mercenary dressed in a futuristic battle suit. Later he faces a mythical monster and finally defeats his half-brother, the King of

the Atlantis. All these scenes are action-based and spectacular. On the other hand, the included science-fiction elements are only complementary and their significance is thus limited. Their visible manifestations are tied to vessels with futuristic design and technologically advanced combat suits, which allow the ordinary people living in the underwater world (the Atlantis) to breathe on the Earth's surface – it is clear that only the highborn like Arthur, Mera or Orm are able to breathe in any environment.

The movie in question involves many different social meanings typical for late modern cultural framework. They are represented and embodied by its characters. As noted by A. Plencner, D. Kral'ovičová and M. Stropko, visual and narrative functions of feature films include much more than their aesthetic frameworks. Any movie narrative – even Aquaman's storyline that is largely driven by fantasy tropes – thus has to refer to elements of everyday life and depict “ordinary” struggles the audiences are able to sympathize with. These aspects might be defined as “social meanings” and filmmakers use them to emphasize the authenticity of their motion pictures.[9] The film is dominated by **man's struggle against nature** (although Aquaman is a metahuman, a superhero). Arthur Curry can spend any amount of time underwater and talk while swimming in the ocean. The motive is also present in the scene when the tsunami hits the coast of Maine and the main protagonist tries to save his drowning father. The binary opposition of **good against evil** is closely linked to encountering **irrational forces**. Aquaman stops the impending military conflict between the inhabitants of the Earth and the people living in the Atlantis. The conflict is personalized by his half-brother Orm, along with the motive of **conspiracy**, as Orm tries to control all the underwater kingdoms through various lies and intrigues. However, Arthur reaches his goal and along the way he finds his (allegedly dead) mother. Trying to help her and at the same time acquire the ultimate magical object (Atlan's Trident), he challenges a mythical sea monster (**irrational force**). Aquaman's mother, Atlanna, portrays “**Promethean revolt**” (she left her underwater kingdom and chose a simple life alongside an ordinary man). The **desire for love** is tied to all her actions – the hero's parents meet again at the end of the story, despite many years of separation. Aquaman also fulfills his role of a **savior**. He becomes the King of the Atlantis, prevents war and millions of casualties and, as a representative of both worlds, maintains a delicate balance between the “surface-dwellers” and the inhabitants of the underwater empire.

Regarding key elements of late modern culture included in the story (RQ3), the analyzed movie is marked by infantilization. According to B. Barber, this is a necessary outcome of the imperatives of late modern global economy, which maintains its growth thanks to producing more goods and services than we need (and can consume). This strengthens the economic importance of children and adolescents.[10] Although Arthur Curry is a grown-up man, his reactions are often comically immature (e.g., while escaping Orm, he mentions that his intention to travel “in the belly of a whale” is inspired by Pinocchio. Mera later finds out that “Pinocchio” is not a military strategist, but a character from

a children's book which Arthur has never read). The movie's narrative also reflects on contemporary discussions on climate change and global warming. Pollution of the oceans provides Orm with a cause – in his words, it is legitimate to wage war against the “surface-dwellers”, because they pollute waters and poison the children of the sea, making the skies burn and the oceans boil. The most obvious manifestation is associated with the aftermath of the massive tsunami. These tidal waves cast tons of toxic waste, which is currently disrupting the oceanic ecosystem, ashore; in front of everyone's eyes. However, the tsunami is a clear act of aggression too, as it causes widespread destruction of humanity's defensive and offensive naval forces stationed across the high seas. Today's media culture is portrayed through the phenomenon of “selfie photograph” (holding an absurdly pink smartphone, Arthur's compatriots from Amnesty Bay insist on taking a picture with him, because they are his fans). The film openly acknowledges its fantasy roots by placing H. P. Lovecraft's novella *The Dunwich Horror* inside Tom Curry's home. Jules Verne's work is mentioned as well; the movie's prologue refers to one of his fantasy stories. The quote comments on Aquaman's parents and their love, claiming that when two ships are put together in the open sea without wind or tide, they will eventually come together. Other pop culture references include using a remix of Depeche Mode's song *It's No Good* at the moment when Black Manta experiments with his battle suit. The same intradiegetic principle is applied when Arthur and Mera visit Sahara – the initial part of their rather awkward desert adventure is acoustically accompanied by a remixed version of Toto's *Africa*.

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# CONFIDENCE AS A MODULATOR IN COVID-19 PANDEMIC BEHAVIORS AND PERSPECTIVES?

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## ABSTRACT

Since the start of the COVID-19 pandemic, individuals have been divided about the best course of action. The media has continued to highlight aspects of the uncertainty and discontent of individuals around the globe. Although fundamental, general confidence in oneself and in others may largely contribute to such behaviors and perspectives. The present study investigated an array of variables pertaining to pandemic-specific confidence, decision-making, and subjective perspectives. This article addresses the findings concerning confidence in the pandemic within and across cultures. 622 complete questionnaires were collected through an online survey, of which 561 were divided into three cultural groups (*United States, Other Western countries, Non-Western countries*) and analyzed across confidence contexts. Cultural groups were based on geography, response frequency, and general cultural tendencies. The findings indicate greater confidence in self-relevant contexts, such as own actions and decision-making, compared to other-relevant contexts, in others' actions and decision-making. Confidence further differentiated across cultural groups, demonstrating minute but notable differences in reported confidence across contexts. These findings provide preliminary evidence that confidence is an underlying modulator in pandemic behaviors and decision-making. Such findings also suggest potential differences across cultures, which should be further expounded on in future research.

**Keywords:** *COVID-19, confidence, pandemic perspectives, behaviors, decision-making*

## INTRODUCTION

The COVID-19 pandemic has introduced new degrees of uncertainty across the globe. In early 2020, the implementation of restrictions resulted in numerous protests against regulations, masks, and testing. While the media typically depicts the most captivating stories, an entirely different perspective urged individuals to abide by governmental regulations and health organizations' recommendations. The two polarizing perspectives seemingly share a common denominator: confidence.

Confidence is arguably a silent, key factor driving our actions and choices. Numerous studies have linked confidence and decision-making, even identifying the neural networks related to confidence [1]. The effects of confidence are typically documented with respect to areas of expertise, such as clinical decision-making [2] or group decision-making [3]. Research has demonstrated that subjective confidence is predictive of information seeking in decision-making [4]. Furthermore, the COVID-19 pandemic has highlighted the uncertainty through confidence in governmental decision-making and misinformation [5][6] and even our ability to “win” against the virus [7]. However, the contextual nature of confidence concerning self and other and how this is represented across cultures has yet to be investigated. More specifically, the timely and unprecedented nature of the COVID-19 pandemic calls for further exploration as to how confidence might modulate behaviors and decision-making during a crisis within and across cultures. Therefore, the study aimed to investigate confidence and decision-making within the pandemic, as well as exploring cross-cultural differences. We explored the role of confidence as a possible, modulating factor in pandemic behaviors in the present article.

## METHODS

Supplementary materials, including the full questionnaire, translations, raw data, and preprocessed data are available on OSF: <https://osf.io/sjhdyl/>.

### Participants

Six hundred and fifty-five respondents voluntarily filled out the complete survey. Exclusion criteria consisted of individuals under the age of 18 years, failure to complete the survey in full, and failure to coherently respond to the questions. Eleven respondents were omitted due to the minimum age criterion, and an additional 22 respondents were omitted for obscure or non-sensical answers. Six hundred and twenty-two respondents were included in the following analyses. Respondents were organized into three groups during the time of survey completion: *United States* ( $N = 224$ ), *Other Western countries* ( $N = 211$ ), and *Non-Western countries* ( $N = 187$ ). Nationality was initially the grouping variable of interest, but geographical location was substituted due to a high number of responses that confused nationality with race. Note, a mix of nationalities could be responding from countries other than their home country. For meaningful group comparisons, 187 responses from the *United States* and from the *Other Western countries* groups were selected at random and used for the final analyses. Thus, the total sample analyzed included 561 participants.

The three cultural groups were characterized by their geographic position, response frequency, and the ideological construct of tradition. The concept of “Western vs. Non-Western” is an ideological construct based on the cultural heritage and traditions of a nation’s practices. Although no finite definition exists for westernization, it is rooted in colonialism, modernization, and globalization

by philosophical conceptualization [8]. Geographic commonalities also exist amongst the “Western vs. Non-Western” distinction [9]. We utilized both ideologic traditions and geographic location to sparse the respondents into cultural groups. Respondents from the United States (US) were sorted into a separate category from other western countries, given the high response frequency. Other Western countries (OW) were defined as those with European-American ties and includes respondents located in North America, Europe, or Australia. Non-Western countries (NW) included respondents located in South America, Africa, Middle East, and Asia.

In total, participants responded from 58 countries, most of which included ten or less respondents ( $n = 49$  countries). Table 1 includes a demographic report of the final data. A full list of the countries and their associated geographic group, as well as a full breakdown of all demographic data are reported in the supplementary materials.

**Table 1.** Mean age and standard deviation are provided. Gender is reported as M (male), F (female), NB (non-binary), and O (other). Education is reported as JH (junior high/middle school), HS (high school), B (Bachelor’s degree), PG (postgraduate work). The risk group is reported as a yes or no (y, n).

Source: Own source

<i>n</i> per group = 187	US	OW	NW	Total ( <i>N</i> = 561)
<b>Age</b>	42.20 (15.03)	29.11 (9.72)	28.81 (10.28)	33.37 (13.43)
<b>Gender:</b> M,F, NB, O	50, 137, 0, 0	40, 146, 1, 0	58, 128, 0, 1	148, 411, 1, 1
<b>Edu:</b> JH, HS, B, PG	0, 18, 64, 105	5, 42, 76, 64	1, 36, 88, 62	6, 96, 228, 231
<b>Risk group:</b> y, n	53, 134	21, 166	21, 166	95, 466

### Study Design

Various social media outlets and university channels distributed the online survey for five months during the heart of the COVID-19 pandemic and accompanying restrictions (May 26, 2020 through October 26, 2020). The present study’s survey was designed in English and implemented through Qualtrics. Given the international nature of the study, the survey was translated into 18 languages with the help of translators and Qualtrics’ translation function. These translations allowed for greater distribution to non-English speakers. The survey consisted of five parts: 1) demographic questions, 2) personal-pandemic opinions, 3) confidence surrounding the pandemic, 4) a pandemic-phrased decision-making task, and 5) two standardized questionnaires. We will discuss confidence surrounding the pandemic.

Given the scope of the present article, further details concerning the decision-making, empathy, and qualitative perspectives will be written in a coinciding article. Notably, culture was initially assessed through Hofstede’s cultural

dimensions on the Value Survey Module 2013 [VSM; 10]. However, an insufficient number of samples was obtained from each country to compute a meaningful cultural index. Therefore, cultural groups were categorized as previously described.

The demographic and personal opinion questions concerned participants' experiences with COVID-19 (e.g., Have you or a family member been infected?) and their opinions concerning the pandemic (e.g., What is your stance on the current restrictions in your country?). Participants were additionally asked to rate (%) their confidence on a series of eight questions concerning self and others' actions or decisions during the pandemic (e.g., How confident are you in your own social distancing practices?).

### Statistical Analysis

The present analysis focused on various confidence contexts within and across cultures. To explore confidence contexts with regards to the pandemic, visual inspection, Kendall's tau correlation, and a paired Wilcoxon t-test were used in R Studio [11]. Quasi-binomial regressions were further conducted for the confidence contexts to assess confidence across cultures.

## RESULTS AND DISCUSSION

As previously mentioned, we divided the results into multiple papers to better communicate our findings [see 12]. The study included an array of variables, such as demographics, personal-pandemic opinions, confidence contexts (8 items), decision-making scenarios (9 items), and an empathy (IRI-B) index. Descriptive statistics are noted in Table 2 for insight into the pandemic-specific opinions of the present sample. The results below focus on the **confidence contexts**, pertaining to the pandemic, within and across cultures.



**Table 2.** Descriptive data pertaining to participants' personal-pandemic opinions and behaviors.

Source: Own source

<b>Restriction Stance</b>	<b>n (out of 561)</b>
Return to normal daily activities	47
Return to normal daily activities, but self-regulate	190
Remain under restrictions, but loosened	189
Remain under the same restrictions	96
Implement tighter restrictions	39
<b>Infection Likelihood</b>	
very unlikely	77
somewhat unlikely	150
neither likely nor unlikely	178
somewhat likely	116
very likely	40
<b>Health Consciousness</b>	
Not at all	23
Seldom	40
Sometimes	93
Usually	217
Very much	188
<b>Media Factchecking</b>	
No, never	5
No, seldom	19
Sometimes	97
Yes, usually	242
Yes, always	198

### Assumption Tests

Given the inherently non-normal nature of public opinion data, particularly for capped range dependent variables (e.g., 0-100), a quasi-binomial regression was used. Additional correlation analyses utilized the Kendall's tau method, considering the large sample size. A posteriori observation led to classification of the confidence contexts as self-relevant and other-relevant. When classified as such, the data violated normality,  $W = 0.952$ ,  $p < .001$ , as expected. Therefore, a paired Wilcoxon test was adopted.

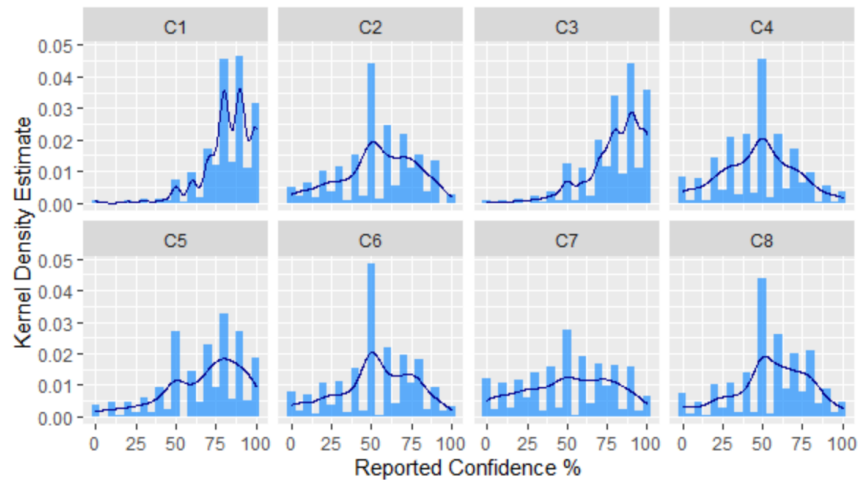
### Confidence in Context

During the survey development, confidence was included to focus on various individual aspects of behaviors and decision-making concerning the pandemic. Visual inspection during data analysis demonstrated a notable pattern across contexts when assessing the frequency of reported confidence (i.e., the number of people who reported 0-10% or 10-20% confidence; see **Figure 1**). The first, third, and fifth confidence contexts show a general left skewness, wherein the second,

fourth, sixth, and eighth contexts demonstrate a common trend toward a normal distribution. The seventh confidence context shows no specific spike in frequency distribution. Actions or judgements pertaining to the self are assessed in the first, third, fifth, and seventh concern (e.g., How confident are you in your own decision-making?). Despite the relatively flat curve in the seventh context, the wording of the context arguably qualifies the context as *self*. Further, actions and judgments of others are assessed in the second, fourth, sixth, and eighth confidence contexts (e.g., How confident are you in the social distancing practices of others?). These examples are the simplest and most evident form of this categorization (self vs. other), and the trend exists across each confidence context (see Table 3).

**Fig. 1.** The plot demonstrates the response frequency (in terms of density) of reported confidence for each confidence context. A trend is evident across the question types. Further inspection of the question phrasal revealed a trend of self-relevant (C1, 3, 5, 7) and other-relevant (C2, 4, 6, 8) questions.

Source: Own source



**Table 3.** *The categorization (self vs. other) of the confidence contexts used in the present study is shown. Contexts that are centered around one's own actions or judgements qualify as self, whereby contexts that are centered around the actions or judgments of others qualify as other. Clarification of each contexts' grouping is bolded.*

Source: Own source

<b>Self</b>	
C1	How confident are you in your <b>own</b> decision-making?
C3	How confident are you in your <b>own</b> social distancing practices?
C5	How confident are you that your beliefs are the best course of action for <b>your country</b> ?
C7	How confident are you in the actions taken by <b>your country</b> concerning the pandemic?
<b>Other</b>	
C2	How confident are you in the <b>media</b> you observe?
C4	How confident are you in <b>others'</b> social distancing practices?
C6	How confident are you that your beliefs are representative of <b>other's beliefs</b> ?
C8	How confident are you in the actions taken by <b>other countries</b> concerning the pandemic?

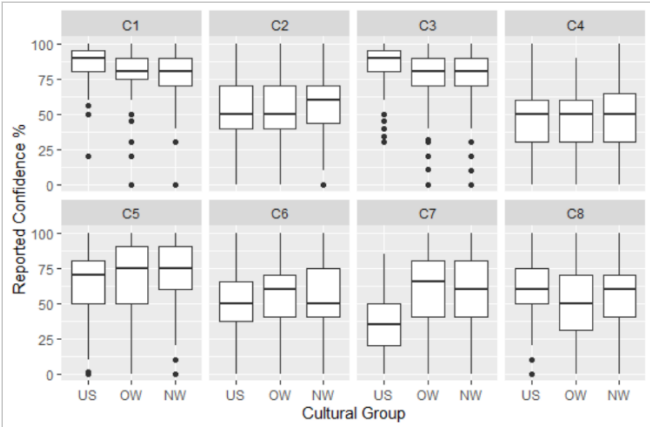
A correlation analysis further minimally supported this trend in which the self/other categorization remained, except for the seventh confidence context. Furthermore, some contexts also correlated across the classification groups, such as the second confidence context coinciding with each confidence context. To further understand the association and possible self/other classification between contexts, a paired Wilcoxon t-test revealed a statistical difference of reported confidence between the context's categorizations,  $V = 1626191$ ,  $p < .0001$ . From the contexts centered around the self, participants were significantly more likely to report higher confidence in their own actions, beliefs, or judgments (median = 80%) than questions centered around others' actions, beliefs, or judgments (median = 50%).

### Confidence across cultural groups

Culture largely modulates how one perceives the world, so we aimed to investigate cross-cultural differences of the confidence contexts. The present analysis investigated the reported confidence concerning self and others' behaviors and decision-making across the three groups, *United States* (US), *Other Western countries* (OW), and *Non-Western countries* (NW). Generally, the results yielded differences in reported confidence across cultures and contexts. Figure 2 depicts the group differences across all confidence contexts.

**Fig. 2.** The plot demonstrates the mean reported confidence for each confidence context across the groups.

Source: Own source



A quasi-binomial regression was conducted on each of the eight confidence contexts to assess cultural group differences. Percentage ratings (of confidence) were treated as proportions for the analysis, in which responses that were 0 or 1 were adjusted to fall within the proportional range using the following equation:  $x' = (x(N-1) + s) / N$  [13]. This equation corrects for values on the proportional bounds, where  $x'$  is the corrected value,  $x$  is the raw value,  $N$  is the sample size, and  $s$  is a constant between 0 and 1 [13]. The present study used a constant of 0.5. The US group was treated as the baseline comparison group for the regression interpretation. Some respondents did not provide an appropriate answer type (e.g., missing words or words such as ‘completely’ that needed clarification). Because this was not the case across all confidence contexts, those with unfitting response types were treated as missing values and kept in the overall sample for analysis. Those with missing values for the given confidence context were excluded from only that regression. This method was to ensure the strength of the sample by maintaining responses from across cultures. The  $n$  used for each regression is reported.

**“How confident are you in your own decision-making?”**

This first confidence context yielded statistical differences between US respondents ( $M = 0.862$  [86.2%],  $SD = 0.12$ ) and OW respondents ( $M = 0.791$  [79.1%],  $SD = 0.15$ ), as well as between US respondents and NW respondents ( $M = 0.81$  [81.0%],  $SD = 0.16$ ). Upon group differences, a follow-up model controlled for age and political position across cultural groups (Table 4). Age and political position were selected as demographic variables of interest upon inspection from a correlation matrix of the demographic variables. The reported confidence of US and NW respondents were no longer statistically different when controlling for these demographic variables. However, age elicited a notable

influence on the regression, suggesting that it might be an underlying predictor for the context and within the NW group. Thus, the most prominent difference, even when controlling for influential demographic variables, is nested between US and OW respondents, with US respondents reporting greater confidence in their own decision-making than OW respondents. While reported confidence was also greater for US respondents compared to NW respondents, the difference was not statistically considerable once the demographic predictors were included.

### **“How confident are you in the media you consume?”**

The second confidence context demonstrated no notable difference across cultural groups (US:  $M = 0.525$  [52.5%],  $SD = 0.24$ ; OW:  $M = 0.544$  [54.4%];  $SD = 0.21$ ; NW:  $M = 0.557$  [55.7%],  $SD = 0.24$ ; Table X). Interestingly, this suggests media perspectives do not differ by cultural groups in the present sample. No follow-up regression was necessary to control for demographic variables, given no difference between cultural groups.

### **“How confident are you in your own social-distancing practices?”**

The third confidence context statistically differed between cultural groups. The US respondents ( $M = 0.844$  [84.4%],  $SD = 0.15$ ) reported greater confidence than OW respondents ( $M = 0.760$  [76.0%],  $SD = 0.19$ ) and NW respondents ( $M = 0.796$  [79.6%],  $SD = 0.19$ ). The follow-up regression demonstrated a driving effect of age, in which the effect of group difference statistically reduced for both the OW and NW levels in comparison to the US level. A statistical difference was still present between US and OW respondents. The effect of age suggests that confidence in our own social distancing, at least in the present study, increases with age. Older participants may take more responsibility to practice safe social distancing, and thus, their confidence in their own actions is increased. Additionally, this finding could be reflective of the toll the virus has taken on the elderly population.

### **“How confident are you in others’ social distancing practices?”**

The fourth confidence context demonstrated a similar outcome as the second confidence context. Neither OW ( $M = 0.480$  [48.0%],  $SD = 0.20$ ) nor NW ( $M = 0.492$  [49.2%],  $SD = 0.25$ ) respondents statistically differed in reported confidence from US respondents ( $M = 0.451$  [45.1%],  $SD = 0.22$ ). Despite the lack of statistically notable differences between OW and US respondents, NW respondents trended toward greater reported confidence in other’s social distancing practices. A follow-up regression was conducted to investigate the extent to which age and political position influenced cultural group differences. The follow-up regression yielded differences between cultural groups and the US base level, in which age was marginally influential, and conservative respondents were more likely to report greater confidence compared to liberal respondents.

This demonstrates that the demographic data is largely influential within the cultural groups, given the notable change in statistical outputs.

**“How confident are you that your beliefs are the best course of action for your country?”**

In the fifth confidence context, OW respondents ( $M = 0.689$  [68.9%],  $SD = 0.23$ ) and NW respondents ( $M = 0.701$  [70.1%],  $SD = 0.24$ ) reported greater confidence compared to US respondents ( $M = 0.634$  [63.4%],  $SD = 0.25$ ). This suggests both OW and NW respondents were more confident that their beliefs were the best course of action for their countries, compared to US respondents who reported lesser confidence in that same belief. Further analysis indicated that group differences were greater when age mediated reported confidence, suggesting that confidence in one's own decisions and ego-centric beliefs about those decisions is mediated across the lifespan. Furthermore, the difference between the cultural groups was surprising, given that US respondents indicated less confidence that their beliefs represented the best course of action for the United States. This contradicts the previous results (i.e., C1: How confident are you in your own decision-making) where US respondents displayed greater confidence in their own decision-making. Such conflicting findings may demonstrate uncertainty.

“How confident are you that your beliefs are representative of other's beliefs?”

In the sixth confidence context, OW ( $M = 0.553$  [55.3%],  $SD = 0.23$ ) and NW ( $M = 0.543$  [54.3%],  $SD = 0.25$ ) respondents were, on average, significantly more confident than US respondents ( $M = 0.489$  [48.9%],  $SD = 0.23$ ), indicating that US respondents reported less confidence that their own beliefs were representative of others than the other cultural groups. Further analysis indicated that cultural differences in reported confidence remained, despite age being a mediating factor of reported confidence.

**“How confident are you in the actions taken by your country concerning the pandemic?”**

In the seventh confidence context, a considerable difference in reported confidence existed between the US and the other cultural groups. US respondents ( $M = 0.362$  [36.2%],  $SD = 0.23$ ) reported markedly lower confidence in the actions taken by their country compared to OW ( $M = 0.601$  [60.1%],  $SD = 0.27$ ) and NW ( $M = 0.573$  [57.3%],  $SD = 0.27$ ) respondents. The follow-up regression indicated an influential effect of political position, while cultural group differences remained. Specifically, conservative respondents were more likely to report greater confidence in their country's actions than liberal respondents.

**“How confident are you in the actions taken by other countries concerning the pandemic?”**

The eighth confidence context revealed reported confidence was notably average, given the confidence reported in their own countries. Reported confidence was similar across cultural groups, with a statistical difference between US ( $M = 0.586$  [58.6%],  $SD = 0.21$ ) and OW ( $M = 0.523$  [52.3%],  $SD = 0.24$ ) respondents. No statistical difference in confidence existed between US and NW ( $M = 0.549$  [54.9%],  $SD = 0.24$ ) respondents. A follow-up regression was conducted to assess possible covariates acting on the relationship between the US and OW cultural groups. This regression yielded an effect of age and political position, in which accounting for demographic variables elicited an underlying statistical difference between the US and NW cultural groups. Importantly, the results from this regression are not reflective of the previous confidence context concerning the actions taken by one's own country. This finding suggests that while respondents felt somewhat confident (or somewhat not confident in the case of US respondents) in the actions taken by their own country to combat the pandemic, all groups were not necessarily confident or lacking confidence concerning the actions taken by other countries. Such findings emphasize the degree of uncertainty present in the pandemic, which is seemingly evident through our own confidence judgements and beliefs.

**Table 4.** The table reports the coefficient estimate, p-value, odds ratio, and confidence interval for all regression models. Bolded p-values are significant. The US group and politically liberal are base levels for categorical comparisons. Rows shaded grey indicate the initial model comparing groups. Rows shaded white indicate the follow-up model comparing groups while accounting for age and political position.

Source: Own source

<b>C1</b>	<b><i>n</i> = 557</b>	<b>Coefficient Estimate</b>	<b>p-value</b>	<b>Odds Ratio</b>	<b>95% CI</b>
Other countries	Western	-0.502	<b>&lt; .0001</b>	0.605	[0.492, 0.745]
Non-Western countries		-0.381	<b>&lt; .001</b>	0.682	[0.552, 0.842]
Other countries	Western	-0.315	<b>.006</b>	0.730	[0.584, 0.912]
Non-Western countries		-0.193	0.108	0.824	[0.652, 1.043]
Age		0.014	<b>&lt; .001</b>	1.014	[1.006, 1.022]
Politically neutral		0.033	.732	1.033	[0.856, 1.247]
Politically conservative		0.187	.137	1.206	[0.942, 1.542]
<b>C2</b>	<b><i>n</i> = 557</b>				

Other countries	Western	0.077	.424	1.080	[0.894, 1.306]
Non-Western countries		0.128	.188	1.136	[0.940, 1.374]
<b>C3      n = 557</b>					
Other countries	Western	-0.532	< .0001	0.587	[0.467, 0.737]
Non-Western countries		-0.325	< .01	0.722	[0.571, 0.913]
Other countries	Western	-0.314	.011	0.730	[0.573, 0.934]
Non-Western countries		-0.101	0.446	0.904	[0.573, 0.932]
Age		0.019	< .001	1.019	[1.010, 1.027]
Politically neutral		-0.008	.937	0.992	[0.804, 1.223]
Politically conservative		-0.086	.514	0.917	[0.708, 1.189]
<b>C4      n = 556</b>					
Other countries	Western	0.117	.214	1.124	[0.935, 1.352]
Non-Western countries		0.164	.081	1.179	[0.980, 1.417]
Other countries	Western	0.222	.032	1.249	[1.020, 1.529]
Non-Western countries		0.281	.009	1.325	[1.073, 1.636]
Age		0.006	.089	1.006	[0.999, 1.012]
Politically neutral		0.012	.891	1.012	[0.849, 1.208]
Politically conservative		0.316	.004	1.372	[1.108, 1.699]
<b>C5      n = 555</b>					
Other countries	Western	0.249	.029	1.283	[1.027, 1.602]
Non-Western countries		0.305	< .01	1.357	[1.084, 1.698]
Other countries	Western	0.385	< .01	1.470	[1.151, 1.878]
Non-Western countries		0.490	< .001	1.633	[1.262, 2.113]
Age		0.009	.032	1.009	[1.001, 1.016]
Politically neutral		-0.165	.132	0.848	[0.684, 1.051]
Politically conservative		0.065	.632	1.067	[0.819, 1.388]



<b>C6</b> <i>n</i> = 557				
Other Western countries	0.258	< .01	1.294	[1.066, 1.572]
Non-Western countries	0.219	.028	1.245	[1.024, 1.512]
Other Western countries	0.370	< .001	1.448	[1.169, 1.795]
Non-Western countries	0.344	< .01	1.409	[1.126, 1.762]
Age	0.007	.031	1.007	[1.001, 1.014]
Politically neutral	-0.017	.856	0.983	[0.815, 1.185]
Politically conservative	0.117	.314	1.124	[0.895, 1.411]
<b>C7</b> <i>n</i> = 557				
Other Western countries	0.978	< .0001	2.653	[2.129, 3.306]
Non-Western countries	0.863	< .0001	2.369	[1.902, 2.951]
Other Western countries	1.050	< .0001	2.858	[2.239, 3.648]
Non-Western countries	0.964	< .0001	2.622	[2.035, 3.379]
Age	0.003	.515	1.003	[0.995, 1.010]
Politically neutral	-0.055	.610	0.947	[0.767, 1.168]
Politically conservative	0.296	.025	1.345	[1.039, 1.740]
<b>C8</b> <i>n</i> = 557				
Other Western countries	-0.252	.010	0.777	[0.641, 0.941]
Non-Western countries	-0.151	.124	0.860	[0.709, 1.042]
Other Western countries	-0.361	< .001	0.697	[0.564, 0.860]
Non-Western countries	-0.255	.024	0.775	[0.622, 0.966]
Age	-0.007	.054	0.994	[0.987, 1.000]
Politically neutral	-0.073	.437	0.930	[0.774, 1.117]
Politically conservative	-0.282	.013	0.754	[0.604, 0.941]

## GENERAL DISCUSSION

Considerable differences in reported confidence in the scope of the pandemic exist with respect to self and others' thinking and behavior. The data revealed that participants reported increased confidence when asked about their own behaviors compared to others' behaviors. When participants were asked about confidence in their *own* decision-making (C1) and social distancing (C3) this finding was particularly evident. Further, when asked about their *own* beliefs with respect to their country, this finding was to a lesser effect though still present (C5). However, when asked about confidence in the actions taken by their *own* country, this was not the case (C7). This may partially be explained under the cross-cultural investigation. The visual inspection and regression model indicate a large difference in reported confidence with US respondents reporting significantly lower confidence than OW or NW respondents. Such a finding is plausible considering the political climate during the presidential election of the United States in mid to late 2020, paired with the demographic evidence indicating that over half of our US sample identified as politically liberal (57%). Self-confidence in decision-making and social distancing also differed across cultural groups. While all cultural groups reported relatively increased confidence in their own decision-making and social distancing, US respondents reported particularly increased confidence. Such increased confidence reported by the US sample demonstrates a sense of superiority often displayed by the United States [14]. This finding may be linked to the unique sense of pride and freedom associated with the American identity [15]. Future research also should further investigate whether this increased confidence is related to American's sense of nationalism.

Conversely, reported confidence for others' actions and decision-making was rather average across confidence contexts. However, some differentiation, although minute, was still present when assessed across cultures. Most interestingly, media confidence (C2) was the only context that did not differ across cultures. This result suggests a general hesitancy across the globe when considering information from the media. We were unable, however, to address the intertwined nature of media censorship and governmental persuasion over the media that is actively present in many countries.

We do not intend to draw conclusions due to the lack of existing literature on confidence in behaviors and decision-making and the unprecedented nature of the pandemic. Rather, the present study emphasizes the relevance of confidence as it underlies pandemic behaviors. Particularly, confidence appears to be an important modulator that drives individuals' thinking and actions during the pandemic. Such confidence seemingly differs across cultures. Future research should investigate the confidence in self and others across broader settings. Research could also investigate the extent of the cultural differentiation by narrowing the definition of culture by selecting specific countries that differ on cultural scales, such as

individualism. Such additional investigations will allow future researchers to begin drawing sound conclusions, given these preliminary findings.

## CONCLUSION

The present study aimed to explore confidence as a modulating factor on pandemic behaviors and decision-making. Our findings demonstrate distinct differences in reported confidence, particularly with regards to self-relevant thinking and actions, as compared to others-relevant thinking and actions. This study also revealed the intertwined relationship that politics and governmental influence have on confidence, such as through the media and executive decision-making. Evidence also exists for cross-cultural differences in confidence concerning pandemic actions. Further, these cultural differences should be explored outside of the pandemic context to develop a comprehensive understanding of the influence of confidence in behavioral decision-making. Additionally, US respondents reported greater self-confidence, which may be linked to the identity and cultural perception some Americans hold. To allow for proper inferences, these findings should be further investigated with stringent cultural groups. Taken together, the evidence suggests that confidence is a relevant component driving our behaviors and decision-making, specifically regarding the pandemic. Such findings provide preliminary evidence to be expounded upon in future work.

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# INTELLIGENCE, SELF-ESTEEM AND ACADEMIC ACHIEVEMENT IN KOSOVO YOUTH

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## ABSTRACT

Numerous studies have investigated the impact of self-esteem and intelligence on academic achievement. The findings are generally inconsistent. The aim of this study was to understand the relationship between intelligence, self-esteem and academic achievement among young people in Kosovo. It was a quantitative cross-sectional study. The sample consisted of 1856 participants, aged 10-18 years old (Mage = 15.29, SD = 1.76). Participants completed the Rosenberg Self-Esteem Scale and The Raven Standard Progressive Matrices. Grade Point Average (GPA) was used to measure academic achievement. Data processing was done with SPSS 21.0 and Microsoft Excel 2013. Participants according to self-reported academic achievement were classified as follows: fail (0.1%), sufficient (2%), good (15.6%), very good (26.7%) and excellent (55.7%). As regards self-esteem participants were classified as follows: low self-esteem (26.9%), and normal self-esteem (73.1%). A significant positive correlation was found between academic achievement and intelligence ( $r = .31$ ;  $p = .00$ ) but not between achievement and self-esteem. This significant correlation resulted for both genders separately. The Mann-Whitney test found significant differences in academic achievement between genders and between groups with high intelligence and those with normal intelligence. Intelligence, but not self-esteem revealed a significant relationship with academic achievement. Future studies on the topic might focus on explanatory factors or the possibility of interaction of other variables related to academic achievement.

**Keywords:** *Intelligence, Self-esteem, school, achievement, Kosovo*

## INTRODUCTION

Multidisciplinary research involving the fields of psychology, education, and social studies has shown great interest in understanding links between youth academic achievement, intelligence, and self - esteem. These studies have explored these variables separately but also together.

**Intelligence and academic achievement.** Research studies have shown that intelligence might indeed be a strong predictor of academic achievement.

However, there are also studies that report weak, or insignificant associations or just a mediating effect. Jencks et al.'s (1979) in eight samples from six longitudinal studies reported correlations ranging from 0.40 to 0.63 between cognitive test scores and the amount of education obtained [1]. Mackintosh's (1998) survey reported a relationship between IQ scores and school performance, which ranges between 0.4 and 0.7 [2]. In a 5-year prospective longitudinal study of 70,000+ English children aged 11 years old intelligence has been found to predict academic achievement five years later, at age 16 [3]. Various studies have found that correlations between psychometric intelligence and achievement are usually moderate to strong (e.g., Deary et al., 2007; Mackintosh, 2006; McGrew & Knopik, 1993; cited by Kornilova et al, 2009) [4]. A more recent study found that intelligence contributed to predicting academic achievement [5].

However, these studies have been criticized due to the low amount of variance they explain, e.g., conventional IQ measures typically explain only about 25% of the variance in academic achievement (MacKinnon, 1962; Grigorenko & Kornilov, 2007; Sternberg et al., 2001; cited by Kornilova et al, 2009) [4].

**Intelligence, self-esteem and academic achievement.** In a pioneer study of the field, half a century ago, which investigated fifth grade and eighth grade students randomly selected, authors reported that IQ but not self-esteem correlated significantly with achievement for the fifth graders [6]. However, more recent studies have found significant relationships for both intelligence and self-esteem. In a sample of 1353 Austrian pupils (mean age 13.74 years), Intelligence and self-esteem were the strongest predictors of GPA independent of [7]. Kaya & Oğurlu (2015) found a statistically significant relationship between intelligence and academic achievement, but the relationship between self-esteem and academic achievement was not statistically significant [8]. Guszowska et al (2016) in the study with 385 first-year undergraduates aged 18-26 years studying physical education and sports at the University of Physical Education in Warsaw, found that global self-esteem had nonsignificant correlations with fluid intelligence and academic performance [9].

**Self-esteem and academic achievement.** Self-esteem is also a well-studied variable especially in relation to academic achievement. In an early meta-analysis across more than two hundred studies a positive effect of self-esteem on achievement was reported, explaining 4–7% of the variance [10]. The correlation range reported was .77 to .96 with an “average” correlation of .21. This study [10] included a total sample of 202,823 participants and produced a database of 1,136 correlations between self-ratings and performance measures. Another study found that, self-esteem was associated with academic achievement [11] but, general self-esteem did not exert any significant influence on later academic achievement. In other more recent studies, correlations between academic and global self-esteem and achievement range from .21 to .53 (cited on Roskam & Nils (2007) [12]. In a longitudinal study conducted with 1130 adolescents (557 males and 573 female) from 1st-6th grades from Belgian secondary schools (Roskam & Nils (2007) using

hierarchical linear models, authors reported a bidirectional relationship between self-esteem and academic achievement [12]. Pullmann & Allik, (2008) reported a more specific relationship, between academic self-esteem rather than overall self-esteem and academic achievement [13]. Moreover, self-esteem in this study was not considered as an indicator of academic low performance.

**Kosovo context.** Kosovo is the youngest country in Europe — both as regards its acknowledgment as an independent state and the average age of its population. Kosovo's population of about 1.8 million is the youngest in Europe, with an average age of 26 years. Despite significant progress across several dimensions during the recent years, Kosovo still is one of the poorest countries in Europe, with almost a third of the population living below the national poverty line in 2017 (24.4%). Overall, unemployment rates were still high at 25 percent of the labor force (46.9 percent of youth) in 2020. As regards research studies examining correlations between intelligence, self-esteem and academic achievement of youth from Kosovo, so far no studies have been published.

The aim of this study was to understand the relationship between intelligence, self-esteem and academic achievement among young people in Kosovo.

## METHODOLOGY

### Sample and procedure

The sample consisted of 1856 students, aged between 10-19 years old ( $M_{age} = 15.29$ ,  $SD = 1.76$ ). In terms of gender composition, there were 762 males (41.1 %) and 1094 (58.9 %) females. Participants were randomly selected from schools in Prizren. The questionnaires were distributed to students in their classrooms after issuing of relevant permissions. Informed consent was asked from their parents prior to the administration of the questionnaire. No incentives for youth participation were given.

### Instruments

Measuring instruments used in the present study included the: Standard Progressive Matrices (Raven, 1938), and Rosenberg Self-esteem Scale. Scales were translated into the Albanian language by using the translation back translation method to ensure correct translation.

1. Standard Progressive Matrices (SPM; Raven, 1938) is a measuring instrument of nonverbal reasoning ability and general intelligence that has the advantage of minimizing possible cultural biases. The RPM is a well-established instrument and most widely used among the non-verbal intelligence tests. It can be given individually or as a group test and is easy to score. Students provided their answers on a separate answer sheet, which was then scored by hand.

2. Rosenberg self-esteem scale [14]: includes 10 items which measure self-respect and self-acceptance. It is a Likert type scale with options ranging from (1) strongly agree to (4) Strongly Disagree. During analysis several items were reversely scored according to the authors' instructions.

3. Self-reported Grade Point Average (GPA) was used to measure academic achievement. In Kosovo, grades in pre-university education range from one (fail) to five (excellent). The classification was made based on the average grade self-reported by students at the time of conducting the research. On the other hand, it should be mentioned that there is empirical evidence (meta-analysis) that suggests that the self-reporting of the grade point average is a good indicator of current performance (eg, Kuncel et al., 2005) [15].

### Study design

The study was a cross-sectional correlational study. Data handling and statistical analysis was carried out by using SPSS software version 21 and Microsoft Excel 2013. These descriptive data were further analysed according to age, gender and other variables investigated. Normality is assessed with Kolmogorov-Smirnov statistic. In this case, the Sig. value is .000, suggesting violation of the assumption of normality for all variables, suggesting the use of nonparametric tests. For differences across groups, Mann-Whitney U test was used. To examine relationships between variables correlational analysis – Spearman-Rho test was used. The method of multiple standard regression analysis was used to predict the dependent variable academic achievement.

## RESULTS

### Descriptive analyses

Participants according to self-reported academic achievement were classified as follows: fail (0.1%), sufficient (2%), good (15.6%), very good (26.7%) and excellent (55.7%) (Table 1). Results showed that the mean value for self-esteem in the study samples was 27.76 (SD=3.47). 26.9 % of the sample were classified with low self-esteem. The mean value for intelligence in the study samples was 47.74 (SD=9.91) in a range from 0-60.

### Comparative analysis for variables investigated

Despite findings that boys report slightly higher scores as compared to girls, Mann-Whitney test revealed no significant gender differences in self-esteem scores and in intelligence scores but there were significant gender differences in academic achievement ( $Md_{females}=5$ ,  $N=1094$ ;  $Md_{males}=4$ ,  $N=762$ ;  $Z=-6.785$ ,  $p<.00$ ).



Mann-Whitney test revealed no significant gender differences in intelligence scores and in academic achievement between groups with normal self-esteem vs. low self-esteem.

**Table 1.** Demographic characteristics of the participants in the survey and mean of intelligence/self-esteem (author survey, own source)

Participants (n=1856)	N	%	Intelligence Mean	Self-esteem Mean
Gender				
Male	762	41.1	47.34	27.82
Female	1094	58.9	48.02	27.72
Age group (years)				
10 to 12	84	4.5	46	30.58
13 to 17	1567	84.4	47.78	27.64
> 18	205	11	48.16	27.56
Grade Point Average (GPA)				
Fail	1	.1	27	24
Insufficient	38	2.0	37.52	28.13
Good	289	15.6	42.65	27.95
Very good	495	26.7	46.27	27.53
Excellent	1033	55.7	50.26	27.82
Cut-off self-esteem level				
Low self-esteem	499	26.9	47.68	23.91
Normal self-esteem	1357	73.1	47.76	29.18

Kruskal-Wallis analysis revealed significant differences in self-esteem scores by age groups X2 (2, n=1856) =47.854,  $p < .00$ ; whereas scores were higher in the early adolescence group (Md=29) as compared to the middle adolescence group (Md=27) and late adolescence group (Md=27). Kruskal-Wallis analysis revealed significant differences in academic achievement scores by age groups X2 (2, n=1856) =47.854,  $p < .00$ ; whereas scores were higher in the early adolescence group (Md=5) and middle adolescence group (Md=5) and as compared to the late adolescence group (Md=4).

#### Correlations between variables

Correlational analyses indicated significant positive correlations between intelligence and academic achievement scores ( $r = .31$ ,  $p < .00$ ), but not between self-esteem and academic achievement (Table 2). These correlations resulted the same even when we looked separately at the groups of participants with low self-esteem and normal self-esteem.

**Table 2.** *Correlations between intelligence, self-esteem and academic achievement scores (author survey, own source)*

Spearman's rho Academic achievement		
Intelligence	Correlation Coefficient	.311**
	Sig. (2-tailed)	.000
	N	1856
Self-esteem	Correlation Coefficient	-.003
	Sig. (2-tailed)	.901
	N	1856

As regards correlational analysis performed separately by age (Table 3), results showed lack of significance of the relationship only at the ages of 11 and 12; whereas in all other age categories correlations with academic achievement are significant., Self-esteem with academic achievement turns out to have positive significant relationship at the age of 13 and a negative significant relationship at the age of 16, but no significant results in other age groups (Table 3).

**Table 3.** *Correlations between intelligence, self-esteem and academic achievement scores by age (author survey, own source)*

Age (Years)	N	Intelligence	Self-esteem
11	40	0.035	0.035
12	43	0.183	0.103
13	201	.457**	.152*
14	380	.388**	0.001
15	341	.350**	-0.051
16	306	.278**	-.146*
17	339	.323**	0.029
18	179	.174*	-0.005
19	26	.513**	-0.309

In the case of correlation analysis by age group we found that the significant positive correlation between intelligence and academic achievement scores was not found in the age group 10-12 years, but only in the age groups 13-17 years ( $r = .34, p < .00$ ) and over 18 years ( $r = .21, p < .00$ ).

A multiple standard regression analysis was run to predict academic achievement from gender, age, intelligence and self-esteem. All the independent (or predictor) variables were entered into the equation simultaneously. The model as whole reaches significance  $F(4, 1855) = 88.724, p < .000, R^2 = .161$ ; and the total variance explained by the model as a whole was 16.1%. Apart from self-

esteem all other variables added statistically significance to the prediction,  $p < .05$  (Table 4).

**Table 4.** *Multiple Regression Analysis Summary for variables and Academic achievement (author survey, own source)*

Variable	B	SEB	Beta	Sig.
Age	-.080	.010	-.172	.000
Gender	.269	.035	.162	.000
Intelligence	.028	.002	.339	.000
Self-esteem	-.001	.005	-.005	.819
Constant	3.850	.236		.000

*<sup>a</sup>Dependent variable= Grade Point Average (GPA)*

## DISCUSSION AND CONCLUSIONS

The aim of the present study was to understand the relationship between intelligence, self-esteem and academic achievement among young people in Kosovo. Our goal in exploring the correlations between intelligence and self-esteem with academic achievement is the first research of its kind in our country, and this fact adds great relevance to the findings. Results showed significant positive correlations between academic achievement and intelligence, but not self-esteem.

The resulting relationship between intelligence and academic achievement is in line with existing studies. However, the correlation found in the present research was of a low to moderate effect size (.31), but comparable although lower than results reported in the studies of Jencks et al (1979) and Mackintosh (1998) reporting an effect size over 0.4. The relationship strength varied with age and was found to be highest in 19-year-olds (.51) and lowest in 18-year-olds (.17). Most important, intelligence seemed to have even a predictive power for academic achievement in this sample along with age and gender, explaining up to 16.1% of the variance in academic achievement. A possible explanation is that the education system in Kosovo, which is still undergoing important reforms, favors and reinforces intelligence, in the sense that this ability is sufficient for ensuring good results. Other factors that are demonstrated to affect academic achievement are not yet considered relevant in the assessments of students, for example, regular studying, punctuality in class, self-motivation, availability of teaching and learning materials, and competency of teachers. Nonetheless, this explanation is tentative and further research is needed to examine this proposition.

The finding that intelligence had significant correlations with academic achievement whereas self-esteem did not, are similar to existing studies providing evidence from other countries, e.g., [6], [8] and [9]. However, these results were not in line with findings from other four studies which found significant correlation ratios [10], [11] and [12]. Moreover, when considered separately by

age, the two significant correlations were one was positive (13-year-olds) and the other negative (16-year-olds). This finding goes in line with many existing theoretical approaches so far that describe self-esteem as a construct that is distinguished by age-based instability which then reflects to relationships with other variables. Yet another explanation might be related to the consideration of self-esteem as a culturally based construct, which fluctuates based on specific cultural values and influencing factors. Nonetheless, this explanation is also tentative since there is no research so far investigating cultural factors involved in the relationship between self-esteem and academic achievement.

Finally, it should be mentioned that the present findings should be also considered in the context of their limitations, the most important one being sample composition. Indeed, the sample of the study was dominated by females (approximately 69%), age group 13–17 years (85%), and excellent grades (approximately 60%). Therefore, care should be taken in generalizing these findings to populations with characteristics other than these. However, despite these limitations the present study provides an important contribution especially because it is the first one investigating the relationships between these variables in Kosovo. Future research might consider other factors such as the socio-economic or cultural contextual variables in population representative samples in Kosovo.

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# **LITHUANIANS' PERCEPTION ON TERRORISM: ARE MUSLIMS THE FOLK DEVILS FOR LITHUANIANS?**

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## **ABSTRACT**

A considerable amount of research in the West countries during the past 30 years has found a strong tendency to associate Muslims with violent acts. This has resulted in an increase of Islamophobia. I have examined Lithuania's media, politicians and public perceptions on Muslims-terrorism in order to understand the correlation between Lithuanian media and political discourse on Muslims and their connection with public discourses. I propose that the weaker the linkage between media and political portrayals of terrorism as associated with Muslims, is with public perceptions of terrorism and Muslims, the less likely the latter will see Muslims as folk devils. My analysis of the data supports this hypothesis and conclusively shows that media and political discourse do not have a hegemonic power to control the portrayal of Muslims and to create a sense of moral panic among Lithuanians.

**Keywords:** *Moral panic, Muslims, Lithuania, intolerance*

## **INTRODUCTION**

*Not all Muslims are terrorists, but all terrorists are Muslims* – I heard this phrase during an interview I conducted regarding the connection between terrorism and Muslims.

During the past 30 years, a strong tendency among people in Europe as well as North America to link Islam with violent acts, especially terrorism has been found [1], [2]. The terrorist attack of September 11 acted as a catalyst for media in European countries and the United States to represent Muslims as *others* and prompted links between the Islamic religion, Muslims and terrorism [3]. The medias' tendency to link terrorism issues with Islam has not decreased and the tendency to link Muslims with terrorism resulted in an increase in Islamophobia, with different forms of expression – from hostile attitudes and intolerance to exaggerated fear and panic of Muslims [4], [5].

Exaggerated and excessive attention by the media, political stances, and popular discourse regarding terrorism and its linkage with Muslims can lead to a chronic form of fear referred to as moral panic.' One of the first and most influential moral panic theorists is Stanley Cohen. According to Cohen a core feature of moral panic is its reification in some anthropomorphic form. Cohen refers to the object of moral panic by the generic terms "*folk devils*." *Folk devils*

*are a socio-psychological phenomenon that reifies and gives a focus to those collective fears.* (e.g. in this case Muslims are the folk devil).

The aim of this research is to examine if Muslims are the folk devil for Lithuanians in terrorism discourse and if so, does it produce moral panic in society. I will seek to answer this question by analyzing Lithuanian perceptions of terrorism and, if and how they link them to Muslims. I intend to use an ethnographic/emic approach to construct a normative, collective representation of how Lithuanians perceive terrorism in relation to Muslims and to answer the question of whether there is a strong, weak, or no correlation at all between Muslims as folk devils and moral panic. I propose that the weaker terrorism is linked with Muslims, the less likely Muslims will be seen as folk devils and, as a result, the more unfavorable the cultural environment will be for moral panic toward Muslims to establish roots. While not central to this research, it is important to note that such findings can contribute to national policies regarding how to treat and integrate Muslim immigrants to Lithuania as well as Muslim citizens.

### **Moral panic theory (1972) by Stanley Cohen**

Press and other media coverage of current events serve as one of the most powerful tools for framing peoples' perception of high profile events. Studies [4], [5] show that the media's framing of particular terrorist events leads to excessive fear of Muslims and Islamophobia.

A kind of excessively exaggerated perception that some cultural behavior or group of people is deviant and poses a threat to society's values is called moral panic. The most widely accepted, used and most cited definition of moral panic is by Cohen: "A condition, episode, person or group of persons emerges to become defined as a threat to societal values and interests; its nature is presented in a stylized and stereotypical fashion by the mass media; the moral barricades are manned by editors, bishops, politicians and other right-thinking people." [6].

For a successful moral panic to exist there must be a common, homogenous, widespread understanding in society about who are folk devils and why they are a threat to our society. Cohen has singled out four crucial agents that help to form an image of the folk devil and to rise and maintain moral panic about them: mass media, moral entrepreneurs, the control culture, and the public. When describing the elements of moral panic, Cohen pays notable attention to media's influence, especially in the first and second stages of moral panic. Mass media is described as the most influential when disturbing events are presented in detail exaggerating grossly the seriousness of the events.

In the symbolization stage, it is important to define who is our "folk devils" – a group of people who engage in a common deviant behavior as perceived from the outside by the general public. This is the basis on which moral panic revolves.



Firstly, when a word, for example, “immigrant” or “terrorism” becomes symbolic of a certain status (delinquent or deviant); secondly, when there are objects or observable indicators that symbolize the word— for example, it could be dark skin color or Islamic clothes; the third stage is when the objects themselves become symbolic of the status (and the emotions attached to the status) [6]. For example, when someone sees a person dressed in Islamic clothes, s/he immediately relate that person with Islam and terrorism.

In seeking to answer the question of whether moral panic of Muslims exists in Lithuania and whether we can call Muslims “folk devils”, I will examine the main agents – Lithuanian mass media and the moral entrepreneurs, that is, politicians; and lastly the Lithuanian public.

### *The construction of folk devils by Lithuania’s media*

Research on Lithuanian media coverage of Muslims is sparse; research by Kumpikaitė-Valiūnienė et al. [7] on Lithuanians’ perceptions of refugees (*from Islamic countries*) revealed that Lithuanians see refugees as a prominent threat in large part because they associate them with terrorism. Fear of terrorism increases fear and intolerance toward Muslims. This fear is part of the initial symbolization stage Cohen views as necessary for the collective construction of a folk devil. Terrorism itself is perceived as an extreme form of deviant behavior and is then linked to an observable indicator – Muslims. This results in a holistic construction of the category of a folk devil, in this case as Muslims.

European Islamophobia reports in 2017, 2019 revealed, that Islamophobic media content in Lithuania is quite insignificant. The report of Repečkaitė [8] concluded, that “Mainstream media continued providing a platform for Islamophobic speakers and statements with little editing and no disclaimers”. Blažytė [9] reported that Islamophobic statements in the Lithuanian media are usually contextualized as related to public discussions on the so-called global refugee crisis and the challenges of refugee integration on a national level, however due to the decline of refugee flows in Europe, the attention to this issue was decreasing in national media as well.

According to a 2019 report of Lithuanian media monitoring by the *Media4change.lt* [14], “The majority of journalists’ work concerning Muslims is neutral (87%), 8% negative, 5 % positive”. However, among negative reports on Muslims, a theme of terrorism remains high – Lithuanian media reporting most part of terrorism content and in that way contributes to and maintains Muslim – terrorist image. To conclude I would agree with Repečkaitė [8], that Lithuanian media is only a platform and tool to spread various information which is mostly influenced by global tendencies and events such as terrorist attacks or the refugee crisis.

*The construction of folk devils by Lithuania's moral entrepreneurs - politicians*

Along with the media, politicians are noticeable agents in shaping perceptions of Muslims. During 2015, individual Lithuanian journalists and politicians expressed their opinions on Muslims and refugees as “folk devils” and potential threats using “them” versus “us” images, however, the highest tendency was seen among the latter.

In 2016, right before the elections to the Lithuanian *Seimas* [i.e., *Parliament*], a series of political commercials by the Labor Party concerning the immigrant crisis appeared. The participants in the commercials were talking about refugees as a potential threat, linking past and present-day problems allegedly caused by refugees and Muslims and then asserting the likelihood that more refugees and immigrants will cause still more future problems [10]. Most concerns were related to deviant behavior (e.g. bus explosion, women abduction, terrorist attacks).

In 2019 the Lithuanian politician Arvydas Juozaitis was portraying *refugees as a coming threat*. In a video *Refugees push Europe to destruction* of his political campaigns Juozaitis speaks about refugees - mostly Islamic states residents - as an upcoming threat destroying European culture, identity, soul, that will “kill us”. From the 9 candidates who ran for President, Juozaitis was in fifth place, far behind the leaders. He received 4,69% of the vote and didn't get to the second round of elections.

From the discussion above, it is clear that in Lithuania there are media and political attempts to portray Muslims and refugees as “folk devils,” and to raise a collective moral panic that also could increase readership and political vote banks for parties promoting such advertisements. However, despite the volatile political commentaries about Muslims, it can be concluded that the discourse around Muslims, refugees and its relation with terrorism or other deviant behavior exists and is prevalent in the media as well as politics.

## **METHODS AND METHODOLOGY**

In order to answer the question if Muslims are folk devils to Lithuanians on the basis of terrorism, I intend to analyze if images on Muslims' relation with terrorism, promoted by the media and moral entrepreneurs reflected in public opinions and attitudes on terrorism.

I am using the anthropological method of free lists. I have chosen to use free list technique because, it provides a potent emic snapshot of the cultural domain, indicates things salient within the culture, should show what symbols are shared by members of the culture and how these symbols vary in relative saliency within the culture [11], [12].

The data was collected between January and February of 2019 via the online platform *Apklausa.lt*. I selected a convenience sample by sharing 5 free lists and 1 survey question to various online groups of students and non-students, and pages of communities of different cities. 41 Lithuanian citizens (age 17-84) participated and answered all 5 free lists; thus all questions were answered by the same participants. Most respondents were from the four largest cities of Lithuania – Vilnius, Kaunas, Panevėžys, Klaipėda.

It is important, that this emic ethnographic sample lets us grasp the range of cultural phenomena, but not the frequency distribution of those phenomena. Comparatively small ethnographic samples (usually less than forty and often as few as ten) are enough to comprehend what are main symbols or items common among members of a culture that constitute a cultural domain and to collect valid data for analysis [13]. The data saturation procedure showed that the sample of this research was ecologically valid.

### Data Analysis

The free list started with a general question *List all the things that come to your mind when you hear the word terrorism*. Answers provide a cluster of concepts by which to grasp an overall understanding of Lithuanian perceptions of terrorism phenomena. Table 1 (as well as all free-list tables) presents the frequencies and saliency indices of the top terrorism terms. In the table that follows I only represent the first top terrorism terms, in terms of frequency, since they capture the main patterns of Lithuanians' approach towards the terrorism phenomena.

**Table 1.** *Top terms about terrorism. Source: own source*

Name	Occurrence	Frequency	Average Rank	Smith Index
Killing	12	28,57%	3,833	0,135
Unstable psychological state	12	28,57%	2,917	0,157
Muslims	10	23,81%	2,400	0,172
Guns	9	21,43%	3,444	0,128
Coercion	9	21,43%	2,444	0,169
Bombs	8	19,05%	2,125	0,131
Armed conflicts	8	19,05%	2,125	0,125
Death	7	16,67%	2,143	0,123
Fear	5	11,90%	2,000	0,086
Explosion	5	11,90%	2,200	0,079
Victims	5	11,90%	2,800	0,079
Islam	4	9,52%	4,250	0,050

Two terms on the top of the list have the same numbers of occurrence and frequency, however, the second term *unstable psychological condition* has higher salience. First, ranking term *murdering* shows that terrorism is comprehensible in peoples' minds as a physical act. The following term *unstable psychological*

*condition* primarily refers to an emotional state of a person than an act that could be described as a reason for terrorism itself. According to salience, it indicates that the informants, describing terrorism, primarily draw attention to the reasons which influence the terrorism phenomena and see *murdering*, a physical act, as an expression of the *unstable psychological condition*.

The third term, Muslims, has a lower number of occurrences, but the highest salience rating of all the terms. This suggests that any terrorist act is conducted by the agents of that act, in this case implying terrorism is mostly conducted by Muslims. The narrative around the Muslims as highly associated with terrorism is further supported by linking the term ‘Islam’ With terrorism, though it does have a lower salience than do the top terms. It is however, hard to ignore the triadic relationship of Islam, terrorism, and Muslims within this cultural domain.

The intent of the question was to change the focus from a respondents’ personal opinion on terrorism to public opinion. The question also provides a way to test if the first free-list, based on personal beliefs, was biased toward more politically correct responses.

**Table 2.** *Top terms respondents’ peers supposedly relate with terrorism.*  
*Source: own source*

Name	Occurrence	Frequency	Average Rank	Smith Index
Muslims	9	22,50%	1,111	0,213
I don’t know	7	17,50%	1,000	0,175
Guns	5	12,50%	1,600	0,088
Bombs	3	7,50%	2,000	0,048
Islam	3	7,50%	1,000	0,075
War	3	7,50%	2,333	0,046
Terror	2	5,00%	1,000	0,050
Middle East	2	5,00%	2,000	0,038

As the first table showed, personally respondents relate terrorism with the agent (i.e. Muslims) who is responsible for the act. Data from the second table agrees with the data of the first table by linking terrorism with an agent – *Muslims*. The term *Muslims* (in the Table 1 and 2) demonstrates the highest salience rating. This strongly implies that the belief in a linkage between Muslims and terrorism is culturally shared.

In the second free-list, the term Islam appeared with a low frequency just as was the case in Table 1. However, the saliency was significantly higher in the second free list. These data suggest that terrorism is closely linked with Muslims but not so closely with Islam for individuals but the link is perceived to be strong among peers.

This inference should be taken with a grain of salt because it is likely based on personal bias as explained above. The gap between saliency indices for Muslim and Islam in the free list asking for personal beliefs, implies that Muslims and

Islam can be seen as referring to distinct concepts that are not necessarily causally related. Much further research needs to be conducted to examine this relationship. On the other hand, Table 2 confirmed that the agency of Muslims could be based on Islamic beliefs.

This sample is important for understanding how Lithuanians portray a typical terrorist. Regarding data from the Table 1 and 2 it was expected, that a potential terrorist has certain religious features, indicating Muslims.

Surprisingly, most of the respondents stated, that it is not possible to recognize a potential terrorist – term *impossible to recognize* was the most common one. It can be assumed, that some people, who are eager to commit a crime want to remain unrecognized and do not stand out from the crowd to accomplish it successfully.

**Table 3.** *Top features of a potential terrorist. Source: own source.*

Name	Occurrence	Frequency	Average Rank	Smith Index
Cannot recognize	8	24,24%	1,250	0,217
Dark skin color	6	18,18%	2,000	0,111
Angry	5	15,15%	1,400	0,126
Beard	5	15,15%	2,000	0,096
Clothing	4	12,12%	1,500	0,101
Muslim	4	12,12%	1,250	0,106
Unstable psychological state	4	12,12%	1,750	0,091
Man	4	12,12%	1,750	0,091
Fanatic	3	9,09%	1,333	0,076

Three patterns to symbolize a typical terrorist can be traced. The first is based on race, relating a terrorist with symbols of darkness, such as *dark skin* and *beard*. The second is religious ethnicity as reflected in the term “Muslims and Islam; the third is through psychological features: angry, unstable psychological condition, fanatic.

It could be concluded, that culturally, terrorism is understood as a consequence of three features race, religion, and the psychological features mentioned above. It can be concluded that the prototypical image of a terrorist in Lithuania is comprised of these three “pillars” and that attempts to reduce Lithuanian biases toward Muslims should attend to all three factors.

**Table 4.** *Causes leading people to radicalize. Source: own source*

<b>Name</b>	<b>Occurrence</b>	<b>Frequency</b>	<b>Average Rank</b>	<b>Smith Index</b>
Environmental impact	10	25,00%	2,000	0,169
Personal lack	7	17,50%	2,286	0,119
Lack of money	7	17,50%	1,143	0,167
Psychological illness/traumas	6	15,00%	1,833	0,115
Anger	4	10,00%	1,500	0,088
Religious influence	4	10,00%	1,500	0,079
Lack of education	4	10,00%	1,500	0,081
Revenge	3	7,50%	2,667	0,043
Believing in something blindly	3	7,50%	2,000	0,052
Influence of the authorities	3	7,50%	2,333	0,046
Influence of the ideology	3	7,50%	2,667	0,029
Faith	3	7,50%	1,667	0,065
Family influence	3	7,50%	1,333	0,067
Personal tendency towards cruelty	2	5,00%	2,000	0,025

A pattern of external factors causing people to join a terrorist organisation is seen here. For example, the highest salience has a term *Environmental impact*; a considerable variety of other terms, related to external influences – *religion influence, influence of authorities, ideology, family* – complement the pattern. This demonstrates that a radical person, due to the influences, could be less personally responsible for his actions (see also Strauss 2007, discussed below).

Only two respondents mentioned *personal tendency to cruelty*, a term which has the lowest salience. The term describes a point of view seeing radicalization and joining terrorist organizations as arising from the personal agency – an agented feature that leads you to take actions without a clear motive.

From Tables 1, 2, 3 a cultural pattern to relate Muslims with terrorism could be observed. Tables 1 and 2 relate terrorism with an agent, who is very accurately described through his religion as being a Muslim. Despite a clear link between terrorism and Muslims in Tables 1, 2, 3, 4 revealed, that being a Muslim is not the cause of radicalism. This could be aptly illustrated by the phrase which one respondent wrote in his free-list answer – *not all Muslims are terrorists, but all terrorists are Muslims*.

The data could lead to a further question – could these external influences be related to Muslims particularly? The data doesn't provide the answer to this question, so it could be only surmised, that specific external influences affect Muslims more than non-Muslims. For example, *religious influence* could be related to Islam (as Islam is the only religion mentioned among all the data examined). Yet, the limitation of this question is that only supposed interfaces can be made.

## DISCUSSION

In this discussion I will cover two questions: What are Lithuanians' perceptions about terrorism; and is the linkage between Muslims and terrorists (or terrorism) weak, moderate, or strong? Regarding the question about Lithuanians' perceptions about terrorism, three patterns could be observed from the data collected which are presented below.

The first pattern is related to race and ethnicity. A race pattern is described mostly through symbols of darkness (e.g., *dark skin color* in Table 3). Such a symbol lacks clarity, as, e.g., *Spanish people* have darker skin color too. I would state, that dark skin color is related with Muslims and Middle Easterners firstly as terrorism and terrorists were related exclusively to Muslims and Middle Easterners (mentioned in Tables 1, 2, 3, 4) and not with other ethnicity and/or religion (as we already have seen from the data presented).

The second relatable pattern is religion, particularly using Islamic symbols through the terms mentioned like *Muslims*, *Islamic clothes*. The data has shown that indeed there are linkages between Islam and terrorism in the minds of Lithuanians. According to Tables 1, 2 and 3, the frequency-count linking Muslims with terrorism/terrorists is average and varies between 12 – 23%. However, the salience rating for this link was significantly high. Surprisingly, confessors of the religion (i.e. Muslims) but not the religion itself were most frequently cited and with the higher saliency when Lithuanians were asked to list terms related to terrorism. To conclude, Lithuanians perceive terrorism through the actors – Muslims, but being a Muslim is not the cause of radicalism.

The third pattern demonstrates that cultural radicalization and becoming a terrorist is seen as an outcome of various negative environmental influences, e.g., *personal lack*, *environmental impact*, *lack of money*, resulting in particular psychological well-being, such as *unstable psychological condition*, *angry*, *fanatic*. Only a few respondents saw the personal agency as leading a person to become a terrorist. This is quite interesting, having in mind that most western cultures, as well as Lithuanians, are individualistic and emphasize a person's agency – free will to act according to their own understanding and make choices.

Claudia Strauss [15] in her article puts this question to light. She wrote that agency for most modern western societies is a highly valued virtue, however, she expands this idea claiming, that agency is just one of various cultural models to explain human actions. Strauss researched public commentaries in the United States about the Columbine school shootings in order to find out the place of agency versus social causes for this terrorist act. She showed, that agency was not perceived by Americans to be a hegemonic discourse explaining the behavior of the two boys Eric Harris and Dylan Klebold.

## CONCLUSION

From the examined data, a weak-to-moderate *Muslim – terrorist* linkage can be traced as terms linking Muslims to terrorism appeared in all four tables in a direct, explicit or indirect, implicit way. It reflects a successful symbolization process, according to Cohen, since a group (i.e., Muslims) becomes perceptually attached to a deviant act or behavior (i.e., terrorism). Thus, Muslims could be called “the folk devils”, however, could moral panic around them be apparent in Lithuania?

As examined in the theory section, Lithuanian media cannot be blamed for disproportionately portraying Muslims as terrorists as no systematic intention to create or publish Islamophobic content could be observed. There were attempts by some Lithuanian politicians to apply the “the folk devils” discourse to Muslims and/or refugees in order to gain political prominence and power. However, political campaigns target Muslims and try to create a sense of moral panic ended with limited success. Despite neither Lithuania’s media nor politicians had no hegemonic power to raise the moral panic of Muslims, yet, Lithuanians may well be primed by public narratives and images of Muslims as a deviant group, spreading by media and politicians.

After examining public perceptions on terrorism, as long with Lithuanian politicians’ and media’s discourse around Muslims, it could be concluded, that the efforts by the Lithuanian media and politicians to deliberately or unconsciously develop the Muslim/refugee – terrorist discourse helped to create a *Muslims as folk devils* cultural script. However, according to my hypothesis, the failure to raise moral panic and direct it towards Muslims using a terrorism discourse by the Lithuanian media and entrepreneur is clearly reflected in the weak to the moderate linkage between terrorism and Muslims in Lithuanians’ perceptions.

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# NUTRITIONAL THERAPY IN CLINICAL MANAGEMENT OF ONCOLOGICAL PATIENTS

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## ABSTRACT

Nutritional therapy helps patients with cancer to maintain their weight within normal limits, maintain tissue integrity and reduce the side effects of cancer therapies. Nutritional oncology deals with both prevention and patient support during treatment, in convalescence and in palliative situations. Cancer patients need full support from the team of health professionals (oncologists, nurses and dietitians). The following basic elements should not be missing from the cancer patient's diet: water, protein intake, animal and vegetable fats, as well as vitamins and minerals. The diet of cancer patients should be closely monitored, as body weight should be kept within normal limits, ie a body mass index (BMI) between 19 and 24 (the calculation is made by dividing the weight by the square of the height). The oncologist should therefore be aware of the adverse effects of malnutrition on patient outcomes and view nutritional support as an essential component of the clinical management, chemotherapy, radiation therapy, antiemetic treatment, and treatment for pain.

**Keywords:** *cachexia, cancer-related malnutrition, clinical management, nutritional therapy, oncological patients*

## INTRODUCTION

Oncological diseases, as well as their treatment, can cause changes in the diet by affecting the taste, smell, appetite, without being satiated and the body's ability to absorb nutrients from food. Affecting the taste can make patients want more sweet foods, no longer tolerate strong flavors, increased sensitivity to bitter taste and aversion to meat. Tumors can partially block the digestive system or make swallowing food painful or difficult. Other factors, such as chronic pain, painkillers, fatigue, depression, fear, and anxiety associated with cancer, can lead to decreased appetite. All forms of treatment have certain side effects, including loss of appetite, nausea, vomiting or decreased immunity [1].

Nutrition is the process by which food is used by the body for growth, for maintaining health, and tissue repair. Consuming the right foods before, during and after cancer treatment helps the patient feel better and stronger. Progressive deterioration of nutritional status is a common feature of cancer patients. Consequently, it is estimated that > 50% of hospitalized cancer patients are

malnourished. Cancer-related malnutrition (CRM) is universal and occurs in 50% -80% of patients with cancer [2], [3], [4]. CRM is estimated to be the immediate cause of death in 20% -40% of cancer patients. Moreover, CRM is not just synonymous with weight loss; it is a process with a complex etiology and involves weight loss as a highly visible component that results in progressive muscle exhaustion [4], [5], [6], [7].

Currently, according to studies, in the practice of cancer, nutritional support is provided only for 30% -60% of cancer patients already at risk of malnutrition [8], [9], [10]. In this context, a correct and early diagnosis of CRM through screening and assessment of nutritional status and a multimodal therapeutic approach targeting nutrition along with other factors involved in the pathophysiology of CRM is of utmost importance in the management of cancer patients [8], [11].

In a survey based on a questionnaire addressed to oncologists in Turkey, on the planning of nutritional therapy at the same time as the initial diagnosis of cancer, 46.0% of oncologists identified patients with visible weight loss (28.0%). The authors concluded that diagnosis and practices need to be improved in terms of the use of evidence-based malnutrition screening tools, consultation of clinical nutritionists on the provision and monitoring of nutritional support, and appropriate advice on oral nutritional supplements (ONS) [12]. As a result, current clinical management of CRM remains limited and complex [7], [12] despite the association of CRM with higher rates of hospitalized cancer patients, long hospital stays, poor tolerance to cancer treatment, poor quality of life and decreased survival of cancer patients [11], [12].

Currently, most oncologists believe that weight loss and muscle mass are an inevitable consequence of progressive tumor growth and therefore focus on better control of tumor growth [13].

The terms "malnutrition", "weight loss" and "cachexia" have been used frequently in recent years, the term "cancer-related malnutrition" is considered more appropriate for cancer patients because cachexia suggests that the patient is in the terminal stage of the disease. Due to poor nutrient intake and metabolic changes underlying CRM, optimized nutritional support can prevent further deterioration of nutritional status only if not combined at an early stage with anabolic / anticatabolic agents [11].

Consequently, CRM is defined as a complex multifactorial process characterized by weight loss and changes in body composition, a key feature it is a severe and specific loss of muscle mass with relative preservation of the viscera, a protein mass that cannot be completely reversed by conventional nutritional support that will lead to progressive functional impairment [7], [11], [12]. Major signs of CRM include anorexia, inflammatory, metabolic and endocrine changes, increased tissue protein volume and loss of muscle mass [11], [12].

Identifying the special needs of each patient and providing nutritional support in accordance with an individualized nutritional plan developed with the help of teams of health professionals (oncologists, nurses and dieticians) is crucial for improving the nutritional status of cancer patients. Counseling is an effective and inexpensive method in combination with other nutritional interventions, which leads to improved nutritional intake in patients undergoing chemotherapy and improved quality of life in patients undergoing radiotherapy [12].

### **Nutritional support for cancer patients**

To detect nutritional disorders at an early stage, the European Society for Clinical Nutrition and Metabolism (ESPEN) recommends nutritional intake, weight assessment and BMI should be assessed regularly, starting from the initial diagnosis of cancer [12].

Total energy, costs of cancer patients, if not measured individually, can be assumed to be similar to that of healthy subjects, generally ranging from 25 to 30 kcal / kg per day, and protein intake should be  $> 1$  g / kg per day and, if possible, up to 1,5 g / kg per day [8].

Individualized nutritional intervention is recommended based on nutritional status a patients and should include dietary advice, treatment of symptoms and disorders affecting food intake (symptoms of impact on nutrition) and nutritional support is provided as ONS, enteral nutrition feeding through the gastric or jejunal tube. From a practical point of view, if malnutrition already exists or if food intake is significantly reduced for  $> 7$ -10 days, the nutritional approach should be based on the integrity of the gastrointestinal tract and gastrointestinal function. Intact gastrointestinal and parenteral nutrition should be used in patients with impaired gastrointestinal function [5], [12]. Enteral nutrition is always preferred for cancer patients who have an intact digestive tract due to a lower risk of complications, improved quality of life and lower costs compared to the administration of parenteral nutrition [5], [12].

Arginine supplementation is thought to increase specific and nonspecific antitumor mechanisms, as well as delay tumor growth and prolong survival, as arginine is essential for the normal functioning of T lymphocytes. has been shown to increase the long-term survival of patients with head and neck cancer undergoing surgery and chemotherapy. The use of arginine supplements in the treatment of CRM in cancer patients reported an increase in BMI and albumin levels [, as well as improved overall survival, in patients with head and neck cancer and a shorter hospital stay in cancer patients [12].

Vitamin D plays a role in reducing the cachexia of cancer patients because it has been shown to suppress IL-6, a proinflammatory cytokine that is a key mediator of muscle loss seen in cancer cachexia [12]. Vitamin D (2000 IU daily for 12 weeks following the 4-week placebo study has been reported to improve

muscle weakness in prostate cancer patients; also low plasma concentrations and combined scores for proinflammatory markers (C-reactive protein, tumor necrosis factor, IL-6, IL-1b and IL-8) in sporadic colorectal adenoma when used over a 6-month period at a dose of 800 IU / day [12].

### **The basics that should be part of a patient's diet oncological**

#### *Fluids*

The volume of fluid is generally recommended not to exceed 30-35 ml / kg body weight per day; the interval may change depending on the patient's hemodynamic status, the presence of fever or loss of body fluid [5], [12].

Water is needed for all the cells in the body to function. If the patient does not drink enough fluids or loses them through vomiting or diarrhea, dehydration may occur, with adverse consequences for the body. Signs of dehydration are: dry mouth, dark and little urine, dizziness, inattention, persistent skin crease when tightening the skin on the chest or between the fingers.

#### *Energy*

It is suggested that adequate energy targets for bedridden and outpatient cancer patients are 20-25 kcal / kg per day and 25-30 kcal / kg per day, respectively, to improve lean body mass and increase the production of anabolic proteins in the liver [12].

#### *Macronutrients*

According to recent recommendations, protein intake should be  $> 1$  g / kg per day and, if possible, up to  $1.5$  g / kg per day in cancer patients. In patients with normal renal function, protein intake at doses up to and greater than  $2$  g / kg per day is safe; in patients with acute or chronic renal failure, the protein intake should not exceed  $1$  or  $1.2$  g / kg per day, respectively [2], [12].

Consistent with the oxidative rate of glucose, the recommended carbohydrate intake (glucose) is  $< 5$  g / kg per day [2], [12]. Current guidelines suggest that optimal carbohydrate intake in cancer patients should not exceed 40% -50% of non-protein energy requirements. Lipids are efficiently mobilized and metabolized by cancer patients and are therefore a valid source of energy in this context. Providing up to 50% of non-protein calories from fat is feasible and safe in cancer patients.

Adequate protein intake is essential during all stages of the cancer patient's treatment and long-term survival.

Carbohydrates are found in vegetables, fruits, whole grains (foods rich in fiber, vitamins, minerals), potatoes, rice, corn, peas, beans, dried grains (foods rich in B vitamins and fiber).

Animal and vegetable fats are an important source of energy because they provide twice as many calories / gram as carbohydrates and are used to store energy, repair tissues and carry some vitamins in the blood.

Unsaturated fats (mono- and poly-) are healthier than saturated fats (fatty fish - salmon, trout, tuna, vegetable oils, oilseeds, seeds). Monounsaturated fats are olive, peanut vegetable oils. Polyunsaturated fats are vegetable oils of sunflower, saffron, corn, flaxseed, seafood.

### *Micronutrients*

Nutritional supplement formulas usually contain electrolytes. Blood electrolyte levels should be closely monitored and supplementation should be adjusted according to the needs of each patient [5], [12]. Vitamins and minerals are necessary for the proper functioning of the body.

Common side effects of treatment (nausea, vomiting, mucus or mouth sores) can lead to a hydroelectrolytic and vitamin imbalance. As a result, multivitamin and mineral supplements are allowed, but should not replace dietary intake. Vitamins should be administered only with the recommendation of a specialist or nutritionist, with special attention to products rich in vitamin B12, which has an important role in cell proliferation.

Vitamins and minerals are recommended in physiological doses, while the use of high-dose micronutrients is discouraged in the absence of specific deficiencies. Vitamin D deficiency is commonly seen in cancer patients and is associated with the incidence and prognosis of cancer [8].

## **CONCLUSION**

In the case of patients diagnosed with neoplastic diseases, malnutrition syndromes frequently occur. They negatively affect the prognosis of the disease through the appearance of related diseases, delayed treatment, prolonged hospitalization of patients. For this reason, adequate nutritional support is very important to provide the body with the necessary energy, the optimal amount of micro and macro-nutrients, so that curative or palliative treatment can be performed in optimal conditions.

The purpose of this article was to provide a practical nutritional approach to aspects of changing the diet of oncological diseases patients. The paper contains preventive measures for CRM as well as non-pharmacological (nutritional support) and pharmacological (pharmaconutrient) measures.

Vitamins and minerals are recommended in physiological doses, while the use of high-dose micronutrients is discouraged in the absence of specific deficiencies.

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# PANDEMIC AND PERCEIVED HEALTH STATUS: A CASE STUDY

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## ABSTRACT

Each older person's perception of their health status is a fundamental factor in understanding quality of life and should be considered in social interventions. Health is one of the main concerns of the elderly, since at this stage of life there is a change in functional capacity and, consequently, a greater sense of fragility and dependence. The aim of this study was to analyze the perceived health of a group of elderly people attending the Day Care Centre (DC) and Home Support Service (HSS), as well as its comparison with the previous year, with the peer group and with the impact of the Pandemic. We conducted a questionnaire survey. We found that there is a relationship between gender and self-assessment of health status, with women being the ones who mostly make a negative assessment. Most of the older people had an "acceptable" value for self-assessment of health, followed by older people with a negative view of their health and only a very small number considered it to be positive. When health status was compared with the previous year the majority consider it to be "more or less the same" showing an adaptive process to ageing, followed by those who consider that their health status had worsened compared to the previous year. 38.1% of the elderly respondents considered that the pandemic had an impact on their health. All of them were female and belonged to the DC, a social response which suffered major impacts from the pandemic. Most of these elderly women consider that the greatest impact of this pandemic was at the psychological level.

**Keywords:** *aging, perceived health, quality of life, pandemic*

## INTRODUCTION

The 21st century began with various challenges, some of which had never been experienced before. One of the challenges faced by developed countries refers to ageing, the way we want and should care for and face this phase of life which, in countries like Portugal, constitutes a substantial slice of the population. According to data from INE/PORDATA the resident population in Portugal aged over 65 years at the end of 2019 was 2,280,424 individuals, i.e., around 22.2% of the resident population in Portugal. We know that we are an ageing country where we have long since passed the balance point in the ratio between the young population (under 15 years of age) and the population over 65 years of age, with the ageing index in 2019 standing at 161.3. Obviously, the fact that we live more

years is a positive indicator, only possible due to the improvement in the quality of life of the Portuguese population in the recent decades. However, we know that many of these elderly people, for objective or subjective reasons, do not age with quality and present a set of diseases and in many cases dependency.

Ageing involves a set of biological, morphological, psychological and social changes, which occur in a continuous and, as a rule, irreversible way. These changes, according to Santos (2010, p. 1036) [1], are varied: "the biological modifications are the morphological, revealed by the appearance of wrinkles, white hair and others; the physiological, related to the alterations of the organic functions; the biochemical, which are directly linked to the transformations of the chemical reactions that are processed in the organism (...) the psychological [that] occur when, when aging, the human being needs to adapt to each new situation of his daily life (...) the social ones are verified when the social relations become altered".

All these changes cause, as a rule, a decline of organic functions in general. This decline does not occur in the same way in all people and varies from individual to individual with the influence of several factors, such as the environment in which one lives, the socio-economic situation, the habits and lifestyles, among others. Each particular context and life history influences lifestyles, the way of growing older, the way one views and the meaning attributed to this process. This complexity implies that old age should be understood in its globality, which includes the biological, social, cultural and, as Queiroz and Sousa (2010, p.408) [2] state, an "existential dimension, which modifies the person's relationship with time, generating changes in their relationships with the world and with their own history".

The subjectivity in the way of facing aging interferes with the way the subject faces his/her health condition. Several studies demonstrate the relationship between objective and subjective conditions in the quality of life of the elderly (Neri, 1993) [3]. As objective factors, we can refer to health conditions, level of education, economic situation, among others. Fundamental factors, but they do not clarify the subject's perception of his/her life and the impact of these factors on his/her life. Subjective factors seek to understand this understanding and may include factors such as life history, psychological state, affective reactions, life satisfaction, perceived health, among others.

Perceived health is one of the commonly used ways to understand the perceived quality of life of the elderly. The concept of perceived health refers to the subjective assessment that each person makes regarding the quality of their health and can be analysed considering the past, present and future. It is a concept that according to Ferreira, Izzo and Jacob (2007, p.155) [4] presents "an individual integration of many aspects of health, among them behavioural competence (social dimension) and the sense of self-efficacy (psychic dimension), i.e. with

the person's sense that he/she is able to perform the necessary behaviours to produce the results he/she desires".

It is, therefore, a subjective assessment that each subject makes about the quality of his/her physical and mental health and may include a comparative assessment of the current and past functional capacity and an assessment (individual and subjective) of aspects such as the ability to perform certain tasks, the functional status and the health status (Teixeira; Neri, 2008) [5]. As a rule, the most common ways in which each person integrates their "perceived health" is through factors such as the existence of illnesses, the volume of medicine taken, the presence of pain and discomfort, changes in cognitive state, a decrease in physical capacity. It should be noted that age does not imply homogeneity in the perception of health status, since the same age group may have different ways of perceiving it, which is related, as already mentioned, to the complexity and heterogeneity of the ageing process.

We may consider that the perceived health status of each elderly person may be a way to understand their functional capacity/ disability. According to Pitanga (2010) [6], there are two ways of looking at health: on the one hand, the positive one, which is related to each person's ability to develop the functions and respond to daily challenges, as well as the positive attitude towards life; on the other hand, the negative one, which, on the contrary, is associated with morbidity and, ultimately, mortality.

The aim of this study was to analyse the perceived health of a group of older people, to understand their self-assessment of their current health status, as well as its comparison with the previous year and with their peer group. In addition, we sought to understand how the concept of perceived health was modified with the current Pandemic scenario. The consequence, on the one hand of the imposed isolation and, on the other hand, of the cancellation of occupational activities (leisure, play, physical, motor, etc.) may have contributed to the deterioration of the functional status of many older people and, therefore, to the increase of their negative perception of their health.

## **METHODOLOGY**

The results of the work presented here were developed from descriptive research. To this end, we opted for the questionnaire survey as a data collection tool. The survey was divided into three dimensions: the 1st dimension refers to the respondents' sociodemographic information; the 2nd dimension integrates the self-assessment of health status. For this purpose, an adapted version of the Self-assessment of Health questionnaire was used. The questionnaire on health self-assessment used was taken from "The European Survey on Aging Protocol - Portuguese version (Paúl et al., 1999) [7]. It aims to evaluate the indices of perceived health in groups of individuals with advanced age, with competence associated with the aging process; The 3rd dimension refers to the relationship

between health and the pandemic, where the respondent is asked to identify the influence of the pandemic on his/her health status and how this influence occurs.

The surveyed population was made up of Day Centre (DC) and Home Support Service (HSS) users from a Private Social Solidarity Institution in the centre region of the country. The total number of users of these social responses was 25 and 23, respectively, from which 30 were selected according to the following inclusion criteria: no diagnosis of dementia, ability to self-complete the questionnaire or support in completing it, and express willingness to participate (with a declaration of informed consent). Thus, 13 Day Care Centre users and 17 Home Support Service users were selected. The questionnaires were personally delivered to the participants.

Initially we performed a statistical analysis of the data to then interpret the results based on the existing literature review.

## **PRESENTATION AND DISCUSSION OF THE RESULTS**

Of the 30 questionnaires sent out, 25 were completed, of which 4 were eliminated, leaving the sample with a final number of 21 participants. The main reasons for their elimination were their incomplete completion and failure to complete the informed consent. Thus, the sample includes 10 users of the DC and 11 of the HSS, for a total of 21 elderly people.

Regarding gender, 61.9% (13) of the sample are women and 38.1% (8) are men. Women were distributed in 8 in the DC and 5 in the HSS. The men were integrated 2 in DC and 6 in HSS. This may be related to the phenomenon of the feminisation of old age, explained by the differences in the physical and metabolic decline between men and women, which leads to greater longevity of women, which has also been related to other risk factors, such as occupational accidents, smoking and alcohol use, as well as differences in the way of facing diseases and disabilities.

In relation to gender, we highlight a difference between the two social responses, with men being more present in the HSS (6) and women in the DC (8). Although no data were collected to justify this difference, we can assume, based on the existing literature, that men have greater difficulty in participating in group activities (Ferreira; Izzo, Jacob, 2007) [4].

Most of the sample was widowed, of the 12 elderly people corresponding to 57.1%, 5 were married (23.8%) and 4 were single (19.1%). The distribution of the elderly by marital status and social response is very similar, since we have 2 singles in each social response, 3 married in DC and 2 in HSS and equal number (6) of widowers in DC and HSS.

Regarding cohabitation, a large proportion, 10 older people (47.6%), live alone. Of these, most (7 elderly people) are integrated in a HSS response which currently represents one of the alternatives for the elderly not having to leave their homes and their belongings, since this service can meet their basic needs at home. It presents itself, therefore, as an important response that, in many cases, is articulated with the informal solidarity that in our country emerges as an important support for the care of the elderly (Pimentel, 2005)[8].

The predominant schooling in the sample has complete primary education, with a percentage of 47.6%, which corresponds to 10 elderly people. Of the respondents, 5 (23.8%) had never attended school and the same number (5, 23.8%) had incomplete primary education. Only 1 elderly person (4.8%) has completed the 2nd cycle. The low level of education of our sample is visible, since approximately half of them (10 older people) do not have completed the 1st cycle and the same number only have primary education. This situation is related to the age of our sample, since compulsory education did not exist when they were young and the opportunity to attend school for several years was scarce, especially in rural areas, as is the case in the geographical context of our respondents.

About the question on self-assessment of health, we put 5 hypotheses of choice for the qualitative self-assessment of the state of health: very good, good, acceptable, weak and very weak. Most respondents (11 elderly, corresponding to 52.4%) consider their health to be "acceptable". According to the data, none of the elderly respondents considers their health to be "very good" and only two (9.5%) consider it to be "good" (both attending the CD). In the evaluation of health as "weak", there are 4 seniors (19.05%), divided equally between the DC and the HSS (with 2 seniors in each), and as "very weak", there are another 4 seniors (19.05%), 1 corresponding to the HSS and 3 to the DC. Thus - and considering the "acceptable" as an intermediate qualitative evaluation, the "very good" and "good" as a positive evaluation and the "weak" and "very weak" as a negative evaluation - we can say that only 9.5% of our sample (2 elderly people) has a positive evaluation of their own health status and 38.1% (8 elderly people) has a negative evaluation of their health status. Thus, in the HSS, the perception of the health condition by the elderly themselves was acceptable (8), weak (2) and very weak (1); in the DC, this gradation was good (2), acceptable (3), weak (2) and very weak (3).

We found a relationship between perceived health status and gender. Thus, the only respondents who made a positive assessment of their health status (as "good") were males. On the other hand, the answers "weak" and "very weak", corresponding to a negative self-assessment of their health, belonged mostly to female respondents (7 women and only 1 man).

When asked to compare with last year their current health situation, the items that presented the highest number of answers were: "More or less the same" answered by 12 participants (57.1%) and "A little worse than a year ago"

answered by 9 individuals (42.9%). The answers "much better than a year ago", "a little better than a year ago", and "much worse than a year ago" did not receive any answer from the respondents. It is thus visible that the feeling that all older people have about their state of health is in line with the known process of ageing, in which the functional deterioration and the state of health is progressive and occurs over time. A curious fact was that for the majority of HSS users (8 against 4 from the DC) their health is perceived as stable when compared to the previous year, but on the contrary most users who consider it to be worse belong to the DC response (6 elderly against 3 from the HSS).

When we asked the respondents to make a comparison with most people of their age and gender, we found that a large part of the elderly (10, corresponding to 47.6%) consider it to be "more or less the same", and that of these the majority who responded were from HSS (7 against 3 in DC). A high number of older people (7, corresponding to 33.3%) consider that their state of health is "a little worse" when compared to their peers, with the answers from HSS and DC being very close (with 3 and 4 older people, respectively). Two older adults (9.5%), both from DC, were more positively considering their health to be "much better" than their peers and, at the other extreme, one older person (4.8%) in a HSS was "much worse". One (4.8%) of the interviewees does not know/does not answer.

Following the same logic of the previous answer, most of the older people (10) assessed their health as stable when compared to their peers. The positive assessment of their health when compared to their peers only emerged in two older people, both attending the DC, which may indicate that they are autonomous older people. The negative evaluation of their health condition in comparison with their peers appears in 8 older adults (38.1%), with the one who makes the worst evaluation ("much worse") being integrated into HSS.

When questioned whether the pandemic had an influence on their health status, we found that the majority, 13 elderly people, consider it had not (61.9%) and 8 answered yes (38.1%), all females. This answer can be easily explained as most older people who answered no (10 out of 13) are integrated in a HSS response, which with the pandemic continued to operate in an identical way to what already existed (with the obvious introduction of personal protective equipment). Most of the older people who answered yes belong to the DC (7 out of 8), a response that was discontinued which led, despite all the effort of the institutions to maintain contact with these older people, to a change in the daily lives of these older people, with a substantial reduction in the activities they developed and, above all, the social contacts, and gatherings they had.

The way in which the 8 older women consider that the pandemic influenced their lives is mostly (7) at the psychological/ emotional level, namely with an increased feeling of isolation (2), feeling of immobility (2), sadness (1) anxiety (1) and fear (1). One of the elderly women mentioned the difficulty in accessing health care/treatment.



## CONCLUSION

In this study, we verified a relationship between gender and self-assessment of health status, where most respondents who made a negative assessment of perceived health were women and only men made a positive assessment of it. These data contradict the study prepared by French, Gekoski and Knox (1995)[9] in which they found that there was a difference between genders in the evaluation of their physical and psychological well-being, where women appeared to have higher levels of perceived health which they related to differences in coping strategies between men and women. However, the data from the present study is in line with the studies where older women, due to having more comorbidities and a higher risk of disability and chronic pain, are the ones who assess their health status the worst. In the same vein, in a prospective study by Wilcox, Kasl and Idler [10] on the relationship between physical disabilities and perceived health with 254 hospitalised older people, the female gender recorded lower rates of perceived health.

We can also conclude that the majority of the older people in our sample (11 older people, 52.4%) have the value "acceptable" in the self-assessment of their health, which may be an indicator that they accept the inevitable biological, psychological and social changes that occur over time; whereas the 8 older people (38.1%) who consider their perceived health to be negative have a pathological view which, as a rule, is related to the onset of illness and the consequent functional decline and onset of discomfort and pain; only two older people (9.5%) have a positive view of their perceived health, which may correspond to a perspective of successful ageing (Baltes & Baltes, 1990, cited in Gonçalves et al, 2006)[11]. It should be noted that the only ones with a positive assessment belonged to the DC which may be explained, according to Almeida [12], by the existing relationship between functional capacity (and the respective reflection of autonomy and independence) and perceived (good) health.

When any comparison criterion was used, the data shows that women have a negative perception of their state of health when compared to the previous year and to men. These results are in line with the studies that show a greater existence of morbidities in women than in men with age. As Pinheiro et al. remind us (2002, p. 688)[13] "although they live longer than men, women report more morbidity and psychological problems and use more health services".

The fact that in the evaluation of health status in comparison with the previous year much of the elderly (12, 57.1%) consider it to be "more or less the same" may indicate an adaptive process, throughout the life course, in relation to physical and functional health. These results were in line with the study presented by Fernandes [14], where a large part of the elderly in the study considered their health to be the same as in the last year. The remaining older people (9, 42.9%) considered that their health status had worsened in relation to the previous year, which may be related, according to Ebly, Hogan and Fung [15], to the tendency

for health problems (visual, hearing, cardiac and musculoskeletal) to worsen and the consequent functional limitations for the performance of basic and instrumental activities of daily living.

Since the WHO defined the outbreak as a pandemic on March 11, everyone's life has changed, especially the lives of the elderly: those who were in the Residential Structures for the Elderly have stopped receiving visits and developing a set of activities, those in Day Centres have been forbidden to continue attending them, many no longer see their relatives at home, on the streets there are no daily meetings and gatherings and, in the moments of hardest confinement, they no longer have any social contact. If we consider that the functional capacity of the elderly is negatively impacted and consequently deteriorates when they stop walking, exercising, developing motor skills, playing games, talking and socialising, then it is easy to imagine that the impact that the current Pandemic is having on their lives will be enormous.

Of the elderly respondents, 8 (38.1%) considered that the pandemic had an impact on their health. All of them were female and integrated the DC, a social response that suffered major impacts with the pandemic, namely with its closure. The activities developed with the frequenters of the DCs were replaced by more individualised activities, the quantity of which was reduced and, obviously, the activities that implied social interaction no longer existed.

Most of these older women consider that the greatest impact of this pandemic was on a psychological/ emotional level, because of the decrease in social encounters and the increase in anxiety, fear and isolation. It is still too early to analyse the impact of the pandemic, but we know that it will certainly have impacts on the mental health of the Portuguese. In a study being developed, with adults over 50 years old, by a team of researchers from the University of Coimbra, to assess the "impact of social isolation imposed by the covid-19 pandemic on the physical and psychological well-being of adults and elderly people", after a first data analysis, the researcher Sandra Freitas states that "the period of mandatory confinement significantly favoured the development of higher levels of depressive symptoms and, consequently, worse quality of life in the Portuguese" [16]

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## **PRIORITIES DURING THE COVID-19 PANDEMIC: PERSPECTIVES, DECISION-MAKING, AND EMPATHY**

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### **ABSTRACT**

The rapid and ongoing evolution of the COVID-19 pandemic has resulted in reactionary decision-making and emphasized discord arising from uncertainty. Given that countries have dealt with the pandemic quite differently thus far, it was relevant to explore the undertones of decision-making, as well as the perspectives of the individuals who are affected. The study aimed to investigate the role of confidence and decision-making in pandemic behaviors as well as related pandemic perspectives. The present article discusses findings concerning pandemic-specific decision-making, the influence of empathy on decision-making, and qualitative reports from respondents. The analyzed sample included 561 respondents divided into three cultural groups based on response distribution, geography, and general cultural categorizations (e.g., Western vs. non-Western). The findings revealed insights into the decision-making of pandemic consequences, as well as a lack of cross-cultural differences within the sample. Subjective reports highlighted key themes including trust in science, prevention and preparedness, and suggested next steps from the respondents' perspectives. These findings from across the globe call for further investigation into cross-cultural decision-making in the pandemic.

**Keywords:** *pandemic, COVID-19, decision-making, perspectives, empathy*

### **INTRODUCTION**

The COVID-19 pandemic has highlighted the vulnerability of humankind accompanied by hesitancy in adapting to change in times of crisis. Despite this shared commonality, the pandemic has also drawn attention to the group and social representation divisions that has lent to the perception that individuals are facing the pandemic alone [1]. This mentality stifles decision-making and combative efforts against the invisible virus. However, such defensive mentalities only partially account for approaches taken in the pandemic. Pandemic perspectives even extend beyond those responsible for developing rules and regulations. Nearly everyone is affected by the COVID-19 pandemic and, as a result, has some perspective and accompanying approaches. Therefore, it was important to acknowledge what these global perspectives were to better

understand the extent to which such perspectives might differ across cultures and whether this translated to decision-making.

Pandemic decision-making (e.g., lockdown restrictions, vaccination rollouts) continues to be a hot topic throughout the pandemic. Policymakers have been responsible for the decisions and actions taken to address the pandemic for their nations. While such decisions have often been mediated by sound scientific advice, political undertones and personal beliefs have notably dictated the decision-making process. Such decisions have been scrutinized by the public in all regards. Often, personal beliefs or experiences drive opinions and bolster confidence in those opinions. Such motivating factors lend to polarized opinions and likely prime whether one agrees with (or not) the actions being taken to address the COVID-19 pandemic.

Aside from the influence of intrapersonal consideration in decision-making, interpersonal consideration, or empathy, also modulates the decision-making process. Affective empathy largely motivates our behaviors. Cross-cultural evidence demonstrates differentiation in affective empathy [2], [3], [4]. Butovskaya and colleagues [4] specifically found cross-cultural differences in perspective-taking, empathetic concern, and personal distress during the first wave of the COVID-19 pandemic. Given that empathy inherently affects decision-making, the cross-cultural impact of the current pandemic paired with empathy may underly pandemic-specific decision-making.

To better understand one's pandemic preferences and decision-making process, the present study aimed to address individuals' beliefs and what factors motivate those beliefs. In addition, decision-making was explored through humanitarian and economic lenses, through which the impact of COVID-19 on behavioral modulators, such as empathy, is cross-culturally investigated.

## METHODS

A more comprehensive description of the methods can be found in the coinciding article [5].

### Participants

Of the 655 respondents that voluntarily completed the survey, only 622 met the inclusion criteria. Additionally, the analyzed sample is comprised of 561 respondents to achieve a balanced distribution across cultural groups. The three cultural groups are: *United States*, *Other Western countries*, and *Non-Western countries*. They were characterized by their geographic position, response frequency, and the ideological construct of tradition (i.e., Western vs. Non-Western; see [6] for more details). Therefore, the final sample was comprised of 148 males, 411 females, and one non-binary individual with a majority of participants having completed an undergraduate (n=228) or post-graduate

education (n=231). A large majority (n=466) also reported that they were not in a COVID-19 risk group.

### Study Design

The survey was live via Qualtrics for data collection from May 26, 2020 through October 26, 2020. The survey was designed in English but was translated into 18 languages with the help of volunteer translators and Qualtrics' translation function, which allowed for more inclusive data collection. The survey consisted of five parts: 1) demographic questions, 2) personal-pandemic opinions, 3) confidence surrounding the pandemic, 4) a pandemic-phrased decision-making task, and 5) two standardized questionnaires. This article will address pandemic-phrased decision-making, empathy, and qualitative opinions.

Decision-making was assessed through a binary choice task. Participants were told: "The following section asks a series of binary questions related to the pandemic restrictions and potential consequences. For this task, consider that your country is under stay-at-home orders with approximately 35,000 new cases per day and 1,000 Corona-related deaths per day. Please choose one of the scenarios." Participants were then provided 9 binary scenarios with two choices: 1) an immediate and greater impact choice (e.g., return to normal daily activities *now* and 60,000 people are infected with the Coronavirus) or 2) a delayed and lesser impact choice (e.g., return to normal daily activities in *two weeks* and 20,000 people are infected with the Coronavirus). The values selected for the decision-making questions were determined based on the daily cases in the United States during the time of survey conception. The same case statistics were not equivalent to other countries. Four of the nine questions included person-based content (see example above), four other questions included business-related content (e.g., return to normal daily activities *now* and 85% of businesses survive vs. return to normal daily activities in *two months* and the 65% of businesses survive). The final question posited a choice between person or business. The first eight questions were positively and negatively phrased (e.g., positive-person: infected, negative-person: die), and the final question was positively phrased.

Two questionnaires evaluated interpersonal consideration and cultural values. The brief version of the Interpersonal Reactivity Index [B-IRI; 7] assessed empathy, or interpersonal consideration. The B-IRI is comprised of sixteen items, in which participants chose how well each item best describes them via a 5-point Likert scale from 1 (does not describe me at all) to 5 (describes me very well). The B-IRI can be condensed to a single score ranging from 16 to 80 or divided into four subscales (i.e., empathetic concern, personal distress, fantasy, perspective-taking). We opted for and used the single score.

Cultural values were assessed through Hofstede's cultural dimensions on the Value Survey Module 2013 [VSM; 8]). Due to an insufficient number of samples obtained from each country, it was not possible to obtain a meaningful cultural

index. Only three countries (United States, United Kingdom, and Germany) possessed at least fifty responses to compute reliable cultural indices, which is in line with Hofstede's original study [9]. Therefore, the cultural indices were not included in the analyses, given that no meaningful inferences could be reliably drawn. For further information concerning how the VSM-13 was scored, see the Supplementary Materials on OSF: <https://osf.io/sjhdy/>.

### Statistical Analysis

The analysis first assessed the differentiation of the decision-making scenarios (*humanitarian* vs. *economic*) through a McNemar's chi-squared test in R Studio [10]. Further analysis deconstructed decision-making patterns across cultures through binomial regressions. A Kendall's correlation was also conducted to investigate the relationship between decision-making and empathy.

### Qualitative Analysis

Four optional qualitative questions were asked within the survey to allow participants the opportunity to clarify factors that may or may not influence their opinions about the pandemic, as well as their thoughts on future actions concerning this and other crises. 431 participants provided responses, which were analyzed through Dedoose [11], a computer-assisted qualitative data analysis software (CAQDAS). One question about the current restrictions in the respondent's state or country was included as a potential control question but was not qualitatively analyzed for the present report. The remaining three questions were coded separately by trained coders. Codes were assigned based on common themes in the data, and one excerpt could receive multiple codes. The developed codes were later compared across question types extracting five common themes underlying the data. Codes were first developed for each question to maintain the value of the code's context. Then, responses were re-analyzed regardless of the question to identify common themes across questions. Notably, the qualitative questions were asked after the personal-pandemic questions; thus, priming could have occurred.

## RESULTS AND DISCUSSION

The present results focus on decision-making within and across cultures, the relationship between decision-making and empathy, and the qualitative reports. The non-normal nature of the data required assessment through non-parametric tests.

### Classification of the Decision-Making Scenarios

The decision-making scenarios can be classified into two groups with emphasis on people (*humanitarian*) and an emphasis on businesses (*economic*). We included four *humanitarian*, four *economic*, and one control scenario to assess



differences in response patterns through various lenses (Table 1). A McNemar chi-squared test revealed statistical differences between *humanitarian* and *economic* responses across participants,  $\chi^2(1, 4488) = 337.67, p < .0001$  (Table 2). Notably, a greater number of participants chose the lesser impact-later timeframe (LL; e.g., return to normal daily activities *now* and 60,000 people are infected with the Coronavirus) outcome than the greater impact-sooner timeframe (GS; e.g., return to normal daily activities in two weeks and 20,000 people are infected with the Coronavirus) outcome when framed as *humanitarian*. Conversely, there was a smaller disparity between participants' choice of the LL or GS outcomes when the scenarios were economically framed. Across the two conditions, there were large disparities between the number of participants who chose the LL and GS outcomes. More respondents chose the GS outcome in *economic* compared to *humanitarian* scenarios. When further assessing the difference in scenario phrasal (e.g., infected/survive vs. die/fail), there were notable differences. For the *humanitarian* scenarios, a greater number of responses for the LL outcome when the scenario was negatively framed (e.g., die),  $\chi^2(1, 4488) = 584.43, p < .0001$ . The opposite was apparent for the economic scenarios, wherein the LL was chosen more often when the scenario was positively framed (e.g., survive). The control scenario paired the two scenarios against each other ('flatten the curve vs. revive the economy'). Respondents notably chose the *humanitarian* option (flatten the curve) over the *economic* option (revive the economy), regardless of the timeframe (*humanitarian*  $n = 433$ ; *economic*  $n = 128$ ).

**Table 1.** The categorization (humanitarian vs. economic) of the confidence contexts used in the present study is shown. Contexts that were framed in terms of people (e.g., X people infected) qualify as humanitarian, whereby contexts that were framed in terms of businesses (e.g., X% of businesses survive) qualify as economic.

Source: Author

Humanitarian	
DM1	return to normal daily activities now and 60,000 people are infected with the Coronavirus vs. return to normal daily activities in two weeks and 20,000 people are infected with the Coronavirus
DM2	return to normal daily activities now and 60,000 people are infected with the Coronavirus vs. return to normal daily activities in two months and 40,000 people are infected with the Coronavirus
DM3	return to normal daily activities now and 2,500 people die from the Coronavirus vs. return to normal daily activities in two weeks and 1500 people die from the Coronavirus
DM4	return to normal daily activities now and 2,500 people die from the Coronavirus vs. return to normal daily activities in two months and 750 people die from the Coronavirus
Economic	
DM5	return to normal daily activities now and 85% of businesses survive vs. return to normal daily activities in two weeks and the 75% of businesses survive
DM6	return to normal daily activities now and 85% of businesses survive vs. return to normal daily activities in two months and the 65% of businesses survive
DM7	return to normal daily activities now and 15% of businesses fail vs. return to normal daily activities in two weeks and 25% of businesses fail
DM8	return to normal daily activities now and 15% of businesses fail vs. return to normal daily activities in two months and 35% of businesses fail
Control	
DM9	flatten the curve vs. revive the economy

**Table 2.** The frequency of greater impact-sooner timeframe (GS) and lesser impact-later timeframe (LL) are presented in the table. Four types of each scenario (humanitarian vs. economic) were assessed in the present study, calling for a repeated measures design in how participants responded to either decision-making context.

Source: Author

	Humanitarian	Economic
GS	328	934
LL	1916	1310

## Pandemic Decision-Making across Cultures

To further investigate decision-making in pandemic contexts, we assessed cross-culture comparisons of response patterns using the three groups: *United States* (US), *Other Western* countries (OW), and *Non-Western* countries (NW). A binomial regression was conducted on each of the nine decision-making scenarios to assess cultural group differences. Participants ( $N = 561$ ) either chose a greater impact-sooner timeframe (GS) or lesser impact-later timeframe (LL) outcome to each of the scenarios. The US group was treated as the baseline comparison group and the GS outcome as the baseline choice for the regression interpretation. Given that the GS outcome is the baseline choice, all comparisons will concern group differences at this level.

Of the first four decision-making scenarios (otherwise grouped as the *humanitarian* scenarios), one showed marginal group effects and three showed no statistical group difference (Table 3). The first decision-making scenario postulated returning to normal daily activities now and 60,000 people are infected or returning to normal daily activities in two weeks and 20,000 people are infected. The binomial regression yielded a difference in the response patterns of US and OW respondents for the GS outcome (US  $n = 20$ ; OW  $n = 8$ ;  $B_{ow} = 0.986$ ,  $p_{ow} = .023$ ,  $OR = 2.680$ ,  $CI[1.149, 6.247]$ ). Due to this difference between US and OW respondents, a follow-up regression was conducted to control for empathy, age, and political position. When accounting for the selected demographic variables, the statistical difference disappeared, which suggests the underlying driving factor was between political positions (Politically neutral:  $B = -0.830$ ,  $p = .050$ ,  $OR = 0.436$ ,  $CI[0.190, 1.000]$ ; Politically conservative:  $B = -1.685$ ,  $p < .0001$ ,  $OR = 0.185$ ,  $CI[0.083, 0.413]$ ). The second, third, and fourth scenarios did not demonstrate a difference between groups (Table 3). However, the fourth scenario approached the margins with GS responses between US and OW countries (US  $n = 36$ ; OW  $n = 23$ ;  $B_{ow} = 0.534$ ,  $p_{ow} = .067$ ) respondents. Notably, these effects are marginal at best, in which follow-up regressions indicated a driving effect of political position, as in the first scenario, resulting in no effect between groups once it was controlled (Politically neutral:  $B = -0.797$ ,  $p < .01$ ,  $OR = 0.451$ ,  $CI[0.250, 0.811]$ ; Politically conservative:  $B = -1.370$ ,  $p < .0001$ ,  $OR = 0.254$ ,  $CI[0.139, 0.465]$ ).

The second set of decision-making scenarios (otherwise grouped as the *economic* scenarios) shows a similar trend in response patterns, by which only one yielded a statistical group difference (Table 3). The seventh decision-making scenario, postulating a return to normal daily activities now and 15% of businesses fail versus a return to normal daily activities in two weeks and 25% of businesses fail, elicited a difference between the GS response frequency of US and NW respondents (US  $n = 62$ ; NW  $n = 84$ ;  $B_{nw} = -0.497$ ,  $p_{nw} = .020$ ,  $OR_{nw} = 0.608$ ,  $CI_{nw}[0.400, 0.925]$ ). Like the differences in the *humanitarian* scenarios, this effect was driven by differences between political positions (Politically neutral:  $B = -0.743$ ,  $p < .001$ ,  $OR = 0.476$ ,  $CI[0.315, 0.718]$ ; Politically conservative:  $B = -$

1.544,  $p < .0001$ ,  $OR = 0.214$ ,  $CI[0.129, 0.354]$ ). The other *economic* decision-making scenarios demonstrated no such group differences. Interestingly, no decision-making scenario yielded a true group difference that was not underlined by the demographic variables. This may indicate that cultural differences, at least as defined in the present study, did not contribute to these pandemic decision-making scenarios.

**Table 3.** *The table reports the frequency of the greater impact-sooner timeframe (GS) between groups, demonstrating the lack of differences between responses.*

Source: Author

DM Scenario	United States GS <i>n</i>	Other countries GS <i>n</i>	Western Non-Western countries GS <i>n</i>
<b>Humanitarian</b>			
DM1	20	8	17
DM2	49	43	50
DM3	18	19	19
DM4	36	23	26
<b>Economic</b>			
DM5	52	53	60
DM6	87	94	79
DM7	62	72	84
DM8	92	98	101

Empathy and Decision-Making

Empathy may be a telling factor driving decision-making as it is central to our ability to understand and connect with others. So, interpersonal consideration (i.e., caring for the well-being of others and empathizing with their situation) may be expected during a global pandemic. Therefore, empathy was included as a potential predictor in the regressions. However, little evidence pointed to empathy as a modulating factor. To further explore the relationship of empathy and the decision-making scenarios in the present data, a correlational analysis was conducted, in which there was no notable relationship between empathy and any of the decision-making scenarios.

Influencing Factors on Decision-Making and the Next Steps

Participants were asked four qualitative questions, of which three were analyzed. The questions included in the analysis were the following: (1) Other factors influencing your perspectives; (2) What are the next actions moving forward; and (3) What can we do to be better prepared for future situations. These questions elicited rich and diverse responses among participants; however, in-depth analysis revealed several common themes which varied across the created groups (i.e., US, OW, and NW). The most frequent topics were (1) science, scientists, and scientific recommendations, (2) a governmental take on rules and regulation and the role of leadership, (3) prevention and preparedness with

mitigation actions in practice, (4) trust in media, and (5) overall well-being encompassing economy and care for the most vulnerable. Participants came up with an array of different solutions that were related to pandemic-specific task forces, personal hygiene and care, self-agency, international collaboration, quicker responses guided by the current knowledge, and paths to normalcy. In the following section, we will elaborate on these occurring themes and their implications found in the qualitative data.

### **Scientific underpinnings**

One of the most common recurring themes was related to science and participants' ability and willingness to trust what messages and directions are relayed to them. There were different takes on how science should be listened to; however, most participants reiterated the importance of listening to the body of knowledge, studies related to the pandemic, individuals closely associated with research, and those working in healthcare. The analysis showed that more than 400 participants reflected on the scientific underpinnings and elaborated on how critical those dimensions were for the pandemic.

Participants suggested that the general population would need to *"take seriously information coming from the scientists and physicians who are in the know."* At the same time, participants reiterated that science explains how viruses are spread, and that one should trust epidemiologists. Another perspective regarding scientific underpinnings related to the statistical data. Here, participants insisted that any action should be governed by the *"number of infected or dead per region."* Comments such as *"number of cases"* should also be used to instruct behaviors and guide rules and regulations.

At the time of data collection, vaccination development was still in the early stages, and participants placed their hopes into finding one. The most frequent comments included *"once there is a vaccine"*, *"vaccine invention"*, and *"further research in order to get vaccines properly out."* There was no difference among the groups in a desire to develop a vaccine, and comments, such as *"to work efficiently on getting vaccines for the whole world"*, were frequently encountered. Overall, the participants were adamant that new knowledge and its sources were most relevant; additionally stating that the world should *"listen to science"* and follow *"the recommendations of global medical professionals, such as the CDC, WHO, and other."*

### **Government and Leadership**

Another salient theme that emerged from the qualitative analysis concerned governments, and their issuance of rules and regulations. The comments ranged from too tight lockdown restrictions to a slower and phased out release of rules in place. Participants often talked about needed transparency from leadership, as well as leadership that inspired confidence and cooperation. More than 360

participants reflected on governmental rules and regulation, tightening border control, and transparent leadership.

Those reflecting on the level of lockdown severity often stated opinions coinciding with *“in my opinion, we should move ahead by using smart lockdown and implementation of strict rules and regulations.”* Furthermore, they would reiterate that *“everyone should follow the guidance provided by the government,”* and that the government should be *“preventing the infections by applying restrictions and having a plan”* while having *“tighter restrictions for travel between high risk areas.”*

When talking about the issues in leadership, some suggested that their government should have ensured more timely responses to the issues, as well as engaged in public education and open communication. Comments such as the *“government need[s] to be more transparent”* and *“consistent communication”* were aimed at the leadership. Often, these comments criticized the lack of responsiveness and decisiveness, stating that *“lack of thoughtful and consistent leadership at all levels of government”* contributed to high prevalence of the virus, and that *“better leadership”* would help in overcoming the current crisis.

### **Prevention and preparedness**

A key takeaway from the qualitative responses related to a timelier response based on the data. Whether it was per scientists’ recommendations, based on current and past pandemic knowledge, or experiences from the international community, participants had strong opinions on preparation and preparedness. Concerning preparation, the most common comments related to the act of gathering information to create and implement a plan, while preparedness related to obtaining personal protective equipment (PPE) and preparing for the upcoming challenges. Mitigation action, such as social distancing, hygiene, and mask wearing, were generally considered common sense. Like the previous dominant themes, more than 250 participants mentioned the relevance of preparation and preparedness.

Part of the prevention suggestions were solely focused on mitigation options. Participants said, *“do not leave the house unless it is necessary.”* They further emphasized the *“use of face masks...”, “...etiquette sneezing and coughing”,* and *“wash your hands, bathe daily, eat well, and disinfect the whole house.”* One pervasive theme related to the healthy lifestyle, in which individuals would not only need to self-regulate with social distancing and mask-wearing but also with daily exercise and healthy eating (e.g., no meat, no sugar, no toxic food).

Quite often, participants mentioned the importance of PPE, especially when reflecting on the first responders. This expressed the idea that our obligation should be to protect them, as they are crucial to help the infected. Participants mentioned the need to *“have a better storage supply of PPE, biohazard suits, face*

*shields in hospitals, and sell them in mainstream stores for average civilians/consumers to purchase them.”* Another dimension, besides self-isolation for prevention, was timely response. There was a strong push for health promotion campaigns, in which there should be a “*continuous health promotion campaign normalizing mask-wearing, physical distancing, regular hand washing, [and] alcohol-based hand sanitizer usage...*”

## **Media**

Media was a theme that largely divided our participants. One participant nicely captured the essence of media communication in the pandemic: “*there is too much information or misinformation.*” Primarily, this was how participants learned about the pandemic, what to do, how to go about it, as well as the prevalence of the virus and resulting deaths. Social media, news, and radio were cited as the most frequent sources of information. While many participants pointed out conflicting information, others were increasingly distrustful of all information.

Some were concerned that “the media exploits stories and skews numbers to their benefit.” Others were quick to point out that “conspiracy theories, myth, and irrational misinformation compete with real data for popularity in the society.” Furthermore, some participants were convinced that even officials and scientists were involved in a misinformation agenda and would state “media should not give false information by virologists in order to unsettle the population.”

Conversely, others scrutinized the quality of reported news by “*searching [the] internet for false and true information.*” The idea intended for “*... correct information [to be] spread throughout the country.*” Some also mentioned the absence of transparency and called for “*more information sharing in general*” by “*verified/trusted/legitimate sources.*” This line of thinking highlighted the need for a “*cohesive, science-based message*” that would simultaneously be a “*single source at all times.*” Lastly, some sought information exclusively from official sources, such as the CDC, WHO, and various departments of health experts, as they wanted a comprehensive picture of the situation. Such behaviors indicate that individuals sought international statistics to figure out how their country compares, while seeking diverse sides of political sources. One such example reads, “*I regularly look at Worldometers to look at the data for different countries. I also look at varied online news from various political viewpoints and seek out new research. From all this I get a feel for what I think seem right.*”

## **Well-being**

While our participants tackled many different topics, one was consistently related to well-being; well-being for themselves, their families, those they care for, as well as the global society. Many were concerned about the economy and individuals’ ability to financially survive the crisis, overcome mental health issues

triggered by the pandemic, and provide sufficient care for those most vulnerable. Consistent with the literature on in-group and out-group relations [1], participants showed the highest regard when their loved ones were closely affected by the pandemic.

These opinions were consistent across all groups. Participants would insist that we would need to “maintain social distancing for a while but be able to change the status of phase because people [adults and children] are having psychological as well as economic consequences.” Many encouraged the economic efforts to implement remote work, including statements such as “encourage work from home”, “revamp the current employment system – allow employers to work from home”. However, others were quick to plead that we would need to “try find a good balance between restrictions and maintaining the economy.” Overall, the majority thought that we would need to be careful to maintain “the wellbeing of society, which is a balance between avoiding becoming ill and avoiding too much economic loss.”

Mental health issues were often brought up in combination with the economy and restrictions. “[P]eople are more affected now by all the restrictions, financially, and more important [,] mentally.” There were suggestions that everyone should “do research before sacrificing everyone’s mental health and livelihood”, that the restrictions should be reconsidered because there were cases of “mental issues [and an] increase in suicides”, as well as feeling “disappointed and passive under the lockdown” which would significantly disrupt their “happy life.”

Lastly, many were concerned about others and mentioned that the pandemic is causing them to be “more responsible, and [to] be sure that our neighbor is [doing fine].” This responsibility extended to their families – “the fact that I got children that need to be protected” – however, there were those who expressed “more worry for the elderly and vulnerable people who would be of higher risk.” Time and time again, participants clearly expressed concern for protecting their elderly parents and ensuring their loved ones were safe by learning how to care for others aside from themselves.

## GENERAL DISCUSSION

The findings demonstrate a distinction in pandemic-specific decision-making. When asked about whether to return to normal daily activities under a specified timeframe (i.e., now, 2 weeks, 2 months), respondents largely chose the delayed timeframe when the risk was an increased infection or death rate. The choice between time frames and the associated risk was not as clearly differentiated when the risk pertained to business survival and failure. While our study does not allow us to conclude the underlying reasons for such differences, this finding may be related to long-term orientation. For example, respondents displayed greater long-term orientation and consideration when pondering the



outcome of a person rather than a business. However, this distinction lessened when respondents were considering a business's outcome. This is not to say that participants lacked a sense of long-term orientation. One possible explanation may concern the people behind the businesses posited in the question. In this sense, respondents may have also exhibited interpersonal consideration for the people behind the businesses. Since the extent of underlying rationale could not be adequately assessed in the present study, future investigations should aim to identify the rationale driving decision-making in the pandemic or a general crisis.

The evaluation across cultural groups demonstrated a lack of differences in pandemic-specific decision-making. This is inconsistent with the studies investigating cross-cultural decision-making styles [12][13]. While we did not directly address decision-making styles, rather the action of decision-making itself, it is still plausible that cultural differences would exist. Importantly, the development of the decision-making task in the present study was contextually biased, given that the story, which participants were asked to consider for each scenario, was based on the pandemic statistics of the United States at the time of survey development. This likely impeded some respondents from applying the scenario, considering that the pandemic situation likely differed in their country. Additionally, the decision-making task did not allow for further assessment into the rationale in choosing one scenario over another. We also were unable to stringently categorize culture, which would be pertinent for additional inference. Further investigation is necessary to better understand the underlying mechanisms of decision-making across cultures.

The data also suggest that empathy had no modulating effect on decision-making within or across cultures. Given that the two are intertwined, this finding was surprising. Conversely, the qualitative data reveals that empathy and interpersonal consideration were commonly reported as influential in respondents' pandemic perspectives, as well as a key factor when planning pandemic actions. There was a variety of reflections in the qualitative analysis, ranging from taking care of the immediate family to acting for the common good. Some participants mentioned how they had more responsibility about their neighbors and those vulnerable: *"I am more worry(ied) for the elderly and vulnerable people who would be of higher risk,"* while others were concerned about their children and their families: *"the fact that I got children that need to be protected"* and *"my parents are at risk and I live with them. I want to protect them."* Many used the airplane oxygen mask model, in which they mentioned taking care of themselves so they would not cause harm to other people's health. Notably, there was considerable differences when talking about pure numbers of those infected or deceased and when reflecting on those close to them. Nevertheless, many participants supported behaviors that would contribute to the common good. Future research may consider a more comprehensive measure of empathy to better investigate empathy across cultures.

The most salient portion of the qualitative analysis were recommendations given for the current COVID-19 pandemic. Those ranged from needs assessment, distribution of PPE material, and proactive measures to healthcare revolutionizing and improved communication from the government and those in leadership positions. Overall, the consensus expressed that we, as a whole (i.e., the whole world), need to learn from current experiences and apply them in the future.

When talking about needs assessments, participants were concerned that all measures were not equally effective and there should be some contextualized effort in addressing those differences; for example, differences in rural versus urban places, differences in the spread of the infection, and differences in access to the preventative measures (e.g., PPE, sanitization, masks, etc.). The highest concern was for essential workers and for governmental responsibility to provide safe working conditions for such workers. Numerous comments mentioned urgency and the need for quicker/faster reaction times.

Moreover, there was a pervasive theme that included better communication and the issues of false information and misinterpretation of data. Participants were adamant that leadership should take firm actions, such as keeping restrictions in place, mask mandates, develop vaccines, and plan, while limiting misinterpretation of the available information. Furthermore, increased international collaboration and lessons learned from other countries across the globe in similar situations and similar contexts would aid combative measures already in place. The government would also be responsible for building the crisis management, evaluating the current situation, and adjusting as needed. It seems that many thought the world failed to respond to the pandemic adequately on all previously mentioned areas.

## CONCLUSION

The present study explored pandemic perspectives and associated decision-making through a forced choice task positing two pandemic-specific scenarios. Respondents' subjective reports elaborated on what influenced their perspectives, and ultimately their decision-making, as well as suggestions for future situations. The findings revealed that decision-making differed in the context of humanity versus economy, with suggestively greater consideration in the humanitarian context scenarios. A lack of cross-cultural differences with regards to decision-making was also demonstrated in the present study and further suggests no modulating effect of empathy on decision-making. However, these findings should be further investigated with an adjusted decision-making task, as well as increased stringent classification of cultural groups. It may be insightful to evaluate decision-making style as well as cultural tendencies (e.g., long-term orientation) next to the decision-making task. These investigations would allow for proper examination into these relationships. Importantly, the subjective reports emphasize prevention and preparedness through increased response time, trust in a scientific recommendations, and statistics, as well as communication and

unity from the governmental level. Therefore, the present study roundly highlights public perspectives on a global scale, which seemingly calls for similar actions and preparedness and comparably prioritizes delayed decision-making concerning reopening strategies.

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## SOCIAL COUNSELLING CHATBOT - PILOT TESTING

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### ABSTRACT

Counselling chatbot - The innovative way of communication with the client within the field of social work. The current development of modern technological possibilities of machine learning software enabled the Institute of Social Work of the Philosophical Faculty of the University Hradec Králové in cooperation with the Občanské poradenské středisko, o.p.s. (Civic Counselling Center) in Hradec Králové, Czech Republic to develop content for a new platform of communication with the client in the field of social counselling. Such an innovative tool in the field of social work is intended to be the initial contact of clients with professional social counselling organization in the web interface of the Internet. There is the first experience and initial conclusions from the pilot testing presented now. Innovative counselling chatbot is not in active service yet, so the pilot testing was managed in a „controlled environment“ of university students in the field of Social Work in May and June 2021. The topic of work/employment (which was chosen as the first of many topics that social counselling typically deals with), investigate the initial reactions of respondents to communication with a chatbot, the preferred style of communication etc.

**Keywords:** *social work, social counselling, chatbot, jobs and employment*

### INTRODUCTION

In the period from 2020 to 2023 University Hradec Králové (Czech Republic) - Institute of Social Work of the Philosophical Faculty received a TAČR grant (Technological Granting Agency of Czech Rep.), focused on the pilot deployment of new technologies in professional social counselling in the Czech Republic entitled "The use of elements of artificial intelligence in the provision of professional social counselling." Specifically, the project will deal with the possibilities of applying new communication platforms - chatbot, later voice bot.

There are three partners developing the chatbot: The Institute of Social Work of the Philosophical Faculty, University Hradec Králové; the Civic Counselling Center in Hradec Králové and the technology partner is Artin, the company that supplies software.

In order to fulfill the goal, a knowledge database will be created for the chatbot / voice bot communication platform usable for professional social counselling provided on the public information network internet. Main reasons for the development of the chatbot we described in the article "Use of New Technologies in Social Counselling – Chatbot as a Plan" in 2020. [1]

It should be the tool to help existing human resources (professional counsellors) to adapt to the growing quantity of work (growing size of target groups dealing with unemployment, loss of housing, over-indebtedness ...).

The authors also perceive the application of chatbot in the practice of professional social counselling as a tool to prevent the departure of professional counsellors to another area of the labor market (due to work overload, wage underestimation ...). The innovativeness of the solution is the partial replacement of man by a machine, in phases of counselling dialogue that can be significantly structured. In general it should not harm any of the points of the Ethical code of the social counselling worker. [2]

The goal of chatbot development is to take over part of the workload of human counsellors in the initial (initiation) phases of the counselling process. The task is therefore to play the role of the first contact with professional social counselling and to be able to orient the clients in the basic possibilities of solving their current social situation. It should be offered on the free of pay basis and promote as much as the possible concept of digitalization in the social service sector as described e.g. in the Federation of European social employers Joint Position Paper on Digitalisation in the Social Services Sector. [3]

On the contrary, what is certainly not the goal of development is the replacement of human work by machine work, the displacement of a human expert in social counselling into other spheres of the labor market. The ambition for the chatbot is to be an assistant, a helper, not the "master" of the situation. It should avoid negative impacts of digitalization on the labour market as described for the Czech republic e.g. by Chmelař et al. (2015) [4] and is longitudinally discussed under the concept of the Industry 4.0 - in Czech Republic predominantly Mařík et al. (2016) [5] and in also adopted in strategic documents like Action Plan for Society 4.0 (2017). [6]

After all, the goal of "controlling the space" of professional social counselling would be really bold for chatbot, as you will find out from the following results of the initial evaluation of its abilities by human users.

## **METHODS**

Design of a pilot testing of a counselling chatbot: The first step was to choose a thematic area that the authors of the chatbot will "teach". Based on the stability of the topic and the long-term availability of clients, the topic of work /

employment was chosen. The chatbot was literally trained by its creators, professional counsellors from a civic counselling center, to understand various questions on the same topic.

For the purpose of pilot testing, the authors devised a number of tricky situations that clients of the civic counselling center typically try to solve in the field of work / employment. Chatbot had to deal with a total of 60 model situations. Difficult questions such as the following were prepared:

- a woman of 56 years of age, working on an employment contract, needs a planned medical examination during working hours, does not know whether she must notify the employer in advance (this is sensitive information for her)
- a woman of 57 years, the employer wants to offer repeatedly (third time) a contract for a definite period, does not know if it is possible
- a man of 50 years, before the end of the year he has already used up a regular vacation day, he needs to move his household, he wants to ask the employer for some other form of leave
- 60-year-old woman, dismissed by her employer, is not sure she seems entitled to obtain severance pay
- a woman aged 50, needs to take care of a sick mother for a long time, does not know if the employer is obliged to release her
- a woman of 25 years, accompanies her grandmother to the doctor, wants to take some kind of leave so that she does not have to take regular vacation

These model situations were subsequently sent to the group of respondents for pilot testing in May 2021 (May 1 - May 14, 2021), which were students of Social Work at the Institute of Social Work, Philosophical Faculty, University Hradec Králové. A total of 357 respondents were contacted in the form of bulk e-mails. Respondents conducted an anonymous discussion on selected topics and then filled in a questionnaire, which was attached to the end of the chat thread. The questionnaire contained a total of 14 questions, which focused on the form and content of communication with the chatbot. There were 63 completed evaluation questionnaires that became the subject of the analysis (return ratio 17.6%).

## RESULTS

What did the respondents rather appreciate: The question "Do you have all the information needed to solve your problem?" 76.2% answered yes, which means only a quarter of respondents would need further dialogue on their topic and clarification of the description of the situation.

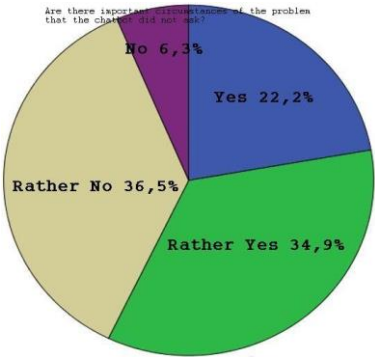
**Table 1.** *Do you have all the information needed to solve your problem?*

		Freq.	Percent	Cumulative Percent
Valid	Yes	48	76,2	76,2
	No	15	23,8	100,0
	Tot.	63	100,0	

*Source: Own data, 2021.*

Respondents also appreciated the comprehensibility of how the chatbot provided information: The variant "definitely yes" and "rather yes" was chosen by a total of 85.8% of respondents, the variants "no" and "rather no" only 14.2%. It also seems that the chatbot has no problem with the factual accuracy of its content. To the question: "Did you find a mistake in the chatbot information?" as many as 49.2% of respondents said "no". However, it should be noted that another 44.4% could not assess the factual accuracy.

What the respondents were dissatisfied with, what we have to work on when developing the chatbot: What chatbot can't do yet is "ask" about other circumstances of the life situation of the client. To the question: "Are there important circumstances of the problem that the chatbot did not ask?" as many as 57.1% of respondents answered "definitely yes" and "rather yes". Only 6.3% did not feel that the chatbot should ask further questions.



**Fig. 1.** *Are there important circumstances of the problem that the chatbot did not ask?* (Source: Own data, 2021.)

Form of communication: Respondents also focused on the format of communication with the chatbot. To the question: "Do you like communication via buttons, or do you prefer to formulate your own question?" we were surprised that the "button" variant won (77.8%). We are a little sad about it, because we wanted to focus on recognizing the content of the written word from the long-term perspective. The chatbot was told that if it didn't understand the question, it should politely answer: "I'm sorry, but I don't understand. My options are limited." Respondents mostly did not encounter this sentence at all! (as much as 71.4%). This sentence was used once in 11.1% of dialogues, twice in 15.9% of dialogues.



Chatbot's personality through the eyes of respondents - language: As chatbot speaks "like a book" and is based on the knowledge of legal laws, we asked respondents if they would appreciate a more informal way of communication. However, the opinion that the chatbot remained with a formal style prevailed slightly (58.1%, of which 20.9% said "definitely" formal). Only 7% of respondents said "yes" to the informal way of communication.

**Table 2.** *Would you appreciate a more friendly (informal) style of chatbot communication?*

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	definitely yes	3	4,8	7,0	7,0
	rather yes	15	23,8	34,9	41,9
	rather no	16	25,4	37,2	79,1
	definitely no	9	14,3	20,9	100,0
	Total	43	68,3	100,0	
Missing	System	20	31,7		
Total		63	100,0		

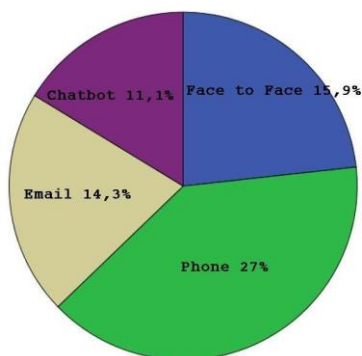
*Source: Own data, 2021.*

One of the basic questions was: "Can chatbot play adequately the role of initial contact with professional social counselling organization"? 53.5% chose the option "definitely yes" and "rather yes", "rather no" and "definitely no" 46.5% of respondents.

**Table 3.** *Can chatbot play adequately the role of initial contact with professional social counselling organization*

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	definitely yes	6	9,5	14,0	14,0
	rather yes	17	27,0	39,5	53,5
	rather no	15	23,8	34,9	88,4
	definitely no	5	7,9	11,6	100,0
	Total	43	68,3	100,0	
Missing	System	20	31,7		
Total		63	100,0		

*Source: Own data, 2021.*



**Fig. 2.** Please evaluate after immediate experience with the chatbot: What form of initial contact with the citizens' counselling center would you choose? (Source: Own data, 2021.)

The traditional forms of initial communication with the counselling center would still be chosen by the predominant number of respondents: 27% telephone contact, 15.9% personal contact, 14.3% email contact. Chatbot ranked 4th (11.1%).

## CONCLUSION

The main strength of the social counselling chatbot is, according to the respondents, the speed of response (10% of open question answers), followed by correct information (7.5%). Among the pros, the respondents in the open question also included the anonymity of the dialogue...

Amongst the main suggestions for further improvement, the respondents concluded in the open question mainly the need to further inquire about the circumstances of the life situation, they were also afraid that some clients would not understand the professional language.

We were also pleased that the respondents were mostly not afraid to describe their life situation with the chatbot - sensitive data (74.4%). However, we take this number with a limited value, as the respondents have so far only been students who are not the real bearers of a difficult life situation. They only tried to empathize with the client's feelings according to model situations.

Thus, in its early stages of development, chatbot still has significant limitations. It is not yet ready to interact with real clients. According to the plan, the first contact with a real client should take place in the spring of 2022.

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Projekt č. TL03000671 - Využití prvků umělé inteligence při poskytování odborného sociálního poradenství

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# SOCIOLOGICAL REFLECTIONS ON IDENTITY AND SOCIAL IDENTIFICATION: THE INDIVIDUAL IN AMBIGUOUS MODERNITY

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## ABSTRACT

The paper examines the diverse ways of self-definition of individuals in a changing reality, which is attributed to a hybrid and ambiguous character. The emphasis is on identity discourse in the individual dimension. While questioning the possibility of clearly defining the Self in the world of diverse relations and ambiguous social reality, a dilemma arises: one identity or many identities? It should be pointed out here that there is a transition from identity as a complex and dynamic attribute (aspect) of the individual to the multiplicity of individual identities as a variety of its identifications with the objects of the social world. More radically, doubts can be raised here about the usefulness of the category of identity. Behind such thinking are not merely methodological difficulties in recognizing the different dimensions and contexts in which the individual defines his or her identity or identities. It is certainly possible to speak here of a different meaning attributed to the category of identity, especially in its theoretical-cognitive sense. The consequence of this is also the different meaning that is attributed to the utility of this category, i.e. its instrumental use for the self-determination of individuals. The stronger the adherence to the terminology of modernity, the stronger the indication of a possible and fully conscious (reflexive) project that identity may become for the constructively acting individual. Departure from modern nomenclature complicates the issues of defining identity itself, and thus also does not make the task easier in the sphere of social practice and does not provide easy utilitarian solutions. Moreover, the difficulties concern not only what individual identity is (or could be) in the functional sense, but also its very structure and the fundamental question of its durability (or at least relative stability) in the context of individualization.

**Keywords:** *Individual Identity, Social Identifications, Individualism, Process of Individualization, Ambiguous (Hybrid) Reality*

## INTRODUCTION

Regarding the genesis of identity as a product of modernity, there is quite a general consensus in the social sciences. However, when it comes to the contemporary formulations of the category's scope of meaning, there is no such agreement. It suffices to point to the discrepancies in defining identity in two different contexts of analysis of modernity, namely the reality of late modernity

and postmodernity. The definition of individual identity, although repeatedly undertaken in the field of sociology and other social sciences, is still far from unambiguous. In a way, this is because the differences in meaning result from different theoretical currents and intellectual traditions in which the category of identity has been explained. Despite the disputes over the definition, there is, however, quite a general consensus that the issue of identity entered the social sciences with modernity, that is, when the actual conditions of social life seemed to provide an opportunity for individual self-definition in a changing world. It seems, however, that the lack of consensus as to the status of this concept in sociology has not prevented its fairly widespread use and application as a tool for examining the condition of individuals, and even – in the collective dimension – of entire groups. More important than the theoretical-cognitive specification turned out to be its research application. The dispute over definition, however cognitively interesting, turned out to be unsolvable.

The interest in identity in social sciences derives from two different sources, which causes it to take two main forms: psychodynamic – based on Freud's theory of identification and Erikson's concept of “identity crisis”, and sociological – directly connected with symbolic interactionism and James's pragmatic theory of the self. [1] The former one is primarily an internal process of self-identification, that is, locating oneself in socially constructed categories, which happens through language. The second form of identity is nowadays exposed to enormous challenges related to the dispersion and ambiguity of the contexts of participation in the social world, and consequently to the increasing difficulties in building common, consensually shared meanings. Indeed, defining oneself on the basis of coexistence with others must take into account the ways in which communities construct conceptions of human beings and social life. Hybrid forms of social life do not provide a foundation that guarantees transparency and stability. And this is one of the essential elements in the process of forming one's Self. It should be underlined that modern man has been largely stripped of the identity previously guaranteed by the so-called *commonsense*. Therefore, identity has been described in a pessimistic mode, where the distinctions between culture and self are blurred in mass culture, resulting in the rise of the narcissistic personality or marked by meaninglessness, lack of sense and the possibility of losing authority figures. All of these, combined, lead to the growth of selfish, closed to others, inbred identities. However, it also takes into account its optimistic dimension, understood as the „democratization of personality”. In this view, thanks to the increasing individualization of life, such mechanisms are liberated that allow the individual to make free choices from among a wide range of identities. [2]

However, regardless of the origin of the concept, in the case of the concept of individual identity one can clearly see its connections with the structures of consciousness. The sociological theory of individual identity was sparked by the idea of the self-conscious social subject. The spread of this notion and the increase in its popularity had to do with real transformations in the ways of human functioning in the world. Just as the sphere of consciousness has been linked to

the category of the subject, or rather the subject has taken possession of it and made it his own, so identity has emerged as another stage in the development of subjective consciousness. [3] Being so correlated with modernity, the identity perspective turned out to be adequate to describe the condition of an individual in the world in which the view of reality is reduced primarily to the optics of individual functioning and coping with the rapid changes. Gaining self-awareness, understood as empowerment (in the philosophical sense, it is the possibility of being and remaining oneself and influencing the shape of being oneself in relation to the surrounding world) has constitutive features in common with identity formation. In a broader context, the process of human empowerment as accompanying the emergence of modernity became the subject of Alain Touraine's analysis. [4]

## **AROUND THE CONCEPT OF IDENTITY**

Identity is most often understood as a process, a phenomenon that continues and develops over time. Though the phenomenon itself is not fully defined, to some extent it defines the individual or even the necessary mechanism needed for that definition. When searching for identity, one asks a fundamental question: "who am I?" Definitional discrepancies include the durability of the construct called identity. In sociology we can point to the presentation of identity as a real and permanent object defining an individual (self-conception) and as a changeable and contextual phenomenon (self-image). These two ways of explaining identity, originating in the tradition of American symbolic interactionism, can be, in a way of simplification, considered as typological patterns of defining identity and the ends of the continuum, between which many intermediate forms of individual identity can be found, never in their pure form, but always within the framework of such dichotomously considered ideal types of identity. In other words, the term "identity" is applied both to a long-lasting and hardly removable structure (self-conception) and to the image of a person at a given moment (self-image). A more appropriate term here is the Self, and individual identity is essentially that which lies between the biographical self and the situated Self. More precisely, it is what results from their continuous coexistence. It is a resultant of an established concept of oneself and an impression about oneself created in the situation of each act of interaction. [5]

Although various concepts of identity approach in their form to one end of the mentioned continuum, in reality both models are realized in individual lives. For example, Anthony Giddens, presenting the concept of individual identity as a reflexive project carried out in late modernity, is closer to understanding identity as a biographical self. Although he emphasizes the dependence of the construction of oneself on every single act of decision made by an individual in everyday life, the overall vision, according to him, is closed in the broader plans of life and determines the trajectory of identity. [6] The individual's behaviour on the way of constructing oneself is deeply considered, takes into account the risk inherent in late modern existence and treats the achievements of highly developed societies

as an opportunity for individual development and modelling one's own life according to intended goals and in a specific time (conducting a dialogue with time).

On the other hand, the postmodern world, as described by Zygmunt Bauman, seems to determine identity to a greater extent in every single act of action and decision-making. The changing (fluid) and multifaceted context of individual actions makes the process of identity construction not so much an opportunity as a necessity, even a requirement. In this sense, it becomes a task to be performed and takes on ethical significance because it is really a way of survival and individual being-in-the-world. The indication of contextuality and situationality in identity formation reflects the difficulties an individual encounters in their attempts to define themselves holistically. The biographical self, however dynamic, possesses the qualities of a certain stability and continuous construction may seem to be an unhelpful strategy in a hybrid world due to fragmentation, uprooting and trust deficit in society. To use Bauman's metaphor, it is the personality model of the "tourist" that is more adequate in liquid modernity than that of the "pilgrim". [7]

Once again, it should be emphasized that individual identity is usually related to the temporal factor, and different understandings of time and the positioning of the human being in relation to its different dimensions. As an illustration, we can point to private time (the individual's internal time), intersubjective time (shared with other people with whom the individual stays), and biographical time (determined by the individual's life course). In all its dimensions we can speak of manifestations of identity, in varying scope and intensity. The degree of its articulability, i.e. the individual's awareness of the essence of his or her own identity and the possibility of verbal expression of what features are its essential components, probably also varies. From a methodological point of view, it is the recognition and naming of these characteristics and the ability to verbally express the components of one's identity, and therefore the ability to answer the question "who am I?".

Apart from temporality, the active and passive aspects of identity should be pointed out. The most significant determinant of the understanding of identity is the active aspect, that is, the description of identity by each individual in terms of processuality and duration over time. Instead, the semantics of the term indicates that identity is a property of being "the same" or a feature of "being" in general. However, in his opinion, it is contextuality, interactivity and dynamism (constant changeability) that are the most significant features reflecting the nature of identity. Hence, the "having an identity" thesis should be considered a simplification typical for the social sciences, which stems from the fact that they try to describe reality as it is or appears to be (a state of affairs rather than a process, difficult to grasp methodologically). Therefore, it would be more appropriate to speak of the attribution of identity to others and identification. However, the identification includes both external (objective) and subjective



(internal) processes. The former, as externally imposed, is related to power because it illustrates the relationship between the identifier and the identified. This relationship is based on naming and identification: The second process, i.e. the attribution of characteristics from within, is in other words self-definition, which is in close relation to an externally imposed identity (it may or may not accept it). [8]

In light of the above, the shortest definition of identity can be formulated as follows: it is a complex consisting of self-creation and external identifications. Only with the assumption that we adopt a static view of identity can it be treated as a set (syndrome) of social or cultural features focused in the individual and manifested in a specific situation (in a certain social context). Only in this limited sense is any adjudication of “possession” of identity legitimate.

## USEFULNESS OF THE CONCEPT OF IDENTITY

A cognitively interesting question is to what extent can identity be considered a useful category in explaining the condition of contemporary man? Does the process of individualization mark the detachment of individuals from social conditions and complete freedom in the process of self-creation? It is then the free, intentional acts of identification of the individual with human objects and subjects that become important. Or does the inscription of individuals in institutional worlds still set limits on their creative self-definition? The answer cannot be unambiguous. It seems, however, that still identity, also due to the high popularity of the concept and its ambiguity, brings many unknowns, but at the same time hope for finding a meaning-oriented key to the contemporary man. [9]

In broad terms, constructing identity is one way of using practical reason. Leszek Koczanowicz, using the terminology borrowed from Michel Foucault, identifies four basic “technologies” developed by humans as ways of actively realising themselves. [10] These are:

- production technologies that allow things to be transformed, produced and operated in any way;
- sign systems technologies, i.e. the use of symbols, the recognition of meaning and the use of all kinds of signs, including language;
- power technologies that subordinate human behaviour to certain goals or to a particular dominance, thereby organizing and objectifying it;
- identity technologies.

It would probably be inappropriate to reason that currently, human self-realisation takes place only within the scope determined by the last sphere of activity. However, it is probably not much of an exaggeration to say that it is precisely the technologies of identity that are considered as a determinant of

modern times. Practical reason still has ample opportunity to realize itself and emanate its activity in all the spheres indicated, and this is indeed what happens. However, it can be assumed that the strong emphasis currently placed (starting from the modern era) on identity technologies is related to the profound changes taking place in the other three technologies. This is indicated by the justifications that identity sociology theorists use to find the foundations of their proposed concepts. For instance, Giddens and Bauman show such specific phenomena in the sphere of work, new rules of establishing relations, and transformations in the world of power that make individual self-determination through identity both an opportunity and a necessity in modern societies. Identity is seen as an antidote to the challenges posed by the ongoing transformations to the functioning of an individual in a diverse and semantically ambiguous social environment. [11]

Reaching for the mechanisms of self-creation has become a determinant of modern times, and individual existence is based today on a deepened awareness of oneself and the world in which one lives and acts. Identity is largely a consequence of using one's own thought structure, reflecting on oneself, but it also includes attempts to understand the surrounding world. It can also be considered in terms of instrumentality – since it is a consciously created project, it becomes, in a way, a tool for shaping oneself. Recognition by the unit of the conditions of its operation allows for their optimal use and inclusion in the unit project carried out. The intensification of such tendencies is evident in the recognition of the role of conscious reflection on reality as a fundamental attribute (and practical skill) of modern man. He/she is required to develop such strong thinking as a desirable and useful competence. In such a context one can place the definition of contemporary developed societies as reflective or simply knowledge societies.

Since the concept of identity is to introduce new possibilities of capturing the dimensions of self-identification and self-definition of individuals, the variability of the social world becomes at the same time the basis on which individual identity is built. The ongoing changes in society result in different conditions for identity formation and the acquisition of self-awareness. In this sense, it is a search for the “real Self” (Ralph Turner's term), which is the expression of one's own Self and, according to him, increasingly shifts from emanation in the world of institutions to emanation in the form of “impulse”. Bauman presents such a view of identity as a recipe for life in fluid modernity and, at the same time, as a constant struggle with the process of its creation. On top of that, he repeatedly emphasized the weakening role of the nation-state in the post-industrial era. Touraine, on the other hand, goes even further in his considerations, as he discredits the very concept of society as inadequate to describe contemporary “societies”

## **IDENTITY AND THE PROCESS OF INDIVIDUALIZATION**

In general, it should be said that the philosophical search for the sources of identity and its existence as a phenomenon has been linked either directly to

consciousness (thinking) or to the subject. Nowadays, the development of the ideas of consciousness and subjectivity are important for the definition of identity, if only in the sense that consciousness makes it possible to see one's own life as a narrative (which is a condition for constructing identity), and subjectivity determines self-determination, that is, it organizes basically everything that an individual may be a part of during his or her life.

However, what is most significant, in terms of contemporary identity contexts, is the relationship of this category to the process of individualization. The popularity that the concept of identity has gained in the social sciences, including sociology, in recent decades can be attributed to the process of individualization. The fact that it is applied to both individual and collective being does not undermine this thesis, because the heterogeneous sources of identity make it possible to separate its collective and individual dimensions. Although there is a visible tendency to transfer the characteristics of individual identity to social entities, the existence of individual identity is impossible without the social environment in which it is created.

In tying the category of identity to the process of individualization one must point to a quite clear gap between the European and the American view of the question of individualism. It should be emphasized that individualism and the process of individualization appear in many forms and are variously understood not only because of their different origins, but also their variability with social development and modernization. We can speak here, for example, about individualism of the “first modernity” and various models of “late modernity” individualism. [12] Regardless of the differences in interpretation, it should be acknowledged that individualism is an essential component of modernity. What aroused resentment and strong criticism, and what in Europe was regarded as a threat of some sort, in America was a virtue on which the whole democratic machinery and its influence rested. We are speaking here, of course, of individualism as a trait determining the functioning of entire communities, and thus an attribute shaping interpersonal relations and individual self-determination.

Nowadays, however, individualisation is most often perceived as a real tendency, an objective process accompanying the transition of societies from the stage of industrial capitalism to post-industrial capitalism, or in other words to the “economy of minds”. In a more radical version, it is heading towards a new post-market era. [13] Such are the social conditions for the realization of the main slogan of modernity, i.e. individual self-determination carried out in the identity scheme. As Jean-Claude Kaufmann notes, individualization is the key to understanding modernity, and personal identity construction is its expression. However, in his view, true individual liberation came relatively late, only in the second half of the 20th century. [14] According to Ulrich Beck, on the other hand, individualization seems to be the most advanced form/scheme of socialization. [15] This means that the process of individualization is spreading and becoming

more widespread (democratising) and that it actually forces the individual to self-determination and self-definition, inscribing numerous threads of the external world into his or her self-created biography. They take the form of institutionalized regulations of social life, but they can equally represent unpredictable and ambivalent patterns flowing from a hybrid, ambiguous contemporary.

## CONCLUSION

The historical variability of identity models is a fact. However, there are doubts whether and to what extent the construction of individual identity is connected with the conditions in which this process takes place. If there are any socially produced rules that govern this process, then identity construction must refer to these rules and cultural patterns in place at a given time and place. If, on the other hand, we assume that with the advent of modernity man decides individually about the formation of oneself and is fully autonomous in these decisions, then identity no longer belongs organically to the culture in which it is created and does not have to reproduce its patterns. All the more so if culture can no longer be defined in a hierarchical system defined by a symbolic code. The second type of point of view on the formation of individual identity includes, for example, the philosophy of Friedrich Nietzsche, in which the individual has at his disposal essentially unlimited means in the construction of his or her own personality.

The existing differentiation in defining identity, mentioned above, derived from the two sources of the concept, means also specific consequences for the process of identity formation. Identity consists of elements and patterns received from others, internalised in the course of interaction (identification), as well as distinctness and uniqueness, and thus a psychic internal construction (identification). Such definitions, so to say, external and internal identity, together determine the proper construction of the individual, which is the result of the constant clash (confrontation) of these two ways of looking at identity.

Considering the deep and dynamic changes taking place in the globalising world identity can be reduced to "consciousness of continuity". This is to be understood in the sense that identity marks the human remaining the same (but not identical) in the course of the changing circumstances of life, even if these circumstances provide heterogeneous or even contradictory patterns. It is a kind of temporal continuation (continuity) of certain personality traits or personality as such and signifies for the individual the sameness of his/her self (self-sameness). Even in the context of hybrid social reality.

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# **TEA PARTIES IN RUSSIAN PAINTING IN THE SECOND HALF OF THE NINETEENTH – BEGINNING OF THE TWENTIETH CENTURY: REFLECTIONS OF EVERYDAY LIFE AND SOCIAL HISTORY**

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## **ABSTRACT**

Tea in Russia is not only the drink loved by millions of people but also a national symbol closely and inseparably connected with Russian culture. The dominance of realism in Russian fine art in the second half of the nineteenth – beginning of the twentieth century gave birth to the widespread popularity of genre painting which started playing a very special role in the country. It is not surprising that tea parties became common themes in these works. Over a cup of tea, the characters in the paintings perform everyday activities: chatting, contemplating, indulging in memories, while taking the opportunity to enjoy their favourite drink.

Paintings are a unique and rarely used source for social history and culture studies as they allow us not only to reconstruct the everyday life of past eras, but also to study how contemporaries saw, perceived, and evaluated a variety of everyday practices. The research undertaken is descriptive and analytical with reference to the principles of historicism, academic reliability and objectivity that help to determine important trends and patterns and characterize the various social phenomena and developments that took place in Russia during the period under study. Unlike Western European painting, the representation of tea ceremonies on the canvases of Russian artists romanticizes both the philosophical aspect and the harmonizing function of the ceremony, but at the same time focuses attention on social issues, which obviously reflects the specifics of national consciousness.

The present research is based on the analysis of eighty-two genre painting works by Russian artists (among them there are the well-known ones by: Ivan Bogdanov, Vasily Makovsky, Konstantin Makovsky, Vasily Perov, Konstantin Korovin, etc.). They not only provide the audience with information about different aspects of everyday culture in Russia from the second half of the nineteenth to the beginning of the twentieth century but also trace the trends in the development of public consciousness and help to determine the main social problems that characterize the historical period and the attitude of society to them. The process of the democratization of society in the second half of the nineteenth century is reflected in the depiction of the ambiguous relationship between society

and the church. The canvases draw attention to the place of tradition in the life of an individual and a family, the changing social role of the nobility which exemplifies the passing era, increasing interest in the way of life of the intelligentsia, and creating the image of the merchant as a new social class with a specific culture. At the beginning of the twentieth century, the nostalgic description of the tea party as a symbol of a bygone era of prosperity and a lost past prevails.

**Keywords:** *social history of Russia, Russian fine arts of the second half of the nineteenth – beginning of the twentieth century, tea party, Russian nobility, Russian merchant.*

## INTRODUCTION

It was in the middle of the twentieth century when everyday life as a social and cultural phenomenon first came to the attention of researchers. It was examined by philosophers and sociologists from a variety of perspectives: B. Waldenfels, [14], E. Husserl [3] and A. Schutz [10] examined everyday life from the point of view of phenomenology; it was studied by R. Barthes [1] and R. Merton [6] [7] in the framework of structural functionalism; it became a subject for postmodern studies in the work of J. Baudrillard [2] and J.F. Lyotard [5], etc.

But much earlier, starting from Modern History, everyday life became the object of artistic reflections. The birth of genre painting can be considered the main evidence of the existence of a purposeful interest in this area. The genre was entirely focused on recording the routines of everyday life. Unfortunately, this huge array of sources remains almost unexplored so far. Notwithstanding the modern interest in visual sources, philosophers, historians and sociologists do not refer to paintings as a valuable source of academic data: paintings and graphics "do not leave the limits" of art history.

In this article, we present an analysis of the group of paintings created in Russia in the second half of the nineteenth and early twentieth century dedicated to the very important phenomenon in Russian culture of tea drinking from the point of view of social history and cultural studies.

The history of tea expansion in Russia is well explored by academics [4] [9] [11], [12]. In recent years, the interest in the topic is on the increase: conferences are held, monographs and articles are published [8] [13]. In our research, we would like to concentrate on the unknown sphere of the topic: representations of tea parties in Russian realistic arts.

The aim of the report is to reveal how and to what extent Russian painting, from the nineteenth to the beginning of the twentieth century, reflected the idea that the tea party was an integral part of the Russian daily routine and reflected social realities. What were the connotations of the tea drinking process? How did



Russians consider this everyday act: as a secular ancient tradition or an aesthetic ritual full of philosophic meanings; a depressing and routine part of everyday life; a form of social denunciation?

## **MATERIALS AND METHODS**

We based the research on eighty-two Russian genre paintings (second half of the nineteenth – beginning of the twentieth century); the most complete catalogue of the canvases devoted to the topic was made for the needs of the investigation. The works are created by well-known Russian artists along with provincial ones famous only in their region. There was no need to estimate the artistic value of the canvases; moreover, less important works of art can sometimes reveal the traits of the epoch better than masterpieces.

While conducting research into gastronomic culture, modern academics rarely refer to paintings as a source of information; but we consider visual arts as a powerful tool to fix and examine not only routine aspects of a tea party but to trace its roots in the culture of Russian society and to reveal the peculiarities of the national mentality.

We refer to empirical methods of observation and use generalization and analysis based on the principles of histories, reliability and objectivity as the basic research methods.

## **RESULTS**

No wonder that tea has become the national drink in China, Japan, or India where it grows, is collected and cultivated. But it is amazing that an exotic product from faraway lands became a national drink in a country where it is not produced but just imported. In the modern global world, the fact could be explained easily: we can name a great number of foreign food products that became an essential part of our daily diet. But we are going to talk about the seventeenth – eighteenth – nineteenth – twentieth-century phenomenon when tea (simultaneously with Britain) became not only the drink loved by millions of people but also a national symbol closely and inseparably connected with Russian Culture. The popularity of Russian tea in the country could be (and still can be) compared to only one national drink – Russian vodka!

The process of tea consumption brought to life the industries producing tea accessories, tea crockery, tea furniture. It formed cultural and family customs and traditions, influenced national cuisine and eating etiquette. Tea parties were depicted by artists.

Genre painting is presumed to display everyday practices on canvas while creating a sense of place. It is generally recognized that genre painting appeared in Russia in the first half of the XIX century – which is much later than in other

European countries. However, for a long time its positioning in the hierarchy of genres was one of the lowest, reflecting the fact that the attitude towards this genre was far from reverential.

The situation changed only in the second half of the XIX century, when realism was proclaimed as the leading movement in art.

The daily life of society in general and of the individual, in particular, became the subject of artistic interest: the household genre manifested its place in Russian art. Neither before, nor since this time in the history of art in Russia, has it occupied such an honorable position. Consequently, tea drinking has not been such an important theme either before or after this period.

The analysis presented in the research defined three main forms of the tea party present in the works of the nineteenth-century Russian painters:

- the tea party as a form of social criticism
- the tea party as a form of narration about everyday practices
- the tea party as a form of poetic admiration

All three existed in parallel. The characteristic features, vitality and presenting this or that topic on canvases varied due to the social and cultural peculiarities of the historical period. For example, in the middle and the second half of the nineteenth century, Russia accusatory pathos became the central topic of the artistic works, while at the turn of the century, poetic and aesthetic motives prevailed and influenced the way tea parties were presented on canvas.

Not in any other national art school have the topics dealing with tea consumption become the basis for social injustice and accusation. In Britain, for example, the depiction of tea rituals is always conflict-free: the space is socially homogeneous presenting people from the same social group, no outsiders can be involved. In Russian painting, the situation is very different. The harmony of a tea party space commonly trespasses, the artists depict people who, due to their social status, can by no means be allowed to participate in the action or be invited to share a meal at the table. On the canvases, they usually stand at a distance and are depicted to draw the audience's attention to the problems of suffering and destitution or even inequality and abuse. It can be seen it in the works by Ivan Bogdanov (*For Payment*, 1890), Vasiy Makovsky (*Hiring a servant*, 1891) and others. Social denunciation is often expanded by adding anticlerical motives: in this case a monk or a priest is the person drinking tea; he is fat, satisfied and indifferent to anyone else's needs (*Alexey Korsukhin*, *In The Monastery Hotel* (1882), *Vasiliy Perov*, *Tea Party in Mytischy* (1861), etc.).

In the painting *Tea Party in Mytischy*, we can see a priest sitting at tea, his eyes half-closed. He does not notice the beggars standing in front of him pointedly: a soldier, who lost his leg at war, and a child. Tea drinking here is

synonymous with indifference; it shelters the need for compassion, which is a feeling one could expect would arise in a priest.

Now we will turn our attention to how the compositional schemes are repeated in the "accusatory" works listed. On the left side people are always sitting, while on the right side - they are standing; on the left side - the subjects are well-fed and indifferent, while on the right – we see the unhappy and the offended. The persistence of the composition involuntarily echoes the Christian understanding of the left (as sinful) and the right (as righteous).

Presentations of tea parties on the canvases allowed for a reflection of social and cultural processes. In the beginning of the nineteenth century, the main heroes of the works of art were noble people. In the second half of the century and later on, the situation changed due to democratization tendencies in Russian society: peasants, the petty bourgeoisie, merchants, priests became the main subjects of paintings while depictions of the noble tea party tradition is out of fashion. If you find noble people in the picture they are "endangered species", very old and decrepit old men and women (Konstantin Makovsky, *Lady of the Manor* (1888), Vasily Maksimova, *Everything is in the Past* (1889)).

Maksimov's painting thoroughly collects and displays the wreckage of a once magnificent world: a decaying uninhabited manor house in the background; dying trees in front of it, the decrepit landlady of the destroyed «gentlefolk», an exhausted dog at her feet, and an old servant woman next to her. Of course, in this case, there is not any grandeur or aristocracy in the depiction of the tea party: no performers, no entourage, no proper place of action. The remaining scattered pieces of a once expensive full set of china wear look inappropriate on the wooden steps and weedy lawns; the same happens to the old-fashioned lace, furs, and velvet clothing of their owner. Indeed everything remains in the past. It is significant, that it was the tea party scene that the artist needed for the most adequate expression of the idea suggested by the title of the picture.

Arts impartially and cruelly monitored social and cultural changes of norms and practices: noble values and patterns fell into disuse, no nostalgia, no compassion or at least "admiration of the passing trend" was involved.

More and more often tea parties were interpreted as a routine activity, an occupation that inevitably followed the everyday existence of a person and not connected with global or painful issues of contemporary realities.

Dozens of works of art showed people listening to birds singing while drinking tea (V. Makovsky, *Nightingale Lovers* (1873)), philosophical conversations (Vladimir Makovsky, *The Conversation. Idealist-expert vs. Materialist-theorist* (1900)), meetings and send-offs (Alexey Korzukhin, *Parting* (1872)), writing letters (Vasilij Golynsky, *Letter to Petersburg* (1902)), family parties (Nikolai Bogdanov-Belsky, *Birthday Party in the Garden* (1920),

discussions of household issues (Konstantin Makovsky, *Household Conversation* (1862)), moments of recreation at home with the family (Alexander Gerasimov, *Tea Party* (1915)).

An unhurried course of routine life in paintings is lovingly revealed in details: it is full of numerous everyday features. The author's intonations, sometimes serious, sometimes touched with a good-natured smile or light irony, do not contain even a shadow of condemnation of the "joys of philistine life". Despite the fact that the tea party in most of these works is not a central but a concomitant event, it does not appear by chance, each time focusing on the private, family, everyday nature of the event, introducing this moment in the context of the day-to-day circle of human existence.

If a painter happens to depict the members of his family drinking tea the topic becomes very intimate and family values are of primary importance (Konstantin Korovin, *At the Tea Table* (1888), Boris Kustodiev, *On the Terrace* (1906), Lukjan Popov, *In the Garden. Tea Party* (1911).

The topic that unites all these works is: the harmonious and happy existence of an artist's family. The canvases do not tell stories or depict events. People are never in a hurry, nothing disturbs them. They are calm and content. The artist tries to communicate the feeling of comfort and a homely atmosphere. Parents and children, pets, white tablecloths, light clothing, samovars, pots, chinaware: all these details are presumed to create a poetic atmosphere of everyday realities.

The tea party is moved out of the traditional home settings: it now takes place on the terrace, in the garden, or on the playground in front of the house, which enhances the sense of poetic harmony of the event. The routine household details are replaced by the silence of a beautiful summer landscape.

The table, at which the household is gathered, is placed near the foreground of the picture so that you can see a few, simple, but rather refined details of the serving. Still, life plays an important role in the paintings, where the time of tea drinking appears as a moment of fullness, joy and spirituality of being. It is important for the artist to show how the sun reflects on the glass, how the porcelain glitters coldly, how the colored highlights fall on the white tablecloths. The life of things becomes an organic and necessary part of the depicted world: objects do not convey information but form a poetic and esthetic kind of environment.

The Russian painter Boris Kustodiev praised the everyday life of tradesmen. In his pictures, you will see curvy merchant women and bearded merchantmen. He created about two dozen paintings, in which the characters drink tea, and sit at a table with a samovar on it. B. Kustodiev can be called the creator of the visual formula of the Russian merchant tea party.

None of the paintings from the second half of the nineteenth century, mentioned in this paper, can be considered a hymn to hedonism. Even if the artists were interested in the objects displayed on the table, and they carefully depicted the treats displayed on it, the images of the treats struck the viewers with their restraint, or even asceticism. Bread, jam, bagels form the main "tea set essentials" within Russian painting. Boris Kustodiev was the first artist to get inspired by the generous, excessive beauty of merchant life. His feasts feature the merchants sitting at tables that represent luxurious still lives with a variety of pastries, a tray with all sorts of fruits next to it, and an indispensable watermelon that rises above. The painter continued admiring the redundancy of their life even creating his works during starvation in post-revolution Leningrad.

If you look at the dates when most of the «tea paintings» were created by the artist, it is the period between 1918 and 1926. In reality, during that period, the well-fed life of a Russian merchant that the paintings depicted was long in the past. In contrast to the tea parties described by the Kustodiev's works, a half-starved existence became the norm of life for a significant part of the country's population during that time. The artist himself is bedridden by an incurable disease. However, there is not the slightest hint of the mood of the time in which Kustodiev lived on the canvases dedicated to the tea parties: they present a nostalgic dream of the past rather than a depiction of reality. Kustodiev continued to create his myth about Russia even when nothing that «fed» that myth existed. As a result, his depictions of tea parties are the form of memory of a lost Russia.

## CONCLUSION

Thus we can see that the tea party theme became very important for Russian art in the nineteenth – beginning of the twentieth century. Though being very private, unimportant and domestic, it reveals different and important aspects of social and cultural life. It can be the subject of a light conversation or anecdote as well as the basis for philosophic reflections or criticism of society; it can also inspire authors to admire routine life. The subject not only illustrates the national preoccupation with tea drinking and peculiarities of the Russian tea party but also reveals the social and cultural context of the epoch: the process of the democratization of society, the relationship between society and the church, traditional values of society, the changing social role of the nobility and the intelligentsia, the merchant culture. In the new epoch that followed the Russian Revolution of 1917 and brought a new way of life to the country, the tea party remained a nostalgic relic of happier times.

Summing up, we emphasize once again that tea-drinking, according to modern researchers, is a kind of social technology, a means to influence society in a certain way: "in a series of everyday rituals, it is always an occasion and a consequence of the interpenetration of being and everyday life, a way of establishing world order, harmonizing what is happening." [15] Yet, not everything was so unambiguous in the Russian tradition. Paintings, a valuable but

undervalued source, provide unique information on various aspects of social history. Artists demonstrated the harmonizing function of the tea ceremony, while at the same time underlining its insecurity and its dependence on social issues, and they worked on these two elements with the same level of intensity. Obviously, this fact can be explained by the peculiarities of Russian national consciousness as opposed to, for example, as mentioned above, English painting where it is impossible to find canvases in which the tea ceremony would be used to present social problems. In Russian painting, there were two mutually exclusive tendencies: to glorify, to emphasize the harmonizing function of the tea ritual and at the same time to destroy it, turning the tea party into an expression of social injustice. In the first case, the tea party is a symbol of pleasure, far removed from any problems and complex issues, while in the second, it is a symbol of the "abused tea party", a harsh and direct form of social denunciation. This duality is the most important feature of the Russian consciousness. The works of art manage both: to praise and enjoy as well as denounce and destroy. Russian painting from the second half of the nineteenth and the first half of the twentieth century exposes this duality with a visual certainty.

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# THE PRINCIPLES OF GUIDED EVOLUTION OF SOCIETY

## – A SYSTEMIC PERSPECTIVE

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### ABSTRACT

Since the beginning of the 21st century, many regions in the world have faced with economic volatility, political instability, environmental degradation, cultural wars and various cyber threats, which only intensified during the coronavirus pandemic. The reason behind these crises is a fragmented character of human interactions that are motivated by self or local interest, despite the fact that we are becoming increasingly interconnected in complex global networks. From a systemic perspective, human interactions in contemporary society are motivated by centrifugal social forces, promoting independence and an increased sense of entitlement, exclusive individualism, hostile competitiveness, all of which are completely purposeless, even harmful in today's global society. We are constantly trying to implement pre-global individualistic values in a global interdependent system, thus causing "cracks" in the social fabric of reality, which we could especially witness during the coronavirus pandemic. In order to bring about a change in current trends, a paradigm shift is required, first of all in human values, which would increase existing centripetal social forces. This means that the generation living today must formulate a commitment to global citizenship alongside involvement in local citizenship. In order to protect ourselves from future outbursts of pandemics and other similar systemic crises, a new vision of human society is required which fosters openness, care for the "other", and mutual responsibility across national borders, as well as cultural, religious, racial, gendered and other divides. The only effective response to global crises is – global response.

**Keywords:** *social evolution, interdependence, global society, systemic perspective*

### INTRODUCTION

The world today is faced with economic, environmental, social, cultural, and security challenges of unprecedented proportions, and it becomes increasingly more difficult for us to adapt to the stormy changes the world brings, especially after the coronavirus outbreak. These changes not only invade our “personal space” in an unpleasant way, but it is getting more and more difficult to navigate through information flows that are abundant of information, but don't give us a

true picture of what exactly is happening. Many people do not understand how to behave, what rules to follow, what to expect from the future. In such an uncertain and complex situation, the question of how to go on living is acute both for society and each individual.

Hence, we can say that today we live in a VUCA world [1], which is an acronym for the world which is *volatile*, demanding from us immediate reactions to unpredictable and perpetually changing conditions, which are out of our direct control, and which we must perform under growing level of *uncertainty*. This is a *complex* world, dynamic with increasing interdependencies, creating new, *ambiguous* conditions, which we never experienced before.

In attempts to deal with the challenges it brings, more and more experts are incline toward the use of systems methodologies and multidisciplinary approaches. In normal science, we are used to describing the world in terms of individual phenomena, organized according to appropriate research disciplines or areas of life to which they most relate. The contemporary world, on the other hand, demands a shift in perspective from focusing on individual phenomena from an aspect of a certain field of science, toward focusing on connections existing between them, which mostly determine the dynamic of the world. Systems science not only captures the aforementioned dynamic of today's world, but also manages to explain how the world ended up being such a volatile, uncertain, complex and ambiguous place. In order to outline this trajectory of development, we need to examine the process of evolution not only from a systemic, macroscopic perspective, usually called "big history" [2].

## EVOLUTION AS A DIRECTED PROCESS

There are several features of systemic perspective, which make it fit for examining the structure and dynamics of evolution on a macroscopic level. First, everything existing within the space-time continuum, from particles to societies and culture (including evolution itself), can be described in terms of a system - a set of elements that is coherently organized in a structure that performs a certain function [3]. Second, since everything can be described in terms of a system, certain universal patterns of systems' behavior could be observed and abstracted into general scientific laws and principles. Lastly, if such universal patterns exist, and if they are truly products of underlying laws and principles, we could use them to predict the future behavior of the system, and plan our actions accordingly.

If we examine the process of evolution, not from the aspect of mechanisms of variation, natural adaptation, and "survival of the fittest", but from the overarching, macroscopic perspective, we can deduce that evolution is a directed process of gradual and stepwise increase of integration of evolutionary substrate – matter, energy and information. This pattern was observed not only in the domain of the evolution of matter [2], but also in the domain of the evolution of life, where the process of evolution results in successive emergence of major

evolutionary transitions, or major evolutionary transitions in individuality [4], which are characterized by individual entities which could sustain themselves and replicate independently, start connecting between themselves in order to form a more complex form of life.

What we are about to show is that the same pattern applies to human and social/cultural evolution as well and that current social processes, especially the ongoing coronavirus pandemic, are “aimed” at bringing human civilization into more integrated form of existence. Actually, several attempts for such a notion were already made in the past, not only in the philosophical, but in the scientific domain as well [5]. According to this perspective, the future evolutionary step of humans is in transition toward emergent, distributed worldwide intelligence, often referred to as “global brain” or “noosphere” (a sphere of interconnected human minds, which envelops the globe and affects the whole life, biosphere), which should happen by our volition, as humanity starts gaining more and more conscious and intentional control over the process of (its) evolution, since evolution itself is also a system which is evolving [5].

Although a considerable number of scientists from different fields of inquiry work on understanding future trajectory of humanity’s development, until recent times the above-described perspective on future human evolution didn’t gain much attention in main-stream science but was often perceived as being “mystical” to a certain extent, thus belonging more to New Age, than to science. The reason for it probably lies in the fact that it failed to provide a clear explanation of the process and causal mechanisms by which such evolutionary transition could happen, thus leaving enough room for different kinds of “mystical” explanations to fill in the gaps over the years. This is even more true for the notion of “directed evolution”, which is a concept most main-stream evolutionist discard without any consideration.

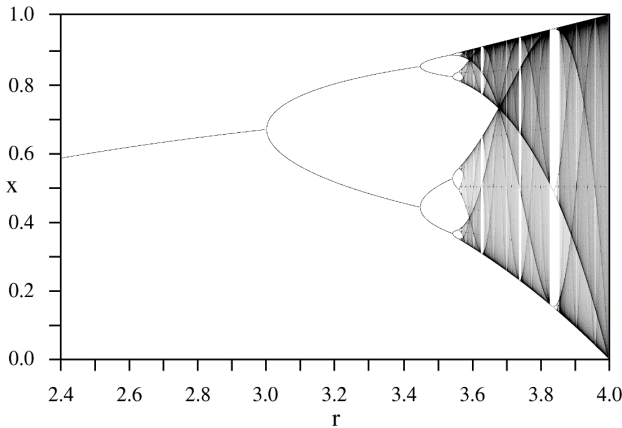
At this point, it is important to emphasize that directedness of the process of evolution by no means implies the existence of a certain supernatural intelligence governing the process of evolution. Rather, as we will try to explain in the following section, “directedness of evolution” is a pattern of emerging complex systems which stem from simple natural forces acting upon evolutionary substrate.

## **DYNAMICS OF EVOLUTIONARY TRANSITIONS**

From a systemic perspective, the emergence of a complex systems from simple systems (e.g. emergence of multicellular from unicellular life forms), happens due to their mutual dynamical interactions, creating interdependencies which give rise to (higher order) hierarchical levels (more complex systems), which exhibit emergent behavior that cannot be simply inferred from the behavior of its components (simple systems) [3]. The reason for the existence of such a pattern of growing complexity lies in the fact that all forms of existence, be it an

atom or an organism, are specific space-time structures able to maintain an optimal flow of matter and energy, under given (environmental) conditions [2], since according to empirically substantiated constructal law, in order for any space-time structure to come into existence and persist in time, meaning reach a certain state of stability or equilibrium, it has to evolve in such a way that it provides easier and easier access to the currents of matter and energy to flow through it [6]. In other words, the more complex the space-time structure is, the more it is able to maintain the flow of matter and energy through it, and this can actually be measured as energy rate density, which is the amount of power per unit volume which a certain space-time structure needs in order to maintain its existence (e.g. the human brain has a much higher energy rate density, relative to its size, than the entire galaxy) [2].

This process, from its inception (initial conditions in the early universe), has been guided by natural forces maintaining two parallel processes: 1) entropic processes, which maintain the ever-increasing energy flow and are manifested on a cosmic scale as expansion, radiation and dark energy, and 2) order-generating processes, which on a cosmic scale generate space-time structures and are manifested as contraction, gravity, or dark matter [7]. For the sake of simplicity, we will denominate these two sets of forces as entropy-creating "centrifugal forces", and order-generating "centripetal forces", since the same processes exist in human society, and are responsible for its evolution, as we will discuss later in this article.



**Fig. 1.** Bifurcation diagram of the logistic map

Figure 1 shows the most precise description of all possible states potentially existing in a dynamical system, whose behavior can be described by the logistic map equation, where  $x$  (y-axis) represents "order parameters", which designate an intrinsic dynamics of system's behavior, and  $r$  (x-axis) so-called "control parameters", which represent (usually external) factors acting upon system's intrinsic dynamics. In terms of above-mentioned forces, order parameters

represent order-generating centripetal forces, while control parameters represent entropy-generating centrifugal forces.

As we stated before, in order to maintain its existence and structure, every natural system depends on the flow of matter and energy through it, which, in turn, initiates the influence of centrifugal forces upon the system's structure, because increased energy flows through the system, evoke structural perturbations of the system. As the energy flow through the system gradually increases, provoking greater structural perturbations, the system starts to absorb these perturbations and balance them out by generating intrinsic centripetal forces, which maintain the process of continuously increasing interdependencies between system's elements, making its structure more integrated and complex, but also more sensitive to structural perturbations, thus demanding more energy to maintain its state [3], [8].

As this process continues, growing interdependencies in the system's structure create a critical threshold of instability, where infinitesimally small change is enough to create a qualitatively new behavior of the system, and in some cases, even complete reorganization on the superordinate level (transition in individuality). These points are represented in Figure 1 as bifurcations – points in which future trajectory of the system's development divides or branches out in two different directions/states: 1) under influence of centripetal forces, system moves toward reorganization on the superordinate level, reaching a new form which is able to maintain stability of system's structure (far from thermodynamic equilibrium), or 2) under influence of centrifugal forces, system's structure disintegrates, moving system closer to thermodynamic equilibrium (maximum entropy) [8].

It turns out that rise, of complexity in nature provides conditions both for greater integration as well as greater instability, thus paving the road for ever-increasing flow of energy, reorganization, and evolutionary development, producing ever more open and coherent space-time structures, maintained far from thermodynamic equilibrium by a flow of energy through it [2], [7].

## **EVOLUTION OF HUMAN/SOCIAL SYSTEM**

Now we can more precisely understand the nature and process of evolution of human/social system, since the same principles and forces act in the symbolic, cognitive-affective realm of human society, as in other natural systems. With that respect, human/social evolution can be seen as a process of ever-growing interdependencies between individuals, creating different social structures, from simple tribes to complex global society, under influence of centripetal and centrifugal social forces – the former ones bringing people closer together, and the later ones pulling people apart. We will not delve into details of this process, since it exceeds the scope of this article, but will immediately “jump” to the

current state of humanity. But, before we do that, we need to examine the nature of the human/social system.

We deliberately made a denomination “human/social system”, because it is impossible to clearly differentiate between the human individual and its social counterpart. The reason for it is that the very thing which differentiates humans from animals, namely the human mind with its capacities for reflection and symbolic representations, is actually both embodied, meaning “attached” to the brain and the body of a person, as well as relational, meaning it is “present” in the interpersonal space between people [9]. Although we don’t fully understand the mechanism behind this phenomenon, there is extensive empirical evidence for the relational nature of mind coming not only from the field of interpersonal neurobiology and social neuroscience, which show that the human mind wouldn’t be able to exist and develop without other people and their minds [9], but also studies from network science, which clearly show that our desires and characteristics are under a constant influence through a dense social network, by people we’ve never even met in person [10].

From a systemic perspective, this means that human society is fundamentally built on positive feedback relations (interdependencies) between humans, which are the key driver of the development of human society, since they increase the values – desires, tendencies or states – which are associated with them. As opposed to negative feedback where we can observe a gradual and often stable development over a prolonged period of time, positive feedback relations work to amplify change usually to an exponent. This is the reason why development caused by positive feedback relations is fundamentally unsustainable because all systems, in reality, exist in an environment that will ultimately place a limit on their growth [3].

Of course, this was not apparent until 20th century, when human society become global. Until then, these effects were mitigated by strict hierarchies (kingships) and wars and conflicts between nations, all of which managed to constrain positive feedback effects. Once society became global, it began to develop exponentially, all inherent instabilities of positive feedback relations began to surface. Garrett Hardin over 50 years ago very eloquently described the state in which humanity found itself in the 20th century, naming it “the tragedy of the commons” [11]: *“The tragedy of the commons develops in this way. Picture a pasture open to all. It is to be expected that each herdsman will try to keep as many cattle as possible on the commons. Such an arrangement may work reasonably satisfactorily for centuries because tribal wars, poaching, and disease keep the numbers of both man and beast well below the carrying capacity of the land. Finally, however, comes the day of reckoning, that is, the day when the long-desired goal of social stability becomes a reality. At this point, the inherent logic of the commons remorselessly generates tragedy. As a rational being, each herdsman seeks to maximize his gain. Explicitly or implicitly, more or less consciously, he asks, “What is the utility to me of adding one more animal to my*

*herd?" This utility has one negative and one positive component. 1) The positive component is a function of the increment of one animal. Since the herdsman receives all the proceeds from the sale of the additional animal, the positive utility is nearly +1. 2) The negative component is a function of the additional overgrazing created by one more animal. Since, however, the effects of overgrazing are shared by all the herdsmen, the negative utility for any particular decision-making herdsman is only a fraction of -1. Adding together the component partial utilities, the rational herdsman concludes that the only sensible course for him to pursue is to add another animal to his herd. And another; and another.... But this is the conclusion reached by each and every rational herdsman sharing a commons. Therein is the tragedy. Each man is locked into a system that compels him to increase his herd without limit-in a world that is limited."*

On the one hand, from the aspect of the society as a whole, positive feedback relations are a manifestation of centripetal social forces, acting in a way to strengthen and expand human relations, thus creating stronger and stronger interdependencies, until almost entire human society entered into a state of global interdependence. On the other hand, from the individual aspect, the same system of positive feedback relations amplifies existing individual desires and tendencies, thus increasing diversity in human society. According to laws of development of the system, as growing social interdependencies along with growing social diversity start approaching a certain maximum, which is defined by structural constraints of the system of society, it enters a critical period, where it becomes vulnerable to even the smallest influence coming from individual actors (elements) in the system [8].

As soon as these instabilities start affecting each individual in the system, due to existing interdependencies on the social level, it activates their short-term self-interest goals, which introduces centrifugal forces into the system of society. These forces manifest themselves both on an individual level, as different kinds of alienation-driven behaviors, as well as collective level, as different kinds of isolationist and separationist politics. In relation to that, studies have shown an increase in narcissistic tendencies by 70% along with a decrease in empathy by more than 40%, since early 1980s until mid-2000s [12], while there is a rise in popularity of anti-systemic parties, especially in Europe, where in many countries they managed to become parliamentary parties, which is something that was, until recently, completely unimaginable. All of these tendencies were only attenuated by the coronavirus outbreak, which in very short time managed to create a pandemic, with unprecedented systemic effects on the whole human society, precisely because of existing interdependencies, making the world even more volatile and unpredictable.

## **SOLUTION FOR THE CURRENT STATE OF HUMANITY**

Considering all of the above, the question is what can be done in order to mitigate the current state of humanity? From the systemic perspective, as we

outlined in this article, all of the phenomena we are facing today are no more than a product of natural forces acting upon human society as a whole and each individual as a part of it, and are “pushing” it to evolve either to a new stable state, or to its demise and disintegration. In order to promote evolutionary change, the only solution is for each individual member of society to consciously choose to pursue “common good” which is comprised of everyone else’s “individual good”. This shift in perspective implies changing our attitude toward each other, rather than changing our behavior, which demands from us to adopt a new set of global integrative values which promote such attitudes. Making such a shift would not only stabilize initially unstable positive feedback relations existing in society, but would also set the conditions for evolutionary change in individuality, turning human civilization into a truly integrated human society.

Nevertheless, in order for humanity to adopt this shift in values, it has to happen systematically and intentionally, through a system of education, aiming to enable each individual to internalize the values of global perspective on life and existence in human civilization, because it is impossible to impose such values coercively. Such a system of education should be inclusive, able to include an extremely diverse community of individuals in its educational process. Our internal capacities as human beings are instinctively tribal; regardless of us living in a global society, we are “designed” to build trusting relations with people who are close to us – our families and friends – and to distrust those who are more emotionally distant. The proposed educational system should facilitate development of capacities which are able to bridge precisely those internal limitations, because the greatest potential for change and growth is created in relations between individuals who are most different from one another [13]. If humanity succeeds in establishing such an educational system, we will be able to see a development of an emotional culture which will enable individuals and communities to build trusting, mutually supportive relations between themselves, in which capacities for interconnected thinking, often referred to as collective or group intelligence can emerge and develop [14]. Precisely these capacities can facilitate the adoption of global worldview and values, by the help of which human communities can evolve towards higher order complexity and stability.

## CONCLUSION

The main purpose of this article was not to outline practical aspects of the process of guided evolution of society, but rather to expose the rationale, causal forces and inner mechanics of social change. Regarding that, in conclusion to this article several generalizations can be drawn. First, the process of evolution is a directed process, “guiding” evolution toward more complex and integrated forms (human society included), which are able to manipulate matter, energy and information in more efficient way. In this process, each new evolutionary form becomes a new whole individual entity comprised of elements existing in the previous evolutionary form. Second, this process is manipulated by two sets of forces we can denominate as centripetal, which bring elements of the system



closer together, and centrifugal force, which pulls them apart. Under the influence of these forces interdependencies start being formed in the system, until it reaches a point of crisis – a maximum number of interdependencies – after which the system is pushed to either self-organize into a higher-order system, or disintegrate. The system of human society is not excepted from this process. Third, evolution of human society is maintained by positive feedback relations between individuals, which are initially unstable, since they cause infinite exponential growth, which is naturally unsustainable. In such a society, individuals tend to instinctively react by introducing centrifugal forces into a social system. In order for society to reach a stable structure in today's conditions, additional centripetal forces have to be introduced in the system, through a process of education, thus stabilizing existing positive feedback relations.

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## **THE PROBLEM OF FOREIGN MIGRANT WORKERS IN THE CONTEXT OF RUSSIA'S NATIONAL SECURITY**

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### **ABSTRACT**

In the article, the authors made an attempt, on the basis of the results of sociological research among students, to identify trends in the transformation of their value orientations in relation to foreign migrant workers and ethnic groups that make up the population permanently residing in Russia. Research Methods. Questionnaire survey of target groups using a specially designed questionnaire made it possible to obtain primary empirical data on the distribution of the main characteristics of the value attitudes of young people concerning foreign migrant workers and representatives of nationalities permanently residing in the territory of the Nizhny Novgorod region of the Russian Federation.

At the time of this writing, within the framework of the project "Dynamics of value orientations of youth", six stages of research on the value orientations of students aged 16 to 24 were carried out. So, in 2006, on the territory of the Nizhny Novgorod region, 1915 students of secondary general education schools and secondary vocational educational institutions, as well as students of higher educational institutions, were interviewed, in 2011 - 3,000 people; in 2014 - 2,500 people; 2015 - 2750 people; 2016 - 2750 people, 2019 - 2750 people. The number of interviewed respondents testifies to the high representativeness of the research results obtained.

When processing the primary database obtained during the field part of the study, special statistical methods of analysis were used:

a) one-dimensional and two-dimensional percentage distributions, which made it possible to identify the prevalence of individual characteristics of value orientations, both in general, among young people, and in its individual groups, distributed by socio-demographic and ideological groups.

b) factor analysis made it possible to identify the main set of factors and the level of significance of each of them, in the formation of a certain set of value attitudes of young people.

c) cluster analysis made it possible to record the level of heterogeneity of the youth environment, the distribution of young people in individual groups, depending on the value system characteristic of each of these groups.

**Keywords:** *youth, values, migrants, security, factors of influence*

## INTRODUCTION

The problem of migrant workers in Russia from the Republics of the former USSR has often been considered in a purely economic aspect. Migrants were perceived, first of all, as labor resources, the involvement of which had been a forced measure due to the shortage of labor in the Russian Federation. However, the issue of foreign migrant workers has long gone beyond just economic problems and has become a part of social, political, interethnic and interfaith relations in Russia. Migrant workers are not impersonal units of labor resources, but are carriers of certain cultural, religious, social and everyday patterns of behavior. It is in this capacity that they contact the population permanently residing in Russia (hereinafter referred to as the local population). The interaction of these groups creates a new specific social reality. Its study, according to the authors of the article, will not only reveal the existing, largely spontaneous, system of relations between the communities of foreign migrant workers and the local population, but can become the basis for the formation of the foundations of state policy to regulate these processes and, in general, to ensure national security and long-term sustainable development of the Russian Federation.

The National Security Strategy of the Russian Federation notes that «implantation of alien ideals and values, implementation without taking into account historical traditions and experience of previous generations of reforms in the field of education, science, culture, religion, language and information activities lead to increased disunity and polarization of national societies, destroy the foundation of cultural sovereignty, undermine the foundations of political stability and statehood. Revision of basic moral standards, psychological manipulation causes irreparable damage to a person's moral health, encourage destructive behavior, create conditions for self-destruction of society. Generation gap widens. At the same time, manifestations of aggressive nationalism, xenophobia, religious extremism and terrorism are growing» [1].

Considering these problems from the point of view of the national interests of Russia, the need to ensure state and public security the National Security Strategy of the Russian Federation pays special attention to the development of a secure information space, protection of Russian society from destructive information and psychological impact, strengthening traditional Russian spiritual and moral values, preservation of the cultural and historical heritage of the people of Russia, prevention of manifestations of radicalism, prevention of extremist and other criminal manifestations, primarily among minors and young people [1].

Within the framework of the project «Dynamics of value orientations of youth» considerable attention was paid to the problems of interethnic relations in general and attitudes towards foreign migrant workers in particular. The time frame of this study made it possible to record the dynamics of public sentiments of young people in this area [2], [3].

This article presents the survey results for 2011, 2014 and 2019 and their comparative analysis. The reader may wonder why exactly the results of the polls over these years formed the basis of this study.

The results of the survey for 2014, for example, attracted special attention due to their sharp difference from the findings for other periods: there was a significant increase in the share of negative assessments associated with the problems of migrant workers. Suffice it to point out that in 2014, 39.2% of the respondents were ready to support the deportation of persons belonging to "undesirable" ethnic groups. In 2011, the share of respondents supporting this position was 21.5%, and in 2019 it dropped to 14.1%. This is due to the fact that in 2013-2014 external pressure on Russia increased in connection with the Ukrainian events. In society, especially among young people, the rapid formation of the psychology of the "besieged fortress", and the process of internal national consolidation was launched. As a result, there has been an increase in negative attitudes towards migrants as bearers of a different culture and representatives of external forces.

The results obtained at this moment of crisis are unique, since they allowed to fix how foreign policy problems can have a decisive influence on the situation inside the country, in this case, on the sphere of interethnic relations. These factors should be taken into account in their work by those state bodies that are responsible for policy in the field of labor migration. At the same time, in the process of making managerial decisions, these state bodies should proceed not only from the quantitative characteristics of migration flows but also their national composition, distribution in individual regions of the country.

It was not by chance that the authors of the article chose the Nizhny Novgorod region, which is part of the Volga Federal District, for the research. According to S. Huntington's classification, the Volga line of the civilizational fault includes the Nizhny Novgorod region, where the Orthodox and Muslim civilizations oppose each other [4]. However, this position is convincingly opposed by V.Y. Zorin, rightly pointing out that in the Volga region over the centuries, not a fault line has formed, but a zone of the harmonious intertwining of cultures and traditions of different peoples [5]. Both of the above circumstances indicate the uniqueness of the Nizhny Novgorod region from the standpoint of the subject of this research. It is also important that more than 140 nationalities live on the territory of the Nizhny Novgorod region [6].

The main value of this study is that it is based on the results of three replicate studies. Since these studies were carried out according to a unified methodology and the same questionnaire was used, the possibility of a statistically correct comparison of the results obtained at different times has appeared.

Given the above, the subject of research in the article was social relations, arising in connection with migration and interethnic processes in Russia as factors influencing the formation of value orientations of young students and the stability of the national security of Russia.

The purpose of the work was to study the impact of migration processes and interethnic relations on the transformation of value orientations of young people in the context of Russia's national security and identify the most significant factors that currently determine the level of interethnic tension in the youth environment.

## **RESULTS**

The studies carried out indicate positive dynamics in the sphere of attitudes of Russian youth towards foreign migrant workers [7]. The situation by 2019 looks quite positive. At the same time, this conclusion should not cause an unjustifiably optimistic perception of the processes taking place in this area of the life of Russian society. An in-depth analysis of the research results allows us to single out the processes hidden from a superficial glance, in the depths of which alarming shoots of future conflicts are formed.

The most important problem of the internal stability of Russia is the question: to what extent can relations with foreign migrant workers lead to an increase in interethnic tensions within Russia? Are these processes related to each other, or the recorded problems in interethnic relations are only national in form, but in fact it is just a negative reaction of the local population to the influx of guest migrant workers?

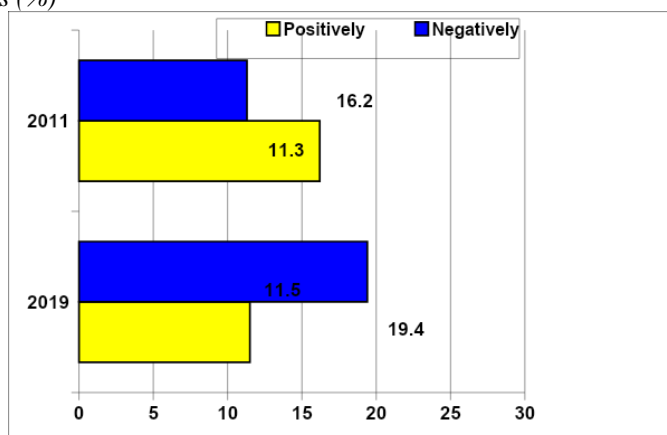
In order to avoid such a meaningful substitution, a comparison was made of the dynamics of attitudes towards both foreign migrant workers and representatives of indigenous nationalities permanently residing in Russia. The results of this comparison are as follows:

**Table 1.** Dynamics of youth attitudes towards migrant workers from other countries and representatives of other nationalities in Russia (column percent)

		Time of polls (year)		
		2011	2014	2019
How do you feel about migrant workers from other countries?	Positively	11,5	8,3	16,2
	Neutrally	69,1	60,5	72,5
	Negatively	19,4	31,2	11,3
How do you feel about representatives of other nationalities permanently residing in Russia?	Positively	16,0	12,0	22,7
	Neutrally	69,1	63,5	68,2
	Negatively	15,0	24,5	9,1

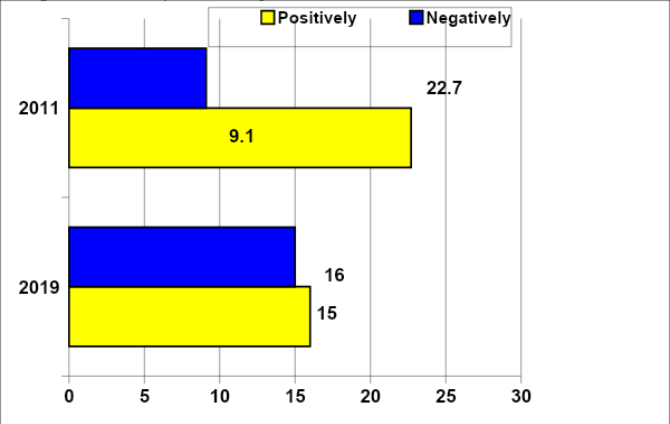
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**Fig. 1.** Dynamics of youth attitudes towards migrant workers from other countries (%)



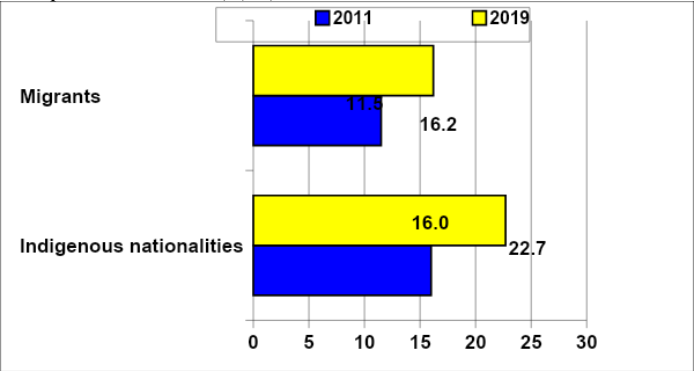
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**Fig. 2.** Dynamics of youth attitudes towards representatives of other nationalities permanently residing in Russia (%)



Source: Authors data

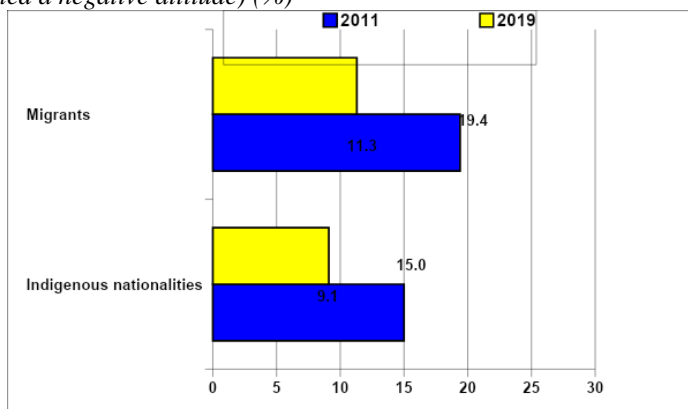
**Fig. 3.** Comparison of the dynamics of the positive attitude of young people towards migrant workers and indigenous nationalities of Russia (share of those who noted a positive attitude) (%)



Source: Authors data



**Fig. 4.** Comparison of the dynamics of the negative attitude of young people towards migrant workers and indigenous nationalities of Russia (share of those who noted a negative attitude) (%)



Source: Authors data

The presented results indicate that although the attitude of young people towards representatives of other peoples of Russia is generally better than towards foreign migrant workers, nevertheless, the processes associated with these two groups of the population are developing according to a similar scenario.

The problem is that interethnic relations within Russia and attitudes towards foreign migrant workers turned out to be synchronized with each other. At the same time, it is the foreign migrant workers that are the active component of the dynamics of such relations. It is not interethnic relations within the country that determine the attitude towards foreign migrant workers, but, on the contrary, the nature of relations with external migrants influences the situation inside Russia.

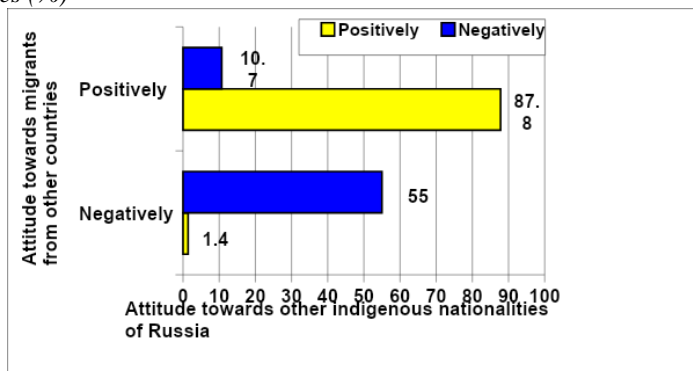
The results of the study demonstrate a high level of influence of the nature of attitudes towards migrant workers from other countries on interethnic relations within Russia.

**Table 2.** Correlation between attitudes of young people towards migrant workers from other countries and attitudes towards persons of other indigenous nationalities of Russia (line percent)

Attitude towards migrants from other countries	Attitude towards representatives of other nationalities in our country		
	Positively	Neutrally	Negatively
Positively	87,8	10,9	1,4
Neutrally	10,1	86,2	3,7
Negatively	10,7	34,2	55,0

Source: Authors data

**Fig. 5.** Attitude towards persons of other indigenous nationalities of Russia in youth groups with different attitudes towards migrant workers from other countries (%)



Source: Authors data

The above data once again confirm the high degree of correlation between negative attitudes, both in relation to foreign migrant workers and in relation to representatives of other indigenous nationalities of Russia.

Among those young people who have a positive attitude towards migrants from other countries, 87.8% also have a positive attitude towards people of other indigenous nationalities permanently residing in Russia. However, if the respondents have a negative attitude towards foreign migrant workers, then in 55.0% of cases, they will also have a negative attitude towards other indigenous nationalities of Russia.

Under certain conditions, the problem of foreign migrant workers can turn from an external into an internal problem of Russia. In other words, the particular issue of the attitude of the local population of Russia to foreign labor migrants under certain conditions can transform into the problem of interethnic relations within Russia.

Thus, the external component: the problem of foreign labor migrants is becoming a factor determining the internal policy of Russia. In order to preserve the stability of the socio-political situation inside Russia and make it little sensitive to external influences, it is necessary to "uncouple" in the public consciousness the connection between relations with foreign labor migrants and interethnic relations of the indigenous peoples of Russia.

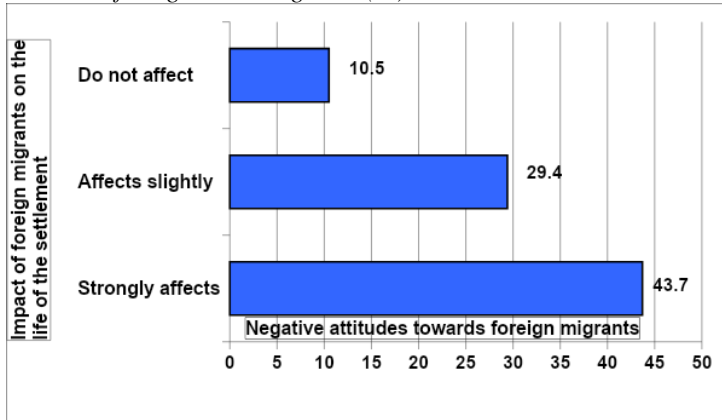
The study recorded the following alarming trend: the very presence of large-sized groups of foreign labor migrants living compactly in certain settlements provokes an increase in anti-migrant sentiments. This phenomenon is clearly demonstrated by the data below.

**Table 3.** Assessment by the respondents of the level of influence of foreign labor migrants at the place of their temporary stay and their attitude towards foreign labor migrants (line percent)

The level of influence of migrants on life in the city, settlement	I have a negative attitude towards migrants				
	Totally agree	Rather agree	Found it difficult to answer	Rather disagree	Do not agree
Strongly affects	25,2	18,5	24,4	15,4	16,5
Influence insignificantly	11,5	16,9	25,7	24,9	21,1
Virtually no effect	3,2	7,3	22,9	31,8	34,7

Source: Authors data

**Fig. 6.** Correlation between the respondents' assessment of the degree of influence of foreign labor migrants on the life of settlements and their negative attitude towards foreign labor migrants (%)



Source: Authors data

These data indicate that the stronger the presence of foreign labor migrants is felt in a given settlement, the more negative attitude they cause towards themselves. Graph 6 shows that in the case of a significant influence of foreign labor migrants on the life of a settlement, the share of those negatively related to them among the local population reaches 43.7%, while where there are practically no foreign labor migrants, this share decreases by 4 times and reaches only 10.5%. Thus, we can conclude that the existing spontaneously formed mechanism for the placement and integration of foreign labor migrants in the places of residence of the local population carries a potential source of contradictions.

At present, the relationship between the communities of local residents and arrived groups of foreign labor migrants from a certain point can acquire a rather

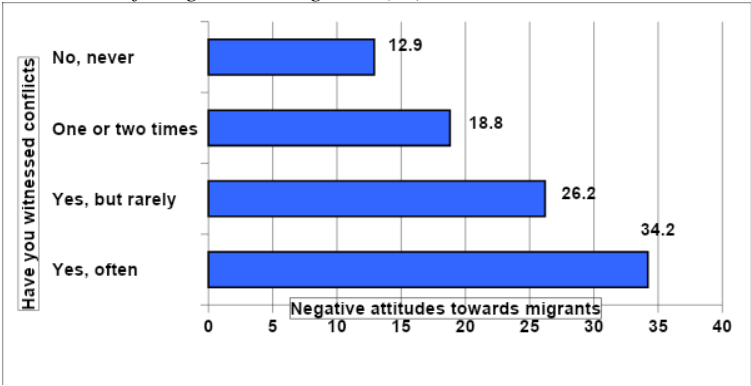
conflict character. It is these conflicts that determine the attitude of the local population towards foreign labor migrants. This dependence is clearly demonstrated by the data given in table 4.

**Table 4.** *Impact of the experience of interethnic conflicts on attitudes towards foreign labor migrants (%)*

Have you witnessed ethnic conflicts?	I have a negative attitude towards migrants				
	Totally agree	Rather agree	Found it difficult to answer	Rather disagree	Disagree
Yes, often	17,3	16,9	23,0	16,3	26,5
Yes, but rarely	13,3	12,9	22,3	25,6	25,8
Once or twice	4,8	14,0	24,1	28,3	28,7
No, I haven't	4,4	8,5	28,8	30,1	28,2

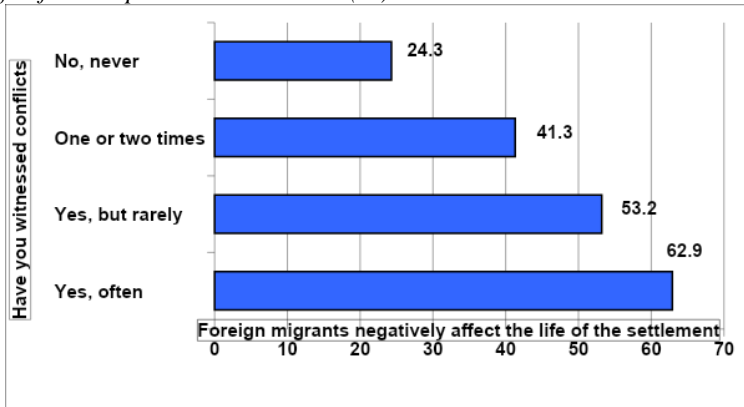
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**Fig. 7.** *Influence of personal experience of interethnic conflicts on negative attitudes towards foreign labor migrants (%)*



Source: Authors data

**Fig. 8.** *The influence of personal experience in the field of conflicts on ethnic grounds on the negative perception of the influence of foreign labor migrants on the life of the respondents' settlement (%)*



*Source: Authors data*

Currently, the mechanism for triggering interethnic conflicts is as follows: an increase in the number of foreign labor migrants leads to an increase in their influence on the life of the settlement; due to the increasing frequency of contacts with the local population, conflicts arise between them; an increase in the number of conflicts, in which the local population becomes a participant or witness, leads to an increase in negative attitudes towards foreign labor migrants.

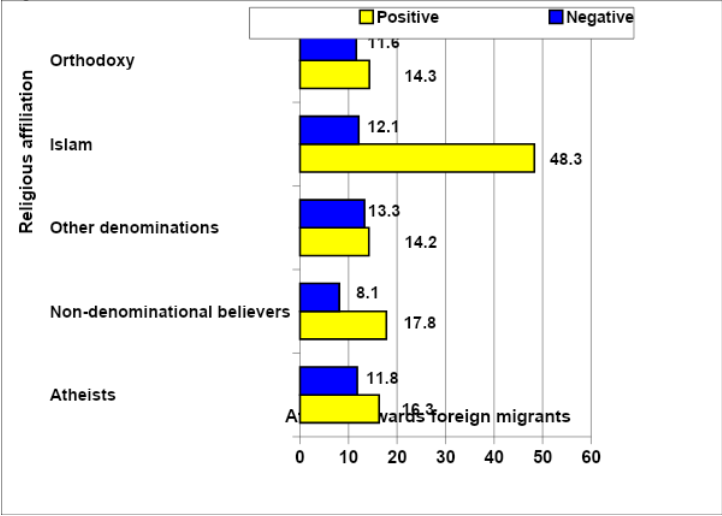
In this regard, the question arises: what turns contacts between the local population and foreign labor migrants into conflict relations and transfers them to local indigenous peoples? Considering that the overwhelming majority of foreign labor migrants come from the area of Islamic civilization, it is logical to assume that this conflict is, inter alia, of a civilizational nature. The results obtained in the course of the study indicate the validity of this assumption.

**Table 5.** *Influence of religious affiliation of young people on attitudes towards foreign labor migrants from other countries (%)*

Religious affiliation	Attitude towards migrants from other countries		
	Positively	Neutrally	Negatively
Orthodoxy	14,3	74,0	11,6
Islam	48,3	39,7	12,1
Other denominations	14,2	72,5	13,3
Non-denominational believers	17,8	74,0	8,1
Atheists	16,3	71,8	11,8

*Source: Authors data*

**Fig. 9.** *The influence of religious affiliation on attitudes towards foreign labor migrants (%)*



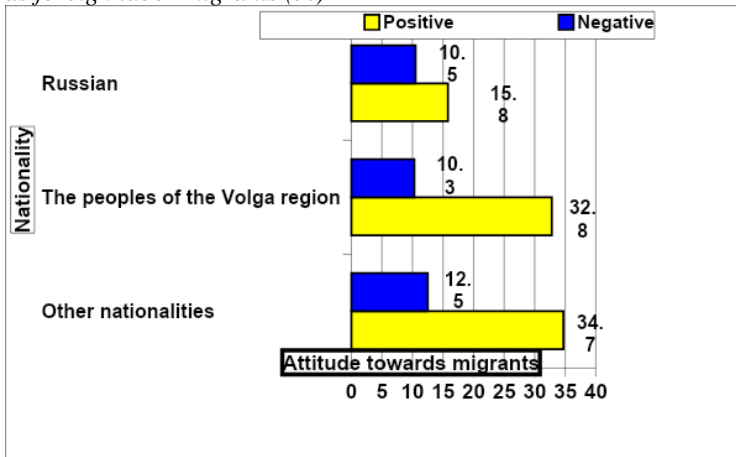
*Source: Authors data*

**Table 6.** *Influence of nationality of Russian citizens on attitudes towards foreign labor migrants (%)*

Nationality	Attitude towards migrants from other countries		
	Positively	Neutrally	Negatively
Russians	15,8	73,7	10,5
The peoples of the Volga region	32,8	56,9	10,3
Other nationalities	34,7	52,8	12,5

*Source: Authors data*

**Fig. 10.** The influence of the nationality of Russian citizens on their attitude towards foreign labor migrants (%)



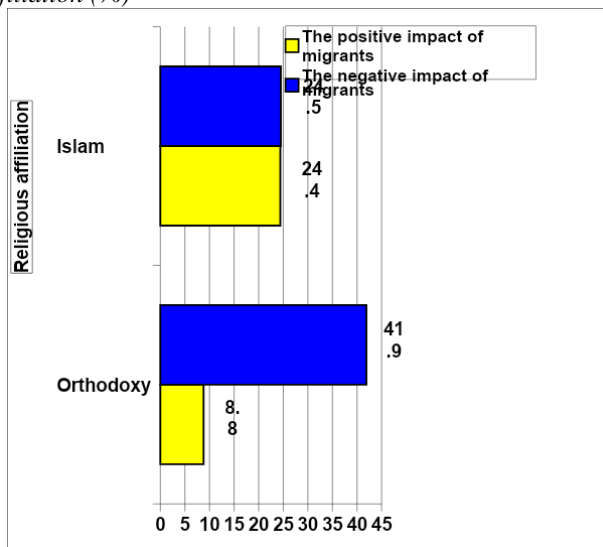
Source: Authors data

**Table 7.** Distribution of assessments of the nature of the influence of foreign labor migrants on the life of settlements in groups of Russian citizens of different religious affiliation (line percent)

Religious affiliation	The nature of the influence of migrants on life in the city, settlement					
	Very positive	Rather positive	Rather negative	Extremely negative	No influence	Found difficult to answer
Orthodoxy	3,6	5,2	26,7	15,2	31,3	18,1
Islam	13,3	11,1	15,6	8,9	40,0	11,1

Source: Authors data

**Fig. 11.** *Distribution of assessments of the nature of the influence of foreign labor migrants on the life of settlements in groups of Russian citizens of different religious affiliation (%)*



*Source: Authors data*

It should be recognized that the factor that the majority of the local population and foreign labor migrants belong to different civilizational areas (Orthodox and Islamic) creates a fertile ground for conflict between them. And since these two groups differ ethnically, the conflict immediately turns into the status of an interethnic conflict. In this case, 41.9% of the respondents who identify themselves with the Orthodox system of values believe that foreign labor migrants have a negative impact on life in their places of permanent residence, while only 8.8% of respondents perceive this influence as positive.

A completely different picture is observed among the respondents positioning their Islamic identity. In this environment, the attitude towards foreign labor migrants is much more positive. The shares in this group of respondents who gave either positive or negative assessments of the impact of the presence of foreign labor migrants are almost equal and amounted to 24% each.

Such a significant gap between the positions of the two groups of the local population of Russia, which differ from each other only in religious identification, suggests that elements of a civilizational conflict are indeed present in the life of modern Russian society and are objective in nature.

A rather alarming consequence of this process is the growth of the ethnic factor, which splits the consolidated position of the local population of Russia in



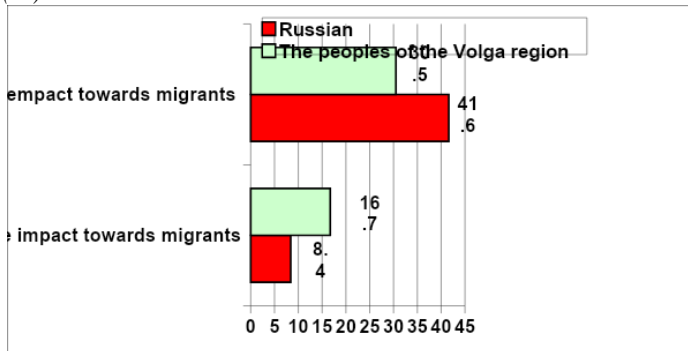
relation to the common problem. In this case, we are talking about the problem of foreign labor migrants. The appearance of such a split is evidenced by the data given in Table 8.

**Table 8.** *Distribution of assessments of the nature of the influence of foreign labor migrants on the life of the local population belonging to different national groups (line percent)*

National groups	The nature of the influence of migrants on life in the city, settlement					
	Very positive	Rather positive	Rather negative	Extremely negative	No influence	Found difficult to answer
Russians	2,7	5,7	26,9	14,7	32,3	17,6
The peoples of the Volga region	5,6	11,1	19,4	11,1	36,1	16,7

Source: Authors data

**Fig. 12.** *Distribution of opinions on the positive or negative impact of foreign labor migrants on the life of the local population belonging to different national groups (%)*



Source: Authors data

## CONCLUSION

Thus, as a result of the study, the following most significant factors were identified that currently determine the level of interethnic tension in the youth environment of Russia:

the numerical scale of the presence of foreign migrants at the place of residence of the respondents:

- personal experience of interethnic conflicts.
- religious identity.
- nationality.

The results of the study indicate that in the country in recent years there have been significant changes in the field of interethnic relations, and their source was labour migrants from other countries. This causes an urgent need to develop new instruments of state policy in the field of interethnic relations and migration processes that are adequate to the modern realities of Russian society.

Unfortunately, least of all, both in foreign and domestic scientific and philosophical-sociological studies, the problem of the influence of modern migration processes on the cultural and communicative situation of the countries of Western Europe and Russia is the least studied. And this is despite the fact that, according to the just remark of S.A. Myasnikov, «the dominant factor in global politics and the fundamental source of conflicts will not be political or economic differences, but cultural and ethnic differences and contradictions» [8]. The fact is that in the conditions of the growing integration of cultures caused by the processes of globalization and the widespread dissemination of mass culture, the destruction of the communicative space of ethnic groups that has been created for centuries, as well as cultural codes that fix the national-ethnic picture of the world, is taking place. As a result, there is a destruction, distortion of the natural processes of reproduction of national cultures [9], strengthening the influence of mass culture on the perception of the world, primarily of young generations. Popular culture is increasingly acquiring the character of a “transnational culture that does not have a national identity» [10]. In these conditions, one of the main social contradictions in the development of modern social reality is a contradiction, which consists in the "collision of the world of the «old «traditional culture, which forms the closed communicative space of ethnic groups, and a new, extremely mobile» mosaic «culture» [11], blurring the boundaries of ethnocultural identity, thereby transforming the communicative spaces of national states, ethnic communities, historically formed in certain territories, in certain natural-geographical and cultural conditions.

Analysis of the "images" of interethnic relations clearly testifies to the place and role of modern migration processes on the state of interethnic relations, as well as on economic, political and sociocultural processes. In the communicative space of a foreign country for migrants, the latter occupies a certain niche with their way of life, spiritual values. Language barriers, religious differences, alienation of attitudes make it extremely difficult for migrants to integrate into the culture and way of life of the host countries. As a result, cultural and communicative communities are created within the boundaries of the country's communicative space, based on their own cultural traditions, language, attitudes, social mechanisms of national and civic identity.

The marginal culture or the culture of the marginalized formed under these conditions is a special type of subculture that has its own specific features. In contrast to the openness of the communicative space of the titular national communities, marginal groups lead a closed way of life, not integrating or poorly integrating into the socio-cultural environment of the host country. For these and

a number of other reasons, the need to study changes in all spheres of social reality under the influence of migration processes is becoming more and more obvious. One of the primary tasks of a scientifically grounded approach to solving this problem, both in economic and social terms, is to predict the further development and transformation of the modern communicative situation in connection with new trends in ethno-confessional and intercultural interaction. It is obvious that taking into account the influence of marginalization on the modern communicative situation is important in terms of understanding the need to coordinate educational, information and communication, as well as law enforcement activities, on the one hand, and, on the other hand, real conditions of social reality that give rise to a certain type of personality and form value targeting, first of all, the youth one.

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# THE TRUST OF THE ALBANIAN YOUTH TOWARDS THE EUROPEAN UNION INSTITUTIONS

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## ABSTRACT

Albania appears to provoke a new problem. The desire of young people to leave the country, as well as the strong focus on EU membership of the country as the greatest answer for their future and that of the country, has drawn academics to the topic. According to studies, young Albanians' trust in national institutions has fallen significantly. Based on these findings, the purpose of this study is to examine the factors, such as: perceived political situation, trust in the national situation and EU education programme, that contribute to a high degree of trust in EU institutions. From a methodological standpoint, the paper is based on the quantity approach, and the survey is the technique of data gathering. The survey was established as part of this research, and the categories for the analyses were determined by the theoretical foundation. A total of 212 people responded to the survey. The analytical model of the paper is based on authors Fukuyama and Putnam. They define trust as an expectation that evolves in a community as a result of regular and societal changes in common norms. This declaration served as the foundation for the entire project. Following the examination and processing of the data, as well as running a multiple linear regression, it was determined that a negative perception of the political situation, low level of trust in national institutions and high level of trust in the EU education programme contribute to the high degree of trust towards EU institutions.

**Keywords:** *Albanian youth, trust, perceptions, institutions, EU*

## THE TRUST OF ALBANIAN YOUTH TOWARDS EU INSTITUTIONS

The concept of trust and changes in how it is understood has recently become one of the most hotly debated topics among academics working on trust issues at both the personal and institutional levels. Recent events in Europe have once again demonstrated that European citizens' trust in European authorities and institutions is eroding. The fall appears to be related to economic and political issues, and neither the Union's members nor its institutions have been able to adequately address the crisis' roots [1]. Trust is also perceived as the expectation that grows inside a community with regular, honest, and cooperative behaviour by other

members of this community, based on common norms [2] In contrast to EU member states, however, the crisis has had less of an impact on non-member but aspirant countries' trust in EU institutions. The same conclusions can be drawn in the situation of Albania, which is one of the countries that has been designated as a candidate country. On the other hand, trust levels appear to vary from nation to country [3], but Albania continues to have the greatest degree of trust in the EU thus far. This attitude is particularly evident among Albanian youth, who appears to be attempting to find solutions to EU membership through expressing faith in EU institutions [3].

Recent research on Albanian youth, on the other hand, do not appear to have been undertaken until 2015-2016. As a result, there has recently been a scarcity of data that can be used to build a clear framework for measuring or understanding if support has changed in recent years. Albanian youth are obviously pro-European, according to a study performed by the Friedrich Ebert Foundation in 2015 [4]. According to their research, 87 percent of Albanian young people would vote in support of EU membership in the event of a referendum. While 62 percent of Albanian youth feel that integration will result in political and economic prosperity. Taking these studies into account, research in this area has mostly concentrated on identifying probable characteristics that influence the increase of trust in Albanian youth. The following are some of the probable variables linked to a significant measure of influence in this context: (i) internal political situation; (ii) level of trust at individual and national level; and (iii) EU youth development and integration projects, such as Erasmus programs.

The main aim of this study is to examine the features that influence Albanian youth's increased trust in EU institutions, as well as to develop an analytical and theoretical profile of Albanian youth. This issue was sparked by the commencement of discussions for Albania as a candidate country on March 24, 2020, and it intends to examine the elements that influence the increase of Albanian youth trust in the institutions of the European Union. Some influencing elements derived from the literature review will be examined in the context of this paper. The study focuses on three main areas to assess the elements that influence Albanian youth's trust in EU institutions: (i) The political situation in the country; (ii) Trust in Albanian institutions; (iii) European youth-focused programs.

According to Mathews and Roz, the core analysis of this study is based on a quantitative methodological approach that is founded on positivist epistemological views, according to which social reality is objectively measurable [5]. The factors used to establish this article are based on Putnam's thesis [6], which claims that communities with high levels of trust are better able to collaborate to solve social problems, making their governments more accountable and honest, as well as improving democratic institutional performance.

Based on Putnam's reasoning, this study examines whether internal political reasons, trust in national institutions, and the impact of Erasmus programs all

contribute to young Albanians' increased trust in EU institutions. The analysis of the paper focused on the analysis and interpretation of the data generated by the survey used in the context of this paper. The survey was distributed to Albanian youth between the ages of 19 and 40, both inside and outside the country. The survey was carried out using the snowball method. A total of 212 young Albanians from inside and outside Albania completed the survey. When accounting for (i) the political situation in the country; (ii) trust in Albanian institutions; and (iii) European youth-focused programs, multiple linear regression is used to estimate the likelihood that trust in EU institutions will increase, while controlling for the economic well-being (incomes) of the survey participants.

## **POLITICAL SITUATION IN ALBANIA**

Albania should align its legislation with that of the European Union in order to join the EU and ensure its efficient implementation. The EU-Albania Stabilization and Association Agreement [7], which was signed on June 12, 2006 and entered into force on April 1, 2009, requires the Republic of Albania to align its legislation with the EU *acquis*. Albania will seek to ensure that its present laws and future legislation gradually align with the EU *acquis*, according to Article 70 of the SAA. This transformation was planned to happen over the course of a 10-year transition period, separated into two phases. The approximation concentrated on the important elements of the internal market *acquis* during the first phase of the transitional period, which began with the entrance into effect of the SAA, while Albania would have to approximate the remaining portions of the *acquis* during the second phase.

The development of judicial reform, as well as the strengthening of the fight against corruption and organized crime with real achievements, has been emphasized by internationals and re-articulated by the German Bundestag in 2019. In response to these calls, the Albanian Parliament and the relevant institutions worked to establish a special prosecutor's office that is focusing on issues of corruption and organized crime. The Albanian Parliament has approved Law No. 95/2016 on the establishment and operation of institutions fighting corruption and organized crime, such as the Special Prosecutor's Office (SPAK). The prosecution of all of the aforementioned instances, including those involving MPs or judges, is at the heart of the SPAK's foundation. SPAK has begun the activity and is currently reviewing the first issues.

All of this hasn't convinced Albanians that the country's political situation is improving. This could be linked to the lack of interpersonal trust. Albanian inhabitants are wary of national institutions and have a low level of trust in them. As a result, trust has a direct impact on the attitude of (non) trustful institutions [8].

## **TRUST AND INSTITUTIONS IN THE ALBANIAN CONTEXT**

The scholars have addressed the notion of trust, highlighting some of its significance, as a mechanism to build healthy relationships between individuals with each other, but also individuals in relation to the state and institutions. This occurrence appears to be able to be explained by institutional theory. The origins of institutional theory can be traced back to James Coleman's Theory of Rational Choice [9]. By addressing how we understand procedures, theory borrows logical reasoning and contextualizes it. This method asserts and supports the notion that actors use utilization to optimize tire utilization [10]. In this approach, this theory presents theory as an entity that enables individuals and societies to comprehend the game rules that affect people's interactions. Institutions are established to examine the boundaries that society erects.

According to Mishler and Rose [11], political trust is perceived as the trust that citizens have in the effectiveness of public institutions believing that public administration policies will serve society. Trust in institutions implies the expectation that individuals have on the positive results of institutions [8]. Emphasizing the significant role of political trust towards the consolidation of institutions, it is essential to establish political trust between citizens and the political elite because under the presence of trust citizens can cooperate with the political elite [12]. In this context, it appears that institutional trust is a critical component in maintaining a strong link between the political elite and the general public. If this link is broken, it may have negative effects for democracy's health. This appears to have occurred in Albania, where national institutions have a low level of trust in Albanian residents, according to the Public Opinion Trust in Government measurement. Religious Institutions (76 percent), Armed Forces (63 percent), Public Education Institutions (63 percent), Civil Society Organizations (57 percent), Media (54 percent), Public Health Institutions (53 percent), and State Police (53 percent) are among the national institutions that receive more than half of respondents' trust in 2017 [13]. In contrast to this, citizens appear to have a high level of trust in EU institutions and other foreign organizations. In contrast to national institutions, international institutions/organizations such as the EU (85%), UN (85%), and NATO (84%) are regarded as the most trusted institutions for the fifth year in a row [13].

## **TRUST IN EU EDUCATION PROGRAMS - ERASMUS PROGRAMS**

Erasmus is a European Union program that promotes education, training, youth, and sport throughout Europe. Its budget seeks to provide approximately 4 million Europeans with the opportunity to study, train, and gain experience abroad. These initiatives have a significant impact on young people's consciousness by encouraging them to become more involved in numerous social concerns, civil society, and decision-making. On the other hand, the interaction



between different cultures in order to promote distinct values is the major goal of such programs.

According to EU regulations, the objectives of the Erasmus program will be as follows:

- Creating a unified sense and strengthening the spirit of European citizenship based on understanding and respect for human rights and democracy;
- Encouraging tolerance and respect for peoples and other cultural heritage;
- To cultivate understanding and solidarity among peoples;
- Finally, support knowledge building.

Education, youth work, and athletics are all important aspects of spreading European values. The ways in which this is immediately reflected in young people reveal themselves in a variety of ways. The well-known Erasmus Program (European Community Action Scheme for University Student Mobility) has heavily funded education in order to improve intercultural competencies and understanding across different cultures [14]. Students recreate their social circles overseas through these activities, based on perceived similarities and differences, which goes hand in hand with altering group borders [15].

## **ANALYSIS OF FINDINGS AND DISCUSSIONS**

This study aims to understand whether internal political reasons, trust in national institutions, and the impact of Erasmus programs all contribute to young Albanians' increased trust in EU institutions. Through multiple regression analysis our attempt is to test the above postulate.

**Table 1.** *Regression Analysis estimating the effect of the political situation in the country, trust in Albanian institutions, and European youth-focused programs, on Trust toward EU institutions*

	Dependent variable:		
	Trust in EU Institutions		
	Model (1)	Model (2)	Model (3)
Pol. Situation	0.011 (0.054)	0.235* (0.131)	0.023 (0.050)
Alb. Institutions	-0.011 (0.012)	0.069 (0.043)	0.144*** (0.050)
EU Programmes	-0.012 (0.039)	-0.003 (0.038)	0.217** (0.083)
Incomes	-0.066 (0.053)	-0.052 (0.052)	-0.031 (0.051)
<b>INTERACTION TERMS</b>			
Pol.Sit:Alb.Ins		-0.026* (0.014)	
A.Ins:EUP			-0.039*** (0.013)
Constant	0.318 (0.283)	-0.322 (0.451)	-0.648 (0.418)
Observations	206	206	206
R2	0.072	0.126	0.206
Adjusted R2	-0.007	0.031	0.119
Residual Std. Error	0.367 (df = 54)	0.360 (df = 54)	0.340 (df = 51)
F Statistic	0.889 (df = 5; 54)	1.341 (df = 6; 54)	2.403** (df = 6; 53)
Note: *p<0.1; **p<0.05; ***p<0.01			

Source: own compilation

The table shows which model outperformed the others. Model 1 reveals that citizens' perceptions of Albania's political condition have no impact on their trust in EU institutions. Model 2 found a significant regression equation accounting for the interaction effect between the political situation in Albania and trust in national institutions (Predicted Trust in EU Institutions = -0.322 + 0.235 (political situation in Albania) + 0.069 (trust in Albanian institutions)- 0.052 (income) - 0.026 (political situation\*trust in national institutions)).

The results show that the political situation has an effect on trust towards EU institutions when is associated with trust in national institutions. The significant interaction term means a better fit of the model to the data, and better predictions from the regression equation. However, it creates uncertainty about the relative importance of the main effects of the Political Situation. Especially because the relationships between the interaction effect of the political situation and trust in national institutions and the dependent variable it is negative.

Model 3 results are more nuanced. A significant regression equation was discovered (Predicted rise in Faith in EU Institutions = -0.648 + 0.023 (political

situation) + 0.144 (trust in national institutions) + 0.217 (EU Education Programme) - 0.031 (Income) - 0.039 (trust in national institutions\*EU Education Programme). When it comes to EU education programs, the data suggest that trust in national institutions has an impact on trust in EU institutions. The significant interaction term indicates a better fit of the model to the data and better regression equation predictions. However, it raises questions about the relative relevance of the primary consequences of national institutions' trust. Especially when there is a negative link between the interaction impact of trust in national institutions and EU education programs and the dependent variable.

According to the findings, trust in EU institutions grows when people have a bad assessment of the current situation and have low trust in national institutions.

## CONCLUSION

This paper aimed to analyse the factors that affect the increase of trust of Albanian youth towards the EU Institutions. A quantitative methodological approach was used to achieve the purpose of the paper. Furthermore, based on the theoretical argument, a questionnaire was designed which aimed to test the main hypothesis and generate some important findings regarding the trust of Albanian youth. To sum up, this study identified the main variables affecting the increase of the Albanian youth towards EU institutions, that are (i) the political situation in the country; (ii) trust in Albanian institutions; and (iii) European youth-focused programs. In order to run the analysis, 3 models have been established, respectively: Model 1: the association between perceived political situation and trust towards EU institutions. The analysis showed that perception of the political situation has no effect on the trust of the Albanian youth towards EU institutions.

Model 2: the association between perceived political situation, trust in national institutions and trust towards EU institutions. Running model 2 a significant regression equation was found. The results show that the perceived political situation has an effect on trust towards EU institutions when is associated with trust in national institutions.

Model 3: the association between perceived political situation, trust in national institutions and EU education programmes and trust towards EU institutions. Model 3 generated a significant regression equation, too. The results show that trust in national institutions has an effect on trust towards EU institutions when is associated with the EU education programmes. According to the results of the multiple regression analysis, Trust towards EU institutions is more likely to increase, when citizens perceive a negative political situations, low levels of trust in national institutions and high levels of trust in EU education Programmes.

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# **VISUALIZATION OF EVERYDAY SOCIAL AND CULTURAL PRACTICES: VICTORIAN PAINTING AS A MIRROR OF THE ENGLISH TEA PARTY TRADITION**

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## **ABSTRACT**

Throughout the second half of the seventeen and the eighteenth centuries, tea remained an expensive exotic drink for Britain that “preserved” its overseas nature. It was only in the Victorian era (1837-1903) that tea became the English national drink. The process attracts the attention of academics from various humanities. Despite an impressive amount of research in the UK, in Russia for a long time (in the Soviet years) the English tradition of tea drinking was considered a philistine curiosity unworthy of academic analysis. Accordingly, the English tea party in Russia has become a leader in the number of stereotypes. The issue became important for academics only at the turn of the twentieth and twenty-first centuries. Currently, we can observe significant growth of interest in this area in Russia and an expansion of research into tea drinking with regard to the history of society, philosophy and culture.

Despite this fact, there are still serious lacunas in the research of English tea parties in the Victorian era. One of them is related to the analysis of visualization of this practice in Victorian painting. It is a proven fact that tea parties are one of the most popular topics in English arts of the nineteenth and the twentieth centuries. No other art school in the world referred to the topic so frequently: painting formed the visual image of the English tea party, consolidated, propagandized and spread ideas of the national tea tradition. However, this aspect has been reflected neither in British nor Russian studies. Being descriptive and analytical, the present research refers to the principles of historicism, academic reliability and objectivity, helping to determine the principal trends and social and cultural features and models in Britain during the period.

The present research is based on the analysis of more than one hundred genre paintings by British artists of the period. The paintings reflect the process of creating a special “truly English” material and visual context of tea drinking, which displaced all “oriental allusions” from this ceremony, to create a specific entourage and etiquette of tea consumption, and set nationally determined patterns of behavior at the tea table. The analysis shows the presence of English traditions of tea drinking visualization. The canvases of British artists, unlike the Russian ones, never reflect social problems: tea parties take place against the background of either well-furnished interiors or beautiful landscapes, being a visual

embodiment of Great Britain as a “paradise of the prosperous bourgeoisie”, manifesting the bourgeois virtues. Special attention is paid to the role of the women in this ritual, the theme of the relationship between mothers and children. A unique English painting theme, which has not been manifested in any other art school in the world, is a children’s tea party. Victorian paintings reflect the processes of democratization of society: representatives of the lower classes appear on canvases. Paintings do not only reflect the norms and ideals that existed in the society, but also provide the set patterns for it.

**Keywords:** *tea parties in Britain, British Victorian art, visual sources, social and cultural studies, national tradition*

## INTRODUCTION

These days, there are a great number of social and cultural practice classifications, both in a detailed and global sense. Tea drinking, of course, refers to everyday practices which present “an alternative line of metaphysical practices that turned out to be implemented in real life” [11], and are intricately intertwined with everyday and existential origin. One can consider tea parties as a tool for harmonizing life, the way to consolidate hierarchies of value and a form of reflection on cultural codes.

Usually, such interpenetration of everyday and existential principles becomes an obstacle to the adequate perception of national forms of tea parties by representatives of another culture, when, first and foremost, external forms of social and cultural practices, its everyday, sometimes random elements are perceived. This was precisely the way the concept of the English tea party was understood in Russia. For a long time the subject’s perception was stereotyped and marked with approximate examination through paying attention to external, insignificant features. Russian sociologists, experts in cultural studies and historians turned to the academic understanding of everyday culture, and at the same time to the study of national traditions of tea drinking, at the turn of the twentieth and twenty-first centuries.

The situation has improved significantly today. The first monographs devoted to English tea drinking have been published [10], numerous articles have been written. The following issues are of interest for Russian academics: the history of the English tea party [7], [9]; national peculiarities of this social and cultural practice and its transformation over time [4], [8], [12]; a comparative study of tea drinking traditions in different cultures [13], [5]; a reflection of the cultural characteristics of tea drinking in language [15] and literature [14].

## MATERIALS AND METHODS

Despite the significant expansion of the range of issues studied, it can be argued that there are significant lacunas in the study of English tea parties. One

of them is the lack of analysis of the visualization of these social and cultural practices in English painting (in the Victorian epoch in particular) which allows us to identify important trends and patterns characterizing various social phenomena and processes and based on the method of describing and analyzing works of art, using the principles of scientific reliability, historicism and objectivity.

The task of the present research is to fill the existing gap partially by considering English painting of the Victorian era (1837-1903) as a reflection and at the same time as a tool for constructing national traditions.

Perhaps nowhere else and never again in history has the tea party attracted such close attention from artists as in England during the Victorian era. This topic was addressed by famous and not so famous masters, metropolitan and provincial. There are hundreds, if not thousands, of tea-themed canvases. The study is based on the analysis of more than a hundred works of genre painting by British artists (among them there are famous works by George Goodwin Kilburn, Henry Spernon Tozer, Charles West Cope, Hilda Fearon, etc.).

## RESULTS

Before the Victorian era, tea in England was a luxurious foreign exotic drink. Along with tealeaves, expensive Chinese porcelain, accessories and furniture were imported into the country. As a result, the tea table was a field of extremely intense Chinese-English dialogue. It was during the sixty-four-year period of the reign of Queen Victoria that tea gained the status of a national drink. This is primarily due to a change in the scale of its consumption. In the second half of the nineteenth century, tea ceased to be an expensive aristocratic drink. Everyone gained the chance to enjoy it: members of the royal family, upper-middle class, workers etc.

However, to determine the significance of the drink in the structure of the gastronomic identity of the people, not only quantitative indicators of its consumption are important. The mechanisms of assimilation of tea included the creation of a special “truly English” material and a visual context of a tea party, which displaced any “oriental allusions” from this ceremony. It was already in the second half of the eighteenth century when locally manufactured porcelain appeared along with British tea furniture and silver tableware. The production of these goods increased on a massive scale in the following decades. In the Victorian era, there was a fashion for special tablecloths, napkins, even special dresses and suits for tea parties.

The change in the external entourage was accompanied by the formation of a specific English tea party etiquette. In the nineteenth century, books appeared regulating all aspects and details of the tea ceremony: how to make tea, how and where to serve it, who to invite to tea, what to talk about at the table. It is

significant that in the Victorian etiquette tradition, along with the norms of how to behave, the prohibitive rules were prescribed in great detail: you could not sip tea from a cup in which a teaspoon had been left; you could not look at others when you took a sip; you could not lower your little finger while holding a cup; ladies should not wipe their lips with a napkin; they should not put a napkin on the table when leaving the tea table (only on a chair), etc., etc. The nuance of such prohibitions was extremely important and vividly reflected English ideas about decency and, what worried the English even more, about indecency in behavior.

The transition from ritual to etiquette, to the creation of a whole set of nationally determined rules of behavior at the tea table marked a new stage of its implementation in English culture and society.

However, in addition to these, there was another mechanism for embedding tea into English culture: the creation of a stable visual formula for English tea drinking. National painting played a significant role in this process.

The first thing that catches your eye when you look at the numerous canvases depicting the tea ceremony is how cozy the world in which all this happens is. Cozy, furnished and bourgeois. There were only two types of surroundings for tea parties in Victorian works of art: either well-furnished interiors or beautiful landscapes. It would seem that there should be nothing unexpected in such representation, because tea is the drink that accompanies a person in the moments of domestic peace, and embodies the simple joys of life. However, in Russian painting of the same time, tea drinking was not only a narrative about a quiet home life. Very often, it became a form of a narrative about how the world is being destroyed, entire estates are disappearing due to the changes in the social and economic context of the era, or about how ruthless and indifferent a person can be towards his neighbor or people from a different social class. Using painting as covert social commentary, Russian artists often forced their characters to drink tea in the interiors of houses abandoned by the owners, against the background of dilapidated estates, on the road, in crowded foyers of uncomfortable hotels.

The world of Victorian painting did not know such a connotation. There were only two types of surroundings for tea drinking here: either well-furnished interiors or beautiful landscapes. In British art, there was no place in this tea party atmosphere for something bad, unfair, ugly or “indecent” and coming from outside the generally accepted norm. The tea plot in the interpretation of Victorian artists has never become a reason for social criticism (as it was, for example, in Russian painting of the second half of the nineteenth century). An only slight irony about the mores and habits of the inhabitants was permitted. The canvases literally exuded peace and contentment.

The picturesque scenes of tea drinking were a visual embodiment of Great Britain as a “paradise of the prosperous bourgeoisie”. So, in the paintings of George Goodwin Kilburn *Tea Time* the girls meet their father who has returned



home, receive a guest, the young wife serves tea for her husband. Everyone is friendly and caring. Everything here is exemplary, everything is correct, everything can serve as an example for the viewer. The man is sitting while the girls are fussing, the elderly man looks at the young creatures with paternal condescension, they look at him respectfully. Each character with all his individuality is the personification of a certain human type; each of them fits into the Victorian ideas of order and norms [1].

A similar order “reigns” in hundreds of English canvases from the second half of the nineteenth and early twentieth century. An elderly lady is sitting by the fireplace with a cup of tea in Henry Tozer's painting *Tea Time*. The surrounding interior is full of touching details, it is simple and radiates an otherworldly charm: this is how sweet and kind grandmothers are described in children's literature, just like in a fairy tale. The depicted world is calm, bright and kind and does not contain a single disturbing note.

A quiet old age, a beautiful youth, nobility in relationships, respect for age, etc., etc.: the tea party plots of Victorian paintings seem to be taken from a kind of a catalog of bourgeois virtues, the one that can be compiled from the most sentimental novels. The sober English mind obeyed the emotional demands of the new “customer”. Bourgeois tastes of this era were broadcast not only by representatives of the middle class: they captured everyone involving Queen Victoria herself, who is often called the “bourgeois queen”.

The Victorian tea party is always an intimate activity usually taking place at home. Images of ceremonial receptions, spacious living rooms with a large number of guests were now in the past. In the new era, artists rarely gathered more than three or four people at the table: only family members or close friends. At the same time, the world of English tea canvases is a women's world. Ladies in a circle of friends, next to children, together with maids: there is almost never a male present in these scenes.

The hostess of the house “reigned” over the tea table. She brewed and poured tea (one should keep in mind that this was perceived not only as a privilege, but also as an important duty, a high mission), and, consequently, the woman turned out to be the center of the ritual, both due to her role and according to the visually perceived tea mise-en-scene. It was the woman who set the entire sequence of the ritual in motion monitoring its compliance with norms and decency.

As a result, the woman became the main actor in the English process of the “visual appropriation” of the tea party. Men supplied and sold tea. Women bought tea and served it. No matter how unequal these functions were, everything that a woman did was an obligatory part of everyday life, repeated daily, and in full view of everyone. The visual formula of the English tea party, first and foremost, involved an elegant English lady pouring her favorite drink gracefully and unhurriedly. This can be compared to a theater play when hundreds of people

prepare a performance behind the scenes but the success of the play depends on the actors who are in the foreground.

It is also important that this female role was easily visualized. During the second half of the nineteenth century, English artists created numerous female images at the tea table. General mise-en-scenes were developed, specific poses, head turns, hand movements were thought out. An English lady pours tea; an English lady hands the guest a cup; she is sitting thoughtfully and abstractedly with a cup in her hand. All these options were brought to the level of clichés, fixed in the subconscious of the viewer in the form of well-assimilated formulas.

It is noteworthy that British artists consistently bred two hypostases of a woman, her two main roles: she is either a caring mother or a faithful wife. Men and children depicted in the Victorian painting in the space of a house live separately and intersect extremely rarely. Such pictorial norms were formed only in the nineteenth century. In the previous era, there were many paintings of the genre, called “conversation pieces”, in which children participated in a tea party with their parents. There was no reality involved as children in English aristocratic and bourgeois families always drank tea separately with their governesses and nannies. The distance between father and children, mother and children throughout the eighteenth century was equally great. Gathering the whole family on the canvas, the artist pursued the tasks of portrait representation which had little bearing on reality.

As for Victorian painting, the desire to draw a different model of relations is obvious: leaving the distance between father and children insurmountable, the artists sharply reduced the distance between children and mother. The tea party was depicted as a time and place, justification and motivation for their rapprochement and communication. The canvas by Charles West Cope *Breakfast Time. Morning Games* depicts a mother and her two young daughters. Coming together to drink morning tea, they are distracted by playing games together. The little blonde girl is so sweet and touching, her mother is so elegant and at the same time caring that the picture is perceived as a kind of visualized example of the Victorian daughter-mother relationship, where all the participants seem to have descended from the pages of children's books about good children and friendly families.

In the painting by J. G. Kilburn *Tea in the Nursery*, a mother and her children are watching kittens. The mother's face shows almost no emotion; she hugs her youngest daughter making a gentle gesture, and this gesture emphasizes Kilburn's desire to show the warmth and closeness of their relationship. However, the girl's pose shows shyness, even stiffness, she is clearly not used to such close contact. Children standing apart from their mother feel much more natural.

The deliberate composition of these and dozens of similar plots becomes even more obvious when comparing them, for example, with Hilda Fearon's painting

*The Tea Party*, created a little later (in 1916) and already beyond the exact chronological framework of the Victorian era. Her heroine is just sitting at the tea table with two children, holding her son trustfully clinging to her on her lap. These poses reflect a high degree of closeness, a very common mood and habit of spending time together, which do not need to be deciphered and strengthened by inventing additional common activities for the heroes. Against the background of the painting by Hilda Fearon all previous works look like theatrical productions in which clichéd classes from the list “parents spend time with children” are “prescribed” for the actors.

Behind the ostentatiousness of the compositions is the real life of Victorian England: the main rule that children were taught from the cradle was that they should be visible, but not audible. Being under the supervision of a nanny all day, and later governesses or tutors, and spending most of their time in the nursery, they often saw mother and father only when they went into the living room to say good night [3; p.132]. It is significant, however, to emphasize the real desire of many authors to remove the distance between mother and children, to show the increased warmth and closeness of their relationship. This aspiration referred not to the norms that existed in society, but to the ideals that were being formed. The artists painted blissful scenes and praised the cult of the family and family virtues but “let slip” the Victorian distance between children and parents and the detached restraint of their relationship.

Very often, the desire to remove the cold note of relationships from the paintings turned into an increased sentimentality of the works. Such sweetness in the scenes depicted did not seem deliberate or excessive to British viewers. There is a feeling that it played a kind of compensatory role in a society where people were always extremely restrained in expressing their feelings.

However, these were the scenes of a children's tea party where Victorian sentimentality along with the desire to demonstrate pleasant and sweet aspects manifest themselves to such an extent. This theme in the English tea party painting tradition is unique. In other European art schools, it is represented by single works (in the Russian one it did not exist at all), while in the English school it was extremely widespread. Everyone admired the cute babies drinking tea, and the tone of these works of art, as it often happened, was set by Queen Victoria. Her favorite artist was Charles Burton Barber; more often the artist painted cute crumbs, mostly little blond girls drinking tea with their equally cute pets (*Prayer, Time for Tea*). The extreme degree of sentimentality combined with technical virtuosity literally fascinated the buyers of the canvases.

Besides Charles Burton Barber, Arthur John Elsley, Harry Brooker and many others specialized in such subjects. On their canvases, children either drink tea in the company of their peers or play with their dolls drinking tea with them; they share this ritual with pets. In any case, they diligently imitate the manners, movements and poses of adults. The prevalence of such plots is one of the most

convincing proofs of the deep penetration of the tea ritual into British life. It became an integral part of everyday life, which was assimilated as a completely natural one from childhood and did not involve special training, which is definitely implied in the case of foreign imported practices.

Both in children's and adult performances, the British tea party ritual imposed increased demands on the appearance of the participants. Tea drinking was by no means considered as a simple thirst-quenching exercise: it was an event even though it was repeated every day (or several times a day). Not a single artist caught their characters 'by surprise', nor did they paint them careless in their dress or with untidy hair. In the context of the Victorian era painting, it is impossible to imagine even a tea party in a bathrobe, quite common in the eighteenth century. Such transformations indicate the changes that took place not so long ago both in the tea party itself and in the guidelines of its representation. The image became a model and a kind of advertising picture visualizing the rules of decency, the norms of behavior of a true English gentleman or lady. These norms included the requirements to "be buttoned up" as a rule, and not to let anyone into your personal space or show others your true nature.

Victorian painting, of course, reflected the processes of democratization that affected tea consumption in the country. It was during this period that representatives from the lower classes appeared on the canvases depicting tea parties [6]. The artists carefully drew very modest or even poorly furnished houses: clay or wooden floors, rough furniture, dull interior colors. They depicted the simple clothes of the characters in detail and emphasized the absence of any jewelry. However, the tea table is always shown covered with a tablecloth; there are not just cups on the table but a porcelain set. Only an expert can tell that this porcelain is much cheaper than the one on the canvases dedicated to aristocratic tea drinking. The poses and gestures of the characters are only slightly less elegant and a little more restrained and simple. They do not have brittleness and affectation that some artists endowed their aristocratic characters with trying to emphasize their innate elegance. However, they reveal their importance, self-esteem and an understanding of the seriousness of the ritual being carried out.

There can be chickens walking in the depicted interior (as in Tom McEwan's painting *Tea Time*), vegetables lying on the floor of a rustic cottage, but the tea table is presented in perfect order with an obligatory white tablecloth, porcelain set with a milk jug, butter dish, cups and saucers. There is no negligence in people's clothes. Most of the characters on these canvases behave as if they are familiar with the basic rules of tea etiquette: no one puts their elbows on the table, everyone shows restraint and an unhurried significance in their movements.

Such interpretations, of course, demonstrate a tangible degree of didacticism, which characterizes English art of the Victorian era in general, and a desire to match the viewer's ideas about a perfect tea party. In any case, in relation to the second half of the nineteenth century, we can talk about the existence of an

English (and even British) concept of a tea party, which is independent of wealth or social status.

## CONCLUSION

Thus, since the Victorian era, the notion of the English tea party has become understandable and common and acquired a set semantic fullness. The English finally appropriated the imported drink, adapted and recoded the practices associated with it and painting became an important and valuable participant in this process. Rarely were English works of art devoted to the topic created by great artists; the painters were not famous or well known outside the country. But, while maintaining a fairly high level of skill and professionalism as well as a desire to trap a new social order and respond to it adequately, they were in great demand: one could see them in every bourgeois English house of the second half of the nineteenth century.

According to the Dictionary of English Artists [2], more than eleven thousand painters worked in the Victorian era, and most of them specialized in everyday genre. Hundreds of artists worked on the visualization of what was called the English tea party, helping to introduce the tea ritual as an integral part of British everyday life. Its connection with the national ideals of a prosperous, comfortable, unhurried, protected life is undeniable. The paintings not only reflected the ideals that existed in society, but also gave them stable patterns and promoted them in society. Having internalized the tea party so it became their own national idea and custom, the British were able to broadcast it to the whole world.

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