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Control y uso problemático de las TIC en escolares

Control and problematic use of ICT in schoolchildren

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Resumen

La era digital ha generado mejoras en la comunicación, pero también desafíos. El uso constante de los dispositivos electrónicos genera problemas en la interacción persona-persona; es un efecto que asocia a niños, jóvenes y adultos. En la presente investigación se analiza una población de n=366 sujetos, entre padres de familia, profesores y estudiantes de 5to, 6to y 7mo grado de EGB Media abordando dos dimensiones de estudio *a) frecuencia de uso de las TIC en estudiantes y b) nivel de control de padres y profesores.* El manuscrito expone los resultados de la aplicación de una escala con garantías de fiabilidad (α= .89), además de un modelo de entrevista para padres y profesores. El mayor uso que le dan a Internet es entretenimiento (43.2% niños - 57.4% niñas), y un 40.9% de niños y 59.1% de niñas tienen cuentas activas en redes sociales.

Palabras clave: Problema social, tecnología de la comunicación, medios electrónicos, internet, escolar.

Abstract

The digital age has generated improvements but also challenges in communication. The constant use of electronic devices develops problems in the interaction from person to person; it is an effect that associates children, youth and adults. In this research a sample of 366 people is analyzed, among parents, teachers and 5th, 6th and 7th grade students of EGB Media, addressing two dimensions of study *a) frequency of use of ICT in students and b) level of control of parents and teachers*. The manuscript presents the results of the application of a scale with guarantees of reliability (α = .89), in addition an interview model for parents and teachers. The biggest use they give to the Internet is entertainment (43.2% children - 57.4% girls), and 40.9% of boys and 59.1% of girls have active accounts in social networks.

Key words: Social problems, communication technology, electronic media, internet, schoolchildren.

Introducción y estado del arte

Los dispositivos tecnológicos son herramientas que facilitan una comunicación eficaz, ya que dan acceso a la información, producción y tratamiento de contenidos (Cacheiro, 2014). Desde la década de 1990 las TIC – Tecnologías de la Información y la Comunicación– han generado un aporte significativo en la sociedad y han influido en todos los ámbitos de la vida de una persona (Demsong *et al;* 2015; García-Umaña & Tirado-Morueta, 2018). Las TIC transforman significativamente el lenguaje, las formas de pensar, el aprendizaje, la comunicación, el trabajo y las decisiones (Vivanco, 2015). El uso de las tecnologías podrían tener repercusiones tanto positivas como negativas (Heredero & Chaves, 2016).

Ciertamente, las TIC ofrecen cualidades como la interactividad entre usuarios, la instantaneidad de la información, la interconexión de dispositivos y la digitalización de contenidos (Belloch, 2012). De esas cualidades, distintos campos se han beneficiado, como el económico, político, cultural y educativo (Muñoz *et al;* 2014). En este último, los ciudadanos refuerzan sus capacidades para responder a necesidades propias y de la sociedad (Demsong *et al;* 2015). La educación y la cibercultura buscan la alfabetización múltiple, potenciando las destrezas y el aprendizaje de los nativos digitales (Salas, 2013), quienes constituyen la mayoría de usuarios conectados, de hecho el número de niños conectados a nivel mundial va en crecimiento (UNICEF, 2017).

Aproximadamente, tres cuartas partes de los adolescentes poseen un teléfono inteligente con acceso a Internet y una cuarta parte se describe a sí misma como «conectados constantemente» (*American Academy of Pediatrics*-AAP, 2016). Por otra parte, la mayoría de niños de cuatro años se desenvuelven en un ambiente tecnológico, en el cual su curiosidad les lleva a usar con más frecuencia y por más tiempo los dispositivos, a la vez que sus padres fomentan el uso de las TIC para el aprendizaje (Lepicnik & Samec, 2013). En Ecuador, el 51.7% de personas posee un teléfono inteligente; en lo que respecta a niños específicamente, el 8.5% con edades entre 5 y 15 años tiene un smartphone activo (Instituto Nacional de Estadísticas y Censos-INEC, 2013).

En el contexto legal, podemos ver que los niños y adolescentes tienen derecho a la información, utilizando distintos medios y fuentes, siempre con las limitaciones que la ley impone, las mismas que se derivan del ejercicio de la patria potestad (Asamblea Nacional, 2012). Además, en Ecuador se promueve que los niños accedan a los medios de comunicación y a las TIC para asegurar un enriquecimiento de sus capacidades en la sociedad del conocimiento (Secretaria Nacional de Planificación y Desarrollo-SENPLADES, 2017).

Pero, a pesar de todas las bondades de las TIC y del fácil acceso a ellas, es importante tener presente que cuando los usuarios no tienen las competencias necesarias, su uso puede ser negativo e incluso peligroso, más cuando se trata de niños y adolescentes (Tamayo, 2015). Es por ello que, se recomienda el uso de las tecnologías educativas sumado al control de padres y profesores. El tipo de uso ideal ha sido denominado por múltiples investigadores como, *e-learning* o educación en línea, de ahí se desprende varios términos, tales como *m-learning* que consiste en el uso del móvil para el aprendizaje y el *b-learning* o aprendizaje combinado entre encuentros virtuales y presenciales (Gómez, Castro y Meneses, 2017). Este tipo de modalidades o estrategias podrían coadyuvar en la utilización correcta de las nuevas tecnologías de la información y comunicación en pro del desarrollo social y educativo.

Sin embargo, existen aplicaciones tecnológicas que crean adicción, generando el concepto de «conducta adictiva a Internet» (Arab & Diaz, 2015); lo que se da sobre todo debido a la falta de control sobre el uso y abuso de dichas tecnologías, provocando un deterioro en el desarrollo cognitivo de niños y adolescentes, así como de la familia (Fernández, 2013; Hernández, Ortíz, & Uribe, 2013; Ponce de León, Rivas, & Castillo, 2017). Arab & Diaz (2015) coinciden en que el uso excesivo e incontrolado de dispositivos crea a futuro grupos vulnerables, problemas sociales e intrapersonales. El ser adultos no asegura que se sostengan acertadas competencias digitales para el uso responsable de las nuevas tecnologías. La Subcomisión de Tecnologías de Información y Comunicación (2017) recomienda a los padres tener una comunicación de manera directa y abierta; así como establecer límites y pautas para el uso responsable de las tecnologías por parte de hijos y padres.

El uso problemático de las TIC y más de las redes sociales se ha asociado con depresión, menos atención, hiperactividad, insomnio, menos rendimiento académico e incluso abandono escolar (Arab & Diaz, 2015; García-Umaña, 2017). Los niños que abusan de los medios en línea corren el riesgo de un uso problemático de Internet y los usuarios intensivos de videojuegos corren el riesgo de sufrir un trastorno de los juegos en Internet (AAP, 2016). Por otra parte, la utilización de TIC en los centros educativos aún es escasa, esto provoca que en el hogar la accesibilidad a dichos dispositivos sea más indisciplinada (Agyei & Voogt, 2014). Las afecciones que las TIC producen en los niños se vinculan a las relaciones que tienen dentro de las aulas, el uso de más de seis horas semanales se podría asociar con conductas inadecuadas, asimismo en jóvenes que utilizan el smartphone por más de seis horas semanales son considerados de uso problemático con interferencia en la vida (Gómez, Castro, & Meneses, 2017).

Existen organizaciones e investigadores que se han preocupado por las consecuencias negativas del abuso de las TIC y plantean algunas soluciones. Por ejemplo la UNICEF (2014) exige medidas de protección contra los nuevos

riesgos en línea para regular el acceso a la información de todas las generaciones; que consiste en: detectar los riesgos que suponen la creación y el intercambio de contenido al igual que ofrecer a los niños el uso digital responsable. Chassiakos *et al.* (2016) proponen que los padres deben dialogar con sus hijos sobre el uso de las TIC. Mientras que Maddin (2012) sostiene que el relato digital es un método de enseñanza motivadora que involucra a los estudiantes en el pensamiento crítico y el aprendizaje reflexivo. Demsong *et al.* (2015) sugieren que en los establecimientos educativos, el uso de las nuevas tecnologías sea dirigido por los docentes, ya que son un pilar fundamental en la enseñanza. Sobrado & Ceinos (2011) añaden que estas herramientas deben integrarse al sistema educativo de manera planificada, para garantizar de alguna manera el crecimiento de competencias digitales en los estudiantes.

La investigación se centra en padres y estudiantes del Ecuador, país latino perteneciente al continente americano, con una población ascendente de 17 millones de habitantes (INEC, 2014). Es considerado como un país hispanoparlante en desarrollo y ha avanzado en los últimos años en varios aspectos; la presencia de las TIC es más evidente en las relaciones sociales, economía, educación y procesos productivos (López, Callejo, & Cajiao, 2014; International Telecomunication Union-ITU, 2016), esto ha contribuido a reducir la brecha digital (Tirado *et al;* 2017). La constitución ecuatoriana contempla en varios artículos su apoyo incondicional al fortalecimiento, acceso universal, transferencia, compromiso y designación presupuestaria hacia las tecnologías de la información y comunicación (Constitución de la República del Ecuador, 2008, Art. 16-262-277-298).

Gonzalez, Trelle, y Mora (2017) señalan que Ecuador se ha empeñado en desarrollar políticas para el uso de las TIC en el ámbito de la educación, dotando de infraestructura, software educativo, capacitación al profesorado, creación de portales educativos, entre otras, con la intención de elevar el nivel de competencias mediáticas en la población ecuatoriana. Por eso el compromiso de reducir la brecha digital también incluye a otros sectores que deben promover el uso de Internet para realizar procesos útiles, como trámites ciudadanos en línea (Torres, 2014). La tabla a continuación destaca el porcentaje de acceso a Internet en comparación con la Unión Europea, destacando la frecuencia de la juventud y analfabetismo digital.

Tabla 1. Frecuencia de analfabetismo entre Ecuador y la Unión Europea

	Ecuador	UE
Hogares con al menos una PC portátil / de escritorio	27.5%	68% *(2010)*
Hogares con acceso a Internet	28.3%	79%
Hogares con acceso a Internet de banda ancha	24.9%	76%
Personas que utilizan Internet al menos una vez al día	64%	62%
Individuos de 16 a 18 años que usan Internet al día	64.9%	84%
El analfabetismo digital	20%	1% *(2015)*

Fuente: Tirado-Morueta *et al.*, 2017

Punín, Martínez, y Rencoret (2014) mencionan que Ecuador se está convirtiendo en un país digital, aunque la generación de contenidos propios camina a paso lento dentro de los medios de comunicación; los cuales se ven en la obligación de actuar dentro de una plataforma web. Muestra de ello es el latente aprendizaje tradicionalista que detectaron Mora, Valencia, Gualotuña & Fabara (2016) en la Unidad Educativa Juan Benigno Vela, debido a que los profesores que tenían entre 45 y 65 años necesitaban mejorar el uso de las TIC.

La AAP (2016) considera que la investigación acerca del abuso de las TIC en niños sigue siendo limitada. Así mismo, el Manual Diagnóstico y Estadístico de los Trastornos Mentales Quinta Edición (2016), sostiene que se requiere mayor investigación sobre el uso problemático de Internet entre los niños y adolescentes. Por tanto, en el eje de la fundamentación teórica se impulsa el desarrollo de la presente investigación acerca del uso abusivo de las TIC por parte de escolares y el control que ejercen los padres en sus hogares, con el objetivo de identificar los factores que motivan el uso y las posibles consecuencias negativas que puedan generarse a corto, mediano o largo

plazo; concretamente se estudia a n=366 sujetos entre estudiantes y padres de familia de una institución educativa ecuatoriana. Para ello se ha elaborado un instrumento con garantías de aplicación que integra dos dimensiones: *a) frecuencia de uso de las TIC en estudiantes y b) nivel de control de padres y profesores.* En suma, se pretende aportar al campo académico científico para la construcción de medidas que garanticen el uso responsable de las tecnologías de la información.

Método

El objetivo principal de esta investigación es identificar cómo se desarrolla el abuso de las TIC en escolares de Ecuador y el rol que desempeñan los padres de familia y los profesores como actores de control. Para ello se desarrolló la investigación en dos etapas, primera: validación estadística del instrumento y recopilación de información y la segunda: análisis de datos y discusión. Se empleó el paquete estadístico SPSS y el programa Excel para la base de datos general.

La recopilación de información se desarrolló durante cuatro meses –enero, febrero, marzo y abril de 2018–, a través de encuestas físicas aplicadas a 332 estudiantes entre 8 y 11 años de edad, quienes cursan quinto, sexto y séptimo año de Educación General Básica Media de la Unidad Educativa Particular Antonio Neumane (institución ecuatoriana). También se realizaron entrevistas a 20 padres de familia y 14 profesores de la institución.

Tabla 2. Población y muestra

	N	Sexo		Porcentaje
		M	F	
Padres de familia	20	8	12	20%
Estudiantes	332	198	134	65%
Profesores	14	8	6	15%
Total	366	214	152	100%

Instrumentos

Para la consecución de resultados se han creado dos instrumentos: el cuestionario y la entrevista, los cuales han sido validados por tres expertos en el área de educación y comunicación. Además, se aplicó un análisis factorial exploratorio (AFE) para determinar ajustes aceptables previos a su aplicación.

La escala sobre preguntas categóricas y de valoración es de tipo Likert 1 a 4 (1 nunca, 2 en ocasiones, 3 frecuentemente, 4 siempre) consta de 15 ítems. El análisis de las propiedades psicométricas de la escala se realizó en dos fases. En primer lugar, un análisis a través de medidas de tendencia central y dispersión (media, desviación estándar, asimetría, curtosis y coeficiente de correlación corregido ítem-total) para comprobar la normalidad univariada de las variables y la consistencia interna en la construcción del instrumento. En segundo lugar, comprobadas las condiciones previas, se procedió a realizar un AFE a través del método de máxima verosimilitud, y aplicando rotación Varimax (tabla 4).

Tabla 3. Media (M), desviación estándar (SD), asimetría, curtosis, correlación ítem-total (r I-T) y alfa si algún ítem es eliminado (a sin ítem)

	Media(*SD*)	Asimetría (*ET*)	Curtosis (*ET*)	*r I-T*	α sin ítem
Frecuencia de uso diario	2.22(1.18)	-1,89(.13)	,20(.26)	,48	,92
Importancia de uso	1.55(.26)	-1,64(.13)	1,42(.26)	,63	,88

Frecuencia de revisión de conversaciones	2.33(.26)	-1,36(.13)	1,27(.26)	,68	,87
Control de uso	2.37(1.11)	-1,15(.13)	-23(.26)	,63	,87
Búsqueda de información	1.67(.44)	-,98(.13)	,04(.26)	,65	,87
Preferencia de uso	2.25(1.48)	-,54(.13)	-,55(.26)	,73	,87
Comunicación con padres	1.42(1.39)	-,63(.13)	-,33(.26)	,76	,87
Permiso de padres para uso de dispositivos	1.05(1.55)	-,36(.13)	-,90(.26)	,72	,87
Frecuencia de amigos en Internet	2.26(1.62)	,20(.13)	-1,11(.26)	,66	,87
Preferencia de actividades físicas que virtuales	2.60(.63)	-,09(.13)	-1,14(.26)	,74	,87

Previo al análisis, se calculó la medida de adecuación muestral de Kaiser-Meyer-Olkin (KMO) y el test de esfericidad de Bartlett. El índice KMO mostró un valor de .91 y el test de Bartlett resultó estadísticamente significativo [$\chi^2(151)$= 6252.118; p < .001], lo que llevó a concluir que la aplicación del Análisis Factorial resultaba pertinente.

La extracción de los factores a través del método de máxima verosimilitud y rotación Varimax obtuvo un resultado de dos dimensiones, descritas a continuación:

Dimensión 1: frecuencia de uso de las TIC en estudiantes

La AAP (2016) menciona la existencia de jóvenes entre 8 a 18 años con uso problemático de Internet, cumpliendo criterios de trastorno en juegos *online*. Por su parte, la UNICEF (2017) y el *World Economic Forum* (2017) demuestran la existencia de un 71% de jóvenes de 15 a 24 años como el grupo más conectado a Internet, y un 56% de niños entre 8 y 12 años expuestos a dispositivos más de 32 horas semanales. El uso descontrolado de las TIC por parte de menores ha sido constantemente estudiado, pues se considera como posible influencia en el cambio de conductas del desarrollo psicosocial de los niños.

Dimensión 2: nivel de control de padres y profesores.

La participación de los padres es fundamental en el desarrollo social y emocional de los niños; las distracciones digitales pueden tener efectos negativos a corto, mediano y largo plazo. El uso constante e incontrolado de las TIC en los niños puede conllevar una serie de consecuencias que tanto el padre como el docente desconocen, siendo éste uno de los principales problemas existentes en la actualidad (AAP, 2016; UNICEF, 2017).

Tabla 4. Análisis factorial exploratorio

	Factores	
	Frecuencia de uso en estudiantes	Nivel de control
Frecuencia de uso diario	.88	
Importancia de uso	.85	
Búsqueda de información	.92	
Preferencia de uso	.89	
Frecuencia de amigos en Internet	.77	
Preferencia de actividades físicas que virtuales	.91	
Cuentas en redes sociales	.85	
Permiso para uso de dispositivos		.88
Comunicación con padres		.88

Control de uso		.78
Frecuencia de revisón de conversaciones		.77
Conocimiento de cuentas en redes sociales		.74
Límites de uso		.68
Conocimiento de búsqueda de información		.66

Método de extracción: Factorización del eje principal. Método de rotación: Normalización Varimax con Kaiser.

Resultados

La presentación de los resultados pertenece a la segunda fase de "Análisis de datos y discusión", se ha ordenado en dimensiones de estudio para una mejor explicación.

Dimensión 1: frecuencia de uso de las TIC en estudiantes

Los resultados obtenidos señalan que el 55.7% de niñas y el 47.7% de niños prefieren usar el smartphone más que otros medios electrónicos.

Tabla 5. Preferencias y tipo de dispositivo

Tipo	Género	
	M f (%)	F f (%)
Portátil	12 (10.8)	13 (7.4)
Smartphone	53 (47.7)	98 (55.7)
Tablet	46 (41.4)	65 (36.9)
Otro	0	0
Total	111 (100)	176 (100)

f=frecuencia

El 70.3% de niñas y el 67% de niños iniciaron con el uso de dispositivos electrónicos con más de seis años. En la tabla 6 se muestra que la frecuencia diaria más alta en niños (56.8%) y en niñas (51.7%) del uso del smartphone es de menos de 2 horas diarias.

Tabla 6. Frecuencia de uso de dispositivo al día

Tiempo	Género	
	M f (%)	**F f (%)**
Entre 2 a 4 horas	33(29.7)	55(31.2)
Más de 4 horas	13(11.7)	25(14.2)
Menos de 2 horas	63(56.8)	91(51.7)
Menos de 4 horas	2(1.8)	5(2.8)
Total	111 (100)	176 (100)

f=frecuencia

El mayor uso que le dan a Internet es de entretenimiento (43.2% en niños y 57.4 en niñas) y un porcentaje promedio de más del 50% revela que el uso de los dispositivos electrónicos mayormente se lo hace para jugar

online.

Tabla 7. Actividades online

Actividad	Género	
	M f (%)	**F f (%)**
Educativo	43(38.7)	56(31.8)
Entretenimiento	48(43.2)	101(57.4)
Interacción social	3(2.7)	5(2.8)
Juegos en línea	1(0.9)	0(0.0)
Personal	16(14.4)	14(8.0)
Total	111 (100)	176 (100)

f=frecuencia

El 46.8% de niñas y 40.3% de niños creen que es de poca importancia el uso de redes sociales, sin embargo un 40.9% de niños y 59.1% de niñas tienen cuentas activas en redes sociales. En consecuencia, su respuesta verbal no corresponde a las acciones personales.

Tabla 8. Cuenta en redes sociales

	Género	
	M f (%)	**F f (%)**
No	42(37.8)	72(62.2)
Si	69(40.9)	104(59.1)
Total	111 (100)	176 (100)

f=frecuencia

El análisis de resultados de la tabla 9 indica que los estudiantes de ambos géneros si comunican a sus padres o cuidadores sobre la navegación que están realizando, por otra parte señalan los niños que no tienen límites del control de uso de los dispositivos electrónicos por parte de sus padres. Quizá el nivel de comunicación o el lenguaje empleado en la praxis no estaría bien sincronizado, considerando la brecha intergeneracional, conviene a los adultos la actualización constante.

Dimensión 2: nivel de control de padres y profesores

Tabla 9. Comunicación entre padres e hijos

	Informar navegación		Límites de uso	
	M f (%)	**F f (%)**	**M f (%)**	**F f (%)**
Siempre	53(47.7)	52(29.5)	33(29.7)	52(29.5)
Frecuentemente	9(8.1)	22(12.5)	16(14.4)	21(11.9)
En ocasiones	43(38.7)	72(40.9)	20(18.0)	49(24.0)
Nunca	6(5.4)	30(17.0)	42(37.8)	54(30.7)
Total	111 (100)	176 (100)	111 (100)	176 (100)

f=frecuencia

El 55.9% de niños y 64.2% niñas siempre usan Internet dentro de la vivienda, por otra parte el 61.3% de niños y el 60.2% de niñas nunca usan Internet en el establecimiento educativo. Sin embargo, el uso de las salas de cómputo es constante, incluso algunas instituciones permiten el acceso en horas libres a sus estudiantes, sin control de acceso a Internet.

Tabla 10. Accesibilidad

Casa			Institución educativa	
	M f (%)	**F f (%)**	**M f (%)**	**F f (%)**
Siempre	62(55.9)	113(64.2)	7(6.3)	10(5.7)
Frecuentemente	24(21.6)	29(16.5)	5(4.5)	8(4.5)
En ocasiones	23(20.7)	34(19.3)	31(27.9)	52(29.5)
Nunca	2(1.8)	0(0.0)	68(61.3)	106(60.2)
Total	111 (100)	176 (100)	111 (100)	176 (100)

f=frecuencia

Entrevista a padres y profesores

La entrevista realizada a los padres de familia determina el uso preferente del smartphone (64.4%) por parte de sus hijos entre todos los dispositivos, en una frecuencia de menos de 2 horas diarias. Reconocen que el uso abusivo de las TIC ocasiona trastornos psicológicos, sociales y familiares. Los docentes consideran que la utilización de los dispositivos electrónicos debería ser más controlada por los padres y por ellos, ya que *"la era digital trae consecuencias y riesgos fatales y más si están siendo utilizados por los más pequeños"*, según sus propias palabras. Agregan que perciben que son los celulares y tabletas los dispositivos más utilizados para conectarse a Internet, redes sociales, juegos en línea, entre otros, con poca limitación de los padres.

Discusión y Conclusiones

Los padres creen que el uso de las tecnologías prácticamente no desarrollan las competencias motrices de los niños y adolescentes; en ese sentido, Heredero, & Chaves (2016), señalan que el problema está en el descontrol y uso excesivo o abusivo. Aproximadamente, las tres cuartas partes de los adolescentes y niños de hoy poseen un teléfono inteligente, con acceso a Internet, a la transmisión de TV/videos y a aplicaciones interactivas. La AAP (2016) había expuesto que la cuarta parte de los adolescentes y niños se describían a sí mismos como conectados constantemente a Internet. En consecuencia, sus actividades diarias se preforman condicionadas a la actividad digital, hecho que llama la atención de múltiples investigadores en todos los ámbitos.

Además, la existencia de un 11,7% de niñas y 14,2% de niños de entre 8 a 11 años que usan dispositivos electrónicos con más de cuatro horas diarias, evidencian la exposición del tiempo frente a las pantallas digitales en un total de 120 horas de las 720 mensuales. Si bien las TIC permiten el acceso de forma inmediata a la información y facilita procesos de comunicación (Lepicnik & Samec, 2013), serviría esta exposición para retomar actividades *m-learning* en instituciones educativas públicas y privadas con la intención de unir esfuerzos en el mismo sentido de la corriente, inevitablemente imaginar detener un proceso evolutivo constante.

En los resultados alcanzados, se menciona que el 49.5% de padres señalan que sus hijos no realizan amigos por Internet, mientras que el 47.7% de los niños mencionan que lo hacen con alta frecuencia, lo que evidencia una comunicación interrumpida entre lo que realmente realizan los estudiantes frente a un dispositivo electrónico y lo que les comentan a sus padres. La exposición de los riesgos digitales concierne un fenómeno oculto que ha tomado vidas adolescentes sin que sus padres se lleguen a enterar hasta la última consecuencia. Por otra parte, Hernández, Ortiz, y Uribe (2013), sostienen que las tecnologías ofrecen oportunidades para el desarrollo de la sociedad, pero cuando se educa a las generaciones futuras sin restricciones ni límites de tiempo, podría construirse una generación con graves problemas de alfabetización mediática digital.

Concluyendo la aportación, se destaca lo que menciona la Subcomisión de Tecnologías de Información y Comunicación (2017) sobre la influencia que los padres ejercen en sus hijos, pues es una de las formas más eficaces

para corregir hábitos, en especial el uso inadecuado de las tecnologías; lo ideal es la creación de pautas para el uso de dispositivos logrando que éste sea efectivo y adecuado desde el mismo contexto familiar. Varias investigaciones relacionan el uso del smartphone con problemas de aprendizaje, relaciones entre compañeros y comportamiento (Gómez, Castro, & Meneses, 2017; García-Umaña, 2017). De acuerdo al estudio realizado hay un porcentaje significativo en crecimiento de uso de los dispositivos y preferencias por el móvil. Lo que conlleva a justificar el control necesario del tiempo de exposición frente a pantallas, se necesita una generación inteligente que controle a los aparatos electrónicos, no dispositivos inteligentes que controlen a la población.

Los menores que pasan más de cinco horas viendo televisión al día tienen cinco veces más probabilidades de sufrir sobrepeso, es una de las consecuencias en el descontrol del tiempo frente a las pantallas. Por tanto, lo que queremos compartir como resultado de la investigación, es que no se trata de prohibir el uso de los dispositivos electrónicos, sino que se estima que parte de la solución es tomar las consecuencias abusivas provocadas para la implementación de sistemas educativos basados en modelos *m-learning* en el sistema educativo del país.

Por tanto, concluimos con certeza que existe una evidente falta de control por parte de los padres y que además es necesario, en futuras investigaciones, profundizar en el uso que los adultos realizan de las TIC, ya que no es posible pretender que tomen medidas correctas respecto a sus hijos, cuando ellos posiblemente también utilizan Internet inadecuadamente.

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Study on the Relationship Between Personality and Knowledge Sharing Behavior Based on Moderating Knowledge Governance Situation

Estudio sobre la relación entre la personalidad y el comportamiento de intercambio de conocimientos basado en la moderación de la situación de gobernanza del conocimiento

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ABSTRACT

In an organization, people's knowledge sharing behavior is not only related to their personality traits but also regulated by the knowledge governance situation of their organizations. This paper demonstrates the intrinsic relationship between the big five personalities, the knowledge sharing the behaviour of the organization and the situation of knowledge governance, establishes a construct model of the big five personalities as the independent variable, the knowledge sharing behavior as the dependent variable and the knowledge governance situation as the moderator variable. The questionnaire was used to collect the scale data and the HLM model was used to test the relevant hypotheses. The results show that different personality traits have different correlations with knowledge sharing behavior, and knowledge governance situation has a moderating effect on the relationship between personality traits and knowledge sharing behavior.

Keywords: Personality Traits; Knowledge Governance Situation; Knowledge Sharing Behavior; HLM

RESUMEN

En una organización, el comportamiento de intercambio de conocimiento de las personas no solo está relacionado con sus rasgos de personalidad, sino que también está regulado por la situación de gobernanza del conocimiento de sus organizaciones. Este artículo demuestra la relación intrínseca entre las cinco grandes personalidades, el conocimiento que comparte el comportamiento de la organización y la situación de la gobernanza del conocimiento, establece un modelo constructivo de las cinco grandes personalidades como la variable independiente, el comportamiento del intercambio de conocimiento como la variable dependiente y La situación de gobernanza del conocimiento como variable moderadora. El cuestionario se usó para recolectar los datos de la escala y el modelo HLM se usó para probar las hipótesis relevantes. Los resultados muestran que diferentes rasgos de personalidad tienen diferentes correlaciones con el comportamiento de intercambio de conocimiento, y la situación de gobernanza del conocimiento tiene un efecto moderador en la relación entre los rasgos de personalidad y el comportamiento de intercambio de conocimiento.

Palabras clave: Rasgos de personalidad; Situación de gobernanza del conocimiento; Comportamiento de intercambio de conocimientos; HLM

Introduction

Knowledge sharing has become one of the basic current organizational behaviors, and good sharing behavior is a key indicator for measuring the effect or level of knowledge management. As individual members of the organization vary in personalities and behaviors, the knowledge sharing of different personalities within the organization or between organizations varies accordingly. Therefore, how personal traits influence people's knowledge sharing? Besides, as there are always differences between organizations in terms of their sizes, functions and content, thus the questions are: what are the knowledge governance patterns for an organization? And how the knowledge governance patterns are influencing the behavior of knowledge sharing?

This study focuses on how the different individual personal traits are influencing the knowledge sharing behavior based on the sample of Chinese company personnel. And by introducing the knowledge governance variable at an organizational level, the study also explores the interaction between the variable and individual personal traits and how the interaction influences company personnel's knowledge sharing.[1,2,3,4]

1. **Literature review**

The research conducted by Costa (1992) shows that personnel's individual personal traits influence personal sharing or knowledge storage, while personal trait is one critical dimension of individual traits; thus, Costa presumes that individual personal traits also influence the individual's knowledge sharing behavior. [5,6,7,8,9,10]

Personality is the individual's intrinsic endowment, long promoting the consistency of individual behaviors, decided by the individual's psychology, resulted from the interaction between individual's innate characteristics and growth process, and having stableness to some extent. Currently, the Big Five Personality traits, also known as the FFM, are widely accepted, and the personal trait has become an important variable in the personnel behavior research. Moreover, as indicated in the research conducted by Gupta (2008) on the relationship between the individual personality and the individual's knowledge sharing and receiving behavior, knowledge sharing and reception vary according to different personalities in the Western cultural environment.

The Five-Factor Model of Personality is consisted of extraversion, agreeableness, conscientiousness, openness and neuroticism. Extraversion is regarded as positive, as scholars like Cabrera perceive that this personality also includes sociability, talkativeness and the tendency to seek stimulation in the company of others, while Barrick points out that people of high extraversion are usually sociable, talkative, assertive, active, confident, brave, energetic, challenge-loving and attention-seeking. People who are more agreeable show a tendency to be more helpful, compassionate and cooperative, while those with more conscientiousness show more self-discipline, acting dutifully, aiming for achievement, and are more willing to take part in activities outside their own duties and to share knowledge. Meanwhile, openness refers the openness of experience, reflecting the degree of intellectual curiosity, creativity and a preference for novelty and variety a person has, as well the extent of seeking and accepting others' opinions, and it is helpful for promoting the knowledge sharing and reception. As for neuroticism, Barrick and Mount perceive that it is a measurement for emotional stableness, as people with high neuroticism tend to experience unpleasant emotions easily, such as anxiety, depression and the lack of self-confidence, while those with low neuroticism has a stable, calm and confident personality, uninspiring and unconcerned, yet it is not clear in terms of their knowledge sharing behaviors [11,12,13,14].

When it comes to the influence of the atmosphere and condition in an organization has on personality and knowledge sharing behavior, the concept of knowledge governance is used to depict the knowledge management of the organization. Anna Grandor (1997) first brought forward the concept of knowledge governance, an organizational arrangement and system design, which facilitates the realization of knowledge sharing behaviors. As the company competition and cooperation become normal, knowledge governance reinforces its impact on the sharing behaviors. Focusing on the micro knowledge governance, Foss believes that different types of knowledge trade match the knowledge governance system, and individual behaviors and interpersonal interactions are the basic units that influence the organizational knowledge management activities and the starting point of the knowledge governance system. However, he fails to notice that the organizational knowledge governance is, in fact, interacting with personal traits.

The domestic research on knowledge governance started late and is low in amount. Wang Jianyou perceives that the governance system in knowledge activities is a choice, while the system has an impact on the activities and their results. Meanwhile, Yan Xiuchun believes that the knowledge of the knowledge-based corporations is evolutionary, so does the knowledge governance; thus, there exists a best knowledge governance pattern in the knowledge condition system. Apart from them, other scholars who study the knowledge governance of corporations from different perspectives fail to research the knowledge governance's interaction with personal traits and its influence on knowledge sharing behaviors [33,34,35,36,37].

This essay holds that, in an organization, personal traits will influence the knowledge sharing behaviors within the organization, but the scale of the influence is related to the knowledge governance pattern of the organization.

2. Theory and model construction

As indicated in psychological research, the FFM can depict the influence the personality types have on working behaviors, among which one behavior critical to the organization is the knowledge sharing behavior. Therefore, the personality types also have an influence on knowledge sharing behaviors. In the following sections, the influence will be discussed in detail.

3.1 Analysis of personality types' influence on knowledge sharing behaviors

As stated above, different personality types in the FFM have various impacts or effects on working behaviors, thus influencing the knowledge sharing behavior differently. Therefore, we make the following assumptions:

H1: In knowledge sharing, different individual personal traits have different influences and actions on the knowledge sharing behaviors. The specific analysis and demonstration are as follows:

(1) The analysis of the extrovert individual agents' knowledge sharing behaviors

Individuals with extraversion are behavioral agents with social interpersonal skills, the willingness to work with others and extrovert expressions of known knowledge (including experience). They gain good feelings in sharing activities, thus are more willing to contribute or share knowledge in work. Gupta explains that individuals with extraversion are usually more confident, fond of novelty and excitement, and more willing to take part in knowledge sharing. On the contrary, low extraversion causes a reserved, reflective, obedient, silent, shy and incurious personality, and a low tendency for taking part in sharing activities. This assumption is supported by Costa's research, that agents with high extraversion have high sharing behaviors, while those with low extraversion will block sharing behaviors. In company activities, the knowledge activity is the most typical and representative, and according to Devries and Ferguson's research, extrovert personality has positive effect on knowledge sharing regardless of contribution reward. Meanwhile, Ardichvili and Amayah point out that extrovert personality may see knowledge sharing behavior as a reward. Therefore, I would like to make the following hypothesis:

H11: Agents with extraversion in the organization are more willing to share knowledge with others, i.e., extraversion has a positive correlation with knowledge sharing.

(2) The analysis of the agreeable individuals' knowledge sharing behaviors

Agreeableness reflects the agent's degree of interpersonal orientation and compassion or hostility to others, including trust, frankness, selflessness, obedience, modesty and empathy, etc., which shows a cooperative atmosphere and form, and becomes the compositions of the knowledge activity environment in organizational knowledge activities. According to Mataler and Gupta's research, agreeableness is an important personal trait in promoting knowledge sharing activities, as in organizational business operations (business operations are, technically, knowledge activities), the knowledge sharing behaviors between agents require respect, frankness, and even altruistic interactions. Apparently, under this circumstance, agreeableness can create the proper atmosphere and benefit agents' knowledge contribution. Furthermore, the obedience and modesty of agreeableness urge, or facilitate agents to accept others' knowledge (in the case that others' knowledge is useful). Therefore, I would like to make the following hypothesis:

H12: The agreeableness of agents in the organization is beneficial for the behaviors of contribution and reception of knowledge, i.e., agreeableness has a positive correlation with knowledge sharing.

(3) The analysis of the conscientious individuals' knowledge sharing behaviors

Conscientiousness depicts the agent's organizational mission orientation, reflecting the agent's motivational characteristics in the organization, and it includes the following parts: capability, punctuality, endeavor, achievement, orderliness, responsibility, result-driven, self-discipline, cautiousness, etc. It is apparent that these characteristics (like capability, responsibility, punctuality and achievement) will drive the agent to contribute knowledge to other people or agents at the proper time in organizational activities, and urge the knowledge-in-demand agent to receive other agents' knowledge. As receiving and contributing knowledge are beneficial for knowledge sharing, I would like to make the following hypothesis:

H13: The conscientiousness of agents has a positive correlation with the agents' knowledge sharing behaviors.

(4) The analysis of the open individuals' knowledge sharing behaviors

The open personal trait refers to the agent's openness to new experience, reflecting the agent's positive pursuit and appreciation for experience, and including imagination, aesthetic sensitiveness, rich sensation, curiosity, intelligence and values. Agents with high openness are usually highly imaginative, curious, fond of variety, and good at bringing forward unusual ideas, and their personal traits are reflected as creativity and pursuit for new knowledge in knowledge activities. The research of Cabrera and Matzler also reveals that people with high experience openness are more tolerant of new ideas. Thus, in organizational knowledge activities, agents with high openness are more apt to accept useful knowledge from others within the organization, while in light of communicative symmetry, the intelligence and values of agents with openness indicate their progressiveness to contribute knowledge to others. To sum up, I would like to make the following hypothesis:

H14: The openness of agents has a positive correlation with the agents' knowledge sharing behaviors.

(5) The analysis of the neurotic individuals' knowledge sharing behaviors

Neurotic personality mainly values the agent's emotional instability, including worry, hostility, depression, impulse and vulnerability. The organizational activities, including knowledge activities, that are participated in by agents need to be backed up by emotional stability and will bring forward agents' feelings and evaluations, reflected by the degree of satisfaction. When the agent's emotion is instable, he or she usually gives negative feedback to the organizational activities, embodied by worry, hostility and impulse; thus, they are unwilling to take part in sharing activities or share knowledge with others. Therefore, I would like to make the following hypothesis:

H15: The neuroticism of agents has a negative correlation with the agents' knowledge sharing behaviors.

3.2 Analysis of the regulative function of knowledge governance situation in personal traits and knowledge sharing behaviors

Effective knowledge exchange within an organization to motivate the knowledge sharing between agents is a system design or organizational mechanism. Italian scholar Anna Grandori studies knowledge governance from the cognitive perspectives of experience integration, organization regulation and social theories, while Foss researches knowledge governance from a micro level, pointing out that agent behaviors and interpersonal interactions are critical elements in influencing organizational knowledge management. Foss not only perceives that knowledge governance has influence on the motivation of agent's knowledge sharing, but also thinks that the agent's knowledge innovation, transferring and sharing are social activities, forming the situation of knowledge sharing.

In the practical process, some organizations recognize the importance of knowledge sharing in organizational development, and have designed system and created atmosphere to promote the knowledge exchanges within the organization, i.e. forming an active knowledge governance situation. Meanwhile, other organizations have not designed relevant systems and mechanism to consciously perform the organizational knowledge governance, forming an unofficial knowledge governance situation.

In an organization, the system design or organizational mechanism, felt and experienced differently by agents with different personal traits in organizational knowledge activities, forms the knowledge governance situation. Therefore, the knowledge governance situation interacts with personal traits to influence the agent's knowledge sharing behaviors; that is to say, the organizational knowledge governance situation has a regulative function in the relationship between the agent's personal traits and knowledge sharing behaviors. Therefore, I would like to make the following hypothesis:

H2: Knowledge governance situation has a regulative function in the relationship between personal traits and knowledge sharing behaviors, and the regulative function varies according to different personal traits. The specific analysis is as follows:

(1) The analysis of the interaction between knowledge governance situation and extrovert personality

Agents with high extraversion are highly sociable, relation-behavior-oriented in the organization, emotionally positive and willing to contribute to the organization. Therefore, they are sensitive to the system and mechanism of knowledge governance in the organization, as they proactively take part in the organization's activities under any circumstance. When official or unofficial systems are applied by the organization to govern the knowledge, the sharing behaviors of agents with high extraversion are reinforced. Therefore, I would like to make the following hypothesis:

H21: Knowledge governance situation has a positive interaction with extrovert personality, i.e. it has a clear regulative function between extrovert personality and knowledge sharing behaviors.

(2) The analysis of the interaction between knowledge governance situation and agreeable personality

Agreeableness is an altruistic personal trait. Agents with high agreeableness show modesty, tolerance, obedience, compassion and politeness in their words and deeds, have strong sense of personal identification and emotional dependency in the organization and tend to help and cooperate with others in organizational activities, and they are more willing to share knowledge. Organizational knowledge governance situation aims at encouraging different agents in the organization to take on knowledge sharing, so it has less influence on agents with high agreeableness in the organization, as they are always willing to share knowledge regardless of the organizational governance (encouraging system) condition. Therefore, the knowledge sharing motivation system or knowledge governance situation is more suitable for promoting and regulating the knowledge sharing behaviors of agents of low agreeableness. In a word, combining the researches of Wang and Amayah, I would like to make the following hypothesis:

H22: When there is an official or unofficial knowledge governance situation, the significance of the relationship between agreeable personality and knowledge sharing behaviors will decline, i.e. the knowledge governance situation negatively regulates the relationship between the agreeable personal trait and knowledge sharing behaviors.

(3) The analysis of the interaction between knowledge governance situation and conscientious personality

Agents with high conscientiousness, showing the personalities of hardworking, fair-minded, loyal and responsible, highly identifying with and pursuing the organizational goal, will not only accomplish their own tasks, but also help others out of their mission-oriented motivation. The official or unofficial organizational knowledge governance mechanism is sensitively perceived and highly identified with by agents with high conscientiousness, while barely recognized and interacted with by those with low conscientiousness. In other words, in the knowledge sharing between agents, as conscientiousness and knowledge governance situation have positive or reinforced interactions, the knowledge sharing behaviors are promoted. Therefore, I would like to make the following hypothesis:

H23: Organizational knowledge governance situation has a reinforced regulative function for the relationship between conscientious personal trait and knowledge sharing behaviors.

(4) The analysis of the interaction between knowledge governance situation and open personality

Agents with high openness are curious, willing to explore new opportunities and things, and craving for knowledge. When there is an official or unofficial knowledge governance mechanism (situation) and it is for promoting knowledge sharing, agents with high openness are sensitive and responsive to the organizational situation. The interaction between the agent's personality and the governance situation makes agents more willing to contribute or accept knowledge, thus the knowledge governance situation can reinforce the knowledge sharing behaviors of agents with open personal trait. Therefore, I would like to make the following hypothesis:

H24: Knowledge governance situation positively regulates the relationship between the open personal trait and knowledge sharing behaviors.

(5) The analysis of the interaction between knowledge governance situation and neurotic personality

Agents with high neuroticism are sensitive, vulnerable, worried, angry, hostile, impulsive and depressed. As in organizational sharing activities, especially in knowledge sharing, this kind of agents mainly worries about the loss they may suffer from knowledge sharing, like the loss of the position acquired using their own knowledge, and the risk of the relatively declination of their advantages and privilege as the organization is improving, agents with high neuroticism seek to avoid knowledge contribution or reception when there is no official or unofficial knowledge governance mechanism in the organization. However, when there is such a mechanism to motivate knowledge sharing, agents with high neuroticism will reduce their negative feelings, such as threat, declination of position and panic about security, when they are sharing knowledge with others, and improve their willingness to exchange knowledge. In this circumstance, the knowledge governance situations, including the operating of an award system and the support for shared knowledge from the organization, can all lower the sensitivity and resistance to knowledge sharing of the neurotic agents and strengthen their confidence in sharing behaviors. By summarizing the above analysis and combing H15, I would like to make the following hypothesis:

H25: Knowledge governance situation reduces the negative correlation between the neurotic personal trait and knowledge sharing behaviors, i.e. it negatively regulates their relationship.

3.3 Theory conclusion and model construction

From the above two-perspective analysis, we can theoretically conclude that:

(1) In organizational knowledge sharing activities, agents in the organization may be different in personal traits; meanwhile, agents with different personal traits behave differently in organizational knowledge sharing activities,

as some personal traits can advance the sharing while others opposing it.

(2) In organizational knowledge sharing activities, the organization applies official or unofficial knowledge sharing mechanism, forming the knowledge governance situation. Knowledge governance situation has various effects on the knowledge sharing behaviors of agents with different personal traits, interacting with dissimilar traits and influencing knowledge sharing behaviors: it positively regulates the relationships between the knowledge sharing behaviors and some personal traits, while negatively regulates those relationships with other traits.

(3) From the above analysis, I set the personal traits as the independent variable X, knowledge sharing behaviors as the dependent variable Y and knowledge governance situations as moderator variable. Here I can get the following construction model (Figure 1):

Figure 1. Construction model of the relationship between personal traits and knowledge sharing behaviors

3. **Variable measurement and research design**

From the above theoretical analysis, it is clear that the personal traits, knowledge sharing behaviors and knowledge governance situations should be able to be measured or defined operationally to become variables. Therefore, the concepts require operational definitions.

4.1 Variable measurement

(1) Measurement of personal traits (X)

Personal traits are the Big Five personality traits. The Big-Five Factor Inventory was built by John, Donahue and Kentle in 1991, and has almost got into shape through over twenty years' application and perfection. According to the actual situations of the Chinese people, this essay puts forward eight choices for the openness variable (X_4), and respectively five choices for each of the other four personal traits (X_1, X_2, X_3, and $X5$).

(2) Measurement of knowledge sharing behaviors (Y)

The knowledge sharing behavior is an outcome variable, resulting from personal traits and regulated by governance situations. Davenpert and Prusak (1998) and Hsu (2007) have profoundly studied the organizational knowledge sharing behaviors, and formed five measuring choices through years of perfection.

(3) Measurement of knowledge governance situations (M)

Knowledge governance situation is a moderator variable, influencing the dependent variable Y (knowledge sharing behavior) by interacting with the independent variable X. This essay holds that Foss's classification is advisable, and by taking Lawson's research results, and Cao Yong and Xiang Yang's research into consideration, I would like to divide knowledge governance situations into two measured variables, the official governance and the unofficial governance. Either of these two measured variables is consisted of corresponding choices, with four choices for official knowledge governance (M_1) and four for the unofficial governance (M_2).

4.2 Sample selection and variable control

(1) Sample selection

From the construction model in section 3, it is clear that this essay mainly focuses on the individual-level research regarding the organizational knowledge sharing behaviors and personal traits, while it also takes into consideration the issue of organizational knowledge governance situation which is on the organizational level.

Therefore, samples of this research should be selected on both individual and organizational scales: from knowledge-intensive corporations around the country and from different teams having enough knowledgeable personnel in relevant companies. 584 questionnaires are distributed via WJX.cn, among which 524 copies are responded, with 52 invalid questionnaires and 472 valid ones. Responses come from 52 organizations, each with an average population of 8 to 12, and are mainly from Shaanxi, Jiangsu, Zhejiang, Beijing, Shanghai, Guangzhou and Shenzhen, etc.

(2) Biodata characteristics of samples

Biodata characteristics in the 472 questionnaires include gender, age, education, job category, work experience, business ownership, company scale and industry, showing in Chart 1.

It can be observed from the eight biodata characteristics in Chart 1 that the gender distribution is almost balanced, with about 83% personnel under 40 years old and 89% with a higher education degree; moreover, the distribution and coverage of industries, positions and organizations prove the rationality of the biodata characteristics of

examinees. Besides, the research selects 54 organizations (teams) with an average population of 9 in each team, member number ranging from 5 to 22. Therefore, the biodata characteristics of the examinees can meet well the research needs.

(3) Variable control

In general senses, knowledge sharing behaviors are connected with corporate ownership theoretically, as the ownership has an influence on knowledge governance situations. However, as knowledge governance situation acts as a moderator in this research, ownership will not be introduced as a control variable.

4.3 Examination on reliability and validity

(1) Reliability analysis

SPSS 19.0 is used in this research to examine reliability. It turns out that the Cronbach's coefficients of the factors (Chart 4) are mostly between 0.80 and 0.90, with the smallest being 0.751, proving the reliability of the data.

(2) KMO test and Bartlett's test

KMO test on variables judges whether the selected scale is suitable for factor analysis. Chart 2 shows the results of KMO test and Bartlett's test. As KMO values in Chart 2 are all over 0.8, the sample size and variables in this research are suitable for applying factor analysis.

Chart 2 KMO test and Bartlett's test on the whole sample and variables				
Variable	KMO value	Bartlett's test		
		^{2}	df	Sig.
Whole sample	0.892	10036.284	820	0.000
X (Personal traits)	0.883	6970.780	464	0.000
M (Knowledge governance situation)	0.879	3537.687	464	0.000
Y (Knowledge sharing behaviors)	0.810	965.723	464	0.000

(3) Confirmatory factor analysis and reliability examination

As stated above, the scale (questionnaire) used in this essay is a mature scale based on previous research, only slightly adapted to the specific questions in terms of word order. Therefore, confirmatory factor analysis can directly be applied instead of exploratory factor analysis.

Confirmatory factor analysis examines the relationship between latent variables and manifest variables, and is consisted of three values, $^2/df$, RMSEA and GFI. NFI and CFI are also examined here. The results are shown in Chart 3.

Chart 3 Confirmatory factor analysis results					
	$^2/df$	NFI	GFI	CFI	RMSEA
X (personal trait 5-factor model)	2.727	0.928	0.919	0.997	0.053
M (knowledge governance situation 2-factor model)	2.004	0.957	0.968	0.976	0.064
Y (knowledge sharing behavior one-factor model)	1.655	0.957	0.953	0.982	0.037

The specific confirmatory factor analysis results are shown in Chart 4, demonstrating how good are the specific personal trait measurements' standard loadings on personal traits, and the standard loadings of measurements of moderator variable M and dependent variable Y's on the variables themselves.

Chart 4 Confirmatory factor analysis and reliability results (N=472)						
Variable	Choices	Standard loading	t-statistic	Cronbach's	CR	AVE

X_1 Extroversion	X_{11} I'm talkative	0.770	10.41	0.858	0.861	0.463
	X_{12} I'm energetic	0.668	9.88			
	X_{13} I can stir huge passion	0.687	10.02			
	X_{14} I'm resolute	0.652	12.83			
	X_{15} I'm outgoing and sociable	0.770	11.34			
X_2 Agreeableness	X_{21} I'm helpful and selfless	0.678	8.37	0.785	0.792	0.506
	X_{22} I'm kind and generous	0.692	10.66			
	X_{23} I usually trust others	0.723	11.23			
	X_{24} I'm thoughtful for others and affable	0.683	10.32			
	X_{25} I like to cooperate with others	0.653	9.56			
X_3 Conscientiousness	X_{31} I'm conscientious about work	0.685	9.23	0.870	0.902	0.418
	X_{32} I'm a trustworthy worker	0.609	10.31			
	X_{33} I'm perseverant enough to finish the task	0.801	11.23			
	X_{34} I'm efficient	0.754	8.96			
	X_{35} I make and stick to plans when working	0.712	11.34			
X_4 Openness	X_{41} I always have creative thoughts	0.661	9.85	0.751	0.763	0.561
	X_{42} I'm curious about a wide range of things	0.657	8.45			
	X_{43} I'm a profound thinker	0.642	10.32			
	X_{44} I have active imagination	0.701	11.23			
	X_{45} I have the potential for development	0.753	9.25			
	X_{46} I value artistic and aesthetic experiences	0.687	8.43			
	X_{47} I like to introspect and bring forward concepts	0.665	9.62			
	X_{48} I'm good at art, music or literature	0.678	7.75			
X_5 Neuroticism	X_{51} I feel depressed	0.678	7.46	0.856	0.870	0.718
	X_{52} I sometimes feel nervous	0.654	8.22			
	X_{53} I worry too much	0.722	8.01			
	X_{54} I'm occasionally temperamental	0.734	9.13			
	X_{55} It's easy for me to get nervous	0.739	8.50			
Y Knowledge sharing behaviors	Y_1 I often take part in knowledge sharing activities	0.784	9.78	0.836	0.851	0.521
	Y_2 I usually spend much time on knowledge sharing activities	0.704	10.03			
	Y_3 I usually take part in and interact with others when discussing a complex question	0.856	8.95			
	Y_4 I usually actively share my knowledge with others during my participation	0.809	7.98			
	Y_5 I usually take part in discussions on various topics rather than on a single object	0.756	8.67			
M_1 Official knowledge governance	M_{11} I have many opportunities to cooperate with other departments to finish tasks	0.836	9.45	0.767	0.782	0.685
	M_{12} My contribution in work can be recognized by the organization	0.712	8.78			
	M_{13} My organization prefers decentralized management	0.784	9.03			
	M_{14} I often work in teams to finish tasks	0.658	10.33			
M_2 Unofficial knowledge governance	M_{21} The organization has a good communicative and sharing cultural atmosphere	0.833	9.43	0.867	0.883	0.671
	M_{22} The organization has an open and innovative managing style	0.858	10.21			
	M_{23} The organization treats its personnel equally	0.860	8.93			
	M_{24} The management staff often create communication opportunities for us	0.845	8.79			

5. Hypothesis test

The hypothesis test is to test the models and corresponding hypotheses in section 3 in a statistic way to reveal the significance of relationships between variables. Therefore, descriptive statistics is needed to deal with the collected variable data and to examine the existence of hypothesized relationships between variables before the hypothesis test of the model.

5.1 Descriptive statistics of variables

The descriptive statistics and correlation coefficients of all variables in this essay are shown in Chart 5. As illustrated in the chart, mean values of variables in the research, except X_5, are above average level, showing the relatively vague

neurotic characteristic of the surveyed company staff. Correlation coefficients of most variables are statistically significant at the 0.01 level; meanwhile, X_5 (neuroticism) does not have significant correlation with official knowledge governance and knowledge sharing. Statistics in Chart 5 has completed a correlation test of the stated hypothesis to an extent, but correlation coefficients cannot replace the corresponding mathematical model.

Chart 5 Correlation coefficients and descriptive statistics of variables										
Variable	X_1	X_2	X_3	X_4	X_5	M_1	M_2	Y	Mean	Standard deviation
X_1	1								3.53	0.833
X_2	0.490**	1							3.99	0.560
X_3	0.482**	0.607**	1						3.94	0.662
X_4	0.583**	0.470**	0.568**	1					3.53	0.633
X_5	-0.219**	-0.035**	-0.052*	-0.120*	1				2.99	0.684
M_1	0.417**	0.387**	0.422**	0.550**	0.013	1			3.72	0.590
M_2	0.474**	0.483**	0.440**	0.479**	-0.051*	0.606**	1		3.62	0.770
Y	0.451**	0.526**	0.435**	0.544**	-0.061	0.554**	0.655**	1	3.53	0.700

**: Statistically significance at the 0.01 level (in both tails of the distribution)

*: Statistically significance at the 0.05 level (in both tails)

5.2 Test model and 4-phase test

The designed model and research object of this essay are cross- hierarchical, so hierarchical linear modeling (HLM) will be utilized for hypothesis testing. Basic testing consists of two levels, Level-1 of individual objects and Level-2 of the organizational level, and four models including the Model 0 are built.

Model 0 tests the existence of variance between laboratories in the knowledge sharing behavior data:

$$\text{Level-1} \quad Y_{ij} = \beta_{0j} + \gamma_{ij}, \gamma_{ij} \sim N(0, \sigma^2)$$

$$\text{Level-2} \quad \beta_{0j} = \gamma_{00} + \mu_{0j}$$

Model 1 tests the main effect on individual level, i.e. the relationships between the individual Big Five personality traits and knowledge sharing behaviors:

$$\text{Level-1} \quad Y_{ij} = \beta_{0j} + \beta_{1j}X_1 + \beta_{2j}X_2 + \beta_{3j}X_3 + \beta_{4j}X_4 + \beta_{5j}X_5 + \gamma_{ij}$$

$$\text{Level-2} \quad \beta_{ij} = \gamma_{i0} + \mu_{ij} \qquad i = 0, \cdots, 5$$

Model 2 tests the cross-hierarchical influence of organizational-level variables on knowledge sharing behaviors, so moderator variables M_1 and M_2 from two dimensions are introduced in the Level-2 formula (4) and the following model is built:

$$\text{Level-1} \quad Y_{ij} = \beta_{0j} + \beta_{1j}X_1 + \beta_{2j}X_2 + \beta_{3j}X_3 + \beta_{4j}X_4 + \beta_{5j}X_5 + \gamma_{ij}$$

$$\text{Level-2} \quad \begin{cases} \beta_{0j} = \gamma_{01} + \gamma_{01}M_1 + \gamma_{02}M_2 + \mu_{0j} \\ \beta_{ij} = \gamma_{i0} + \mu_{ij} \qquad i = 1, \cdots, 5 \end{cases}$$

Model 3 tests the cross-hierarchical regulative effects on the organizational level. Influences or regulative effects of the organizational-level variables on individual-level variables are mainly embodied by the intercept and slope in formula (5), from which the following model is built:

$$\text{Level-1} \quad Y_{ij} = \beta_{0j} + \beta_{1j}X_1 + \beta_{2j}X_2 + \beta_{3j}X_3 + \beta_{4j}X_4 + \beta_{5j}X_5 + \gamma_{ij}$$

$$\text{Level-2} \quad \begin{cases} \beta_{0j} = \gamma_{00} + \gamma_{01}M + \mu_{0j} \\ \beta_{ij} = \gamma_{i0} + \gamma_{i1}M + \mu_{ij} \qquad i = 1, \cdots, 5 \end{cases}$$

From the Model 0 test, we can get the following results: $\tau_{00} = 0.0812**$, $\sigma^2 = 0.432**$; $T = 66.712**$

and $\chi^2 = 120.465**$ and from these results, we can calculate that ICC (1) =0.149978, which means 15% population variance comes from between laboratories. Therefore, we can conclude that the organizational level has an influence on individual variance, and the influence needs further testing.

5.3 Hypothesis results

Test results of the above four phases and four models are shown in Chart 6.

Chart 6 Models and the hypothesis testing results of the HLM model				
Variable	Knowledge sharing behavior Y			
	Model 0	Model 1	Model 2	Model 3
Intercept	3.501**	3.503**	2.853**	1.593**
Level-1 regressor				
X_1 extroversion (β_1)		0.261**	0.222**	0.198**
X_2 agreeableness (β_2)		0.387**	0.342**	0.354**
X_3 conscientiousness (β_3)		0.362**	0.321**	0.308**
X_4 openness (β_4)		0.434**	0.478**	0.398**
X_5 neuroticism (β_5)		-0.131*	-0.124*	-0.103*
Level-2 regressor				
M_1 official knowledge governance (γ_{01})			0.308**	
M_2 unofficial knowledge governance (γ_{02})			0.431**	
Interaction terms				
X_1*M (γ_{11})				0.128**
X_2*M (γ_{21})				-0.214**
X_3*M (γ_{31})				0.201**
X_4*M (γ_{41})				0.097**
X_5*M (γ_{51})				-0.250**
Variance between laboratories	0.090**	0.057**	0.038**	0.014**
Variance within laboratory	0.435	0.268		
$R2$		0.398	0.331	
**: statistically significance at the 0.01 level (in both tails of the distribution) *: statistically significance at the 0.05 level (in both tails)				

From Chart 6, it is obvious that H11 to H15 within H1, i.e. the hypotheses of relationships between different personal traits and knowledge sharing behaviors, have all passed the test, so they are statistically significant at the 0.01 level. In other words, extrovert, agreeable, conscientious and open personal traits all have a positive correlation with knowledge sharing behaviors, correlation coefficients respectively being 0.261, 0.387, 0.362 and 0.434; while the neurotic personal trait has a negative correlation with knowledge sharing behaviors, correlation coefficient being -0.131.

The testing results of H21 to H25 within H2 show that these hypotheses are all statistically significant at the 0.01 level. That is to say that, the knowledge governance situation has a positive interaction with extrovert personality, and the extrovert personality has an obvious positive regulative function on knowledge sharing behaviors; the knowledge governance situation has a negative function on the relationship between the agreeable personality and knowledge sharing behaviors; organizational knowledge governance situation has a reinforced regulative function on conscientious personality and knowledge sharing behaviors; the knowledge governance situation positively regulates the relationship between the open personal trait and knowledge sharing behaviors; and the knowledge governance situation reduces the negative correlation between the neurotic personal trait and knowledge sharing behaviors.

4. Conclusion

Two main hypotheses and the 10 specific corresponding hypotheses brought forward in this research have been tested in samples and are proved statistically significant. According to the testing results, it is revealed that various personal traits have different relationships to different extents with knowledge sharing behaviors, knowledge governance situations regulate the relationships between personal traits and knowledge sharing behaviors, and directions and interactions of the regulations vary according to personal traits. Based on the research results, suggestions on company knowledge management practices are made:

Firstly, for companies dominated by knowledgeable employees, the core management tasks are knowledge management and knowledge sharing. Thus, for the purpose of realizing effective management, personal traits measurement in personnel recruitment should be valued, as personal traits are relatively stable individual characteristics shaped by both agents and the environment throughout the agents' personal growth and development. This research focuses on the relationships between personal traits and knowledge sharing behaviors, revealing the significant differences of relationships between diverse personalities and knowledge sharing instead of judging whether the personal traits, as objective existences, are good or bad. The results demonstrate that extrovert, agreeable, conscientious and open personal traits have a positive correlation with knowledge sharing behaviors, while the neurotic personality has a negative correlation with knowledge sharing. Therefore, candidates with higher neuroticism should be rejected when recruiting knowledge-sharing-related personnel.

Secondly, as knowledge governance situations have interactions with personal traits and can thus promote knowledge sharing among employees, companies should strive to create or perfect their knowledge governance situations. On the one hand, the building of official knowledge governance systems and situations encourages knowledge sharing behaviors, developing positive interactions between the governance situations and employees' personal traits, and enhancing employees' knowledge sharing behaviors. On the other hand, the cultural atmosphere, human-centric management, sense of participation and perception of justice in the organization also interact with individual personality development, and these organizational atmospheric mechanisms form unofficial knowledge governance situations. Therefore, unofficial knowledge governance mechanism should be valued, and corresponding governance situations should be perfected to promote the knowledge sharing behaviors among employees in the organizations.

Author Contributions:

Conceptualization, Wang Xiaoyan, An Liren and Nosheena Yasir.; Methodology, Wang Xiaoyan, An Liren and Nosheena Yasir; Software, Wang Xiaoyan, An Liren and Nosheena Yasir.; Validation, Wang Xiaoyan and An Liren.; Formal Analysis, Wang Xiaoyan; Writing – Original Draft Preparation, Wang Xiaoyan, and An Liren.; Writing – Review & Editing, Wang Xiaoyan An Liren and Nosheena Yasir.

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Impact of school location and professional qualification on level of giving feedback among primary school mathematics teachers in oral questioning process

Impacto de la ubicación de la escuela y la calificación profesional en el nivel de retroalimentación entre los maestros de matemáticas de la escuela primaria en el proceso de preguntas orales

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ABSTRACT

The purpose of this study is to explore the impact of school location and professional qualification on levels of giving feedback among primary school mathematics teachers in oral questioning. This study is a quantitative study using survey methods. Questionnaires were used in this study to collect data on the level of giving feedback in the verbal questioning of primary school teachers and to see the difference in the level of responding to verbal questioning based on school location and professional qualification of mathematics teachers (with Cronbach's alpha value of 0.91). A total of 154 primary school mathematics teachers around the state Negeri Sembilan were selected as samples for this study using simple random sampling methods. The findings were analyzed using descriptive statistical analysis and inferential statistical analysis to answer the research questions.

Keywords: Feedback, Oral questioning, Primary school mathematics teacher.

RESUMEN

El propósito de este estudio es explorar el impacto de la ubicación de la escuela y la calificación profesional en los niveles de retroalimentación entre los maestros de matemáticas de la escuela primaria en las preguntas orales. Este estudio es un estudio cuantitativo que utiliza métodos de encuesta. Los cuestionarios se utilizaron en este estudio para recopilar datos sobre el nivel de retroalimentación en el interrogatorio verbal de los maestros de primaria y para ver la diferencia en el nivel de respuesta al interrogatorio verbal basado en la ubicación de la escuela y la calificación profesional de los maestros de matemáticas (con el alfa de Cronbach valor de 0.91). Un total de 154 maestros de matemáticas de primaria en todo el estado Negeri Sembilan fueron seleccionados como muestras para este estudio utilizando métodos de muestreo aleatorio simple. Los resultados se analizaron mediante análisis estadístico descriptivo y análisis estadístico inferencial para responder las preguntas de investigación.

Palabras clave: retroalimentación, preguntas orales, profesor de matemáticas de primaria

1. Introduction

1.1 Literature review

Feedback is seen as the main component in conducting questioning activities and one of the factors that have a strong influence on students' learning in mathematics (Havnes et al., 2012). Feedback is also referred as one of the key elements in the questioning process as contained in the Initiation-Response-Feedback Model (IRF) where feedback serves as a response given to the students after the students answer the question posed to them (Molinari et al., 2013). Cotton (2013) use the term 'formative feedback' which defines as information disseminated to students to modify their thinking or behavior for the purpose of improving learning. The main argument is feedback in the process of questioning should be used to encourage students to be more independent. The formation of self-regulation refers to the extent to which the students can control the aspects of their thinking, motivation, and behavior while learning (Veon, 2016).

A good feedback is when students are given the opportunity to reflect and provides them with appropriate scaffolding or guidance to help them carry out their tasks, understand the criteria of success and actively engage in learning (Havnes et al., 2012). According to Clark (2012), the feedback given by teachers should be implemented in the zone of proximal development (ZPD). The zone of proximal development is the distance between the actual developmental level as determined by independent problem solving and the level of potential development as determined through problem-solving under adult guidance, or in collaboration with more capable peers (Vygotsky, 1978). In this context, students build their own knowledge based on existing knowledge and that knowledge evolves through social environments and effective interactions with the teachers. Therefore, it is very important for a teacher to improve his / her skills and knowledge in the aspect of giving feedback so that the knowledge of the student can be developed in line with the social interaction conducted by the teacher through questioning activities in the teaching process of mathematics (McAninch, 2015).

Not all feedback are formative (Heritage, 2011). For example, by simply telling students to 'work hard' is not considered a feedback in the formative assessment because the statement does not help to develop. However, giving students a specific strategy to work on problem-solving is a good feedback practice in the mathematic teaching and learning process (Hadley, 2010; Havnes et al., 2012). Svinicki (2010) states that a good feedback should encourage students to correct their mistakes, for example, students comparing their solutions with their successful classmates' solutions. Additionally, criticism should also be avoided as a negative feedback may result in undesirable attitude changes to students (Black & McCormick, 2010).

However, there was a problem in giving feedback to students in questioning activities during teaching and learning mathematics (Hadley, 2010). This is because there was a claim that the teachers did not provide feedback effectively to the students during a questioning activity (Shahrill & Clarke, 2014). In this context, teachers do not comment and discuss the answers given by the students but only state whether the answers or responses given by the students are correct or false. This indirectly makes learning process less meaningful and does not stimulate students to think higher.

In addition, misunderstanding about giving feedback and handling feedback in an improper manner tends to negatively affect the student learning process. This is because providing good feedback in oral questioning activities are very important processes in ensuring that students understand the well-learned mathematical concepts and in promoting bilateral interactions between teachers and students (Choi et al., 2005). The good responses and feedback from teachers can help students to correct their misconceptions on the concepts learned and give teachers the space to help students to improve their thinking in mathematics (Franke et al., 2009). Additionally, studies by Dibbs (2014) showed that the most difficult aspect in the teaching and learning process is giving feedback to students. This matter needs to be studied as feedback is seen as a key component of oral questioning practice and is one of the factors that have a strong influence on the development of students' learning (Henning et al., 2012).

Besides, there was also a study which reported that the difference in school location such as urban and rural school teachers showed a significant difference in the aspect of providing feedback where teachers who were teaching in urban school were found to be providing greater feedback than teachers in the rural areas (Jamaluddin, 2007; Ramlah, 2016; Suzana, 2015). However, that study did not focus on the aspect of providing feedback to primary school mathematics teachers but instead focused on other subjects as well as teachers other than primary school. Hence, the question here is whether there is still a significant difference in the practice of giving feedback on the teaching and learning process of primary school mathematics teachers based on the school location

Besides, very few studies conducted on primary school mathematics teachers in terms of providing feedback on verbal questioning based on professional qualification. In addition, there is also a recent study that teachers with low level of professionalism qualification are not able to provide better feedback to students in verbal questioning activities (Mumtaz, 2013). However, the findings do not focus on mathematics teachers in primary schools but

towards university lecturers. In addition, there are previous studies that examine the factors that influence the level of feedback given by mathematics teachers such as instructional time, teaching experience and level of teacher knowledge (McAninch, 2015; Shute, 2008). However, all of these studies did not mention the school location and profesional qualifications of mathematics teachers that might affect the level of primary school mathematics teachers in responding to the students in oral questioning activities during the teaching of mathematics. Hence, this study is important to reduce the research gap between limited studies on the level of feedback based on the school location and professional qualification. Therefore, it is very interesting for researchers to understand more about this phenomenon. Hence, this study was conducted to answer and explain one research questions:

- What is the impact of school location and professional qualification on level of giving feedback in oral questioning of primary school mathematics teachers?

2. Methodology

This is a quantitative study using survey method. Questionnaires were used in this study to collect data on the level of giving feedback in the oral questioning activity of primary school teachers and to see the difference in the practice of giving feedback in oral questioning activities based on the school location and professional qualification of mathematics teachers. The samples of the study were primary school mathematics teachers who taught year 1 to year 6 mathematics at primary schools around Negeri Sembilan. A total of 158 primary school math teachers were selected as samples for this study using simple random sampling methods. This sampling method was used to ensure that every mathematics teacher at schools around Negeri Sembilan had the same opportunity to be selected as respondents in this study (Creswell, 2013)

The researcher chose to use questionnaire as the main tool for collecting data due to the constraints of the large sample size and the location of the sample. This questionnaire was consisted of two parts: part A and part B. Part A was related to teacher information (7 items), while part B was about the level of giving feedback in oral questioning activity (19 items). This questionnaire used 5 point Likert scale: 1: Never, 2: Rarely, 3: Sometimes, 4: Regular and 5: Most frequent.

The reliability of the questionnaire for this study was based on Cronbach's Alpha value which is 0.913. This value was obtained during the pilot studies and was appropriate to continue with the actual study due to its high reliability. The data obtained from the questionnaire were processed and analyzed using Statistical Package for Social Sciences (SPSS) version 24 for Windows. The analyses carried out using SPSS were descriptive analysis and inferential analysis. Descriptive analysis is used to describe the characteristics of variables while inferential analysis is used to make a generalization of the results from the sample to the study population (Chua, 2012).

3. Results and analysis

3.1 Respondents' profile

In this section, the demographic information to be discussed are gender, school location, teaching experience, academic qualifications, options and professional qualifications. From the aspect of gender, 44 (27.80%) of the Mathematics teachers were male while 114 (72.20%) of them were female and this makes the total number of teachers to be the sample for this study as 158 teachers. This implies that most of the teachers involved in the study was consisted of female teachers.

From the aspect of school location, 50 (31.6%) teachers involved were teaching in urban schools while 108 (68.4%) teachers were teaching in rural schools. In addition, as for the teaching experience aspect of primary school mathematics teachers, the study found that there were 60 (38.0%) teachers with 1 to 10 years of teaching experience, 44 (27.8%) teachers had 11 to 20 years of teaching experience and the remaining 54 (34.2%) teachers had teaching experience of 21 to 30 years. Therefore, the majority of samples for this study had 1 to 10 years of teaching experience. On the other hand, 44 (27.9%) teachers had a Diploma in Teaching, 20 (12.7%) teachers had a Diploma in Education and the remaining 94 (59.4%) teachers had a Bachelor of Education.

Table 1. Demographic profile of the respondents

Demography		Number	Percentage
Sex	Man	44	27.80%
	Woman	114	72.20%
School Location	City	50	31.60%
	Rural	108	68.40%
Experience Teaching Mathematics	1 year to 10 years	60	38.00%
	11 years to 20 years	44	27.80%
	21 years to 30 years	54	34.2%

Professional Qualifications	Diploma in Teaching	44	27.90%
	Diploma in Education	20	12.70&
	Bachelor of Education	94	59.40%

3.2 The impact of school location and professional qualification on levels of giving feedback among primary school mathematics teachers in oral questioning

The test for determining the homogeneity of variance was carried out first using the Levene test before a two-way ANOVA analysis was conducted to ensure that the two-way ANOVA test conducted complies with the appropriate conditions. As a result of the Levene test, it was found that the results of the non-significant Levene test showed that the variance of dependent variables in each sample group was almost identical (Pallant & Manual, 2013). Levene's analysis of the tests performed as shown in Table 2.

Table 2. Levene test results

F Value	df1	df2	Significance
2.871	5	152	0.355

Table 2 shows the results of the Levene test which was conducted, i.e. F (5, 152) = 2.871, P = 0.355 indicate that the value was not significant (p>0.05). The findings of this test also showed that the variance values for dependent variables in each sample group were almost identical. Therefore, the study data comply with the two-way ANOVA test requirements. The results of the two-way ANOVA test analysis are as follows

Table 3. Two-way ANOVA analysis of giving feedback in oral questioning activity of primary school mathematics teachers based on school location and professional qualification

Main Impact	Sum of Squares	df	Mean Square	F	Significant Levels
School Location	.137	1	.137	.741	.391
Professional Qualification	.832	2	.416	2.244	.110
School Location * Professional Qualification	.397	2	.198	1.069	.346
Error	28.196	152	.186		
Total	2651.756	158			

A two-way between-groups analysis of variance was conducted to explore the impact of school location and professional qualification on the level of giving feedback of primary school mathematics teachers in oral questioning activities (Group 1: Diploma in Teaching; Group 2: Diploma in Education; Group 3: Bachelor Degree of Education). The interaction effect between school location and professional qualification group was not statistically significant, F(2, 152) = 1.069, p = 0.346. Besides, there was a not statistically significant main effect for school location F(1, 152) = 0.741, p = 0.391; and professional qualification F(2,152) = 2.244, p = 0.110. So, the two-way ANOVA test results show that there is no significant difference in the level of feedback in oral questioning activities of primary school mathematics teachers based on school location and professional qualification.

4. Discussion

The findings show that there is no significant difference in the practice of giving feedback in oral questioning activities among primary school mathematics teachers based on school location and professional qualification. Thus, the location of the school and professional qualification of primary school mathematics teachers does not affect the level of giving feedback in oral questioning activities that has been implemented. This finding coincides with the findings of Jamaluddin (2007); Ramlah (2016) and Suzana(2015). Hence, coinciding with the findings of this study, researchers have identified other factors that influence the practice of giving feedback in oral questioning activities by primary school mathematics teachers.

Shute (2008) states that the level of students' achievement influence how the practice of feedback is implemented by a teacher. His study notes that immediate feedback is given to low-achieving students while delayed feedback is more appropriate for high-achieving students. In addition, a study conducted by McAninch (2015) found that the frequency of use of oral questioning by primary school mathematics teachers in high-achieving students class were more frequent than the frequency of oral questioning in the classroom of low-achieving students. The lack of questions posed to students led to the lack of feedback given by teachers to students. This is because giving feedback is very closely related to oral questioning activity. The practice of giving feedback on the response of students is one of the key elements in the process of questioning as specified in the Initiation-Response-Feedback (IRF) Model in which it is a normal process in the execution of oral questioning involving questions of teachers (initiation) - answer from student (response) – feedback for the student's response (feedback). Hence, this implies that the practice of giving feedback to students' responses in questioning activity is not influenced by school location and professional qualification.

Education in Malaysia which is more focused on exams forces teachers to pursue mathematical syllabus in a short time (Suah & Ong, 2011). This indirectly makes the teaching and learning process in the classroom more focused on memorizing facts, procedures and techniques to answer exam questions correctly, especially in solving mathematical problems. As a result, the lack of questioning activity implemented in the classroom thus influencing the practice of giving feedback in oral questioning activities. This indirectly proves that school location and professional qualification do not impact the practice of giving feedback in the oral questioning activity of primary school mathematics teachers.

Additionally, lack of knowledge and understanding among teachers on how to provide effective feedback to students also explain level of providing feedback is not influenced by school location and professional qualification. It is also stated by Rohaya Talib et al. (2014) that teachers have a weak understanding and knowledge of how to provide feedback effectively to students, especially in applying assessment for learning to help improve student learning. Lack of knowledge and understanding of teachers towards the practice of feedback also leads to the lack of interest in the teaching and learning process as well as resulting in the lack of involvement of students in learning activities.

Besides, the topics taught also influence teachers' practice in providing feedback to students. This is supported by Shahrill and Clarke (2014) who find that oral questioning activities will be more frequently used in difficult topics as more questions are needed to enhance students' understanding of the topics being taught. Hence, the more often oral questions are asked to the students, the more often the teachers need to give feedback to the students' response. The oral questioning activity is a catalyst for students' understanding in parallel with Koizumi (2013) study findings that teachers use oral questions to improve students' understanding of the topics taught. Hence, in more difficult topics, teachers will respond more frequently as a result of questioning in the teaching and learning of the more difficult topics. This is indirectly making questions asked by teachers more open-ended and helping students to improve understanding (Weiland et al., 2014). This once again indirectly proves that school location and professional qualification do not influence to the level of giving feedback in the oral questioning activity of primary school mathematics teachers.

In addition, teachers who are not ready to implement the effective feedback in mathematics teaching also answer the question of why there is no significant difference in level of providing feedback to students based on school location and professional qualification (Kassim & Zakaria, 2013). In this context, teachers' readiness is seen from two aspects which are readiness of knowledge and mental and emotional readiness. The findings by Zarina (2016) point out that the readiness of teachers in the aspect of knowledge especially mathematical knowledge of teaching greatly influences teachers in implementing effective feedback. From the emotional aspect, teachers are not interested in providing feedback effectively to students in the teaching and learning process but instead prefer to provide feedback in simple forms such as' right ',' wrong ',' good 'and ' ok '.

The readiness of teachers in implementing the practice of giving feedback is also influenced by in-services training or courses provided to teachers. The lack of training for teachers in the aspect of providing feedback to students indirectly influences the level of providing teacher feedback on student responses (Abdullah et al., 2015). This is also evidenced in a study by Suzana (2015) that teachers' training in the aspect of providing feedback is still at a moderate level. Hence, it is very important for teachers, especially primary school mathematics teachers to have enough training to implement the practice of giving feedback in oral questioning more effectively. Therefore, school location and professional qualification do not have a significant impact in level of giving feedback to students' responses in the process of oral questioning in mathematics teaching.

5. Conclusion

This study has shown that the level of giving feedbacks to student responses in oral questioning activity is not influenced by school location and professional qualification. This study has also shown that the practice of giving feedback to student responses in oral questioning activity has been carried out well by primary school math teachers. Hence, this study is expected to be able to assist and provide guidance to mathematic teachers to improve the practice of giving feedback in the oral questioning activity. In addition, there are reasonable practical implications to be taken into consideration by the policy makers and implementers in relation to teachers' professional development.

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Signs of Resistance: Developing Iranian Women's Memoirs

Señales de resistencia: desarrollando la memoria de mujeres iraníes

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ABSTRACT

This article takes into account that during the last decade, more than ever, Iranian women memoirists developed writing their life stories to convey their message to a wider public. In a society where 'keep face', 'protect appearance' and many more cultural proverbs are preventive forces on the way of modest female memoirists, it is crucial to examine what has assisted them to successfully assert themselves and unveil their voice. In this regard, to either align to the socially accepted movement of the time or invent new modes of narrative was promising for them. Most women's memoirists chose to move with the Movement of Memory-Writing in Iran which involves the narrators' memoirs related to the Iranian revolution and the Iran-Iraq war. Iranian women memoirists showed great fame and success in writing the genre. Moreover, the employment of humor genre in memoirs is another sign of resistance in Iranian women writing.

Keywords: Memoir, women autobiographer, narrative mode

RESUMEN

Este artículo tiene en cuenta que durante la última década, más que nunca, las mujeres iraníes que se dedican al recuerdo desarrollaron la escritura de sus historias de vida para transmitir su mensaje a un público más amplio. En una sociedad donde "mantener la cara", "proteger la apariencia" y muchos más proverbios culturales son fuerzas preventivas en el camino de las memorias modestas, es crucial examinar qué les ha ayudado a afirmarse con éxito y revelar su voz. En este sentido, alinearse con el movimiento socialmente aceptado de la época o inventar nuevos modos de narración era prometedor para ellos. La mayoría de las memorias de mujeres eligieron moverse con el Movimiento de Memoria de Escritura en Irán, que involucra las memorias de los narradores relacionadas con la revolución iraní y la guerra Irán-Irak. Las mujeres memorias iraníes mostraron gran fama y éxito al escribir el género. Además, el empleo del género humorístico en las memorias es otro signo de resistencia en las mujeres iraníes que escriben.

Palabras clave: memoria, autobiógrafa, modo narrativo.

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Introduction

Persian memoir was emerged in early 19th century by Mirza Mustafa's travelogue. He was a political figure who has been sent to Georgia for some political discourse. His book of memoir describes in detail the events of this mission, his comments and impressions about the fellow travelers and the people facing them on the trip. Its description relies on memories, visits and personal perceptions in many sections. The general appreciation of the work of Mirza Mustafa caused the members of the other delegations abroad to write similar works (Fazeli, Iranian Oral History).

Later, some of the young people in this era found the opportunity to go abroad and learn new sciences and techniques and become familiar with the rapidly expanding fields of science and industry. On the other hand, they became familiar with the manifestations of Western civilization and somehow influenced by it. The result of these events, in addition to the profound social, political, cultural and economic impacts on Iran, is the accumulation of travelogues and memorabilia of written letters, some of which are known to the authors and some also belong to unknown and anonymous individuals (Fazeli).

Taj al-Saltanah was the first female memoirist, daughter of Naser al-Din Shah, the King of Persia from 1843 to 1896 in Qajar Dynasty. Taj al Saltaneh's memoirs, *Crowning Anguish: Memoirs of a Persian Princess from the Harem to Modernity* narrates the intense conflicts between life in harem and modernism.

In late nineteenth century, with the growth of feminism in the world, the process of women's Autobiographical writing accelerates, and writing memoir prevails in the world.

Today we see the most exciting memoirs coming out in 2018, introduces thirty best memoirs to the readers, including 22 autobiographies written by female writers and 8 memoirs by men (Kibler, 2018). Moreover Amazon Best Sellers books introduces eight memoirs out of top ten best autobiographies (popular products based on sales) written by women. [1] Iranian women have certainly been a part of this phenomenon of women's memoirs and have overwhelmingly heeded the call to testify to "unusual claims" upon the world (Malek, 2006, p 361). Unlike many female memoirists express disappointment with female memoirs, as Simone de Beauvoir said, 'Very often women think all they need to do is tell . . . the story of an unhappy childhood'(cited in McDonough,), some women memoirists have found their way to express themselves and represented an unveiled feminine voices to the world and showed their genius in writing memoir.

In the other hand, in Iran the context and motive for the trend towards memoirs of warfare captives continue to flourish. Development of oral history projects mainly among men, also forms a different kind of modern memoirs in Iran. People welcomed memory-telling and memory-writing; narrating the memories of the era after victory of Islamic Revolution can be considered as period of formation of a phenomenon called "Movement of Memory-Writing" (Behboodi, 2019). Yet the question is how women memoirists could follow their writing career and resist the masculine context and still reach fame and success.

Iranian Women Memoirists

An autobiography of a woman will necessarily present specificity in relation to a masculine autobiography. Heilbrun (1999) believes that there is one general purpose behind these female stories: to tell what has not been told before, or has not been told in the public sphere by women to women (Contemporary Memoir, p. 45) .What is crucial in feminine studies of memoirs is not only should one pay attention to the content of the memoirs but also should be aware of the presenting or narrating the memoirs. *Veiled voices* the title Farzaneh Milani used for female autobiographers in an environment where the "work of many women have been slighted and excluded from literary histories and anthologies because the value structure of an almost entire male literary tradition insisted that only certain kinds of experience are worthy of serious consideration." (Najmabadi, p.11)

Some Iranian women memoirists, who stay and live in Iran, aligned to the post-war "Movement of Memory Writing" to record the history of pain and patience during and post war Iran.

Masoume Abad's memoirs *I'm Alive*, first published in 2012, is the story of a 17-year-old girl who is a politician now. Along with three other women, she has been imprisoned by the Ba'athist regime while working in medical clinic for the Iranian Red Crescent Society during the war. In her memoir she narrates about her childhood, Iran's Revolution, the Iran-Iraq war and her four years captivity in Al-Rashid prison in Iraq. Maryam Erfanian's *The Way to Go* is another example. It is a memoir of Betul Khorshahi, a pre-revolutionary fighters and activists in the imposed war, who was captivated in her Haj travel by Al-Saudi in 1987.

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The Days Without Mirror, edited by Golestan Jafarian, narrates the memoirs of Manijeh Lashgari, the wife of released pilot, Hossein Lashgari. The story is told of a woman who was not present at the war, but was seriously damaged by the war. Her husband was captivated at war and as a single parent; she had to manage her own life. She has spent fourteen years in complete ignorance and expectation. It took three more years for the visit to take place after the spouse was declared captive. The feeling of strangeness and suffering prevailed over their love and passion of youth.

Iranian women living in Iran preferred to move with the mainstream, with the movement of telling memoirs of war which is occurring in recent decade. In fact it's a sign of resistance. They not only resist the restrictions around them by joining the movement but also show their superiority over their male comrades in war by representing themselves in variety of roles more than men; as captives, social workers, wives, mothers, and etc. Erfanian goes further in her interview, saying: *The Way to Go* "is the story of the masculinity of Iranian women in war" (Mashregh news).

According Heilbrun (1999) entertaining or enlightening is not the objective of the women's writing memoirs today (Contemporary Memoir, p. 45). Thus, we should search for what has not been told in the public sphere. "The old forms of family, marriage, parenting, children, solitude, aging as well as the old forms of our professions still have to be dealt with by most women writers. However, instead of trying to fit new ideas into these old forms, today's women memoirists must invent or create a new form of memoir in which they discover themselves, reach fame, and recreate themselves." (Heilbrun, Women's Lives, p.66)

Another sign of resistance for Iranian female memoirists which is mostly represented in the writing of women memoirists living out of Iran is the employment of humor genre. Billingsley (2017) believes, "Humor is a promising method of feminist resistance, allowing women to shift oppressive scripts of discourse that discourage women from speaking to a context where women can speak on their own terms" (p. 20).

Satrapi's graphic memoir is an attempt at cultural translation of the Iranian people and its history to non-Iranian communitie. Her work thus not only creates a bridge between the diaspora and host communities, but works within the Iranian diaspora community as well, as she negotiates her own identity in exile, deals with the complications and desires of return, and creates, via culture and literature, a third space for her own identity as Iranian in exile (Amy Malek,2006, p.380). Firoozeh Dumas, an Iranian immigrant living in America, is one of the outstanding memoirists who narrates her own life story and inspires readers to laugh even at the tense moments of her life experience. Female characters represented in Funny in Farsi are silenced or oppressed characters among the members of their family whose actions are also objects of fun in some cases. Her humor is grounded in her unique social experience which develops positive social solidarity with other ethnic groups in one hand and with her female readers on the other hand. Intimate, gentle and peace-building memoirs are remarkable traits of her jokes which engage constantly the readers. She is a sensitive observer of her social environment in her interactions with them. She cares for human interactions and enjoys appropriateness in communications.

Conclusion

In recent decade among women some literary-valued memoirs emerged with creative mode of representation which can be a sparkle of hope for the veiled voices of Iranian female autobiographers and memoirists. The current study represents how women living inside and outside of Iran try to resist the difficulties in their life. Women memoirists in Iran chose to move with the social and cultural movements of their time while narrating and sharing their experiences in patriarchal society of Iran to get their writings published. They narrate their experiences involving Iran's revolution and the Iran- Iraq war. However, those who live out of Iran negotiate their difficulties in humorous mode to build bridge with other ethnic groups and resist their surroundings.

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On-campus and Distance Learning of Educational Statistical Research Course: A Comparative Analysis of Postgraduates' Academic Performance*

Curso de investigación estadística educativa en el campus y a distancia: un análisis comparativo del rendimiento académico de los posgraduados

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ABSTRACT

The purpose of this study was to examine the differences in academic performance of students in on-campus and distance learning postgraduate programs at a public research university in Malaysia. The study depended on data from 121 postgraduates drawn from 21 specializations of the Master of Education. The postgraduates were enrolled in an Advanced Research Methodology course involving statistical analysis in the educational field. The study employed a survey for data collection and independent *t* test for data analysis. The study's findings reported no significant differences in terms of the academic performance between on-campus students and distance students in educational statistical analysis. However, the two groups of students differed significantly in terms of their age composition as distance learning students comprised the majority of mature working students (25 years or older) relative to their counterparts in the on-campus program. Further, the study showed that on-campus and distance students were indistinguishable from each other, in terms of their grade point average scores and passing rates. Hence, the findings of the study can potentially be applied to higher education institutions that are considering offering distance learning as a studying mode in determining whether distance learning can be as effective as on-campus learning.

Keywords: Postgraduate education, educational statistical learning, advanced, research methodology course, on-campus learning, distance learning.

RESUMEN

El propósito de este estudio fue examinar las diferencias en el rendimiento académico de los estudiantes en los programas de posgrado de educación a distancia y en el campus de una universidad pública de investigación en Malasia. El estudio dependió de datos de 121 postgraduados extraídos de 21 especializaciones de la Maestría en Educación. Los postgraduados se inscribieron en un curso de Metodología de Investigación Avanzada que involucra análisis estadísticos en el campo educativo. El estudio empleó una encuesta para la recolección de datos y una prueba t independiente para el análisis de datos. Los resultados del estudio no informaron diferencias significativas en términos del rendimiento académico entre los estudiantes en el campus y los estudiantes a distancia en el análisis estadístico educativo. Sin embargo, los dos grupos de estudiantes diferían significativamente en términos de su composición por edad, ya que los estudiantes de educación a distancia constituían la mayoría de los estudiantes maduros que trabajaban (25 años o más) en relación con sus contrapartes en el programa en el campus. Además, el estudio mostró que los estudiantes en el campus y a distancia no se podían distinguir entre sí, en términos de sus puntajes promedio de calificaciones y tasas de aprobación. Por lo tanto, los resultados del estudio pueden aplicarse potencialmente a las instituciones de educación superior que están considerando ofrecer el aprendizaje a distancia como un modo de estudio para determinar si el aprendizaje a distancia puede ser tan efectivo como el aprendizaje en el campus.

Palabras clave: educación de posgrado, aprendizaje estadístico educativo, curso de metodología, investigación avanzada, aprendizaje en el campus, la educación a distancia.

INTRODUCTION

Statistical assessments are an essential part for conducting quantitative studies in the education field (Chen & Hero, 2015; Nordin et al., 2016; Adnan & Ritzhaupt, 2018). Yet, postgraduates are facing problems in understanding and applying statistical approaches when conducting their research. This involves application of inferential statistics on data collected for their studies (Zhang et al., 2012; Chiou et al., 2014). In addition, some students are studying while working in distance learning settings, and this causes issues, as these students juggle between work and studies (Chiou et al., 2014; Hannigan et al., 2014). Previous research has also indicated that distance learning settings have a negative effect on academic performance of educational postgraduate studies (Zhang et al., 2012; Hannigan et al., 2014). Yet, there are limited studies that have been conducted in terms of educational statistical learning in postgraduate levels particularly in comparing on-campus and distance learning settings (Chiou et al., 2014; Hannigan et al., 2014). As such, the study investigates this issue by comparing both on-campus and distance modes of learning with regards to educational statistical learning in postgraduate education settings.

Distance Learning and Educational Statistics Learning

Due to work or family commitments, distance students are unable to pursue learning in residential on-campus learning. This calls for more flexible learning environments that allow learning to be suited to their daily workloads or family commitments, which can be catered for in distance learning settings. For distance learning to be successful, there is also a need for digital instruction that enables learning communities to become a platform for promoting social interactions, completely independent of geographical boundaries (Norman et al., 2015; Nordin et al., 2016; Andersen et al., 2018). The availability of these flexible courses with short-term assignments have been reported as a key elements to address within distance education. Within the rapid advancements of the fourth industrial revolution, this will lead to an inevitable scenario of distance instruction evolution, in which new distance learning approaches and assessments are needed for digital education.

Digital education offers several advantages that suit lifelong learners. First, its flexibility allows students to access online learning materials and activities at their own time and place, at their own convenience. In some cases, lectures and formal meetings are conducted in the evenings or weekends to avoid disrupting working times. Second, distance postgraduates do not have to take a break from work, allowing career progression. Third, students are provided the chance to collaborate and network with other students that have diverse backgrounds in their working professions. Finally, it enables them to also gain expertise and develop skills related to their careers as well as reduce financial burden (Hashim et al., 2018; Nordin et al., 2018). Albeit these benefits, distance education raises several challenges to postgraduates as it is extremely difficult to balance work and study. These issues can cause negative effects to both work and study.

METHOD

Participants

The study's participant are 121 students enrolled in Advanced Research Methodology course as part of a Master degree through on-campus and distance learning as learning modes in a local public university. The students are are from 21 specializations on education, which were curriculum and pedagogy, Malay language, Teaching English as a Second Language (TESL), measurement and evaluation, information technology, mathematics, computer, science, business, religious, sports, Arabic language, economics, literature, history, counselling, pre-school, religious, and special education as well as educational administration, psychology, and sociology.

The Advanced Research Methodology is a compulsory for the Master of Education program. The course is aimed to equip students with skills in conducting research that will enable them to understand research methodologies, evaluate reports, and conduct comprehensive research. Through this course, students studied on inferential statistics, and were exposed to various types of research, methods and approaches for specific problems, research planning, sampling data techniques, data collection and analysis approaches, and systematic research report writing. Among the statistical techniques in the course, were research design, parametric, and non-parametric inferential statistics.

Distance Instruction

There were two modes of learning implemented, which were on-campus and distance learning modes. The on-campus mode of learning was conducted in a 14-week period while the distance mode was conducted with face-to-face sessions (held during school holidays) and online learning sessions. In maintaining consistency, the face-to-face and distance students are taught by the same professors. Similar assignments, quizzes, tests, and final examinations are assigned to both sets of students. They can also access their learning materials, tests, reports and other materials on a centralized learning management system. On completion of the programme, both on-campus and distance students are awarded the same Master's degrees. In short, the course for both on-campus and distance learning are similar and comparable. The only difference is the mode of delivery, and perhaps to a certain extent, the background characteristics of students in on-campus and distance learning programmes.

Data Collection and Analysis Method

This study was a comparative analysis design. Specifically, the objective of this study is to answer the research question, "Is there a mean difference in Advanced Research Methodology score between on-campus and distance postgraduate learners?" In this study, samples of 70 on-campus students and 51 distance students were randomly and independently sampled from the populations of on-campus and distance students, respectively. Each student was given an score

through a mid-term examination. The data was collected through a survey that was distributed to the postgraduates taking the course and analyzed via independent *t* test analysis.

Results

The null hypothesis was tested that on-campus students and distance students have equal Advanced Research Methodology scores. The alternative hypothesis was on-campus students and distance students will not have equal Advanced Research Methodology scores, thus necessitating a non-directional or two-tailed test. The test was conducted using an alpha level of 0.05. The raw data and summary statistics for on-campus students and distance students are presented in Table 1 and Table 2, respectively. For the on-campus student sample, the mean and variance were 15.400 and 34.939, respectively, and for the distance student sample, the mean and variance were 17.539 and 38.128, respectively.

Table 1: Advanced Research Methodology data for On-Campus Student Sample

			Statistic	Std. Error
Data	Mean		15.400	.7065
	95% Confidence Interval for Mean	Lower Bound	13.991	
		Upper Bound	16.809	
	5% Trimmed Mean		15.385	
	Median		15.250	
	Variance		34.939	
	Std. Deviation		5.9109	
	Minimum		2.0	
	Maximum		29.0	
	Range		27.0	
	Interquartile Range		9.5	
	Skewness		.099	.287
	Kurtosis		-.406	.566

Table 2: Advanced Research Methodology data for Distance Student Sample

			Statistic	Std. Error
Data	Mean		17.539	.8646
	95% Confidence Interval for Mean	Lower Bound	15.803	
		Upper Bound	19.276	
	5% Trimmed Mean		17.510	
	Median		18.000	
	Variance		38.128	
	Std. Deviation		6.1748	
	Minimum		5.5	
	Maximum		29.5	
	Range		24.0	
	Interquartile Range		9.5	
	Skewness		.031	.333
	Kurtosis		-.784	.656

An independent sample *t* test was conducted to determine if the mean Advanced Research Methodology score of on-campus learners differed from distance learners. As shown in Table 3, Advanced Research Methodology data were gathered from sample of 70 on-campus learners and 51 distance learners, with an on-campus sample mean of 15.400 (SD = 5.9109) and a distance sample mean of 17.539 (SD = 6.1748). The independent t-test indicated that the Advanced Research Methodology score means were not statistically significantly different for on-campus and distance learners (t = -1.929, df = 119, p = 0.056). Thus, the null hypothesis that the Advanced Research Methodology score means were the same by learning mode was failed to reject at the 0.05 level of significance. The results provide evidence to support the conclusion that on-campus and distance learners not differ in Advanced Research Methodology scores,

on average.

Table 3: Descriptive Analysis Results for Group Statistics

	Mode	N	Mean	Std. Deviation	Std. Error Mean
Score	On-campus	70	15.400	5.9109	.7065
	Distance	51	17.539	6.1748	.8646

Table 4: Descriptive Analysis Results for Independent Samples via *t*-Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Score	Equal variances assumed	.261	.610	-1.929	119	.056	-2.1392	1.1089	-4.3349	.0565
	Equal variances not assumed			-1.916	105.102	.058	-2.1392	1.1166	-4.3532	.0747

Discussion

(i) No significance difference between on-campus and distance learning

The study's findings reported no significant differences in terms of the academic performance between on-campus students and distance students in educational statistical analysis. This could be linked to the studies of Joksimovic et al. (2015) and Cho and Heron (2015). Joksimovic and colleagues (2015) studied on the frequency and duration of interactions of student-system, student-content, and student-student had an effect on learning outcomes measure in terms of final course grades. They discovered that student-student interaction had the most significant effect on final achievement in which student-student interaction had a 10-fold increase on academic performances. Interestingly, their study also revealed that student-content had a reverse effect on learning achievements.

In relation to this study, as there were no significant differences between distance and on-campus learning, this could have been caused by both student-student and student-content interactions. Here, as student-student interactions had a positive effect on learning performance, the distance learners could have had a higher level of online interactions that were meaningful for their learning. On the contrary, the levels of student-student interaction could have been low for on-campus students. As for student-content interactions, a reverse scenario was identified, showing that high levels of student-content rather than student-student interactions could have caused to the negative learning performances.

(ii) Age differences between on-campus and distance learners

Findings also indicated that the two groups of students differed significantly in terms of their age composition as distance learning students comprised the majority of mature working students (25 years or older) relative to their counterparts in the on-campus program. This could be related to the studies of Simonds and Brock (2014) as well as Kibelloh and Bao (2014). For the study of Simonds and Brock (2014), the study investigated between student age and their preferences for types of online learning activities. The study discovered that older students have a higher preference for video lectures that consists of professors' talking heads, while younger ones to be prone to more to interactive learning strategies and tools. In terms of the study of Kibelloh and Bao (2014), they found out that professional working mothers had difficulties in balancing between work and family in China. These were caused by conflicts of demanding work schedules that were family obligations, studies, and caring for children as well as the elderly.

CONCLUSION

The study has investigated on academic performances of on-campus and distance learning on educational statistics for postgraduate education. The study revealed that there are no significant differences in terms of the academic performance between the two groups of students. However, the two groups of students differed significantly in terms of their age composition as distance learning students comprised the majority of mature working students (25 years or older) relative to their counterparts in the on-campus program. Further, the study showed that on-campus and distance students were indistinguishable from each other, in terms of their grade point average scores and passing rates.

Although this suggest that there is no significant difference found between on-campus and distance postgraduate education for learning about educational statistics, some limitations have to be considered. First, the course was conducted for learning about advanced statistics in educational settings. It would be interesting to look into a course on basic statistical analysis in postgraduate education and how it would affect learning in both on-campus and distance educational settings. Second, the academic performances of the students were measured via a mid-term

test. Changing the assessment to a final examination using online tests or real-time learning analytics for formative assessments (see Norman et al., 2015) would also be beneficial, in terms of studying summative performances of students learning about this subject. Third, the university's learning management system was used as a learning platform for both on-campus and distance learners. Using an alternative learning environment such as massive open online courses (see Nordin et al., 2016) could be interesting. Finally, certain geographical and cultural factors may have affected the results. It would be interesting to have focus on different settings and seeing how such settings affects students' performance. In sum, the findings of the study can potentially be applied to higher education institutions that are considering offering distance learning as a studying mode in determining whether distance learning can be as effective as on-campus learning.

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The 'Branches Map' method and ESL students' Motivation in essay writing*

El método del "Mapa de ramas" y la motivación de los estudiantes de ESL en la redacción de ensayos

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ABSTRACT

This study aims to study secondary school students' perceptions towards the use of 'branches map' method and its influences to motivate them in their essay writing. Semi-structured interview was conducted to collect the data. Twelve students of age sixteen with different level of English proficiency were selected to participate in this study. The analysis of the data indicated that majority of the students had positive perception towards the use of Branches Map method to motivate them in writing. The students responded that the use of 'Branches Map' method helps them in planning their writing, generating ideas, and enhancing creativity in writing. These results manifested that the tree structure of the 'Branches Map' method used in the pre-writing process were able to enhance students' motivation in essay writing.

Keywords: Motivation, ESL Writing, generating ideas, English proficiency.

RESUMEN

Este estudio tiene como objetivo estudiar las percepciones de los estudiantes de secundaria sobre el uso del método de 'mapa de ramas' y sus influencias para motivarlos en su redacción de ensayos. Se realizó una entrevista semiestructurada para recopilar los datos. Doce estudiantes de dieciséis años con diferentes niveles de dominio del inglés fueron seleccionados para participar en este estudio. El análisis de la fecha indicó que la mayoría de los estudiantes tenían una percepción positiva sobre el uso del método Mapa de ramas para motivarlos en la escritura. Los estudiantes respondieron que el uso del método 'Mapa de ramas' les ayuda a planificar su escritura, generar ideas y mejorar la creatividad en la escritura. Estos resultados manifestaron que la estructura de árbol del método 'Mapa de ramas' utilizado en el proceso previo a la escritura fue capaz de mejorar la motivación de los estudiantes en la redacción de ensayos.

Palabras clave: Motivación, ESL Writing, generación de ideas, dominio del inglés.

1. INTRODUCTION

Writing is a mean of communication which made possible through graphics symbols, arranged according to certain conventions to form words which in turn are arranged to form sentences. Writing is a complex yet a creative process that is an essential skill for effective communication, which comprises refining ideas and expression, coupled with presentation and editing. However, to glean the interest in writing among students is not an easy task for teachers. Writing is also considered as one of the most difficult skills which students have to deal with combining ideas, choosing the right vocabulary so that it would not overlap and so on. Problem of writing becomes very much compounded when students are made to express themselves in a second language. The reason is based on the fact that most students lack the skills to communicate effectively in English (Benjamin Amoakohene, 2017). Therefore, various methods need to be used in order to facilitate and enhance students' writing skills. One of the most used method is by using concept map. Concept map is a pedagogical tool that allows learners to construct a visual representation of their understanding of connections between concepts. Teachers usually will find the very best method or teaching tool in order to attract their students into the learning process and concept-mapping is one of the traditional methods that have been used for years by the educator all over the world for writing. The mind mapping strategy can be used to explore a wide range of topics in writing and also used in every kind of writing such as narrative, descriptive, recount, persuasive and argumentative (Riswanto & Prandika, 2012). While enhancing their imagination to be expressed on a piece of paper, concept mapping has also been studied as a productive intervention to improve critical thinking when reading and learning a second language (Khodaday & Ghanizadeh, 2011).

Writing is always considered as the least favourite component of English language subject as students found it to be 'complicated' and 'time wasted'. Students find composing in English difficult because the writing process demands them to employ many cognitive and linguistic strategies of which they are uncertain (Maghsoudi & Haririan, 2013). Lack of motivation to write which is conceptualised in terms of attitudes and beliefs as the result of repeated writing experiences is also a factor (Faisal et al., 2017). There are several factors that can explain students' loss of motivation to write in English. Firstly, writing is often taught in a rigid way, with the teacher emphasising conformity to text types and writing conventions, rather than students themselves searching for meaning in writing. Second, students are often given writing tasks as exercises detached from other classroom activities, and with little or no opportunities to interact with classmates when writing. Lack of motivation, however, may not only be due to unattractive writing tasks. Language barrier often cited as one of the major factors of students' lack of motivation to write in English (Zulkiflei et al., 2017). This may be due to the official command language used in school and the lack frequency of English language used around peers. Hence, students often encountered difficulty in choosing the word due to lack of vocabulary.

In order to make writing more interesting among students, the researchers proposed a method for the students to understand and make their essay more organised. Since it is hard for students to write, they barely have anything in mind to jot down. Hence, the mind mapping strategy can be used to generate ideas in writing; and also used in every kind of writing such as: narrative, descriptive, recount, persuasive and argumentative (Riswanto & Prandika, 2012). A little bit innovation has been made to the mind map and is named as "Branches Map" method. The tree itself is a unique form of the mind map as it includes its 'roots' that could actually be made as the topic title. The tree shaped of the map (Figure 1) is more presentable, simple and organised. Furthermore, the number of the branches will be form based on the main points of the essay. As for example, an argumentative essay requires 5 main points; thus, students need to draw 5 branches for each point. This would ease students' in generating ideas as the main points is clearly highlighted on the branches. Hence, it isnot impossible for students to develop ideas in elaborating their points in every paragraph.

Figure 1: Branches Mind Map

According to Abd Karim and Rafidah (2016), mind maps feature tree-like branches of information that display key concepts as well as relationships. The most associated individual in Mind Maps is Tony Buzan, whose publications can be traced back in 1960s (Buzan, 1993). The concept of Mind Maps, which rely upon the Radiant Thinking Information- processing System (Buzan, 1993), are generally used to generate, visualise, structure and classify ideas around a central keyword. As such, mind maps are found to support techniques of brainstorming, visual thinking, organisation, problem solving, decision making, and writing (Harris and Caviglioli 2003; Buzan 2005). According to Naqbi (2011), mind mapping strategy is important to help students in organising and developing their ideas

and thoughts. Moreover, mind mapping technique is also an effective tool to help students generating ideas and evaluating them. They were able to recall and retrieve their prior knowledge about different topics which is beneficial for designing mind maps. Therefore, it could be said that mind mapping can have a positive impact on students' cognition skills and information retrieval skills. It is also concluded that the mind mapping technique is an appropriate tool to help students in planning their writing as the approach encourages students to gain an in-depth understanding of the writing topics (Naqbi, 2011). Thus, the aims of this study are to investigate students' perceptions towards the use of Branches Map Method and to examine its influences on students' motivation on essay writing.

3. METHODOLOGY

This study employed a qualitative research design where focus group interviews were conducted. Twelve secondary schools students from various schools in a state in Malaysia were involved as participants. The questions for the focus group interview were designed to elicit the students' views toward the use of Branches Map Method strategy in motivating them in learning and doing essay writing. Moreover, the questions were designed to allow students the freedom to give their views on the Branches Map method strategy in writing and their future consideration. Furthermore, the responses to the items were categorised, coded and analysed based on the group's proficiency level.

4. Findings and Discussions

The results are presented in this section. The followings are the tables of summary of the interview conducted which are categorised into three groups which are excellent, average and weak.

4.1. Excellent Group

Table 1 presents the answers given by the participants from the excellent group.

Question	R1	R2	R3	R4
1) Was the Branches Map Method fun?	- Don't really understand the method. - Weird, not used to it.	- Don't understand the method. - Somehow fun.	- Yes, it was fun. - Can get more ideas.	Yes, it was good for me.
2) What do you think of the method? (creative, helpful, brilliant?)	- Kind of weird. - Against her writing.	Against his writing but think it was creative.	Can elaborate points.	Gets more way to elaborate points.
3) Was it easier to construct your essay using this method?	Helps to generate ideas.	It helped; it was easier.	It was helpful.	It was very helpful.
4) Do you think you can write better essay using this method?	No, it opposes her way of writing.	He doubts that.	Yes.	Yes, very much agree.
5) If yes, would you use this method in the future? If no, why?	No, it opposes her way of writing.	Can try to adapt.	Of course, she will try.	Yes, she will.
6) Do you think this method helps you to think creatively?	Only thing that was creative is the topic we taught.	Yes, it did.	Yes, she thinks so.	Yes.
7) Do you prefer using the branches map method individually or in group?	- Individual. - She isn't good working in a group.	- Group - He would be lost working alone.	- In a group. - Can share ideas with others.	- Group. - Can share ideas together.
8) Would you do more essay writings after this?	Yes of course but not using this method.	Yes, he will.	Yes, she can apply the method in essay writing.	Yes, she can apply the method in essay writing.

*R=Respondent

Table 1: Interview summary of the students who are good in English.

Among the higher proficiency of these students, half of them reacted somewhat negative by stating that the Branches Map Method was "weird" or "oppose to my writing style". One of them even kept emphasising that the method is against her way of writing and preferably using her own approach to do essays, whereas other two reacted positively towards the Branches Map Method by stating that the method "was fun and it helps me to elaborate more ideas and points in my essay writing". As Branches Map Method was created by us based on the mind-mapping concept, most of the students in this group agreed that it helps them to think more creatively. According to Abd Karim and Rafidah (2016), mind mapping is basically a process of writing down a central idea and coming out with new and related ideas from the centre. The mind mapping strategy can also be used to explore a wide range of topics in writing such as narrative, descriptive, persuasive and argumentative (Riswanto & Prandika, 2012). As for the motivation whether the method helped them to feel like writing more essays in the

future, all of them said they definitely would apply it in essay writings, especially when they work in a group. The findings showed that students like to interact more with others in this 21st century learning and teaching style. This interaction helps them to develop language and social skills (Morris, 2016).

4.2. Average Group

Table 2 presents the answers given by the participants from the average group.

Questions	R5	R6	R7
1) Was the Branches Map Method fun?	Yes, it was fun.	- Yes, it was fun. - She can write the essay easier.	- Yes, it was fun. - Can improve her writing skills and the map is easy to draw.
2) What do you think of the method? (creative, helpful, brilliant?)	- It helps to write better. - More organized to write elaborations and examples.	- It helps to write better.	It makes her easier to do essay.
3) Was it easier to construct your essay using this method?	Yes, it is easier.	Yes, it is easier.	- Yes, easier. - She just have to fill in the points, elaborations and examples and make it in a sentence to write an essay.
4) Do you think you can write better essay using this method?	Yes.	Yes.	Yes.
5) If yes, would you use this method in the future? If no, why?	She can use the Branch Map method to elaborate the points better than before.	She thinks it was very helpful.	She likes to make essay in point forms before writing them down correctly.
6) Do you think this method helps you to think creatively?	- Yes. - She can list all the sentences much better.	Yes, it helps her to write essay.	It makes her think about the ideas to support the points.
7) Do you prefer using the branches map method individually or in group?	In a group.	- Group. - She can share her ideas together with others.	- Individual. - She cannot use other people's idea to do her own essay.
8) Would you do more essay writings after this?	- Sure. - She doesn't like to write essays at first but maybe Branches Map method can make her do more essays.	- Sure will.	- Yes. - She found an easier method to do essay.

*R=Respondent

Table 2: Interview summary of the students who are average in English.

For the average group students, all of them think that the Branches Map Method was fun and easy to apply in pre-writing of essays. They claimed that the method is helpful and "more organised to write elaborations and examples", according to Respondent 5. Bharambe (2012) also claimed that mind-mapping provides a useful focus for students to organise their thoughts and ideas to present information clearly and attractively. Most of them also agreed that it helps to construct their essay better because they can list out and write down all their points and elaborations, just like what Respondent 7 stated, "I like to make essay from point form...it makes me to think about the other idea to support the points.". By this, we can also assumed that the Branches Map Method also helped in brainstorming ideas on essay writings. MacDowell (1999) defined brainstorming as "the act of defining a problem or ideas and coming up with anything related to the topic". Therefore, this method will certainly help students to think more creatively and can get more ideas after listing down whatever it is related to the essay topic. This can be supported by the results of the survey by Abd Karim, Rafidah (2016), where her studies showed that the mind-mapping tool encouraged creative thinking and users of mind-maps became faster at generating and organising ideas for writing.

These students from the average category also stated that this Branches Map Method has make them to want to write more essay writings in the future, one of them stated that "I don't like to write essays at first but maybe this can make me do more essays.". Another also said that she found this method very easy and would like to use it in the future for pre-writings.

4.3 Weak Group

Table 3 presents the answers given by the participants from the average group.

Questions	R8	R9	R10	R11	R12
1) Was the Branches Map Method fun?	Yes, it was very fun.	- Yes, it was too fun. - Helps him to make his essay better.	Yes.	The best.	Yes, it was fun.

2) What do you think of the method? (creative, helpful, brilliant?)	- Yes, it was creative. - The map has examples and elaborations.	It was creative.	It was fun.	- Easier to write an essay. - Easier to find ideas.	Sometimes he understands, sometimes he did not.
3) Was it easier to construct your essay using this method?	Easier.	Yes, easier.	- No. - She didn't understand what we taught.	- Yes, she can understand the elaborations and examples easier.	- Maybe. - He has to keep it up (with the pace).
4) Do you think you can write better essay using this method?	He thinks he can.	Can.	No.	She thinks she can.	Yes, he had a lot of fun using it although he sometimes he doesn't have the vocabulary to describe.
5) If yes, would you use this method in the future? If no, why?	He thinks would use because it is easy.	Yes, it is easier.	No.	Yes, it is easier to elaborate and separate the points.	Yes, he will.
6) Do you think this method helps you to think creatively?	- Yes. - It makes him more interested to do essay.	Yes.	Yes.	Yes, she thinks so.	Yes, he thinks it helps.
7) Do you prefer using the branches map method individually or in group?	- In group. - They can exchange ideas.	- In group. - For individual he prefers another group's method.	In group.	- Group. - She doesn't mind using it individually too.	Both.
8) Would you do more essay writings after this?	- Maybe. - After he learned this method he would like to write an essay.	Maybe.	No.	Yes, although she doesn't like writing.	Depends, if he have time he will.

*R=Respondent

Table 3: Interview summary of the students who are weak in English.

Interview session with this group resulted in a positive attitude towards the Branches Map Method as well. All of them addressed that the method was really fun and creative. This can be proved by Tony Buzan in "The Mind Map Book" (1993) where he stated that "mind map is usually more fun and interesting to create than the standard chart or set of notes". However, there was one student where she has a very negative attitude towards English writings, due to her very low proficiency towards the language. She agrees that the method itself was fun and creative, but refused to do more writings in the future and thinks that the method would not make her write better essays. It could be concluded that the negative attitude of this student will make her have lower cognitive achievement, and lower motivation (Victori and Lockhart, 1995). Therefore her English language proficiency is not as good as the others and she needs one of our interviewees to translate English to Malay to her. Overall, students in the weaker group have lower motivation to do more essay writings in the future, providing just a few of them have a change of mind in essay writing and will consider to do it.

6. CONCLUSION

The results of this research discovered that the students' attitude towards the newly introduced Branches Map method has indeed influenced their motivation in essay writing, for a few of the interviewed students agreed to do more essays in the future using the method. However, it was also learned that the students have varied reactions towards the method. Some of the respondents, mostly from the average and weak groups, stated that the method was fun, creative, and easier to be carried on as pre-writing routine, especially in generating ideas and elaboration or organising ideas. Studies shown by M. Yunus, C. H. Chien (2016), that majority students in their studies agreed mind-mapping helped them organise their thoughts better. However, these groups did not express any further interest to do more essay writing in the future. Just as previous researchers who found out that "even though students were highly motivated to learn English, but they tend to labor minimal efforts in their learning process (Melor and Nur Rashidah, 2011; Noraini, 1999). We believed that it was their basic proficiency level and language barrier that are the causes of their attitude towards essay writing.

Nevertheless, half of the excellent students interviewed referred the method as complicated and uninteresting. This group insisted they would be using their own way of writing an essay, favourably disposed to their pre-existent methods. In any case, the excellent students cited no objection to learn and use the method in essay writing in the future. Researcher such as Thanget (et al. 2011) also proposed that students with positive attitudes and higher level of motivation will be more successful compared to those with negative attitudes and low motivation. Therefore, the attitude of students towards essay writings will affect their motivation in writing and thus decides

their proficiency level. Finally, we found out that using the Branches Map method in the process of teaching writing could also enhance students' interest and contribution in the learning process, considering its function to eliminate the tension in the classroom together with giving more independence to the students to be more creative and expressive in essay writing.

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Renovative system of professional capacity reproduction as effective regional management condition

Sistema renovador de reproducción de capacidad profesional como condición efectiva de gestión regional

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ABSTRACT

The article studies the orientation of professional potential reproduction to ensure the effectiveness of regional management, discloses the mechanisms for management professional potential transformation into the indicators of its effectiveness and efficiency. They provided the data of the sociological study "Professional potential reproduction system development among regional management personnel". The result of the study in this direction was the developed cumulative technology for computer assessment of the competence potential among regional management employees, which includes three blocks: assessment unit, planning unit, and control (correction) unit.

Keywords: renovation system, professional potential, public service, effective management.

RESUMEN

El artículo estudia la orientación de la reproducción potencial profesional para garantizar la efectividad de la gestión regional, revela los mecanismos para la transformación del potencial profesional de gestión en los indicadores de su eficacia y eficiencia. Proporcionaron los datos del estudio sociológico "Desarrollo potencial profesional del sistema de reproducción entre el personal de gestión regional". El resultado del estudio en esta dirección fue la tecnología acumulada desarrollada para la evaluación informática del potencial de competencia entre los empleados de gestión regional, que incluye tres bloques: unidad de evaluación, unidad de planificación y unidad de control (corrección).

Palabras clave: sistema de renovación, potencial profesional, servicio público, gestión efectiva.

1. Introduction

Professional potential reproduction is of particular importance and relevance for effective management of the region under the conditions of its systemic renovation, the meaning of which is precisely the orientation of professional potential reproduction towards regional management effectiveness provision. During previous studies, they emphasized the first half of the logical link "the systemic renovation of professional potential reproduction - the effectiveness of regional management". The second part of the link was implicated in the general context of the presentation. In this case, it acquires an already expanded, explicit character. In this regard, we clarify the general research task - to reveal the mechanisms of management professional potential transformation into the indicators of its effectiveness and efficiency. The task includes three subtasks: firstly, the ways of individual professional potential aggregation into group (structural) ones and then into institutional ones; secondly, the ways of model integration for professional and institutional effectiveness; thirdly, the organizational and technological models for regional management efficiency provision. At that it should be noted that the objectives of the study do not include clarification of efficiency and effectiveness concepts in relation to state and municipal government, justification of evaluation criterion system, the comparative analysis of evaluation methods, etc.

2. Problem study degree

There is a significant array of publications related to the topic of research. The competency-based approach (J. Raven, S.M. Spencer, S. Witness, S. Holliford) was widely used in the study of staff professional development issues in state and municipal government [17, 18, 22,27]. In the framework of this approach, professional competencies are studied actively (A. Nikitina, M.I. Sycheva) [16,25].

One should distinguish the group of scientific studies highlighting the issues of personnel and professional potential reproduction management, namely: personnel management strategy [8.9]; personnel policy [20,21,28]; the development of competency models [14]; the assessment of professional development of personnel [19]; competency-based approach application to assess the certification of state and municipal employees [3,5].

This group also includes the research on social institution management methodology [4], the technologization of state and municipal government [6], the development of the sociological and socio-technological culture of managerial personnel [7,12], personnel technologies [2,23].

Let's note the studies that reveal the problems of state and municipal management effectiveness, the conditions and the ways for managerial effectiveness and efficiency improvement [13,15,29]. Criteria and performance indicators are defined and described in the works by T. Kartseva, I. Sheburakov [11,24], effectiveness evaluation methods - in the works by E. Akimova [1]. They should also highlight the works related to the consideration of regional management effectiveness [10].

3. Research methodology

They used the materials of the study "The development of a system for professional potential of regional management personnel reproduction" - an expert study in five regions of the Central Federal District of the Russian Federation in 2013-2014 (127 government employees were interviewed), as well as the materials from the study "The study of the corporate culture of civil servants of the Belgorod Region" conducted in 2016 in the city of Belgorod (808 civil servants were interviewed). They used the data of the sociological study "The evaluation of the municipal personnel policy effectiveness of the city of Belgorod", conducted in the city of Belgorod in 2014 (1100 municipal employees were the respondents).

The collection of primary sociological information was carried out through a questionnaire, the analysis of documents, free interviews and observation included. The methods of empirical data grouping and typologization and the qualitative analysis of factors are also used.

The empirical sources of research are regulatory, legal and analytical documents of federal, regional and municipal governments on personnel policy and personnel potential reproduction;

4. Main part

127 experts took part in the sociological study "The development of professional potential reproduction among regional management personnel", most of whom have been in the public service for more than 3 years. The emphasis of the study on this particular group of respondents is conditioned by the need for experts to analyze the real experience of public service.

The link between the development of professional competencies and management efficiency is unequivocally

noted by the majority of experts (86.62%). The awareness of this relation by experts makes us to understand the need of causal interaction development between public servant effectiveness indicators and the indicators of success in regional management. Tracking and establishment the vector of dependence between acquired (or development level) professional competencies and the level of the entrusted region development involves the use of a qualitatively new approach to professional potential management among public servants.

The effectiveness of regional management is determined not only by its professional potential, but also by many other factors. Based on the expert survey, 17 factors were identified that mainly "cover" the area of managerial effectiveness determination. Then the experts were suggested that to evaluate the determination significance of the identified factors using 5-point scale.

Assessing the conditions that determine the effectiveness of regional government bodies, the experts determined the introduction of control not only over incomes but also over the expenses of employees (30.71%), the imposition of sanctions for rude and disrespectful treatment of employees with citizens (25.40%), the organization of broadcasts of meetings and online meetings via the Internet (25.98%) for the group of stronger influence.

The least significant conditions included accounting only for professional abilities and merits when you are hired for state and municipal services (32.28%), continuous improvement of managerial personnel professional potential (43.31%), the rational use of the managerial personnel professional potential (46.03%), the optimization of career advancement of managerial personnel taking into account their professional potential (37.10%), the establishment of a direct dependence of employee salaries on the results of activities (46.03%). The absence of conditions assessed by experts as unambiguously important, a rather large group of conditions assigned to the group without influence allows us to conclude that there is the regression of the management mechanism that ensures the effectiveness of the governing bodies of the modern region.

An expert assessment directly indicates a critical situation in efficient and effective regional process provision. The current situation requires an immediate review of the existing system of measures to create the conditions for the professional functioning of regional employees, to search for innovative forms of incentives aimed at real-life requests of a modern manager.

Special attention is required to study the current situation with simulation practices ensuring the necessary conditions for the professional activity effectiveness of regional public servants. The imitation of conditions organization and fulfillment for the necessary support of professional activity deliberately eliminates all efforts to create an effective reproductive cycle of the regional management personnel professional potential.

According to experts, the most important reasons of public administration ineffectiveness are the following ones: an excessive bureaucratization of management (50.39%), incompetence of officials (39.37%), total irresponsibility in the management system (36.00%), corruption (48.41%), the lack of a national idea (31.50%), population distrust to state authorities (46.46%).

Having ranked the measures on current situation change, the experts consider the measures increasing the motivation of public servants, introducing special payment conditions to stimulate highly efficient work (55.12%) and to increase the professionalism and competence of public servants (51.97%) as the most important ones. According to experts, the increase of professional and civil responsibility of civil servants (40.94%) and the increase of public confidence in public authorities (39.37%) is no less significant.

Assessing the importance of new principles of personnel policy introduction in the public civil service system, the experts identified a number of the most promising areas of modernization in their opinion: the creation of objective and transparent competitive selection mechanisms (52.76%), the formation of personnel reserves through the selection, training and career growth of candidates for post replacement and their active practical use (52.76%), the establishment of a special procedure for remuneration depending on the achievement of professional performance indicators (41.73%), the improvement of material and moral motivation system among public servants (53.54%), the expansion of probationary period use practice during post replacement (33.07%).

Analyzing the comparative importance of material incentive measures, the experts found the following motivational measures to be most effective: the organization of remuneration depending on the achievement of professional performance indicators (59.06%), the payment of bonuses for the performance of especially important and difficult tasks based on work results (64.29%), raising the level of civil servant wages to competitive one at the labor market (63.78%).

Taking into account the general research task - to reveal the mechanism of the professional potential of regional management transformation into the indicators of its effectiveness and efficiency - it is worth noting in this study the ways they perform the aggregation of individual potentials of state and municipal employees into the competence potential of governing bodies.

The result of the studies in this direction was the cumulative technology we developed for computer assessment of the competence potential of regional government employees.

The analytical capabilities of the technology involve the evaluation of the regional government competence at various levels:

- individual competence potential (individual level) - involves the assessment of a particular employee who is in a particular position and performs the functions corresponding to that position. The need for this type of assessment is associated with the ability to determine the conformity of the position, individual work in problematic (scarce) competencies, the formation of individual professional development cards, administrative decisions on career and reserve strategies of a professional. Individual competence potential, both functional and promising, is a working tool for personnel and organizational planning. Personnel reserve personification can be used both at the regional and federal levels, provided that a regional and federal personnel portal is formed - the database of profiles and personalities that can satisfy certain requirements of a functional or prospective order, formed both at the local and federal levels;

- job competency potential (job level) - involves the cumulative assessment of some position, the possibility of functional and prospective order provision by the competency-based capabilities of the job subculture personnel who are in job niches, as well as an extrapolated forecast of performance and indirect regional indicators related to the functional main of the assessment. Such an aggregate assessment allows the global analysis of the regional government position and determines the corrective educational order;

- competency potential of management (structural level) involves a cumulative assessment of the department competency potential, which may be regional management departments, as independently functioning cells of the regional government and the elements of a single mechanism, to correct its competency deficit and determine the "weak" link of regional management. The emphasis of analysis at this level of assessment shifts from personal and official performance to the aggregate activity result of a department, which is possible with the existing competency picture. The forecast of each unit performance of the regional government allows us to anticipate violations in the supply chain of services to the population of the region and prevent consequences that may affect the social well-being and life quality of a regional client;

- the competence potential of the regional government body (administrative level) makes it possible to obtain the synthesis of diagnostic and analytical data on the competence deficit and surplus, functional and promising problem field, to assess the likelihood of strategic goals and foresight guideline achievement. In fact, this level of assessment is some form of certification of the regional management competency level to the requirements of the social and administrative (federal) order to ensure an appropriate indicator of the region socio-economic development.

The coherence of analysis levels, their hierarchical elaboration, allows us to conclude about the state of local regional management by three main positions: competency-based potential - the effectiveness of activity - the quality of life in the region.

The cumulative assessment technology includes three units: assessment unit, planning unit, and control (correction) unit.

1. The assessment unit combines the functions of multilevel diagnostics and the analysis of the functional competence potential of regional government bodies. This unit consists of the following subunits:

1. The choice of competency profile - includes the personal orientation of an assessed respondent by official groups of regional management. In the case of an exact choice, the set of prototype competencies is first transformed into the competency model of the job group, on the basis of which, the profile for competency evaluation of a particular position is developed. The prototype, the models and the competency profiles of regional employees are in the databases, and can be supplemented, expanded or changed at the request, which allows the use of the program resource proposed for consideration to assess the competence potential of any organization, provided that its local database of competency profiles is created. Moreover, the universalistic potentialities of the proposed product will make it possible to obtain a system program in the database of which specialized complexes of manned organizations can be placed initially. The result of this sub-unit is a specific normative competency profile of the evaluated position, allowing the respondent to see the set of competencies and their implementation levels necessary for an effective performance of the official's functional load.

2. The diagnosis of competence development and implementation level recorded in the job profile, based on indicator models of the prototype competency set. This diagnosis can be represented by the data of specific employees or by the statistical majority of the unit. The program features allow you to reproduce comparative

charts that reflect the overlap of real and normative competency profiles of jobs or comparative schedules of specific employees. Subunit results are the following ones:

A. Diagnostic and statistics data:

- Evaluation competency profiles of regional employees who have undergone diagnostics (individual level);

- Evaluation competency profiles with the statistical distribution of the posts that have passed the assessment (job level);

- Evaluation competency models with a statistical distribution among the personnel of organizational units that have passed the assessment (structural level);

- Evaluation competency prototypes with a statistical distribution throughout the regional government (administrative level).

B. Comparative statistics data:

- Comparative assessment charts of real competency profiles at an individual level of assessment (personal comparison) - the comparison of indicators of specific employees - helps in making personnel decisions regarding career and rotational changes, when you decide on the formation of a personnel reserve;

- Comparative assessment charts of normative and real competency profiles at the individual and job level of assessment (normative comparison) - allow you to visualize the problem deviation or the competency norm excess;

- Comparative evaluation charts of competency-based model indicators of regional government body units (structural comparison) - the use of comparative and competitive mechanisms in the development of labor collectives, as the motivating forms of professional potential development among regional employees. In the case of the expert or administrative formation of the normative competency profile of a unit, there is also the option of normative comparison implementation at the structural level - the specified normative profile for the unit is placed in the program database and can be retrieved on demand to create comparative competency diagrams;

- Comparative assessment charts of real competency prototypes of regional government bodies (administrative comparison) - a potentially possible form of assessment, subject to network use of the resource and the creation of interregional and federal portals where competency indicators of regional administrative structures will be posted. As in the previous case, through the development of competency requirements for a regional government body by federal experts, a normative competency profile can be laid in the federal portal, with which it becomes possible to compare regions normatively with respect to the competence potential of their employees.

1. The analytical report on the diagnosis involves the development of a problem profile and the determination of functional competency deficit and surplus, presented in the form of a qualitative, quantitative and prognostic indicator.

- The qualitative indicator of functional competency deficit is a set of deficient competencies, indicating the required level of development and its indicator characteristic. The qualitative indicator of a functional competency surplus includes the set and the description of competencies whose development level exceeds the profile requirements;

- The quantitative indicator of the functional competence deficit is an integral coefficient of the functional load implementation effectiveness among employees and makes it possible to assess its performance. The quantitative surplus indicator makes it possible to obtain the coefficient of professional potential that is not used when you fulfill the functional load and to determine the probability of occurrence of all directions (scenarios) of professional regression pathologies. The analysis of this indicator in conjunction with its high-quality analogue, its correlation with functional requirements, suggest personnel changes and the change of official assignment complexity level;

- The prognostic indicator of deficit and surplus - makes it possible to establish the relation and clearly demonstrates the areas of possible problems and (or) success of the activity and the growth and (or) decline of performance indicators (directions and indicators) of the subject and higher level activity.

The analytical report on all indicators can be done at all levels of regional management competence potential evaluation: individual, job, structural and administrative. For the full implementation of all analytics capabilities at the structural and administrative level, it remains an important technical condition to create and place normative functional competency profiles of the same departments and a single regulatory profile for regional governments in the software base or on the regional, interregional and federal portal.

The results of this sub-unit are the following:

- The list of deficient competencies (mismatch with the functional order) for the individual and structural level. In the case of unit and body regulatory profile development - also for the structural and administrative level;

- The list of surplus competencies (functional order exceeding), with the same conditions of presentation;

- The coefficient of the functional load efficiency (maximum indicator 1), the same conditions of the coefficient calculation at all levels of assessment;

- The coefficient of unimplemented competency potential,   indicators of pathological scenario likelihood for the development of a professional situation (professional regression, stagnation and burnout);

- The list of specific performance indicators of an employee, the main line, unit or body, as well as indirect indicators of the socio-economic development of the region, decreasing as the result of the functional competence deficit;

- The list of specific performance indicators of an employee, the main line, unit or body, as well as indirect indicators of the socio-economic development of the region, increasing the presence of a functional competency surplus.

2. The planning unit includes the functions of strategic orientation (foresight goal-setting) and strategic assessment of the competence potential for regional management. The following subunits are located in this unit:

1) The definition of foresight goals and strategic objectives consists in a qualitative assessment of development prospects, political vectors, strategic priorities, which is transformed into high-quality managerial positions regarding the desired future and specific tasks for their achievement. The tools of the section are the clarifying concept windows, as well as the relevant material of programs, the strategies and the documents for planning policy and the Russian Federation and region development proposed for consideration. Concept windows offer step-by-step instruction for the development strategy determination in respect of regional management personnel, offering the user guiding questions and the options for expert assessments and suggestions on foresight goals and objective modeling. The result of the subunit is a formulated strategic landmark and strategic objectives in key areas of regional development.

The potential of the program allows you to accumulate the results of work on this subunit in the database and carry out the comparative and integrating function of the resource:

- the comparative function of the subunit is implemented by comparing two or more variants of the strategic vision of the region foresight scenario;

- the integrating function is the combining of the selected intelligent products in the database and their provision to the user as a single heuristic result of experts.

The level assessment is presented in this subunit as the possibility of strategic modeling of level tasks, with a consistent decrease of the hierarchical status: regional level - administrative level - structural level - job level - individual level. Moreover, the variability of goal hierarchy development allows the use of different procedural approaches:

- conceptual approach - a generalized version is possible, in which one basic level (for example, regional) is developed, which averages the requirements, but sets the boundaries of strategic and personnel guidelines for all levels.

- centralized approach - the entire hierarchy can be determined by one expert or a group of experts at the same time;

- decentralized approach - the entire hierarchy can be determined by one expert or a group of experts at the same time. This approach can be implemented in two ways:

1) direct planning of the strategy - expert opinions can be used that are reference for assessment levels - a federal expert can formulate and post general strategic guidelines for the federation (federal level) on the federal portal; the heads of regional representations form the foresight strategies for a governing body (administrative level); the heads of structural divisions - the strategic guidelines of departments (structural level); job elites - the strategies for the job line development (job level); employees formulate personal professional strategies (individual level). Such an approach requires the consistent filling of all hierarchies, with the orientation to the previous heuristic;

2) top-down strategy planning - a federal expert can formulate and post general strategic guidelines for the federation and regions on the federal portal (federal and administrative level); the heads of regional offices formulate foresight

strategies for departments (structural level); the heads of structural divisions - the strategic guidelines for positions and personnel (job and individual level); official elites - the strategies for the development of specific officials (individual level).

1) The development of a prospective competence profile - the profile is developed on the basis of an expert evaluation of the previous goal-setting and involves a consistent correlation of the selected guidelines for the development of the region with the competencies of the prototype. The result of the first stage is a promising competency model of a foresight expert. The second stage of the section is the definition of requirements for model components, which allows you to develop the competency profile of a promising expert (the expert of the future, foresight expert), whose presence is the prerequisite for promising area of strategic planning achievement. Such a result of the subunit will be obtained in the case of the main regional strategy development (conceptual planning) for the previous actions of the expert. In three other cases (centralized and decentralized approaches to planning), the result is a set of hierarchically arranged target profiles, each of which represents a personnel benchmark for the respective regional management services.

2) The assessment of the compliance of posts with a specific long-term profile of competencies, involves the diagnosis of individual, official, structural and administrative compliance with prospective competence potential. It can be carried out both by individual diagnostic methods (accurate assessment), and by expert determination of the necessary competence availability in groups or in the management body as a whole. The diagnostic procedures result of data monitoring, as well as comparative statistics similar by positions to the diagnostic sub-unit in the evaluation unit.

1) The analysis of the prospects for strategic goals and objective achievement on the basis of the existing prospective competence potential allows us to assess the likelihood of prospect implementation and determine the zone of prospective competency deficit or surplus. Consideration of this position from the point of view of specific competency-based characteristics allows for personnel planning and the launch of a mechanism for personnel potential reproduction in accordance with long-term requirements. These opportunities for promising action are especially relevant in the area of regional and federal government, and allow you to anticipate the equipping of administrative tasks and goals with appropriate professional support.

During the analysis, the function of strategic landmark planning correction (returning to the first planning sub-unit) can be implemented, which is possible in two directions:

1) The decrease of requirement level for the competency indicator, due to the groundlessness of the prospective request;

2) The increase of requirement level for the competency indicator, due to the presence of a surplus of competencies, or the development of new strategic guidelines that expand the horizon of long-term planning, due to the presence of unused, promisingly important professional potential.

The results of this sub-unit are the following ones:

- the list of deficient competencies (inconsistency with the prospective order) for an individual and structural level. In the case of the regulatory profile development of the unit and body - also for the structural and administrative level;

- the list of surplus competencies (a prospective order exceeding), with the same conditions for submission;

- the list of problematic strategic tasks that are not equipped with competence support.

3. The control unit (correction). This unit includes four subunits.

1. The correction of functional competency deficit involves the consideration and the selection of educational correction programs. The programs are a downloadable unit and are updated according to the current offer of the educational services market of the regional DPO and interregional and federal centers. In addition to this function, the subunit provides for applying to the reserve of the Federal Portal, where reservists with the required competencies can be selected. If there is a lack of competencies within the framework of the official, structural and administrative level, a competency request may be generated in the Federal Portal (for one or several competencies) - in this case, the selection of a reservist is carried out by competency surplus analysis. The result of the subunit is the following:

1) the educational matrix, the development of which can be carried out at all levels of analysis (individual, job, structural, administrative), which is the report on the necessary educational programs that correct the existing

functional competence deficit in terms of replenishment. Such a matrix plays the role of an educational order for educational service providers of a corporation, a region, and the Federation;

2) a functional competency order, consisting of deficient competencies, sent to the Federal Portal of Competency Management, and which is the guide during managerial decision making, personnel policy correction and rotation program development for regional personnel services.

2. The management of the functional competency surplus consists in the qualitative analysis of the surplus characteristics and the formulation of promising tasks that can be placed in the regional database and removed from there when you implement the function of long-term planning - and is offered to the manager as the options for strategic guidelines. The bearer of the competent competency surplus can be placed in the regional and federal personnel reserve base as the holder of specific surplus competency characteristics and at the same time the owner of a unique competency profile. The room of the reservist is accompanied by the additional processing of his personal and address (official) data (resume), in order to be able to extract complete information from the database and consider it during management decision making. The result of this sub-unit is the following one:

- the list of tasks for strategic planning;

- the candidates for a personnel federal and regional reserve development.

1. The correction of prospective competency deficit involves, in addition to educational correction, the connection to the databases of specialists meeting the competency requirements of the territory, which form the personnel reserve of the Federation and regions, and review their competency profiles against the background of perspective order profiles. Correction based on such a rotation and selection of personnel allows not only to receive timely human resources, but also to make a promising order for the Federal Portal to form an appropriate personnel reserve. As part of the work in this subunit, a request can be made to the Federal Portal, where the required promising profile or the scarcest competencies is loaded into the order area. In response to the request, the list of personnel service respondents capable of implementing the strategic guidelines of a specific Federation subject is formed in the database of the Federal Portal. The result of the work is a promising competency order of the subject and the list of reservists.

The management of a prospective competency surplus involves the actions similar to the actions of the functional surplus management unit, but at the same time, it makes it possible to review the level and the range of strategic tasks in accordance with the increased human resources of the regional government

5. Conclusions

1. As a result of the study, they substantiated and offered the solution to the problem of the competency-building potential aggregation of regional management — individual, official, structural, administrative through cumulative technology and computer assessment — has been substantiated and proposed.

2. The description of the cumulative technology is provided, consisting of assessment, planning and management units (correction).

3. The assessment unit includes subunits: the choice of competency profile; diagnostics of development and implementation level of the competencies recorded in the job profile; the analytical report on the results of the diagnosis, which involves the development of a problem profile and the determination of functional competency deficit and surplus, presented in the form of qualitative, quantitative and prognostic indicators.

4. The planning unit, performing the functions of strategic orientation and strategic assessment of competence potential, includes the following subunits: determination of foresight goals and strategic objectives; building a promising competency profile; assessment of the compliance of positions with a promising competency profile; analysis of the prospects for strategic goals and objective achievement on the basis of the existing prospective competence potential, which allows to assess the likelihood of prospect implementation and determine the zone of prospective competence deficit or surplus.

5. The control (correction) unit provides for the correction of functional competence deficit, the management of functional competency surplus, the correction of prospective competency deficit, and the management of prospective competency surplus.

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Personal orientation of educational activities as a basis for the development of professional orientation of students of pedagogical specialties

Orientación personal de actividades educativas como base para el desarrollo de la orientación profesional de estudiantes de especialidades pedagógicas

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ABSTRACT

This article is devoted to the development of professional orientation of students of pedagogical specialties. Based on the works of I.S. Yakimanskoy, E.V. Bondarevskaya, A.A. Melik-Pashayeva, I.N. Semenova, V.K. Zaretsky and other researchers, the authors clarified the principles of personal orientation of educational activities that contribute to the development of the professional orientation of students of pedagogical specialties at the university. The article also presents the author's complex of pedagogical conditions ensuring the development of the professional orientation of students of pedagogical specialties in a higher educational institution. The complex includes the following components: identification and formation of value orientations of students of pedagogical specialties; creating in higher education educational environment that promotes self-realization of the individual; accounting of students' subject experience; development of pedagogical abilities of future teachers; development of professional skills of university teachers as the basis for the formation of professional orientation of students of pedagogical specialties. The article also describes the results of experimental work, which confirmed the effectiveness of the developed complex of pedagogical conditions that ensure the development of the professional orientation of students of pedagogical specialties in a higher educational institution on the basis of personal orientation of educational activities.

Keywords: professional orientation, students; pedagogical specialties, educational activities; subject experience

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RESUMEN

Este artículo está dedicado al desarrollo de la orientación profesional de estudiantes de especialidades pedagógicas. Basado en los trabajos de I.S. Yakimanskoy, E.V. Bondarevskaya, A.A. Melik-Pashayeva, I.N. Semenova, V.K. Zaretsky y otros investigadores, los autores aclararon los principios de orientación personal de las actividades educativas que contribuyen al desarrollo de la orientación profesional de los estudiantes de especialidades pedagógicas en la universidad. El artículo también presenta el complejo de condiciones pedagógicas del autor que garantizan el desarrollo de la orientación profesional de los estudiantes de especialidades pedagógicas en una institución de educación superior. El complejo incluye los siguientes componentes: identificación y formación de orientaciones de valor de estudiantes de especialidades pedagógicas; creando en la educación superior un ambiente educativo que promueva la autorrealización del individuo; contabilidad de la experiencia de los alumnos en las materias; desarrollo de habilidades pedagógicas de futuros maestros; desarrollo de habilidades profesionales de docentes universitarios como base para la formación de orientación profesional de estudiantes de especialidades pedagógicas. El artículo también describe los resultados del trabajo experimental, que confirmó la efectividad del complejo desarrollado de condiciones pedagógicas que aseguran el desarrollo de la orientación profesional de los estudiantes de especialidades pedagógicas en una institución de educación superior sobre la base de la orientación personal de las actividades educativas.

Palabras clave: orientación profesional, estudiantes; especialidades pedagógicas, actividades educativas; experiencia de la asignatura.

1. INTRODUCTION

1.1 Introduction to the problem

Consideration of the problems of development of professional orientation of students of pedagogical specialties is determined by the requirements of society to the future teacher, who must be fully developed, creative person, capable of learning and applying them in practice. However, the success of the formation of the pedagogical orientation of students largely depends on the orientation of the educational process on the development of the personality of the students themselves - their motives, goals, abilities and aptitudes (Bogomolov, 2009; Iravani, et al, (2015).

In our opinion, it is the personal orientation of students' learning activities that is the basis for the further development of their activity characteristics, personal and professional qualities (Polyakova & Lushkina, 2011: Sarantsev, 2016: Saharchuk, 2004).

1.2 The urgency of the problem

The urgency of the problem of development of pedagogical orientation of students of pedagogical specialties on the basis of personal orientation of educational activity is determined by the following factors:

• modernization of higher education due to the changing paradigm of development of higher education and the need to improve the quality of education;

• the entry of modern native institutions of higher education into the world educational space within the framework of the Bologna Agreement;

• the introduction of a two-tier system of training, involving the development of new requirements for the subject-scientific, psychological, educational, scientific-methodological and information-technological training of higher school teachers;

• increasing the role of psychological and pedagogical training of future teachers due to changes in the requirements for their professional qualities, allowing to ensure competitiveness in the labor market and, consequently, the effectiveness of future professional activities (Serikov, 1994: Strelkov, 2007: Titova, 2018).

1.3. Study of the problem

Considering the features of the development of professional orientation in students of pedagogical specialties, one can see that the study of the psychological and pedagogical foundations of pedagogical work has been conducted and is

being conducted by many researchers (Khayrullov, 2005).

The ideas of the necessity of orientation of the educational process on the personality characteristics of students were voiced in the works of Ya.A. Kamensky, J.-J. Rousseau, later - J. Korchak, E. Bern, C. Rogers and other scientists. In native pedagogy, they were vividly expressed in the "pedagogy of non-violence" by L.N. Tolstoy, in the works of N.P. Pirogov, K.D. Ushinsky, later - S.T. Shatsky, V.A. Sukhomlinsky, A.S. Makarenko. At present, the concepts of personality-oriented education of students are devoted to the work of V.V. Serikova, E.V. Bondarevskaya, V.A. Belikova, G.K. Selevko, I.S. Yakimansky, V.Ya. Laudis. Also in Russian pedagogy, the types of pedagogical abilities and the issues of training future teachers (F.N. Gonobolin, N.V. Kuzmina, V.D. Shadrikov) have been studied in detail, the requirements for the teacher's personality (V. A. Slastenin, A. I. Shcherbakov, and others.), Analyzed ways to solve pedagogical problems (Yu.N. Kulyutkin, G.S. Sukhobskaya, etc.) and the basics of pedagogical communication (A.A. Bodalev, A.A. Leontiev, R.Kh. Shakurov and others). The problems of the development of professional (including pedagogical) competencies are the work of both foreign researchers (J. Raven, S. Taylor, L. Pilo, D. Torrington, L. Hall, S. Taylor), and native authors (I.F. Isaev, I.A. Mishchenko, E.N. Shiyanov, S.G. Molchanov, A.V. Khutorskoy, M.A. Choshanov).

However, our analysis of psychological and pedagogical literature showed that the level of elaboration of the problem of the development of the professional orientation of students of pedagogical specialties on the basis of taking into account their personal characteristics in the educational process is insufficient both theoretically and practically. This circumstance determined the choice of the topic of this work (Tsvyk, 2003: Ardashkin et al, 2015; 2018).

1.4 Hypothesis.

The effectiveness of the development of the professional orientation of students of pedagogical specialties is based on the personal orientation of their learning activities in the implementation of the following complex of pedagogical conditions:

• Identification and formation of value orientations of students of pedagogical specialties in order to assist them in choosing a system of life values and professional determination.

• Creation of an educational environment in higher education based on the inclusion of students in various types of research and creative activities that promote self-realization of the individual.

• Accounting for students' subjective experience through the creation of an educational space at the university, in which personal self-determination of students of pedagogical specialties is carried out.

• Development of pedagogical abilities of students of pedagogical specialties on the basis of a focused study of the degree of their formation and application in the educational process of a set of exercises aimed at their improvement

• Development of professional skills of high school teachers as the basis for the formation of the professional orientation of students of pedagogical specialties (Arokiasamy et al, 2013).

2. METHODS

The development of the idea of developing the professional orientation of students of pedagogical specialties on the basis of the personal orientation of their learning activities was based on the principles of systems, activity, humanization, individualization, feedback, and integration at the level of interdisciplinary communication, reflexive activity and problem. The work is based on the following methods: theoretical - analysis, synthesis, systematization, synthesis, modeling; and empirical - conversation, observation, quantitative and qualitative analysis of the research results, testing (Bakholskaya et al, 2016: Clark, 1997; Zhampeisov, et al, (2018).

3. RESULTS AND DISCUSSION

Based on the fact that the orientation of the individual is a combination of stable motives and is characterized by the interests, beliefs and worldview of the person as a whole, the authors consider the professional orientation of the individual as internal the predisposition of the subject to a specific professional activity, manifested in motivation, abilities and value orientations. The professional orientation of the teacher expresses a positive attitude towards his profession, a striving for self-realization and satisfaction of his professional ambitions and aspirations, which ultimately contributes to the effectiveness of pedagogical activity.

Focusing on the works of N.F. Gonobolina, N.V. Kuzmina, V.A. Slastenin, P.A. Prosetsky, V.A. Krutetsky, T. V. Yermolayeva and other authors, we came to the conclusion that the professional orientation of the personality of future teachers develops already in the process of studying at the university, and at the same time has a significant impact on students' mastery of professional knowledge and skills.

Based on the concept of student-centered learning, formulated in the works of I.S. Yakimanskaya (calling to base the educational process on the basis of the subjective experience of students), I.N. Semenova and V.K. Zaretsky (considering personal reflection as the basis for the inclusion of the subject of education in cognitive activity), E.V. Bondarevskaya (who sees the goal of student-centered learning in supporting the learner's individuality, in developing their reflection and desire for self-improvement), A.A. Melik-Pashayev (who proposes to subordinate the content of education to the development of the student's personality in order to develop logical thinking, perception and communication skills) and other authors, we clarified the principles of personal orientation of educational activities that contribute to the development of the professional orientation of students of pedagogical specialties at the university:

1. Creation of favorable conditions at the university for the realization of the freedom and individual rights of students. This principle can be implemented through the openness of the university in relation to a variety of scientific, social and industrial relations in the region, country and sphere of international cooperation; through the expansion of the conditions of interaction of subjects of learning in informal communication, art, sports, etc.

2. Awareness and acceptance by all subjects of the educational process in the university of a hierarchical system of values in the development of the future teacher. It should be noted that recognizing the development of students' personality as the main goal of studying in an institution of higher education, it should not be opposed to the assimilation of knowledge and skills, it would be more expedient to focus on the development of their professionally important qualities. personal and pedagogical abilities.

3. The principle of ensuring continuity in the development of personality. In accordance with it, the personality characteristics of students should be taken into account, starting with the selection of applicants and ending with their employment.

4. Variability in the implementation of personality-oriented higher education. The assimilation of new knowledge and skills should include the variation and free choice of such educational parameters as the level of difficulty of the tasks to be solved, or the choice between their collective or individual implementation.

5. The development of self-development of the personality of students, which should be manifested in the need-motivational sphere and the ability to be creative. Considering that the property of self-development is reflection, one should take into account that it is the student age that is the most sensitive to the development of reflexive abilities.

6. Creating conditions for psychological support for the development of students' personality. This principle can be implemented through: determining the psychological readiness of students to meet the requirements at various stages of study at the university and drawing up individual recommendations; identification of symptoms of psychological overload for the purpose of their prevention; creating a favorable psychological climate in academic groups.

Thus, in the center of the process of development of professional orientation of students of pedagogical specialties is the personality of the student himself with her individual psychological characteristics, and it is the personal orientation of educational activities that creates the best conditions for self-development and personal growth of future teachers.

Within the framework of the problem under study, we developed a set of pedagogical conditions that ensure the development of the professional orientation of students of pedagogical specialties in a higher educational institution.

The complex of pedagogical conditions includes the following components:

1. Identification and formation of value orientations of students of pedagogical specialties in order to assist them in choosing a system of life values and professional determination.

2. Creation of an educational environment in higher education based on the inclusion of students in various types of research and creative activities that contribute to the self-realization of the individual. The educating environment in this case allows you to create a free space for the interaction of the student with significant others

(students, teachers), where he makes a free choice of many responsible decisions. To do this, you should take care that both academic and scientific activities carry a situation of success as a set of conditions that are realized and experienced by the student as successful. It is precisely on the basis of this that significant changes occur in the students' personality: their level of self-esteem, self-esteem, self-esteem, and positive attitudes towards the surrounding reality increase.

3. Accounting for students' subjective experience through the creation of an educational space at the university, in which personal self-determination of students of pedagogical specialties is carried out. By subject experience, we understand the already existing experience of the individual, acquired in the course of communication, activity, training, and decision-making. It should be borne in mind that students already have certain attitudes towards teaching activities that have developed in the course of their schooling. Thus, our survey of bachelor students of the first and second courses of pedagogical specialties showed that almost all of them witnessed the unfair attitude of teachers towards students, and 67% noted the prevalence of an authoritarian style of communication among school teachers. Such facilities may affect the professional development of students, therefore, in our opinion, they need to be monitored and adjusted.

4. Development of pedagogical abilities of students (communicative, perceptual, organizational, suggestive, creative, reflexive, etc.) based on a focused study of the degree of their formation and use in the educational process of special exercises aimed at their improvement.

5. Development of professional skills of university teachers as the basis for the formation of professional orientation of students of pedagogical specialties. The process of development of the professional orientation of students of pedagogical specialties can be productive only if it is prepared, supported and directed by pedagogical influence that is adequate to its nature and inner essence. Consequently, the need for personal and professional improvement of the teacher serves as a condition and means of student development. In the integral pedagogical process, the teacher creates and implements his own pedagogical concept, the result of which is expressed in a qualitative change in the personality of the student and the teacher himself.

According to modern psychological and pedagogical research in particular, the development of students and teachers in the educational process can be carried out in the following ways:

- the usage of innovative educational technologies (interactive, reflexive, health-saving, design, etc.) that treat the student as an equal partner of the educational process that realizes its potential;

- the change in the nature of pedagogical communication in the direction of its openness and empathy;

- the carrying out purposeful preventive work aimed at preventing and, if necessary, overcoming the formation of professional deformations of teachers, such as: pedagogical dogmatism, authoritarianism, conservatism, social hypocrisy, emotional indifference.

The inclusion of this pedagogical condition is due to the fact that students who have passed their professional development within the framework of an authentic culture of pedagogical relations in the "teacher-student" system, in our opinion, will be able to transfer them to their future pedagogical activities in the "teacher-student" system, practice, implementing the main provisions of the personality-oriented approach.

The effectiveness of the developed complex of pedagogical conditions that ensure the development of the professional orientation of students in pedagogical based on the personal orientation of educational activities, was confirmed as a result of experimental work carried out during 2011-2018. The experiment was attended by 250 students of 1-4 courses of pedagogical specialties (Weist, 2001).

4. CONCLUSIONS

In the course of the conducted experimental work we obtained the following results:

1. Specified the specificity of value orientations of students of pedagogical specialties in order to assist them in choosing a system of life values and professional determination. In this area, we have summed up the results of a 5-year study of the motives for choosing a specialty and ideas about the future profession among first-year students. The results of the study showed that the reasons for the choice of a pedagogical specialty among students are (in order of decreasing significance): interest in a specific area of knowledge (chemistry, philology, psychology, history, geography, etc.); love for children and desire to work as a teacher; a shortage of subject teachers in the city and the

possibility to choose further from a large number of vacancies; failure to enter another specialty or the difficulty of studying in other faculties; a positive example of adults (parents or school teachers) who wanted to follow.

2. The ideas of creating an educative environment based on the inclusion of students in various types of research and creative activities that contribute to the self-realization of the individual are systematized and put into practice. The result was an increase in the number of students participating in competitions in pedagogy and psychology in cathedral, university and All-Russian conferences and scientific competitions.

3. The system of development of pedagogical abilities of students was tested and introduced into the educational process. The system is a purposeful work aimed at studying the degree of development of pedagogical abilities of students through the use in the educational process of test techniques that investigate the degree of development of such abilities as: communicative, reflective, organizational, suggestive, perceptual and creative. The research was accompanied by the inclusion of special tasks and exercises designed to develop one or another type of abilities into the content of the studies. Let us give an example of the results obtained: the students' communicative abilities improved (the coefficient of efficiency was 1.31); indicators of development of empathic qualities of students (efficiency ratio was 1.18), their creative abilities (in terms of thinking fluency, efficiency ratio was 1.31; in terms of flexibility of thinking, efficiency ratio was 1.20; in originality of thinking, efficiency ratio was 1.17) etc.

4. Systematic native and foreign experience in the development of professional skills of teachers of higher education in general, and to overcome the formation of professional deformation of the personality of teachers, in particular. Theoretical and practical results of the research are introduced into the content of educational material in such disciplines as: "Introduction to pedagogical activity", "Pedagogy", "Pedagogical conflictology" among bachelor students; "Andragogy as a scientific basis for adult education", "Theory and methods of professional self-education of the individual", "Pedagogical excellence" among undergraduate students, as well as refresher courses for teachers of the university "Curator School" and "Pedagogy and Psychology of Higher Education."

Generally, the results of the use of the developed complex of pedagogical conditions for the development of the professional orientation of students of pedagogical specialties were monitored during the passage of students of pedagogical practices.

The study showed that students with whom work was carried out to develop a professional orientation made fewer mistakes in building subject-subject relationships with students, better established contact with the class, more adhered to humanistic principles in communicating with students. All of the above leads to the following conclusion: the development of professional orientation of students of pedagogical specialties will be effective if the educational practice of students is based on organization personal orientation of their educational activity, which confirms put forward Hypothesis.

Conflict of interest

The authors acknowledge that the data presented in this work does not contain any conflict of interest.

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The Learning of English Literature in Malaysia: A Review of Literature

El aprendizaje de la literatura inglesa en Malasia: una revisión de la literatura

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ABSTRACT

Literature has been a core component in English education. By learning literature, learners can learn English without having to understand the grammatical rules directly. With literature, learners can learn both the language and the other elements of it such as culture, moral values, life lessons and relatable situations. Such is the importance of literature; the Ministry of Education Malaysia has integrated it as part of the English curriculum to help increase the level of English proficiency among Malaysian students. However, this has created divisive opinions from various parties due to many challenges and issues faced by teachers and students. This paper aims to investigate the current issues and challenges faced by secondary school teachers and students in learning and teaching English literature. Through this paper, the researchers have highlighted the brief history of the introduction of literature in the English education and how the role of literature has developed throughout the years. Next, a closer look at the challenges and issues faced by teachers and students from previous studies and research have been highlighted for future researchers to take into consideration. By looking at previous studies, it has been discovered that motivation and attitudes towards learning English literature could be major factors that future researchers can further look into.

Keywords: English Literature, Issue, Challenges, Learning English, Attitude, Motivation.

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RESUMEN

La literatura ha sido un componente central en la educación del inglés. Al aprender literatura, los alumnos pueden aprender inglés sin tener que entender las reglas gramaticales directamente. Con la literatura, los alumnos pueden aprender tanto el idioma como otros elementos del mismo, como la cultura, los valores morales, las lecciones de vida y las situaciones relacionadas. Tal es la importancia de la literatura; El Ministerio de Educación de Malasia lo ha integrado como parte del plan de estudios de inglés para ayudar a aumentar el nivel de dominio del inglés entre los estudiantes de Malasia. Sin embargo, esto ha creado opiniones divisivas de varias partes debido a muchos desafíos y problemas que enfrentan los maestros y estudiantes. Este documento tiene como objetivo investigar los problemas y desafíos actuales que enfrentan los maestros y estudiantes de secundaria en el aprendizaje y la enseñanza de la literatura inglesa. A través de este documento, los investigadores han destacado la breve historia de la introducción de la literatura en la educación en inglés y cómo se ha desarrollado el papel de la literatura a lo largo de los años. A continuación, se destacó una mirada más cercana a los desafíos y problemas que enfrentan los maestros y estudiantes de estudios e investigaciones anteriores para que los futuros investigadores los tengan en cuenta. Al observar estudios anteriores, se descubrió que la motivación y las actitudes hacia el aprendizaje de la literatura inglesa podrían ser factores importantes que los futuros investigadores pueden investigar más a fondo.

Palabras clave: Literatura inglesa, Problemas, Desafíos, Aprender inglés, Actitud, Motivación.

1. INTRODUCTION

When it comes to learning English, literature has always been a major contributor to its process. There can be no learning English without learning literature. In other words, English and literature are two inseparable components that relies on one another. All over the world, English learners are introduced to literature in their English classes. English educators would incorporate literature as part of their component in their curriculum and syllabus. Over the years, literature has evolved into becoming a mainstay in English education (Sivapalan & Subramaniam, 2008). It is believed that learning literature can bring out the enjoyment in learning English especially for English as Second Language (ESL) learners (Arafah, 2018).

According to Keshavarzi (2012), through literature, English educators and teachers have been attracting ESL learners to learn the language beyond the restrictions of its grammatical rules and structures due to its relevance and purposeful learning. Short stories, poems, and novels are some of the literary texts used in the classrooms to familiarize ESL learners in using the language diversely. By learning poems, ESL learners are able to see the beauty of the English language and how it can be used in different ways while staying true to its grammatical rules. Learning literature opens up another dimension in English learning and is seen as one of the most effective methods to teach English without actually teaching English.

However, there have been debates and contradicting evidences in which learning literature might actually hinder the purpose of English teaching. It is also said that due to literature, ESL learners tend to become more disinterested in learning the language because they lack the required understanding to fully enjoy what is being taught. In Malaysia, teachers have been finding many ways to teach literature while getting the students to be interested without losing the purpose of English teaching and maintaining the essence of the literary texts (Muhammed, 2013). Nevertheless, this proves to be difficult due to various factors (Thamrini & Syed, 2018). Teachers themselves have been finding it difficult to teach literature since they themselves are not adequate enough to teach. A study conducted by Aziz and Nasharudin (2010) revealed that English teachers are facing difficulties in finding the right approach to teach literature to the students (Murugan & Yunus, 2019). Thus, the aim of this conceptual paper is to investigate the current issues and challenges faced by secondary school teachers and students in learning and teaching English Literature in Malaysia.

2. ENGLISH LITERATURE IN MALAYSIA

2.1 Brief History of Integration

As early as in the 1970s, literature has been introduced and used in schools as part of English Language Reading Programmes and it was officially included in the Malaysian English Learning syllabus in 2000 by the Ministry of Education (Ganakumaran, Shahizah & Koo, 2003). The integration of literature was for secondary school students and not more than 5 years later, the Ministry opted to introduce literature for Standard 4 until Standard 6. The Ministry of Education has realized the importance of literature in English education thus implemented this component in the English syllabus. It is hoped that the inclusion of literature in the English syllabus could benefit students in three aspects which are language development, cultural enrichment, and personal growth (Sivapalan & Subramaniam, 2008). It is believed that through literature, students can learn new cultures and discover the aesthetic values of the English language. Since literature involves real life situations with people and everyday activities, the students could relate this with their own lives and thus making them more interested in literature and subconsciously interested in learning English as a whole.

As the years progressed, the role of English literature has changed from being the central cog of the English syllabus to almost being fossilized and re-invented as the major powerhouse it once was (Subramaniam, 2007). The Ministry of Education has allocated a single period in the school's timetable for the subject of English literature, where the students are expected to learn novels, short story, dramas and poems. Suliman & Melor (2014) stated that the inclusion of a single period English literature would enable students to broaden and widen their views on other cultures and countries. Such is the importance of literature, a plan to make English literature as a compulsory subject in the secondary schools is included in the Malaysian Education Blueprint 2013 – 2025 and is expected to be executed in the second wave of the blueprint (2013).

2.2 Issues and Challenges in Teaching and Learning English Literature

Although the inclusion of English literature in the English syllabus has been around for more than 10 years, there expected outcomes are not within the intended target as the students' achievement in literature are below that what was expected of them especially in the critical thinking area of the texts (Othman et al., 2015). Past studies have shown findings that highlighted the issues and challenges faced by both teachers and students in English literature. In a study conducted by Mustakim et al. (2014), many teachers that carry a negative opinion on the integration of literature tend to conduct the lesson in a traditional "chalk and talk" method and would "spoon-fed" their students rather than coming up with creative ways to teach the subject. Teachers also have challenges as they need to explain their lesson wisely to ensure that the lessons are not only enjoyable but also meaningful (Rahamat et al., 2017; Velayutham & Yunus, 2019). These teachers would resort to become the dominant figure in the classroom while the students are simply taking everything that these teachers provide them including the answers (Ramlan, 2015). Thus, this create a repetitious environment in the classroom that most of the students find boring and eventually become highly uninterested in the lesson. This is supported by another study conducted by Ghazali, Setia, Muthusamy and Jusoff (2009) whereby the result of the study showed that the teachers' strategies of teaching literature were considered as "boring" and "dull" by the students.

Students finding literature as boring and dull may be due to how the teachers conduct the lesson. Nonetheless, some of teachers themselves are unsure of how to effectively teach literature to their students (Aziz & Nasharudin, 2010). Due to this, any means of getting the students interested in learning literature might derailed. The students are not only uninterested in the lesson, they will also fail to appreciate literature as a whole. It is important to note that teachers' attitudes towards teaching literature plays an influential factor for the students and the atmosphere of the classroom as it can affect the students' motivation and interest towards the lesson (Thamrini & Syed, 2018). Students can sense if their teachers are not into the lesson as they are and this will create a negative atmosphere in the classroom.

When a teacher is not interested in teaching the lesson, the students will be affected and they will notice it right away through the teachers' effort in creating an exciting and joyful activities in their lessons. Students need a teacher that is capable of conducting entertaining and interesting activities instead of "chalk and talk" (Othman et al., 2015), which is the core of literature itself. Another reason for teachers to become disinterested in teaching literature is due to the pressure and expectation of students' performance in examinations. This could lead to teachers abandoning their creative instincts and skills and opted for exam-oriented methods in order to prepare the students for their examinations rather than truly dissecting the literary texts as it should (Choo, Abdullah & Nawi, 2017). Some of the teachers might have numerous interesting and fun activities planned but due to the pressure from the school, they might succumb to the old traditional ways of teaching.

One of the other challenges that ESL teachers and students face is the selection of the literary texts that are being used in schools. According to Irene (2014), it can be very difficult for the teachers to teach the literary texts when the language level of the texts is higher that the students' English level. Such difficulties require the teachers to explain to the students word by word and this is time-consuming for the teachers. When the lesson focuses too much on the grammatical of the literary texts, the purpose of learning literature is then lost. The students will find the literary texts too difficult to comprehend and they will become disinterested. When they are uninterested towards the subject, their attitudes and motivation will become negative. Othman et al (2015) added that the success of the students' learning literature is determined by the students' attitudes towards literature. When the texts become too difficult for them to understand, they will lose their interest and their attitudes towards learning literature will also change.

Wan Kamariah (2008) stated that students' perceptions towards poems are usually negative due to its complicated usage of the language and its figurative meanings. This shows that the students cannot relate with the content of the literary texts because the selection of texts might be coming from outside instead of local. By using international literary texts, teachers will have a challenging time to try and relate the content to the students because it could be something that the students have never experienced before. For example, if the poem talks about snowy days, the students could not relate because they might have never seen snow in real life. When this happens, the students will become disengage from the lesson because they cannot make their own examples of the situation. These are the challenges that ESL teachers and students face in teaching and learning literature. Although most lessons have been assisted by the usage of technologies, having these challenges will continue to hinder the progress of literature education in Malaysia.

3. CONCLUSION & RECOMMENDATIONS

Teaching English has always been a challenge for any English teachers and educators. Over the years, English teachers and educators have been finding new methods and techniques to ensure the effectiveness of their lesson. The same can be said when it comes to teaching Literature. As literature is seen as a vital cog in English syllabus, it is essential to discover the challenges and issues that teachers and students are facing in order to improve the integration of literature in the English syllabus. Through this paper, the researcher has highlighted the brief history of the introduction of literature in the English education and how the role of literature has developed throughout the years. Next, a closer look at the challenges and issues faced by teachers and students from previous studies and research have been highlighted for future researchers to take into consideration. By looking at previous studies, it has been discovered that motivation and attitudes towards learning English literature could be major factors that future researchers can further look into. Further investigation and research are needed in the future to discover the new challenges and issues faced by English teachers in teaching literature. Due to new teaching methods that are being introduced at a fast pace, feedbacks from the teachers are essential to discover the best and effective methods to teaching literature to the students. In addition, more detailed and in-depth research on the effect of literature on students' attitudes and motivation in learning English should be conducted to see the relation between these factors. For future researches and studies, it is suggested that a quantitative or mix-method research should be conducted to gain accurate data and information on the challenges and issues faced by secondary school teachers and students. This is to ensure that a mass

group of secondary school teachers and students from all over Malaysia can participate to discover the pattern of challenges and issues that they face. The targeted participants should be secondary English school teachers with at least 3 to 5 years of teaching experience in order to relate to the purpose of this study. As for the students, a mixture of lower and upper secondary school students should be sufficient to collect the data needed. Using questionnaires for this is highly recommended as questionnaires can easily cover a large demographical spread sample (Mathers, Fox & Hunn, 2007). A mix-method design can also be used by using interview session with the teachers and using questionnaires for the students.

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Reconfiguraciones de la política, la cultura y el territorio a través de una política pública para la cultura

Control and problematic use of ICT in schoolchildren Reconfigurations of politics, culture and territory through a public policy for culture

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Resumen

Con base en una investigación antropológica iniciada en 2015, el presente artículo enfoca una de las principales políticas públicas culturales de descentralización y acceso a la cultura implementada en Uruguay en los últimos años: Centros MEC. La investigación ha implicado recorrer diversas localidades y la triangulación de observaciones, entrevistas y la revisión de fuentes. Recuperando el punto de vista de los distintos agentes e instituciones involucradas en su desarrollo y funcionamiento, el artículo se propone explorar las relaciones entre política, cultura y territorio e indagar cómo se construye la política cultural desde su engranaje institucional y desde las prácticas concretas que se introducen en los distintos escenarios territoriales. En última instancia, se busca aportar al conocimiento de las configuraciones sociales que se producen a través de la implementación de estas iniciativas de política pública.

Palabras clave: política, cultura, territorio, Centros MEC, Uruguay

Abstract

Based on an anthropological research started in 2015, this article focuses on one of the main public cultural policies of decentralization and access to culture implemented in Uruguay in recent years: Centros MEC. Research has involved crossing different towns and the triangulation of observations, interviews and the revision of sources. Recovering the viewpoint of the different agents and institutions involved in its development and functioning, the article aims to explore the relations between politics, culture and territory and to investigate how the cultural policy is constructed from its institutional mechanism and from the concrete practices that are introduce in the different territorial scenarios. Ultimately, it seeks to contribute to the knowledge of the social configurations that are produced through the implementation of these public policy initiatives.

Keywords: politics, culture, territory, Centros MEC, Uruguay

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Introducción

Las políticas culturales presentan un desafío para los Estados y sus estructuras institucionales y burocráticas. La polisémica noción de cultura hace que su "traducción" a los términos de la política pública sea al mismo tiempo una oportunidad como un problema, pues: ¿Cuáles son los límites de la cultura? ¿Qué expresiones o prácticas pueden ser definidas como "culturales" y cuáles no? ¿Cuándo y cómo están garantizados los "derechos culturales"? ¿De qué forma se conocen y se toman en cuenta las demandas de las personas y qué ocurre cuando estas demandas no se condicen con las posibilidades y el enfoque estatal? Incluso, yendo a un plano más inmediato, ¿cuánto está dispuesto el gobierno de turno a destinar del presupuesto estatal para "la cultura", cuando sus resultados no son mecánica o linealmente medibles, como puede ocurrir en otros rubros? La relación de inmediatez y cercanía que está ocurriendo entre las personas y las dimensiones espacio-temporales en el mundo globalizado, adiciona el desafío de procesos y dinámicas culturales cada vez más veloces y escurridizas pero no por eso menos relevantes en términos de experiencias personales y colectivas. De la diversidad del planeta y sus alrededores se puede tener rápida y literalmente "un pantallazo", y los mercados e industrias juegan un papel clave en ello, direccionando los gustos, las experiencias y sentidos. Pero que estos procesos alcancen escala mundial no significa igualdad de condiciones o posibilidades de conocimiento y acceso; incluso en un país pequeño como Uruguay, la posición social, el capital cultural y el lugar de residencia configuran definitivamente diferencias, pero sobre todo desigualdades, en los consumos culturales (Dominzain et al., 2015).

La redefinición de la cultura en sentido amplio está conectada con múltiples campos, entre ellos el campo político, ya sea a nivel nacional como transnacional. Los proyectos de descentralización política por un lado y el empuje del frente discursivo de los derechos culturales por otro -ambos de fuerte presencia en la región en las últimas décadas-, no son fenómenos tan diferentes y distantes de los debates en torno a la cultura y, de un modo más concreto, a las políticas públicas culturales. Cultura y política conforman un entramado denso, con efectos de realidad en los escenarios locales. De esta manera, la cultura en la que piensa el Estado para elaborar sus políticas culturales se esparce por todas partes y parece estar en constante ampliación, pues se encuentra, sin duda, en constante disputa. En esta línea, y aunque pueda estar de más decirlo, la relación cultura-Estado no solo es un terreno posible de indagación, también es un terreno necesario.

A pesar de su revalorización en los últimos años, la noción de política cultural cuenta con un trayecto extenso (García Canclini, 1987; Nivón, 2014). En la actualidad se conecta con significantes quizás no tan nuevos, pero que pujan hoy con más fuerza, como los de descentralización y democratización. En Uruguay un cambio de sentido en esta línea se impulsó a partir de 2005 con el primer gobierno nacional de izquierda; desde entonces se crearon nuevas direcciones ministeriales vinculadas a la temática y comenzaron a implementarse un conjunto de políticas públicas con una impronta democratizadora de la cultura[1]. Es importante mencionar que durante este transcurso también se puso en marcha un proyecto de descentralización de la estructura de gobierno del país: al nivel nacional y departamental se adicionó un tercer nivel, llamado municipal. En 2009 se sancionó la Ley de Descentralización Política y Participación Ciudadana y en las elecciones de 2010 y 2015 se crearon 89 y 23 municipios respectivamente (Andrioli et al., 2012; Ferla, González, Silva y Zuasnabar, 2016; Nion y Feo, 2017).[2] Es probable que en las siguientes elecciones continúen activándose municipios, puesto que "aún quedan muchas porciones del país sin municipalizar, principalmente en los departamentos del centro del país" (Nion y Feo, 2017: 7). Lo significativo de este cambio es que acentúa el discurso de descentralización a través de prácticas de redistribución de poder entre nuevas figuras políticas;[3] asimismo, es posible suponer que cambian las percepciones del territorio, el cual se reorganiza a través de nuevas fronteras y lazos políticos.

Este trabajo pretende sumar una contribución a las variadas discusiones que el tema convoca, tomando como objeto de estudio una de las políticas públicas para la cultura más relevantes del Uruguay contemporáneo: "Centros MEC". Su relevancia tiene que ver con la magnitud y alcance territorial que ha alcanzado y con la logística esbozada para su ejecución. Iniciada en 2007 como proyecto, "Centros MEC" pasó a ser rápidamente una Dirección dentro del Ministerio de Educación y Cultura (MEC); consiste en un conjunto de espacios que ofrecen actividades culturales y educativas en localidades de 500 a 5000 habitantes de todo el país.

Me propuse un abordaje etnográfico orientado a comprender y poner en relación, pero incorporando también

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1   El Frente Amplio tuvo su primer período de gobierno en la historia nacional entre 2005 y 2010 gandando también los dos períodos electorales siguientes y llegando así al presente. Esto ha permitido dar continuidad a las políticas culturales implementadas durante el primer gobierno.

2   Existen dos mecanismos a través de los cuales se crean municipios. Uno es el que establece la obligatoriedad de que todas las poblaciones de más de 2000 habitantes se constituyan como tales; el otro es el de creación voluntaria, potestad que tienen los Intendentes con aprobación de las Juntas Departamentales, para lo cual el criterio numérico poblacional es independiente. El intendente también tiene la potestad de proponer la creación de municipios en las capitales departamentales (Nion y Feo, 2017: 7).

3   Lo "nuevo" es la legitimidad constitucional y las potestades y obligaciones que se le otorgan a los municipios presididos por un alcalde o alcaldesa. No obstante, quienes ocupan esos cargos son en muchos casos personas con trayectoria de militancia político-partidaria, lo que los hace reconocidos en las pequeñas localidades.

otras miradas, puesto que el estudio es parte de un grupo interdisciplinario. Entre 2015 y 2017 realicé incursiones etnográficas en seis departamentos –Canelones, Paysandú, Rivera, Salto, Maldonado y Montevideo- visitando en algunos casos las capitales y en otros pequeñas localidades y también he mantenido encuentros con interlocutores de Soriano, Rio Negro. El trabajo de campo ha implicado observación participante, entrevistas y conversaciones informales con actores políticos (por ejemplo Directoras/es de cultura departamentales), técnicas/os de Centros MEC (Coordinadores departamentales, animadoras/es[4]) y destinatarias/os de la política, además del relevamiento de publicaciones, informes y datos producidos por el propio Estado.

Al comenzar a explorar el tema un interrogante cobró relevancia: ¿Desde qué enfoque teórico resultaba pertinente y esclarecedor abordarlo? Sin duda la dimensión territorial y el carácter multisituado de la política aparecían como rasgos ineludibles. Centros MEC llegó a las distintas ciudades y localidades pero el trayecto que siguió en cada una es particular; las características de los escenarios y de las y los trabajadores que le dan cuerpo son variadas, pero también hay un marco común dado por líneas de trabajo generales -por ejemplo el Plan Nacional de Alfabetización Digital o la impronta de contratar talleristas y artistas locales-, el enfoque conceptual de la política definido desde la Dirección y sus mecanismos burocrático/administrativos. Asimismo, haciendo la política encontramos un conjunto de actores e institucionalidades que, con mayor o menor énfasis, forman parte de las articulaciones. Entre ellos pueden aparecer desde las propias infraestructuras y aparatos estatales, hasta asociaciones de artistas, colectivos de vecinos y jóvenes, empresas agroindustriales y cooperativas rurales, entre otros.

Contemplando esta multiplicidad, me planteé conocer cómo funciona el engranaje que produce las prácticas y discursos que son, en términos concretos, la política cultural. Retomé entonces la noción de "mediador" propuesta por Latour (2008), y me apoyé en su teoría del actor-red, entendiendo que permitirá configurar una mirada que hurgue en los intersticios así como comprender el papel que cada uno de estos actores/mediadores tiene.

"Socios" y gestores haciendo un ensamblaje

Para conocer a los modos como se negocian los sentidos y las prácticas es preciso tomar en cuenta quiénes son los actores presentes y cuáles son las características de los contextos locales que hacen posible algún tipo de vínculo entre ellos. En relación a ello, las barreras y las posibilidades de desarrollar trabajo de campo sobre políticas culturales que están dispersas en el territorio es un tema relevante pues de ellas depende nuestro conocimiento de lo que acontece en esos espacios y, por consiguiente, del funcionamiento de la política. Por un lado la variedad de actores involucrados en esta red, donde encontramos desde pobladores rurales y urbanos niños, jóvenes y adultos, funcionarios de distintas instituciones, cargos y figuras políticas de jerarquía diversa, gestores culturales, docentes, artistas y administrativos, entre otros, nos aproxima a una heterogeneidad de discursos y puntos de vista sobre Centros MEC en particular, y sobre el papel de la cultura en general. Los escenarios también son diferentes, desde localidades rurales distantes de las redes de circulación -y, por tanto, con dificultades de acceso-, espacios marcados por dinámicas laborales-productivas, hasta Centros ubicados en entramados urbanos, con mayores facilidades para gestionar recursos y actividades. La heterogeneidad puede ser un rasgo común a los más diversos terrenos de investigación, pero en este caso adquieren una relevancia específica. Me interesa subrayar la existencia de distintas enunciaciones, localizadas en distintos enclaves territoriales[5], que refieren a una misma entidad -Centros MEC- y portan disímiles expresiones de capital cultural, simbólico y político. Cada uno de los actores involucrados vivencia la política cultural desde una posición específica -territorial, política, social, de género, étnica, generacional, laboral, etc.-, en función de la cual producen sus significaciones y discursos. Las críticas u opiniones que producen son completamente válidas en tanto experiencias situadas, pero no son absolutas, sino relacionales.

Por otro lado, acceder a los distintos interlocutores no es igual de posible en todos los casos, sea por las dificultades de llegar a las localidades o –según la posición que se ocupe- por la (des)confianza que alguien "de afuera" puede suscitar. Así, mientras algunas/os interlocutores se mostraron interesados en aportar al estudio e incluso se sintieron reconocidos al ser convocados, otros/as en cambio, pudieron sentirse incómodos, o incluso considerar que "no tienen mucho para decir". En la misma línea, algunos discursos -por ejemplo el de los jerarcas políticos- pueden parecernos excesivamente estereotipados y otros -como el de los pobladores de las pequeñas localidades- demasiado

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4   Animador/a es el nombre que recibe el técnico/a que trabaja a diario en el Centro MEC, recibe a quienes concurren y organiza actividades bajo la supervisión de los coordinadores departamentales. También hay talleristas y docentes.

5   Mi alusión a la diversidad territorial o los múltiples enclaves territoriales que reúne el país, está en consonancia con la noción de "enclaves culturales" de Achugar (2002). En los primeros años del siglo XXI, estudiando los imaginarios y consumos culturales él y su equipo constataron la existencia de "notorias diferencias y heterogeneidades que aparecen con mayor fuerza cuando se pasa de lo nacional a lo departamental y de lo departamental a lo zonal, local o barrial" (Ibíd: 16); esto es significativo en una sociedad que se ha pensado, históricamente, como homogénea. A partir de ahí surgía la necesidad teórico-metodológica de "una lectura que preste particular atención a las peculiaridades y a los localismos (…) [pero sin perder de vista las] grandes coincidencias dentro de la sociedad uruguaya" (Ibíd). Frente al registro de divergencias y heterogeneidades, cabe pensar, decía Achugar, en la existencia de 'enclaves culturales'. Así, proponía entender a los "enclaves" como "'agrupamientos', 'islas' con perfiles específicos que coexisten o existen en escenarios más amplios, supuestamente homogéneos o cohesionados y que establecen o suponen 'tensiones' y/o 'polarizaciones'" (Ibíd).

simples, pero sería un error considerar que existen puntos de vista más válidos que otros. Desde la perspectiva etnográfica, cada narrativa cuenta con un valor propio en tanto es relacional a otras narrativas. Hallar la dimensión crítica en las reflexiones que consideramos simples y lo novedoso en los que creemos repetitivos o acartonados, no solo es pensar a los discursos y actores en su complejidad, también es parte de la reflexividad necesaria para identificar los prejuicios que tenemos sobre los temas y personas con quienes trabajamos. El desafío para quien investiga es comprender estos matices desde la especificidad de su posición.

El diseño de Centros MEC es novedoso pues implica la asociación de tres institucionalidades: la del propio MEC que impulsó la propuesta, los gobiernos locales y ANTEL, la empresa de telecomunicaciones estatal. Cada uno de estos actores son llamados "socios" y su asociación parece lógica, pues persiguiendo el objetivo de descentralizar bienes y servicios culturales, en el diseño de la política el vínculo con los actores locales resultaba no solo necesario, sino ineludible. Por otra parte, desde el comienzo se puso fuerte énfasis en la cultura digital, los talleres de alfabetización digital para adultos fueron una de las actividades principales, así como la disposición de computadoras y acceso a Internet para todo público. Esto hizo necesario gestionar una vía de acceso a medios digitales y a Internet, recursos que son los que aporta ANTEL.

De este modo la política se estructuró en base a una tríada institucional con la Dirección de Centros MEC a la cabeza y es sostenida en territorio por un numeroso conjunto de trabajadoras/es, los mediadores en términos de Latour -o "fusibles" como lo señaló una interlocutora-. Ellos son el nexo entre las y los destinatarios de la política y las instituciones que disponen los recursos para su ejecución. Es su gestión permanente, tejiendo redes que conectan actores e intereses diversos, la que hace posible que los Centros sean espacios con contenidos. Entre ellos están las y los "coordinadores departamentales" -generalmente una dupla, aunque también existe un equipo de tres y otros individuales- contratados por el MEC, que desde las capitales departamentales, pero también desplazándose en territorio, organizan y gestionan las líneas de trabajo de los Centros que agrupa cada departamento. También contratados a través del MEC encontramos las y los docentes de alfabetización digital y talleristas de una variedad de actividades que están en función de la demanda de la población y de la oferta disponible en las localidades o ciudades próximas. Artistas, expositores u otros profesionales son contratados puntualmente para eventos, pero no son parte del plantel estable de funcionarios.

Las características de estos puestos de trabajo no son aspectos menores que hacen al funcionamiento de este engranaje. Tanto los cargos de coordinadores departamentales como los de docentes han sido concursados en distintas instancias y no son cargos políticos ni adquieren calidad de funcionarios públicos. Inicialmente las convocatorias señalaron que se trataba de contratos por 12 meses, mientras que llamados posteriores, cuando ya se había acumulado cierta experiencia y se proyectaba el crecimiento de la política, establecieron una contratación por tres años, pudiendo ser renovados o revocados de acuerdo a la evaluación de su rendimiento. Algunos de los docentes y coordinadores que integran el equipo de trabajo de Centros MEC desde el comienzo, entienden que ya es hora de ser admitidos como funcionarios públicos efectivos; algunos de los argumentos de peso que tienen es que se los mandata como "representantes del MEC en el territorio" -es decir no solo de esta política específicamente, sino del Ministerio todo- y que su nivel de trabajo es ampliamente mayor que el de otros funcionarios. Sobre todo los coordinadores tienen una elevada exigencia al participar de la gestión de los Centros y de otras actividades donde se demanda la presencia del ministerio. No obstante, su reclamo es controversial pues admitirlos como empleados públicos supone un ensanchamiento del Estado y, por consiguiente, del gasto público, aspecto sobre el cual el Frente Amplio y en particular el actual presidente, Tabaré Vázquez, se ha mostrado cauteloso, ordenando "austeridad" a su equipo de gobierno desde el inicio de su mandato.[6] Además, en términos de política partidaria, cada decisión que el gobierno toma tiene un precio, latente en la crítica que la oposición pueda hacer. Así, se marca fuertemente una línea de intervención estatal que articula territorio y cultura, pero sobre una estructura que, al menos desde la perspectiva de los trabajadores, se percibe inestable.

Otros rasgos relevantes de este cuerpo de trabajadores del MEC es que son jóvenes o adultos jóvenes, en general no llegan a tener cuarenta años y, además muchas son mujeres. Del Censo de docentes de 2011 (es decir sin considerar coordinadores) surgía que "el promedio general de edad es de 31,5 años, siendo 19 años el mínimo registrado y 46 el máximo" (Centros Mec, 2011: 3); a su vez, el 70,4% eran mujeres (Ibid). También es notoria la presencia de mujeres en el equipo central. En conjunto, en las secciones de Dirección, Secretaría de Dirección, Alfabetización digital, Evaluación y seguimiento, Comunicación y gestión de proyectos culturales, Ejecución presupuestal y Administración y logística, hay diecisiete mujeres -incluyendo la actual Directora- y siete varones. Es entre las y los coordinadores departamentales donde aparece actualmente una distribución equitativa por sexo, con quince mujeres y quince varones[7].

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6   Se trata del segundo mandato presidencial de Tabaré Vázquez (2015-2020, el primero tuvo lugar entre 2005 y 2010), el tercero de la fuerza política de izquierda Frente Amplio.

7   Tomado   de   https://www.centrosmec.gub.uy/innovaportal/v/653/31/mecweb/equipo-de-centros-

La relevancia de estos aspectos se evidencia cuando las y los propios trabajadores narran sus experiencias de intercambio y negociación con otros actores del territorio, sobre todo los políticos, de donde surge que suelen llamarles "las chiquilinas de Centros MEC" o "los gurises". Por el tipo de trabajo que desarrollan -gestionando, generando redes, realizando actividades- y también debido a que Centros MEC representa una institucionalidad relativamente nueva, en ocasiones ellas/os pueden ser vistos con desconfianza o como competencia (aunque también hay que decir que hay casos en que se destaca el trabajo colaborativo). Incluso cuando no persiguen el cometido de una carrera política, el capital cultural de jóvenes con formación en muchos casos terciaria[8] y el capital que suponen las redes que van generando, hace de las y los coordinadores departamentales nuevas figuras políticas en territorio, que disputan la legitimidad de figuras más tradicionales como las y los militantes político-partidarios de las localidades y los más recientes alcaldes y alcaldesas.

Mención aparte merecen las y los "animadores". Ellas/os son parte de los recursos que aportan las Intendencias o Municipios -además del local y parte del transporte-, aunque eventualmente se los remunere con presupuesto del MEC. Su función es gestionar la apertura y actividades diarias en los Centros de cada localidad, o como el propio nombre lo indica, la de "animarlo". Las percepciones sobre los animadores y las expectativas con respecto a su función son variadas y muestran la perspectiva crítica de los interlocutores, quienes tienen una reflexión activa sobre qué acciones mejorarían la política cultural y cuáles, por el contrario, la perjudican. Son las Intendencias Departamentales y los Municipios quienes deciden qué funcionario/a será el animador/a de cada Centro. De acuerdo a lo comentado por mis interlocutores, las rivalidades políticas o la desconfianza con respecto a la propuesta de Centros MEC, ha conducido a que, en ocasiones, se designe para este cargo a personal no idóneo, o que también es solicitado para otras tareas. No obstante, también hay que decir que en algunos casos se realizaron llamados específicos, ingresando como animadores/as personas que no eran parte del plantel de funcionarios públicos del departamento o las localidades y que tuvieron interés es realizar esta tarea. En estos casos la modalidad de la relación laboral también es el contrato y, paulatinamente, las y los animadores que integran el equipo de Centros MEC desde el inicio comienzan a solicitar legítimamente como sus pares docentes o coordinadores, que se les admita como funcionarios públicos.

Para algunos el animador es la figura clave del Centro pues de él/ella depende que el espacio sea amigable y convoque. Desde su punto de vista, en cambio, hay relativo consenso en que la exigencia que se les coloca no se corresponde con los recursos que les proporcionan. En esta línea, es interesante notar que mientras las y los coordinadores departamentales pueden decidir en qué utilizar el presupuesto, es decir, cuentan con cierta autonomía para desarrollar las líneas de trabajo que entienden pertinentes, las y los animadores son figuras por completo dependientes a la hora de emprender cualquier acción.

Las situaciones mencionadas nos recuerdan la tensión entre reconocimiento y redistribución problematizada por Nancy Fraser (1997) y ameritan indagarse con mayor cuidado. En la misma línea, también parece ser un tema pertinente a discutir una posible reforma del Estado a la luz de los procesos políticos y culturales que se están impulsando.

Mediaciones y procesos culturales

El despliegue y territorialización que ha seguido esta política cultural también es uno de los aspectos más novedosos pero, sobre todo, es inédito en tanto proceso cultural y de producción de redes asociativas entre el Estado y otros actores sociales, políticos y económicos del interior del país. Siguiendo a Latour en su definición de lo social "no como un dominio especial, un reino específico o un tipo de cosa particular, sino como un movimiento muy peculiar de reasociacion y reensamblado" (Latour, 2008: 21), que "es visible sólo por los rastros que deja cuando se está produciendo una nueva asociación entre elementos que en sí mismos no son 'sociales' en ningún sentido" (Ibíd: 23), podemos imaginar esta política como un ensamblaje de elementos humanos y no humanos, móvil y extendido cual red, conformado por discursos, prácticas, infraestructuras, personas y territorios, entre otros componentes posibles. En este ensamblaje, sus mediadores producen un efecto, alteran el orden de las relaciones y las cosas. Es por eso que, tomando nuevamente a Latour, no se los puede considerar simplemente intermediarios (Ibíd: 90).

Por lo dicho hasta aquí, me interesa colocar la idea de que la acción/asociación de los distintos mediadores que integran este ensamblaje produce una suerte de capital social y cultural nuevo. A través de su intervención, pero

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8   Capital cultural y nivel educativo no son sinónimos, pero sí están relacionados. De acuerdo a Bourdieu, el capital cultural aparece bajo tres estados: el incorporado -como disposiciones duraderas del organismo-; el objetivado, -a través de bienes culturales, cuadros, libros, diccionarios, instrumentos, maquinaria, etc; y el institucionalizado, -como forma de objetivación muy particular, porque tal como se puede ver con el título escolar, confiere al capital cultural, que supuestamente debe garantizar, propiedades totalmente originales (Bourdieu, 1987).

siempre en articulación con otros y a través de negociaciones de sentido, se acentúan o introducen prácticas, percepciones o imaginarios en lugares y entre grupos donde antes no estaban. Un ejemplo de ello es la alusión a los "derechos culturales" o la "ciudadanía cultural", u otras expresiones discursivas que a través de las actividades de los Centros MEC se ponen en juego, como la "alfabetización digital", "igualdad de género", "ser joven no es delito" , entre otras.[9] Dicho capital se acumula en aquellos actores que constituyen el cuerpo estable de trabajadores de esta política y es el que hace posible emprender actividades y procesos sostenidos en el tiempo de "acceso a la cultura". La continuidad en el tiempo es un aspecto relevante para que esto suceda, mientras que la fragmentación -por ejemplo cuando se cambia de personal o se renuevan los actores políticos-, puede introducir cambios favorables o negativos, según su intencionalidad. En este sentido, uno de los aspectos controversiales de esta política es que buena parte de su funcionamiento recae en actitudes personales de aquellos que son parte de la red.

Para ilustrar estos aspectos es preciso conocer otras características de cómo se ha desarrollado y estructurado Centros MEC. En el transcurso de una década -desde su inicio en 2007 hasta hoy-, se alcanzó la cifra de 127 centros ubicados en distintos puntos del país. En 2015, una publicación revelaba un dato que permite dimensionar su hondura, en términos de construcción territorial e institucional: "en 36 localidades del país Centros MEC fue la cuarta institución del Estado en instalarse" (Elissalde, 2015: 9), luego de primaria, las comisarías y el correo. La presencia de esta institucionalidad en el territorio ameritaría ser pensada en términos de nuevas prácticas de gobierno, es decir, desde la perspectiva de la gubernamentalidad propuesta por Foucault, "entendida en el sentido amplio de técnicas y procedimientos para dirigir el comportamiento humano" (Foucault, 1997, en Rose, O'Malley y Valverde, 2010: 114).

¿Por qué llegar a las localidades del "interior" con una propuesta cultural? La respuesta es tan sencilla como visibilizar que existen desigualdades de acceso a determinados bienes y servicios culturales que tienen que ver con el territorio y la relación centro-periferia. Y aunque no es difícil caer en consideraciones socio o etnocéntricas -siempre pensamos a las periferias y ruralidades como lugares que "no tienen" o "les falta" lo que es parte de la ciudad-, no es menos cierto que las pequeñas localidades o los enclaves rurales disponen de menos espacios de recreación y acceso a propuestas culturales del tipo que se ofrecen en las ciudades, y que sus usos del tiempo suelen girar en torno al trabajo en tanto actividad principal (Castelli, 2017). Esto no significa desconocer formas de recreación y sociabilidad específicas e intereses diferentes a los que pueden expresar los habitantes de espacios urbanos. Dada su configuración histórica como país ganadero, Uruguay no necesitó contar con polos económicos, políticos o de desarrollo además de la capital, si bien las capitales departamentales cumplieron y cumplen un rol relevante en la organización política del país (Klaczko y Rial, 1981); como resultado, se jerarquizó un espacio -la capital-, en detrimento de otro -el interior- Pero no se trata únicamente de visibilizar desigualdades culturales, sino sobre todo, de ponderarlas con relación a otras y destinar fondos públicos para disminuir la brecha.

Subrayando su función descentralizadora, y entendiendo que "descentralizar quiere decir perder poder en el centro" (Elissalde, 2015: 9), se ha puesto énfasis en concebir Centros MEC como una red de espacios, no solo de esta política en sí, sino del Ministerio de Educación y Cultura todo.[10] Esta postura centra y descentra la propia propuesta de Centros MEC de forma permanente, pues demanda su articulación con otras políticas culturales o sociales -por ejemplo Un pueblo al Solís, Fondos Concursables, Premios nacionales, Plan Ibirapirtá, etc.- y la visibilización de las y los trabajadores como funcionarios del Ministerio. La imagen de una red resulta pertinente tanto para pensar el territorio como las posibilidades de un proceso de descentralización cultural. Como mencioné más arriba, los Centros están ubicados mayoritariamente en localidades pequeñas, que no llegan a ser ciudad, si bien cada capital departamental cuenta con al menos un Centro MEC. Esto se puede atribuir a cuestiones logísticas -gestionar la descentralización de actividades requiere de nodos operativos en lugares estratégicos-, pero también a que la función de la política se ha ampliado más allá de las pequeñas localidades. También en las ciudades se organizan múltiples actividades, proponiendo líneas de trabajo con grupos de escasas o nulas posibilidades de acceso a "la cultura", por ejemplo, población privada de libertad.

Hay distintas versiones sobre las etapas iniciáticas de Centros MEC, cuando se decidía dónde y por qué instalar allí un Centro, pero coinciden en que la cifra a la que se aspiró -y quizás todavía se aspira- es la de ciento ochenta Centros MEC funcionando en territorio. Roberto Elissalde, quien dirigió esta política desde sus inicios hasta 2015 recuerda que

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9   Las líneas de trabajo que se desarrollan en los Centros son de lo más diversas, pero tienen el común denominador de que buscan garantizar derechos humanos en general y culturales en particular. Así, por ejemplo, encontramos desde talleres de instrumentos musicales, danza, manualidades, fotografía, hasta charlas sobre género y sexualidad, ciencia y tecnología, etc. También se apoya la organización de eventos como festividades o jornadas de esparcimiento en las distintas localidades, incluso actividades deportivas y la participación en actividades organizadas por otras instituciones estatales.

10   Tomado   de: **http://centrosmec.org.uy/innovaportal/v/19627/31/mecweb/que-es-centros-mec?breadid=null&3colid=19625** Consultado 31/7/2017.

"El proyecto era totalmente abierto, abrir casas del MEC ¡180 casas querían abrir del MEC! (...) cuando yo vi el asunto me pareció una locura 180 casas, vamos a reducirlo a 90 por lo menos, una cantidad que podamos manejar, pero estaba todo el resto de la cosa abierta, no había ni estructura, ni formato, ni tipo de despliegue, ni nada y arrancamos de una forma bastante atípica (...) Esto fue intuición política, voluntad de salir al territorio y una idea de cómo queríamos que fuera el trabajo (...) de salir, de estar en todo el país, de que vos entrás al ministerio y es un ministerio de todos, si todos financiamos el ministerio entonces tenemos que estar en todos lados y tener políticas que realmente cubran. Primero decidimos abrir en cuatro departamentos, la idea era hacer cinco centros en cada departamento, por dieciocho departamentos, eso nos daba noventa centros, y excluir Montevideo, que eso era una señal positiva para la gente del interior, decir no, Montevideo no corre en esto, esto es solamente para el interior del país" (Entrevista personal, 2015).

En esta versión la cantidad de centros está asociada a lograr una determinada presencia del MEC en cada departamento, primero con cinco centros, para alcanzar luego diez. En el proceso de territorialización la política tomó algunos matices relacionados a las condiciones de posibilidad de los distintos escenarios locales, municipales y departamentales. No en todos lados por igual se han podido instalar Centros y desarrollar procesos de trabajo.

Además de los que se encuentran en las capitales departamentales, hay Centros ubicados en ciudades, es decir, conglomerados poblacionales ampliamente mayores a 5000 habitantes (por ejemplo en Paso de los Toros, que supera los 12.000) y, en algunos casos, en pequeños centros poblados, con menos de 500 habitantes (como Cainsa en Artigas, con 355 o Lapuente en Rivera, con 321)[11]. Asimismo, hay departamentos que no alcanzaron ese mínimo previsto al comienzo, mientras que otros lo superaron. La cantidad de Centros por departamento es atribuido, de manera consensuada por los distintos interlocutores, a la apertura o cierre de los poderes políticos locales. Tacuarembó, por ejemplo, cuenta con dos centros, Lavalleja y Soriano con cuatro, mientras Paysandú y Florida llegaron a diez y Canelones a once.

En el transcurso de los diez años que lleva Centros MEC, el entramado político ha atravesado distintos gobiernos. A nivel nacional el Frente Amplio ha permanecido, lo que garantizó la continuidad de la política, si bien con algunos cambios de acento. A nivel departamental en algunos casos hubo continuidad del mismo sector en el gobierno y en otros cambió, aspecto que influye en el respaldo que la política tiene en el territorio. Los municipios (nivel de gobierno que todavía sigue multiplicándose) adiciona densidad política a la trama. A poco de iniciado el proceso de "municipalización", Gonzalo Carámbula anticipaba que

"de consolidarse esta experiencia tendrá un impacto innegable en las relaciones interinstitucionales. Se volverán a plantear muchos de los temas que ya son motivo de preocupación en 'los otros niveles', como la insuficiencia de los recursos humanos y materiales, o los problemas de una comunicación fluida; pero sin lugar a dudas se generarán múltiples oportunidades de desplegar 'políticas de proximidad'.

Esta nueva situación puede ser una gran ocasión para sumar, facilitar la formación profesional y permitir una mayor participación en la elaboración y aprehensión de las políticas. Hay todo una línea de investigación y trabajo que se abre paso en diversos continentes con la consigna de 'ciudades creativas'. El desarrollo de nodos o eslabones donde destaque ese carácter enriquecerá todos los planes de "cultura", en especial a aquellas propuestas –como las regionales– que promuevan y faciliten la sinergia de recursos para potenciar las singularidades.

Sin embargo, el aprovechamiento de estas condiciones que se abren exige, por una parte, un trabajo superior de investigación, formación y elaboración. Por otra, un cuidado extremo de las instancias de negociación y articulación política, porque el mapa de las adhesiones o identifcaciones ideológicas y partidarias se ha vuelto más complejo" (Carámbula, 2011: 376).

Así, comienza a tornarse evidente que el entramado político operando en el territorio es apretado, y que la mediación de sus intereses tiene un papel clave en el impulso o freno de Centros MEC. De hecho, algunos interlocutores señalaron que la intermediación de los intereses políticos es lo que puede "matar" la política cultural, relataron las dificultades que han tenido en sus búsquedas por articular con los "socios", y expresaron su incertidumbre con respecto a la continuidad de Centros MEC si ganara las elecciones nacionales otro partido.

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11   Cabe recordar que la propuesta inicial de Centros MEC establecía como "localidades objetivo" aquellas de población entre 500 y 5000 habitantes.

Palabras finales

He intentado dar a conocer y sugerir posibles líneas de análisis de la política pública para la cultura Centros MEC, en curso en Uruguay desde 2007. Descentralizar y promover el acceso a la cultura entre las y los habitantes de pequeñas localidades y de la periferia en general -entendiendo por periferia todo el territorio que está más allá de la capital-, viene siendo su cometido, trazando un proceso de trabajo sostenido que ya alcanzó una década. En esta dirección, un primer apunte es que su cometido de "perder poder en el centro" -enunciado fuertemente por el primer director de Centros MEC y apropiado por muchos de sus operarios- anima a repensar la díada centro-periferia en relación a las prácticas y procesos puestos en marcha y en conexión con otras formas de descentralización implementadas en el período.

El tiempo transcurrido permite reflexionar sobre su desarrollo y su situación actual. Así, hoy se puede comenzar a atisbar qué ha sucedido con al menos una parte de "la cultura" en el interior del país. La extensión, la variedad de actores y actividades y las diferentes características de cada localidad y departamento hace riesgoso generalizar conclusiones, aunque sí es posible, a la luz de los emergentes del trabajo de campo, considerar aspectos que guardan similitudes. El territorio es, a la vez, múltiples territorios y la política, que en la letra también es una, se desdobla, acopla e interacciona con esa multiplicidad, tomando distintos acentos. Éste es uno de los puntos más desafiantes a la hora de investigar; en otras palabras, poder decir algo del conjunto, pero también de las especificidades y no perder de vista las interconexiones entre ambos planos.

El recorrido que realiza Centros MEC desde su formulación en el centro, hasta su aplicación, a modo tentacular, en los distintos enclaves, está conformado por mediadores de trayectorias variadas y pertenencias institucionales distintas. La articulación entre "socios" que hacen parte de distintos niveles de gobierno y, por tanto, que pueden pertenecer a sectores políticos opuestos, es uno de las novedades salientes de esta política cultural. Estas características no tienen un significado unívoco: son tanto una potencia como una dificultad. En el/los territorio/s observamos ensamblajes de actores de las más diversas posiciones que resultan exitosos, porque valoran la propuesta de Centros MEC de formas similares, ven la posibilidad de aunar esfuerzos, o tienen una visión común sobre "la cultura". Al mismo tiempo, cuando estos aspectos no se comparten, sobrevienen dificultades que constituyen barreras para su desarrollo. Hay que tener en cuenta, además, que los territorios tienen sus propias historias de entramados, existiendo relaciones y tensiones que se acarrean de años atrás e influyen -positiva o negativamente- en la propuesta actual.

Lo "político-partidario" es una de las dimensiones principales que definen cómo se conectan los mediadores, desde la selección de quién será el/la animador/a en cada Centro, hasta la disposición o negación de recursos materiales. En la misma línea, los tiempos de la "vida política" también juegan un papel; al aproximarse las elecciones se enfatizan las incertidumbres de las y los trabajadores de los Centros, por no tener certeza de lo que puede ocurrir con sus puestos de trabajo.

Introduje la idea de que la acción/asociación de los distintos mediadores que integran este ensamblaje produce un tipo de capital social y cultural nuevo, manifiesto por ejemplo en nuevas formaciones discursivas que se expanden por el territorio; se trata de ideas de carácter provisorio, que podrán ser argumentadas o modificadas con más elementos empíricos cuando finalice el trabajo de campo. Cabe decir, entonces, que resta conocer con mayor hondura a los destinatarios, sus puntos de vista, apropiaciones y resignificaciones de los aspectos mencionados. De sus experiencias y valoraciones dependerá que la puesta en marcha de este cuantioso y novedoso esfuerzo institucional y de recursos humanos cobre verdadero sentido.

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Practical aspects of pedagogy in civic education of students of Technical University

Aspectos prácticos de la pedagogía en la educación cívica de los estudiantes de la Universidad Técnica

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ABSTRACT

The article discusses the practical aspects of pedagogy that contribute to the success of the formation of civic education of students in the educational space of a technical university. The problems of the formation of civic education of students and the scientific coordination of the educational process in modern higher education are analyzed.

Keywords: The pedagogical design, pedagogical conditions, civil culture of students, civil education.

RESUMEN

El artículo analiza los aspectos prácticos de la pedagogía que contribuyen al éxito de la formación de la educación cívica de los estudiantes en el espacio educativo de una universidad técnica. Se analizan los problemas de la formación de la educación cívica de los estudiantes y la coordinación científica del proceso educativo en la educación superior moderna.

Palabras clave: diseño pedagógico, condiciones pedagógicas, cultura civil de los estudiantes, educación civil.

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Introduction

It is known that in conditions of multidimensional social, economic and value changes in contemporary Russian reality, the priority goals and tasks of general and professional education are significantly overestimated. In the system of higher professional education, the tasks of the spiritual and creative development of students are brought to the fore by means of the integrated organization of the process of education and self-education on the basis of humanistic values and principles of general cultural development of the individual (Karpanina, 2004).

At the same time, the tasks of individualizing university education and differentiating the training of specialists, taking into account both the needs of students in the social and professional self-determination of the individual, and the social goals of self-realization of the specialist through activities unfolding in modern conditions are actualized.

Practical approbation of the program of civic education of students in the educational space of the technical university made it possible to single out a set of conditions in the composition: social pedagogical, didactic-methodological and acmeological.

The purpose of developing these conditions is the creation of a developing educational environment on the basis of the implementation of the interactive and creative basis of the teacher's professional and professional interactions with students. At the same time, it is to provide pedagogical support in the appearance of a person's civil formations in the students and an adequate pedagogical correction in this regard, organized in accordance with the socio-psychological structure of the individual's civic culture and proceeding from the content of the stages of civic education of the individual in training in the conditions of a technical university (Filonov, 2000).

In this regard, it is necessary, first of all, to make students aware of the meaning in their civic education and self-development. That is why the set of pedagogical conditions was primarily aimed at actualization and organization of procedural features and components of educational and cognitive activity, thereby putting them at the forefront for students. This helped not only the successful development of knowledge, but also the conscious personal acceptance of their students into their own spiritual-value sphere as a source for the development of civil beliefs, ideals and principles. As a result, a basis was laid for the manifestation of civic qualities in the personal orientation toward learning from scientific-theoretical and value-meaning positions.

At the same time, the formation of socially valuable beliefs and socially directed attitudes of the future specialist's behavior was stimulated, and the development of analytical skills and methods of self-knowledge and self-regulation of the individual on the basis of a spiritual and moral comprehension of their ideals and principles was intensified.

Methods

Thus, under the conditions of a pedagogically supportive and civilizing educational environment organized by the teacher, the students have an increase in important parameters of the civil culture of the individual - civil reason, social responsibility, professional orientation of activities.

At the same time, the qualitative state of the integral parameters of civil culture in students is revealed through socio-pedagogical diagnostics (input, intermediate, final), developed by the teacher with the purpose of multidimensional characterization of the manifestations of civil culture. And this is precisely what is an important social and pedagogical condition that ensures the correspondence of target, substantive and procedural components of educational and cognitive activity, being at the same time a means of its social and pedagogical management.

Realizing the goals and objectives of civic education in the process of integrally mastering students the academic discipline, the basic content of the training material was specially interpreted by us in the unity of its civil and vocational-oriented principles.

Forming a socially and spiritually valuable worldview of the individual, the teaching material was mastered by the students in the unity of the scientific-theoretical and practically-significant aspects.

To do this, it was necessary to fill it with the emotional experience of learners of personal involvement in the values of the culture of their people and state, which contributed to the successful adoption of the traditions and ideals of culture and their "cultural transfer" into the individual spiritual and value sphere of the individual.

In turn, the teacher was important to help students in gaining personal conviction in the public significance of the forthcoming activity and to contribute to the development of positions of creative and responsible world transformation from future specialists on the basis of a personal need for independent activity in the implementation of acquired professional knowledge and skills. At the same time, pedagogical support for the growing creative activity of students was gradually consolidated in the independent civil position of the individual in terms of beliefs, views and assessments about the social significance of the specialist's activities.

Civic education of future specialists in the higher education system is influenced by a number of factors: professionally oriented learning activity, socially oriented interactions in the team and an active self-relationship of the individual during the period of study at the university (Karpanina & Kuznetsova, 2007). The pedagogical design of the criterial model of civic education in the process of mastering the discipline by students is important to implement on the basis of an integral organization of the components of the university educational process (education and self-education, upbringing and self-education, etc.).

The goal of civic education of specialists in the system of higher professional education in the conditions of a technical university includes the process of formation of the leading values and semantic positions of consciousness and self-consciousness that act monolithically with the actions and actions of the individual and do not allow it to alienate from the reality to which it belongs, And the prospects for the life of a future specialist and allow him to resolve his life in a civil society in a holistic and independent manner (Karpanina et al, 2018; Zare, (2015).

Results

The pedagogical achievement of the goal thus set occurs on the basis of the selection by the teacher of the means of developing educational content as part of the study by the future specialists of the mainstream discipline, on the one hand. On the other hand, on the basis of system and technological support for the implementation of this content in the process of using a comprehensive program that gives a step-by-step implementation to the solution of developmental learning tasks.

The main socio-pedagogical conditions for organizing the process of civic education in the conditions of a technical university are:

- complex diagnosis and assessment by the teacher of the dynamics of the emerging civic personality formation among students by means of social and pedagogical diagnostics, assessing the quality of knowledge on the subject, manifestations of ideological readiness in practice;

 - the implementation of an adequate pedagogical correction, proceeding from the tasks of a system-holistic development of civic consciousness, self-awareness and behavior of future specialists.

Thus, on the basis of the advanced system-holistic design of the pedagogical model of civic education in the process of mastering the humanities knowledge by students, on the basis of its technological realization in selected pedagogical conditions (social pedagogical, didactic-methodological and acmeological), in the end.

As a result, the future specialist becomes capable not only of self-development of the leading parameters of the civil culture of the individual during the period of study at the university, but also to further personal improvement on the formed civic and value basis. And this gives personal meaning and ideological perspective of his professional activity aimed at protecting and preserving the spiritual and material traditions of Russian culture, popularizing and spreading the civil and moral ideals and values of his people, educating young generations of Russians in a patriotic and civil spirit.

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Testing: methodology and quality indicators

Evaluaciones: metodología e indicadores de calidad

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ABSTRACT

Testing is a modern high-quality method of knowledge check. Informatization which began in the late XX – early XXI century contributed to the growth of various tests. However, the inclusion of tests in the educational process is at a slower pace. This is largely due to the lack of a methodological basis for test development. It is proved that the test control methodology is an interdisciplinary theory that combines the achievements of pedagogy, psychology, measurement theory, quality theory, statistics, mathematics, organization and management theory. The article describes the principle of the testing methodology; the type and kinds of tests are determined, as well as the methodological principles for high-quality text creation. The criteria are described that must be met by tests: relations with education and training, objectivity, systematicity and comprehensive nature, relevance, the relationship of increasing difficulty content and form, and test optimality.

Keywords: testing, methodology, test quality indicators, control, education system, Russian Federation.

RESUMEN

La evaluación es un método moderno de verificación de conocimiento de alta calidad. La informatización que comenzó a fines del siglo XX y principios del siglo XXI contribuyó al crecimiento de varias pruebas. Sin embargo, la inclusión de pruebas en el proceso educativo es más lenta. Esto se debe en gran medida a la falta de una base metodológica para el desarrollo de pruebas. Está comprobado que la metodología de control de prueba es una teoría interdisciplinaria que combina los logros de la pedagogía, la psicología, la teoría de la medición, la teoría de la calidad, la estadística, las matemáticas, la teoría de la organización y la gestión. El artículo describe el principio de la metodología de prueba; se determinan el tipo y los tipos de pruebas, así como los principios metodológicos para la creación de textos de alta calidad. Se describen los criterios que deben cumplirse mediante las pruebas: relaciones con la educación y la formación, objetividad, sistemática y naturaleza integral, relevancia, la relación entre el contenido y la forma de dificultad creciente y la optimización de la prueba.

Palabras clave: pruebas, metodología, indicadores de calidad de las pruebas, control, sistema educativo, Federación de Rusia.

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Introduction.

Testing is one of the important tools for obtaining pedagogical information in the learning process, the most objective and high-quality way to control knowledge, and skills. Such characteristics of this type of control as the possibility of equal condition creation for all students, common criteria for achieved result evaluation and interpretation, contributed to its widespread penetration into the practice of teaching in general and higher education.

Consideration of testing in the context of the interconnected problems of education quality improvement and its informatization relevant to the modern Russian school allows us to talk about shifting the emphasis from the purely controlling function of a single test control "for all" to its hidden varied diagnostic and training opportunities.

Problem statement. In the 2000-ies, active informatization took place as the part of various programs aimed at all levels of Russian education development: an array of innovative, electronic, developments supporting the Russian State educational standards of basic and secondary (complete) general education was replenished annually. An important place in this array is occupied by computer training and control systems, including diagnostic tests (Adonina et al, 2018: Fisenko et al, 2018: Fisenko et al, 2019: Kornilova et al, 2015).

At the same time, despite the presence of practical developments in the field of computer testing and training that implement the specific capabilities of the computer as a flexible, adaptive learning tool, they are not widely applied in the practice of teaching at school and university (Polyanskaya et al, 2018; Abilgaziyeva et al, 2018). The reason lies not only in the well-known tradition of the pedagogical environment, which tends to rely on already known and tested means, but also in the absence of mass experience of innovative electronic pedagogical tool introduction into teaching practice (which are essentially complex and multifunctional information and educational systems), as well as in the absence of technological and methodological descriptions, offering the ways and methods of their integration into the current educational process and effective use algorithms.

Problem discussion.

Testing methodology basics.

The methodology of pedagogical testing can be defined as the doctrine of the main provisions, forms, methods, principles of scientific research and the effective organization of practice in the field of pedagogical control and student training level assessment. The principles of test control scientific organization are formulated in the form of basic rules that contribute to testing effectiveness increase (Rumyantseva et al, 2018).

Some of the most general rules, mostly recommended by V.S. Avanesov, are given in the form of a number of principles:

– the connection of test control with education and training, which emphasizes that training without further testing is inefficient, since only objective control shows in which direction further training should be adjusted;

– objectivity, aimed at the need to eliminate subjectivity and bias;

– fairness and publicity, meaning equally benevolent attitude to all subjects, openness of all stages of testing, timeliness of familiarization with the test results;

– scientificity and effectiveness, prescribing the need to verify the results for reliability and validity;

– systematicity and comprehensiveness, emphasizing the need to coordinate the goals and results of the current, milestone, thematic and final control, and their scientifically based frequency;

– scientific credibility, requiring only true knowledge to be included in the content of tasks and the elimination of controversial ones;

– systematic content, meaning the need to include in the test knowledge related to each other by a common structure;

– the compliance with development, requiring the comparison of a discipline content with the current state of science;

– significance, involving the selection of the most important, key knowledge;

– representativeness, requiring the inclusion in the test content not only significant and scientifically reliable information, but also taking into account the completeness and sufficiency of controlled material volume;

– the content variability, suggesting a constant change, redesign and improvement of the test content in accordance with the development of science and educational standard changes;

– the complexity and balance of the test content, paying attention to the need to display the main topics of the training course, the combination of theoretical, historical, factual and practical knowledge;

– the relationship of content and form as the way of the discipline content reflection in a test content most fully; one of the important conditions during a quality test creation is the requirement to combine organically the contents of the tasks with the form of their presentation, since outside the test forms, neither the test nor its contents make it possible to talk about the test at all;

– the increasing difficulty of controlled knowledge (for a homogeneous test or within the thematic completeness of individual parts of the test, subtest);

– the test optimality, dictating the need for strict selection of the test content. It should be borne in mind that it is impossible to fully invest the content of the discipline in one test, and therefore, only that basic thing is selected for the tests (especially the final control) that pupils or students should learn after the discipline study.

In the works by S.I. Arkhangelsky attention is drawn to two principles in the test content: scientific and educational. Scientific reflects the process of science development and its applicability, and educational reflects the principles of knowledge system development (Arkhangelsky, 1974).

The content of a test depends on the purpose of the test and the amount of controlled training material. Accordingly, the type of test is selected (homogeneous, heterogeneous, integrative, adaptive, etc.). Since the test is created to solve certain problems, it is suitable only for those tasks and goals for which it was created.

In accordance with the testing methodology and the basic principles of its organization after structuring, a test is carried out to check the test for compliance with the planned characteristics. At that, the process of test application provides for the fulfillment of a number of requirements:

– organization of control in accordance with the developed instructions;

– test subject preliminary training conduct;

– mandatory creation of appropriate conditions for testing: places, equipment, devices, software and methodological materials;

– creation of favorable psychological conditions;

– presentation of a test in an effective form;

– optimization of the scoring system, the methods for their presentation and result interpretation.

It should be noted that during testing both the knowledge of the educational material and its ignorance are revealed, and this makes it possible to widely use testing for diagnostic purposes, to prepare diagnostic tests with a special selection of content that allows to assess the strength of knowledge, completeness, depth, flexibility, specificity and generalization, systematicity and, effectiveness. It is the task that determines and points to the means of pedagogical influence, reveals the content, the inner side of the pedagogical process and the pedagogical concept under knowledge control.

Test quality indicators. For the pedagogical measurement, the selection of the academic discipline content and the formation of the optimal number of units of knowledge, one can use the classifications of controlled knowledge and abilities developed by B. Bloom and R. Gange. In Russian literature, the most detailed various types of knowledge are presented by V.S. Avanesov, namely:

1) names;
2) the meanings of names;
3) factual knowledge;
4) knowledge of definitions;
5) comparative knowledge;
6) classification knowledge;
7) knowledge of opposites, contradictions, synonymous and antonymic objects;
8) associative knowledge;
9) causal knowledge and the knowledge of causal relationships, classification grounds and principles;
10) procedural and algorithmic knowledge;
11) technological knowledge;
12) generalized, systemic knowledge;
13) evaluative knowledge;
14) probabilistic knowledge;
15) abstract knowledge;
16) structural knowledge;
17) methodological knowledge.

The list of types of knowledge used to prepare test tasks can be expanded or, summarized, reduced depending on the objectives of control.

According to J.A. Bayramova, the methodology of pedagogical testing can be defined as "the doctrine of the main provisions, forms, methods, the principles of scientific research of the effective organization of practice in the field of pedagogical control and the assessment of the student preparedness level" (Bayramova, 1999).

In this regard, the main principles are distinguished:

1. The relationship of test control with education and training, which emphasizes that training without further testing needs to be adjusted for further training.

2. Objectivity, which is aimed at elimination of subjectivity and bias.

3. Scientificity and effectiveness, requiring the verification of results for reliability.

4. Systematicity and comprehensiveness, emphasizing the need to coordinate the goals and results of the current, milestone, thematic and final control.

5. Significance, involving the selection of the most important, key knowledge.

6. The relationship of content and form as the way to reflect the content of the discipline in the test content most fully.

7. The increasing difficulty of controlled knowledge.

8. The optimality of the test, requiring the rigorous selection of the test contents. It should be borne in mind that it is impossible to fully enclose the entire content of the discipline in one test, and therefore, only that basic thing is selected for the tests (especially the final control)that pupils or students should learn after studying the discipline.

Various approaches to the design, creation and parameterization of test materials are described in the works by V.S. Avanesov, M.B. Melnikov, Yu.M. Neumann and V.A. Khlebnikov and other authors. The high skill of modern test developers is based on a deep understanding and mastering of theoretical knowledge, hardware and software, practical experience, and examination skills.

The development of quality tests is currently being conducted on the basis of reputable research teams, however, it seems that in the near future the theory and practice of test designing and creating will be mastered by teachers.

In general, when they develop and apply tests, one should rely on the rule derived from collective practical work experience: the more massive the testing, the more problems it solves, the more responsible the test procedure and result, the more likely it is to draw erroneous conclusions when poor-quality control and measurement materials are used, and therefore, in such studies it is necessary to use better pedagogical meters, processing technology, evaluation, analysis and interpretation of test results. This rule can help determine when and what tests can and should be used, what requirements should be set for tests during knowledge testing on different samples of subjects.

Conclusions

To understand the essence of modern test methods and knowledge testing technologies, assessing the level of subject training and monitoring the educational process, it is important to know the definitions of not only the pedagogical test, but also other concepts related to testing.

The introduction of correct definitions determines the sequence of fundamental concepts of design, creation, parameterizing, using tests as pedagogical meters and makes it possible to distinguish them from pseudo tests. Pedagogical meters are created from test tasks in accordance with the purpose of testing on the basis of the corresponding mathematical model that defines the information function of the test and determines the specification and structure of the proposed test.

Understanding of the educational process, its dynamic nature and timely, targeted impact on it become especially effective when they analyze the results of independent testing using standardized measuring instruments of educational achievement. This allows you to identify not only qualitative, but also quantitative changes occurring in the educational system and its individual components.

At that, in order to improve the quality of student training and the quality of education in general, it is important to analyze individual quality indicators and analyze the dynamics of changes in the educational system. In this regard, when they develop a model, it is necessary to focus on a monitoring system creation that includes a certain set of elements, procedures and subsystems.

The problem of obtaining high-quality objective information on the pedagogical activity of an educational institution is currently becoming extremely important. In the context of competition on the labor market in Russia, a social demand of information consumers is starting to form for qualified educational services provided

to the population by a particular educational institution, for staff potential, the comfort of staying at school, additional educational services, the interaction of schools with universities, etc.

Educational institutions provide the opportunity to form and use various types of monitoring in their practice on the basis of independent educational statistics: didactic, dynamic, diagnostic, substantive to improve educational technology and the quality of student training.

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Pedophilia in Quranic perspective: A thematic analysis

La pedofilia en perspectiva coránica: un análisis temático

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ABSTRACT

Pedophilia is an issue that has not been addressed as much as the lesbian, gay, bisexual, transgender and queer or questioning (LGBTQ) issues lately, although it has been going on for many years. It can contribute to a negative impact on children and society. This issue has undermined the family institution, community, and religion as it shows that most pedophile offenders who often make headlines are Malay Muslims. The question arises is, is there any discussion in the content of such revelations, or any Quranic verses discussing on this problem through specific methods. Therefore, the purpose of this article is to analyse Quranic verses on pedophilia or sexual abuse of children. By using qualitative method in collecting of Quranic verses and looking at the view of the infidelity regarding on pedophilia. This article found that the Quran is the best source in dealing with issues that faced by Muslims nowadays. Hence, this article as an effort to find solutions of pedophilia issues that affecting the humanities.

Keywords: Pedophilia, Perspective, Quran, Analysis, Thematic.

RESUMEN

La pedofilia es un problema que no se ha abordado tanto como los problemas de lesbianas, gays, bisexuales, transgénero y queer o cuestionamiento (LGBTQ) últimamente, aunque ha estado sucediendo durante muchos años. Puede contribuir a un impacto negativo en los niños y la sociedad. Este problema ha socavado la institución familiar, la comunidad y la religión, ya que muestra que la mayoría de los delincuentes pedófilos que a menudo aparecen en los titulares son musulmanes malayos. La pregunta que surge es, ¿hay alguna discusión sobre el contenido de tales revelaciones, o algún versículo coránico que discuta sobre este problema a través de métodos específicos?. Por lo tanto, el propósito de este artículo es analizar versos coránicos sobre pedofilia o abuso sexual de niños. Mediante el uso del método cualitativo en la recopilación de versos coránicos y mirando la visión de la infidelidad con respecto a la pedofilia. Este artículo encontró que el Corán es la mejor fuente para tratar los problemas que enfrentan los musulmanes hoy en día. Por lo tanto, este artículo es un esfuerzo por encontrar soluciones a los problemas de pedofilia que afectan a las humanidades.

Palabras clave: pedofilia, perspectiva, Corán, análisis, temático.

1. Introduction

Pedophilia is not a new issue that is attacking Malaysian today, but it is an issue that the public does not care about due to lack of awareness and knowledge among parents and children. Pedophilia or sexual harassment of children is a serious crime in today's Malaysian society. While this is not a frequent case, it does have a huge impact on the family institution. And while most Malaysians do not understand what Pedophilia is, And who is at risk for the victim of Pedophilia? And what effect does it have on the victims?

Bell (2007) states that parents should be careful about pedophilia cases and child abuse around them. Bell added that the majority of children may be excluded from being victims of pedophilia and abuse if their parents have the knowledge and information about pedophilia as well as seeing the incident or case happen to the person closest to them. He also said that the government should involve in bringing awareness and knowledge to all, especially through government programs and campaigns that could open the eyes of parents.

2. The pedophilia

Pedophilia originated from the Greek word "love" (philia) and "child" (paedo). It belongs to the symptoms of paraphilia (Paraphilic Disorders), which is a category of 'illness' that has a tendency to be sexually satisfied or high sexual excitement in ways that are beyond the norm. Other examples of paraphilia disorders are voyeurism, frotteurism, exhibitionist and others. In the psychiatric reference book, *Diagnostic and Statistical Manual of Mental Disorders*, Fourth Edition, a pedophile is an individual who fantasizes about, is sexually aroused by, or experiences sexual urges toward prepubescent children. According to the *Kamus Dewan Edisi Keempat*, pedophilia refers to the desire to have sex with children (Noresah, 2005). Thus, these sexual offenses directly affected crimes or sexual abuse to the child.

The definition of sexually abused children is generally defined by the United Nations International Children's Emergency Fund (UNICEF) and the World Health Organization (WHO). According to UNICEF (2010) and WHO (1999), sexual abuse of children is the involvement of children in sexual activities that they do not understand well, which they cannot reasonably recognize. Sexual abuse includes acts of sexual exploitation, raping, coercing or sexually assaulting a child, exposing confidential body parts or displaying pornographic material. Behaviors that do not involve touch-ups, exposed body parts and obscene words spoken to children are also sexual abuse. Additionally, exploiting children for pornography purposes through the internet and using such material to enable a child to be used by others as a prostitute is also a form of sexual abuse. Usually, child sexual abuse is aimed at giving sexual satisfaction to the pedophile.

Based on the paragraphs above, the definitions of sexual abuse includes three parts, which are touching, non-touching, and child pornography. The act of touching is when there is sexual interaction on the part of a child such as inserting an object into the vagina, mouth or rectum, oral and anal sex, kissing with or without the tongue, sexual touching the private parts and parts of the body. While non-verbal acts include showing children obscene materials, encouraging children with words, words manipulation, coercing or threatening children to engage in any sexual activity or prostitution, encourages children to view private parts, obscene calls, send obscene words, record videos, and pictures (Norazla, & Mohd Farok, 2018).

Pedophilia is also classified in the sexual orientation group as defined in the Diagnostic Statistical Manual, pedophilia does not occur only when individuals engage in stimulant behaviors child sexual abuse, but the act of preserving, imagining and fantasising about children sexual activity is also referred to as pedophilia (American Psychological Association, 2000; Eher et al., 2015). Thus, every child is at risk of becoming a victim of pedophilia.

3. Thematic analysis

To achieve the objective of the study, to analyse Quranic verses on pedophilia or sexual abuse of children. The thematic analysis begins with the collection of child-related sentences. Table 1 below lists some of the verses of the Quran that have been found.

Table 1. Children's theme in the Quran.

No.	Theme	Surah
1.	Children are a gift	al-Shura [42]: 49
2.	The daughter was buried alive	al-Takwir [81]: 8
3.	Afraid of being poor	An'am[6]: 151
4.		al-Isra'[17]: 31

5.	General children	al-Nahl [16]: 72
6.		Al-Isra [17]: 64
7.		Maryam [19]: 77
8.		Al-Kahfi [18]: 46
9.		Shu'ara [26]: 133
10.		Saba'[34]: 37
11.		Saba'[34]: 35
12.		Ghafir [40]: 67
13.		al-Ahqaf [46]: 15
14.		al-Hadid [57]: 20
15.		al-Mujadilah [58]: 17
16.		Al-Munafiqun [63]: 9
17.		al-Taghabun [64]: 14
18.		al-Taghabun [64]: 15
19.		al-Qalam [68]: 14
20.		Nuh [71]: 12
21.		Al-Mudathir [74]: 13
22.		'Abasa [80]: 36
23.	The Orphan	al-Nisa'[4]: 127
24.	Born in ignorance	al-Nahl [16]: 78
25.	Breastfeeding for 2 years	al-Baqarah [2]: 233
26.	Allah knows what is in the womb	Luqman [31]: 34
27.	Adopted child	al-Ahzab [33]: 5
28.	Daughter of the evil sign	al-Nahl [16]:58
29.		Zukhruf [43]: 18
30.		al-Najm [53]: 21

Based on the table above, 30 verses of the Quran have been compiled based on 10 themes of children. After examining each of these verses, it is found that there are no verses in the Quran specifically discussing the context of pedophilia or sexual abuse of children. Most of the context of the sentences in the table above focus on the well-being and rights of the children.

4. Pedophilia according to Quranic perspective

The Quran is the source of Islamic jurisprudence and a major reference of all Muslims all over the world. The meaning of the Quran is divided into two, languages and terms. In linguistic form, Quran means reading (qiraat, tilawah). While the Quran in terminological meaning as described in *Mu'jam al-Asasi* is the word of Allah passed on to the prophet Muhammad, the majority of the verses were revealed in Mecca and partly revealed in Medina, consisting of 114 surahs in 30 constituencies. While in the book of *Mabahith fi Ulum al-Quran*, Quran means the word of Allah revealed to Prophet Muhammad in Arabic. The Quran is written in *mashaf* which is passed down from generation to generation and is rewarded by anyone who reads it. It begins with surah *al-Fatihah* and ends with surah *al-Nas* (Al-Qattan, 1981).

To discuss pedophilia from the Quranic perspective, it is a contemporary study that needs to be addressed in order for this issue to be resolved in light of the role of the Quran as a source of Islamic law. Thus, pedophilia in Islam is also an act prohibited by religion and is an act of *Zina*, the person who commits the act commits a great sin and is punished justly (Eko, 2016).

4.1 *Zina*

Allah says in Surah Isra' verse 32:

"Nor come nigh to adultery: for it is a shameful (deed) and an evil opening the road (to other evils)."

Imam al-Din Abi Fida' Ismail Ibn Kathir (d. 774 H) explained that Allah prohibits his servants from committing adultery or getting near adulterous behavior (Ibn Kathir, 2000). The prophet Muhammad said:

"I did not see anything so resembling minor sins as what Abu Huraira said from the Prophet, who said, "Allah has written for the son of Adam his inevitable share of adultery whether he is aware of it or not: The adultery of the eye is the looking (at something which is sinful to look at), and the adultery of the tongue is to utter (what it is unlawful to utter), and the innerself wishes and longs for (adultery) and the private parts turn that into reality or refrain from submitting to the

temptation."

[Al-Bukhari, Sahih Bukhari, *Kitab al-Qadr, Bab haram ala Qurbatu ahlakhnaha Annahum la Yarji'un*, No hadis 6612]

It is clear that the meaning of *"do not approach"* in the Quran indicates that all means that lead to *Zina* such as eyesight, touch are illegal and shunned, even if they are considered as minor sins. And the eyes are the senses that Allah commands to protect because through them men will die with lust.

Zina is defined by any unauthorized sexual intercourse. This is an act that is defined as referring to *Zina*. In the sense that all premarital sex with marriage refers to *Zina*. There are, however, those who are married, but the contract (*akad*) is not lawful or binded, either marrying a mahram or marrying someone else's wife or marrying a person in *I'ddah* (Hamka, 1983). Therefore, Allah commands the believers to lowere his gaze, as He says in surah al-Nur verse 30:

"Say to the believing men that they should lower their gaze and guard their modesty: that will make for greater purity for them: and God is well acquainted with all that they do."

Because the eye is the main source of damage to the heart, as some scholars say, it is a poisonous arrow that pierces the heart. So Allah commands that the genitals be kept, just as He commands the eyes to be kept because the eyes are the windows of the heart (Ibn Kathir, 2000).

Imam Abu 'Abdullah Muhammad ibn Ahmad ibn Abu Bakr al-Ansari Al-Qurtubi, when interpreting the above verse states that Allah commanded to hold your gaze, then preserve the genitals, because the eye is the leader of the heart.

Syeikh Muhammad ibn Muslim ibn Ubaydullah ibn Shihab al-Zuhri (d. 741) said, do not look at prepubescent girls, even though he was young. Abu Muhammad Atha bin Abi Rabah Aslam bin Shafwan (d. 115 H) said that it is *makruh* (frown upon) watching little girl relieving themselves in Mecca (Al-Qurtubi).

So the same approach should be taken against pedophiles, in the view that children can stimulate their appetite, so lower therefore his gaze as the first step in preventing them from pushing into sexual act. The context of prevention is stressed by Allah with the phrase *'do not approach Zina'*. Next, the discussion looks at another context of pedophilic crime, the act of incest. The term is different compared to pedophilia but the sample and victims are the same.

4.2 The incest

Often incidents involve older family members engaging in sexual abuse of children or adolescents in the family. Insects, in particular, have a more serious impact on the victim as it also affects the primary support of the child, his or her own family. Children who are victims of sexual abuse of their own family often do not receive full support from family members (Tsun, 1999; Roesler, & Wind, 1994; Lorentzen et al., 2008). Quranic verses on incest may also be associated with pedophilia, this is because incest can happen to children, English proverb calls it, like leaning on a glass door it breaks when it should give you comfort. This act of incest is a cruel act and it is forbidden by the evidence from the Quran. Allah said in Surah an-Nisa' verses 23:

"Prohibited to you (for marriage) are: your mother daughters sisters father's sisters mother's sisters; brother's daughters sister's daughters foster-mothers (who gave you suck) foster-sisters; your wives' mothers; your step-daughters under your guardianship born of your wives to whom ye have gone in no prohibition if ye have not gone in; (those who have been) wives of your sons proceeding from your loins; and two sisters in wedlock at one and the same time except for what is past; for Allah is Oft-Forgiving Most Merciful."

Ibn Kathir (2000) This honorable verses is the verse that establish the degrees of women relatives who is not eligible for one to marry, because of blood relations, relations established by suckling or marriage. Ibn Abi Hatim recorded that Ibn `Abbas said, "(Allah said) I have prohibited for you seven types of relatives by blood and seven by marriage." Ibn `Abbas then recited the verses, (Forbidden to you (for marriage) are: your mothers, your daughters, your sisters). At-Tabari recorded that Ibn `Abbas said, "Seven degrees of blood relation and seven degrees of marriage relation are prohibited (for marriage).

The above Quranic verses prohibit the practice of incest to safeguard the family lineage. Islam is very concerned about sexual offenses as it affects the five main purposes of Islamic law: religion, life and dignity, property, intellect, and posterity (Al-Zuhaili, 1992). Thus, Insects is a complex form of sexual abuse to deal with and is the most frequently secret form of abuse compared to other forms of sexual abuse and abuse perpetrated by psychological

trauma (Chen et al., 2007). And it is similar to a pedophile crime case because the victim is an innocent child.

4.3 Homosexual and bisexual

Pedophiles are subdivided into several classifications. One of the first distinctions made when classifying pedophiles is to determine whether they are "exclusively" attracted to children (exclusive pedophile) or attracted to adults as well as children (nonexclusive pedophile). In a study by Abel and Harlow (2001) of 2429 adult male pedophiles, only 7% identified themselves as exclusively sexually attracted to children, which confirms the general view that most pedophiles are part of the nonexclusive group. Pedophiles are usually attracted to a particular age range and/or sex of the child. Research categorizes male pedophiles by whether they are attracted to only male children (homosexual pedophilia), female children (heterosexual pedophilia), or children from both sexes (bisexual pedophilia) (American Psychiatric Association, 2000).

The percentage of homosexual pedophiles ranges from 9% to 40%, which is approximately 4 to 20 times higher than the rate of adult men attracted to other adult men (using a prevalence rate of adult homosexuality of 2% to 4%) (Hall, R. C., & Hall, R. C, 2007). Therefore, this study looks at the arguments regarding sexually explicit acts such as homosexuality can be *qias* on pedophilia issues. This is because there are pedophiles who love children of the same sex, different sexes and both. Allah said in Surah al-A'raf verses 80-81:

"We also (sent) Lut: he said to his people: "Do ye commit lewdness such as no people in creation (ever) committed before you? "For ye practice your lusts on men in preference to women: ye are indeed a people transgressing beyond bounds."

Ibn Kathir (2000) in *Tafsir al-'Azim* said, they did some of that none of the children of Adam or any other creatures ever did before them. They used to have sexual intercourse with males instead of females. This evil practice was not known among the Children of Adam before, nor did it even cross their minds, so they were unfamiliar with it before the people of Sodom invented it, may Allah's curse be on them.

Al-Qurtubi (2009) stated the true meaning of the word *al-fahsyah* in this verse is same-sex relationships between man. The true meaning is disgusting, but Allah SWT specifies this word in surah al-Isra verse 32 which means: *"Nor come nigh to adultery: for it is a shameful (deed) and an evil opening the road (to other evils)."*

The verses below are the story of the Quran which tells the story of the Sodomites whom the Almighty God inflicted on their disobedience to God. According to Ibn Kathir's view above, it is clear that it is an act contrary to the original nature of human creation. Therefore, such an act is not new in Islamic history but it is a recurring issue with the same context but different space and time. So, it is not surprising that new terms such as pedophilia exist in the millennium today. Allah said in Surah al-Syu'ara verses 165:

"Of all the creatures in the world will you approach males.

In another verse, Allah says in surah al-Ankabut verse 29:

"Do you indeed approach men, and cut off the highway? And practice wickedness (Even) in your councils? " But his people gave no answer But this: they said: "Bring us the Wrath of God If thou tellest the truth."

Other scholars argue that the meaning of this verse is that they commit abusive (homosexual) acts on travelers (Al-Tabari, 2009). Therefore, homosexual acts resemble pedophilia, just different from several angles. The first difference, in the age of pedophilia, is between adults and minors as stipulated by the Children Act 2001. And second, the differences in agreement between the two parties, both parties committed homosexual relations with consent. In the case of pedophiles, children are being forced by pedophiles.

5. Conclusion

The crime of pedophilia cases to this day is increasing with the number of victims among children. Every child is exposed to victimization and every person at risk of becoming a pedophile. Although there is generally no specific discussion of pedophilia in the Quran or the hadith, Islam provides the *Qias* way of finding the closest argument. Thus, this study brought three contextual themes that are discussed through arguments and qias through the proposition of *Zina*, incest, and homosexuality. This study can see the value of revelation in the discussion and search for solutions to contemporary issues that hit the country.

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Investigating the causal and underlying conditions affecting the provision of sports services to female spectators in Iran

Investigar las condiciones causales y subyacentes que afectan la prestación de servicios deportivos a espectadoras en Irán

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ABSTRACT

The present study aimed to investigate the causal and underlying conditions affecting the provision of sports services to female spectators in Iran. The qualitative research method was applied in this study. The statistical population included the chief executive officers and the board of directors of the league and federations of football, volleyball, and basketball, senior managers of sports stadiums, female spectators attending the official women's competitions, female spectators having a history of attending the stadiums and sports halls during the official male competitions, and academic experts in field of sports management who were familiar with the sports events; the theoretical sampling method was used in this research. In this study, 32 elite individuals were interviewed through 32 semi-structured interviews until achieving the theoretical saturation. Data collection tool included the semi-structured interviews. The results indicated 7 main causal conditions including the financial support, facilities, cultural issues, management resources, management approaches, benefits of the provision of services to female spectators, and social issues. Also, based on the results, the underlying conditions were classified into the 2 categories of the nature of spectators' presence and the nature of sport.

Keywords: Sports Services, Women, Athletes, Spectators

RESUMEN

El presente estudio tuvo como objetivo investigar las condiciones causales y subyacentes que afectan la prestación de servicios deportivos a las espectadoras en Irán. El método de investigación cualitativa se aplicó en este estudio. La población estadística incluía a los directores ejecutivos y la junta directiva de la liga y las federaciones de fútbol, voleibol y baloncesto, gerentes superiores de estadios deportivos, espectadoras que asistían a las competiciones oficiales de mujeres, espectadoras que tenían un historial de asistencia a los estadios y pabellones deportivos durante las competiciones masculinas oficiales y expertos académicos en el campo de la gestión deportiva que estaban familiarizados con los eventos deportivos; El método de muestreo teórico se utilizó en esta investigación. En este estudio, 32 individuos de élite fueron entrevistados a través de 32 entrevistas semiestructuradas hasta lograr la saturación teórica. La herramienta de recolección de datos incluyó las entrevistas semiestructuradas. Los resultados indicaron 7 condiciones causales principales que incluyen el apoyo financiero, las instalaciones, los problemas culturales, los recursos de gestión, los enfoques de gestión, los beneficios de la prestación de servicios a las espectadoras y los problemas sociales. Además, según los resultados, las condiciones subyacentes se clasificaron en las 2 categorías de la naturaleza de la presencia de los espectadores y la naturaleza del deporte.

Palabras clave: servicios deportivos, mujeres, atletas, espectadores

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Introduction

Dealing with the women's issues (issues related to the presence of women in the society) is one of the most fundamental issues of any civilization and society. Despite all studies conducted on the women's issues and the family, this subject is still worth of debate and expansion into the new areas. The current status of the world and the Islamic world require presenting a comprehensive model in accordance with the time and space requirements to respond to the current needs of societies (Afroog et al., 2012). The issue of women's role and performance in the present-day societies is among the major issues which need to be taken into consideration due to their sense of ability and authority in the society. However, sometimes their pivotal presence in the active arena is turned into a passive position and they are given an instrumental role in interactions. A major issue here is that what effective measures have been taken in contemporary societies to design a model for women? Whether women are model-oriented and passive, or they themselves have been able to be a model on the basis of their beliefs, principles, rules, and values in line with the religion and nationality.

The current conditions governing the world are such that, on the one hand, the attitude of nations towards Islam and the issues of women in Islamic countries, especially in Iran, are shown unrealistic and distorted, and on the other hand, the enemies of Islam and Iran are trying to present patterns of women in the global arena, and especially to promote the rich Iranian culture and the freedom of women's participation in society to Islamic countries. Therefore, it is very important to have a precise and systematic look at women's issues and to study these issues and plan in this regard. We believe that true Islam has the capacity for the active presence of women in the social arenas in the best and most complete way and it presents a comprehensive model of women. The current conditions of the world and the Islamic world also require providing a comprehensive model that meets the requirements of time and space in order to respond to the current needs of societies (Bannar &Emami, 2015). Sport is one of the most important institutions of the modern industrial societies, which most of the population of each country deals with it in various forms. As a social phenomenon, it is also affected by different issues of societies and covers various groups including the athletes and spectators (Sheikhi, 2002).In the current situation, sport is regarded as a human and educational issue and is rapidly expanding among all sections of society (Ehsani, 2003). Given the influence of spectators on the feel of pride and motivation in athletes, there is a view that the presence of female spectators in the sports fields would have a positive impact on the athletes and spectators. It seems that with the presence of women and families in the sports events, it is possible to greatly increase the level of social monitoring and control at the stadiums; as the sub-culture of hooliganism would not have the opportunity to express itself in confronting with the culture of honor. This can be helpful to keep the environment of stadiums safe and sound. Hence, given the current conditions of Iran in the world, various dimensions and barriers of the women's presence at the stadiums should be examined and necessary measures are taken in this regard to eliminate them (Gharehkhanloo, 2007).

Also, the strong interest of women in watching tournaments, as well as the influence of the presence of female spectators on the observance of ethical issues by athletes and spectators and the impact of seeing sports competitions on the creation of a better mood and morale in women, is a good reason for investing in this field with the goal of developing culture and creating conditions commensurate with the values of the Islamic society at the stadiums. Research shows that women's position is very high both in the Iranian culture and tradition and in the teachings of Islam. In the national culture of Iran, many speeches and behaviors, that are considered normal in the absence of women, are usually proceeded with caution and even abstention in a group where women are also present. Pudency and modesty of men in the presence of women is a customary national identity of Iranians, which is known as the "cultural shyness". The presence of women as spectators in the stadiums is likely to prevent immoral behaviors of men. Although this theory seems to be difficult for testing, it is not easy to skip it. Unfortunately, today in some competitions, especially in football, the use of very ugly words and offensive language by spectators are increasingly commonplace, so that sometimes thousands of spectators use the most outrageous words for even more than a few minutes. This behavior is likely to be repeated in the presence of a few thousand women. (Rahmaninia et al., 2006).

Loveloc et al. (2001) defined the quality of service in terms of the benefit, that is, quality of service is the judgment of the viewer or participant about the superiority of the sports services or service components; whatever the perception of spectators or participants is close to the superiority level, their evaluation of the quality of the service would be better. Customer satisfaction is a judge about the sport services or service components; the desired level of satisfaction, which is related to the desirable performance, is higher than the satisfaction level of the spectators or participants. What is simply acceptable and maybe the key point here is the difference between these two types of evaluation; that is, while satisfaction depends on the experience, the quality of service is not dependent on the experience; one needs to experience a sports product to be content with it or not, but experience is not necessary for the concepts of quality. There are still few researches on the evaluation of the quality of services in the spectator sports environments. Furthermore, it should be taken into account that spectator sports environments are different in terms of the nature of participation (active and passive) (Alidoosh Qahfarkhi et al., 2012).

Various variables such as the cultural, social, economic, managerial, civil, and legal factors in this field should be considered and analyzed. Women comprise half of the population, and enriching their leisure time by watching men's sports competitions, especially at the championship level, would significantly affect the well-being of the community. Women's

entry into sports halls has long been discussed, but no thorough measurement has yet been done on this issue, and the presence of women in stadiums and modeling the sporting services in this stratum is not taken seriously. Hence, the study seeks to investigate the underlying and causal conditions challenging women's entry into stadiums. Therefore, the main question of the present research is that what are the effective causal and underlying conditions in sport services for the female spectators in Iran?

Methodology

The present research is applied in terms of purpose and is among the field research types. The present research was conducted qualitatively, because of the less known or unknown nature of the studied subject, the existence of rather different processes, the existence of unknown variables and inadequacy of quantitative research in covering the subject in this study. Qualitative study can be used to understand and explain social phenomena from data obtained by interviews, documents, observations, etc.

In order to implement this research, in the first stage (comparative study), the present study was conducted as a desk study and attempts were made to use data from the program documents such as the strategic document of the country's sports development system and the theoretical studies to describe and analyze research related to sports services to female spectaculars. The analyses conducted by the researcher in the first stage led to the promotion of knowledge and development of a guide for interviews for the second stage. In the next stage (qualitative interviews), the grounded theory was used to build the proposed model of the research.

The statistical population comprised the directing managers and the board of directors of the league and the football federation, volleyball and basketball, senior managers and experts of sports stadiums, female spectators at the official women's competitions and female spectators who had a history of attending the sports stadium and halls during the official competitions of men, as well as the academic experts and commentators in scientific field of sports management who were familiar with sporting events. The samples were selected by theoretical sampling method. In the present study, 32 elite individuals were interviewed through semi-structured interviews in 32 sessions to achieve theoretical saturation. Table 1 indicates examples and interviews conducted among them.

Table1. Details of Research Interviews

Occupational and Social Status	Number of interviews
Directing managers and the board of directors of the league and the football federation, volleyball and basketball	6
Senior managers and experts of sports stadiums	4
Female spectators at the official women's competitions	9
Female spectators who had a history of attending the sports stadium and halls during the official competitions of men	7
The academic experts and commentators in scientific field of sports management who were familiar with sporting events	6
Total	32

The first part of the study (desk study) investigated the research pertaining to the research subject and identified the underlying and causal conditions. Through qualitative interviews, these cases were considered as interview guides. In the second part, qualitative interviews with academic elites and scholars were used for the data collection process. During the interview, information was recorded using various recording methods such as note taking and recording the interview on the audio or video tape.

Immediately after the completion of the interview, detailed notes were taken about the interview process. In this research, in order to record the data from the interviews, in addition to writing down the outline, the researcher recorded the interview using a special recording device with the consent of the interviewee. The potential participants were contacted for interview, and those willing to participate in interviews were interviewed at their desired time and place. In this regard, an interview manual was first sent to individuals that included the title, purpose and general interview questions to get interviewees acquainted with the subject.

In the qualitative method, the terms of acceptance, transferability and confirm ability were used to assess the validity. The data and findings of the qualitative method should be acceptable and reliable, which involves collecting real data. In the present study, the methods of Parger and Pitney (2009), including multiple data sources, multiple analysts and multiple methods were used in order to increase the acceptability of research data. In the present study, we improved multiple data sources in order to increase the acceptability of the results by selecting sample individuals from different strata (confirmed by the research group) and using written and authoritative sources. In the present study, with the

participation of research colleagues and experienced people in the qualitative research (considering their research background), we improved multiple analysts to increase the acceptance of the results during interviews and data analysis. Eventually, in order to improve the multiple methods in order to increase the acceptability of the results, interviewing techniques, libraries and Internet searches were used to collect the maximum data during the research. Transferability of the research results indicated that the results are generalizable to other groups and environments. Through numerous reviewing of interviews and extracting the maximum and non-repetitive content, the research attempted to improve the transferability of the results.

The confirmability of the results of the qualitative research is realized when other researchers can clearly follow the research path and actions taken by the researcher. One way to realize this issue is that the researcher explains exactly the whole process of research and the direction of his decisions during the research in the report, which was practiced during this research. Also, in the process of research advancement, we attempted to avoid the maximum presence of the colleagues of the research group despite limitations, namely, lack of time or lack of access. In order to analyze the research data, the literature was first reviewed. Then, by collecting statistical samples, the data collection framework was developed. In the next step, the researcher entered the research field, and arranged the data and analyzed the data of the first case. Then repeating the theoretical sampling was conducted until reaching the required level. Eventually, at the end of the research analysis, we reviewed the literature and theoretical foundations of the subject.

Research Findings

Causal conditions indicate the importance of the main studied phenomenon (providing sports services to female spectators in Iran). In this research, after investigating the experts' opinions and conducting research interviews, 7 causal conditions were identified, namely, financial support, facilities, cultural issues, management resources, management approaches, the benefits of providing services to female spectators and social issues. There are also significant underlying issues in providing sports services to female spectators in Iran. Certain conditions that affect the strategies and this research considered the internal factors affecting the main phenomenon and strategies as underlying conditions. Underlying conditions were categorized in two general areas. These classes include the nature of the spectators' presence and the nature of the sport. Figure 1 indicates the effective causal conditions and underlying conditions in sports services for female spectators in Iran.
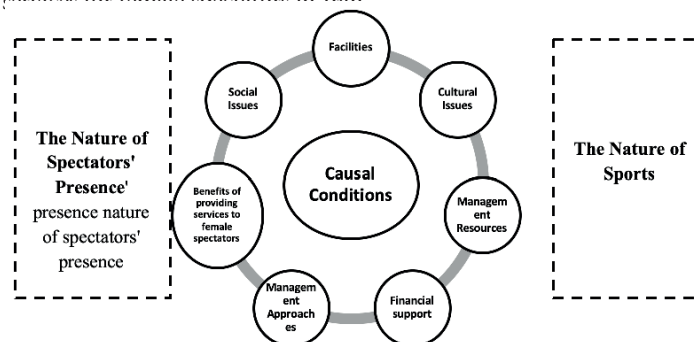
Figure 1. Effective Causal and Underlying Conditions in Sports Services to Female Spectators in Iran

Discussion and Conclusion

The results of the present study indicated that effective causal factors influencing the provision of sports services to women in Iran included 7 factors, namely, the financial support, facilities, cultural issues, management resources, management approaches, the benefits of providing services to female spectators, and social issues.

Regarding the attraction of spectators and providing services to them, especially in professional sport, some issues such as financial issues are affective which can also affect other areas of sport. Chi and Liu (2009) pointed out that facilities in each sport are affected by financial issues. Also, Ahmadi et al. (2016) pointed out that approaches and management resources are significant issues in attracting spectators. Moreover, Torkfar et al. (2010) pointed out that while developing standard management approaches, appropriate management resources lead to the development and presentation of services to the spectators. Also, Emamomic (2010) pointed out that the nature of the sport is one of the issues that determine the need to develop and pay attention to providing services to spectators in different groups. Such attention indicates that the results of the present study are consistent with the results of research conducted by Chi and Liu (2009), Ahmadi et al. (2016), Torkfar et al. (2010) and Emamomic (2010).

Due to the lack serious programs, providing services to female spectators in Iran requires different factors and areas, thus, the present research determined a number of different dimensions that need serious attention. Management and financial resources, as well as attention to some cultural and social issues, lays the groundwork for the conditions

and infrastructure in the sport of the country to provide services to female spectators. This makes female spectators to meet their needs in benefiting the sport space and persuades them to attend the stadiums.

The results of the research indicated that the effective underlying conditions of sport services to female spectators in Iran were categorized in two general areas. These categories include the nature of the spectators' presence and the nature of the sport and some research pointed to this issue. Sayor et al. (2017) pointed out that sport is one of the most significant issues that encourages all groups to watch and see. Kheiri and Ghorbani (2017) also determined that the presence of spectators is one of the essential requirements of sport, which has made it possible to plan the attraction of significant spectators.

In addition, the nature of sport itself has become an effective underlying factor for providing services to female spectators. Schneider and Bristho (2007) point out that sport has become the most significant and essential industrial concern in the world nowadays, such that it could attract all people in every situation. This issue can also be a significant underlying factor in the success of sports in issues related to spectators. Thus, it can be stated that the results of this study were consistent with the results of the research conducted by Kheiri and Ghorbani (2017), Schneider and Bristho (2007) and Sayor et al. (2017).

The increasing expansion of sport in the society has made sports effective in all aspects of societies, to the extent that Demil and *Bucardo* (2014) stated that sport has profound effects on all aspects of the world. Countless attractions of sport, as well as the many benefits of doing sports or even the presence at sports, for some reasons, including spectators, have made sports to have increasing effects on individuals. Moreover, the high potential of sport has led many companies and business organizations to select sport as a significant field in their business activities. Therefore, the nature of sport has caused issues of attracting spectators and the provision of services to them as a significant economic issue for clubs, communities, companies and organizations. Therefore, the nature of the sport and the nature of attracting spectators were able to act as an underlying factor for effective delivery of services to female spectators.

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Economic nature of the competence: general methodological approaches to the problem

Carácter económico de la competencia: enfoques metodológicos generales del problema

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ABSTRACT

In the period of structural and qualitative changes in the Russian economy, the development of the labor market and the educational services market, the effectiveness of economic education is largely determined by the level of formation of economic competencies of students. The development of the diversification process required bringing the education system in line with the requirements of market relations, the principles of alternatives and variability, ensuring the quality of education, which is the most important condition for the specialist's demand in the labor market. The target component of the model of formation of students' economic competences by definition includes the goals and objectives of economic training. The increased demand for economic knowledge has led to new forms of economic education. The *activity component* in the model of formation of economic competencies focuses on the fact that in the domestic system of education in relation to the vocational school there was a long-term practice of compiling the qualification characteristics of a specialist, which fixed the requirements for knowledge, skills and abilities of graduates of various specialties, where in addition to the knowledge paradigm there were the terms "readiness", "ability", "responsibility", "understanding" and "worldview", expanding the close framework of such a paradigm. The main idea of the activity approach in education is not connected with the activity itself, but with the activity as a means of formation and development of the student's personality. The content component of the model involves the formation of students' economic competencies in the form of key, professional and additional economic competencies at different levels of professional education, taking into account training in economic and non-economic specialties.

Keywords: Economic training; key, professional, additional economic competencies; competence approach, diversification of education.

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RESUMEN

En el período de cambios estructurales y cualitativos en la economía rusa, el desarrollo del mercado laboral y el mercado de servicios educativos, la efectividad de la educación económica está determinada en gran medida por el nivel de formación de competencias económicas de los estudiantes. El desarrollo del proceso de diversificación requirió alinear el sistema educativo con los requisitos de las relaciones de mercado, los principios de alternativas y variabilidad, asegurando la calidad de la educación, que es la condición más importante para la demanda del especialista en el mercado laboral. El componente objetivo del modelo de formación de las competencias económicas de los estudiantes, por definición, incluye las metas y objetivos de la formación económica. La mayor demanda de conocimiento económico ha llevado a nuevas formas de educación económica. El componente de actividad en el modelo de formación de competencias económicas se centra en el hecho de que en el sistema educativo interno en relación con la escuela vocacional había una práctica a largo plazo de recopilar las características de calificación de un especialista, que fijaba los requisitos de conocimiento, habilidades y destrezas de graduados de diversas especialidades, donde además del paradigma del conocimiento existían los términos "preparación", "habilidad", "responsabilidad", "comprensión" y "visión del mundo", ampliando el marco cercano de tal paradigma. La idea principal del enfoque de la actividad en la educación no está relacionada con la actividad en sí, sino con la actividad como un medio de formación y desarrollo de la personalidad del alumno. El componente de contenido del modelo implica la formación de competencias económicas de los estudiantes en forma de competencias económicas clave, profesionales y adicionales en diferentes niveles de educación profesional, teniendo en cuenta la capacitación en especialidades económicas y no económicas.

Palabras clave: formación económica; competencias económicas clave, profesionales, enfoque de competencia, diversificación de la educación

Introduction

In the period of structural and qualitative changes in the Russian economy, the development of the labor market and the educational services market, the effectiveness of economic education is largely determined by the level of formation of students' economic competencies, as well as the development of adaptive abilities of the individual to new types of professional and market activities (Abdulatipova & Tsakhaeva, 2017; Abuzjarova, 2018; Ashmarov, 2018; Aminova & Tsakhaeva, 2018; Badakhova, 2017; Bolotin et al, 2017; Borisov, 2018; Borisova & Novoseltseva, 2016; Borisova et al, 2018).

The basis of the system of formation of students' economic competencies are ideas of development of vocational education (humanization, democratization, advanced nature of education and its continuity) that were formulated by A.M. Novikov, as well as diversification as general pedagogical principle of vocational education development, justified by T.Yu. Lomakina, and the following principles: multilevel and gradation, differentiation and flexibility, practical activity and continuity, territorial integrity and universality.

Multilevel and gradation contribute to the continuity of the formation of economic competencies of the graduate and allow developing economic educational programs taking into account the individual characteristics and capabilities of students.

Differentiation and flexibility suggest the development and testing of various areas of formation of economic competencies of the graduate in combination with a variety of forms, methods, technologies of training and education (Borovikova, 2017; Gadzaov & Dzerzhinskaya, 2018; Gadzhieva, 2018; Gasanova et al, 2017; Gnatyuk & Pekert, 2018; Ilkevich & Medvedkova, 2017; Kryuchkova, 2018; Kuznetsov et al, 2018; Morozov et al, 2018; Narkevich & Narkevich, 2018).

Practical activities and continuity provide a sequence of formation of economic competencies of the graduate in accordance with the requirements of the market economy, the demands of the labor market.

Territorial integrity and universality imply the obligation of economic education and training, taking into account the world economic crisis.

The basis of the classification: the subjects to which the goals and objectives of vocational education are directed - personality (humanization, universality, diversification) and society (democratization, territorial integrity); levels of vocational education (multilevel and gradation, practical activities and continuity) and types of professional activities (differentiation and flexibility, practical activities and continuity).

In the conditions of *diversification of education* (expansion of academic freedoms, independence, variability and alternatives), the strategy of personnel training is changing: it is important to train specialists in accordance with the needs of economic activity of the region, the needs of employers, the needs of market participants. The Concept of modernization of Russian education specifies the necessary conditions for achieving a new quality of vocational education: forecasting the needs of the labor market, improving the efficiency of the market of vocational education, eliminating imbalances and unnecessary duplication in personnel training (Osipova, 2018; Popov, 2018; Schwarzkopf,

2018; Sergeeva & Trubakova, 2017; Tsahaeva et al, 2017; Tsahaeva et al, 2016; Zulaeva et al, 2018).

Research methodology. The development of the diversification process required bringing the education system in line with the requirements of market relations, the principles of alternatives and variability, ensuring the quality of education, which is the most important condition for the specialist's demand in the labor market.

The main directions of development of diversification processes in education at the present stage are the following ones:

marketing of the pedagogical labor market, development of methods of rapid and strategic response to its changes;

modernization of the content, technologies of personnel training, quality management system of education;

development of mechanisms for the integration of professional educational institutions into the socio-economic and socio-pedagogical environment;

improvement of mechanisms to strengthen the practical orientation of training in accordance with the needs of the region;

development of mechanisms to ensure the unity of the federal and regional components in the content of education, strengthening its educational component;

development of monitoring system of pedagogical process;

timely updating of models of social and professional image of the specialist in accordance with the social order;

creation of conditions for formation (taking into account regional conditions, opportunities of professional educational institutions) of the specialist's personality possessing professional and social mobility, competitiveness;

organization of the system of employment of graduates, providing them with secondary employment.

There is a real competition in the labor market, the success of which depends on the quality of specialist' education and training, the presence of their personal qualities that allow them to take his place in the social structure of society, to satisfy their claims, needs for self-realization.

The model of formation and development of students' economic competencies, developed by us, includes the following interrelated components: target, activity, content, design and technology, evaluation and reflexive.

Research results. The *target component* of the model of formation of students' economic competences by definition includes the goals and objectives of economic training.

The *purpose* of economic education in **secondary school** is to instill a responsible attitude of students to the basics of economic knowledge. This goal implies the following *tasks*: in the field of education - the development of students' knowledge of the basics of modern economy, the principles and laws of its functioning and development, the formation of initial ideas about the essence of the economic system, its basic categorical structures and the nature of production activities; in the field of self-consciousness - understanding of their individual economic potential, the formation of conscious civil economic behavior; in the field of motivation - the development of interest in the problems of the economy, the constant need for economic knowledge, the desire for civilized entrepreneurship, which should be a means of social protection, to facilitate the solution of the problem of employment of graduates, their adaptation to the modern economy.

Substantiating the process of implementation of continuity in economic education of students at all levels of secondary school, it should be noted that since 1992 various experimental courses began to introduce in general education institutions of Russia, there were new approaches to the organization of economic education. However, there are problems with the content of economic education. To date, affluent foreign experience in economic education has been accumulated, but it should be borne in mind that it should be used with great caution: direct copying can lead to a shift in the value orientations of students. The fact is that the classical market, which forms the basis of the content of most Western textbooks on Economics, is extremely far from the current state of our economy and can be considered only as a distant prospect, as an abstraction. It is no secret that many decisions in the economic sphere in modern Russia are often more political than market-oriented and are determined by the dynamics of transition processes. Another problem with the content of economic education is that we still have a knowledge-based approach to learning. The first place is given to the task of students learning a large number of economic terms at the expense of the formation of their functional literacy and moral basis of choice. However, many economic concepts are quite difficult to understand for students, and therefore there is a problem of adaptation of the existing economic terminology for all age levels of education in secondary school.

In accordance with the decree of the Government of the Russian Federation "On the concept of modernization of Russian education for the period up to 2010" in the last two forms of secondary school from 2006/2007 academic year specialized training of high school students is provided. The system of specialized training (profile training) should be focused on the individualization of training and socialization of students, including taking into account the real needs of the labor market. The transition to profile education is aimed at providing deep and specialized general education training for students in selected areas of knowledge, establishing equal access to full-fledged education for different categories of students in accordance with their individual abilities and needs, ensuring continuity between general and vocational education. In high school the teaching of Economics focuses on the deepening of knowledge on the basics of economic theory and its applied aspects, the study of types and forms of business, professional orientation and mastery of basic professional skills. Subject areas "Technology" and "Social Studies" provide an additional opportunity to acquire economic knowledge for students in 10-11 grades, allowing disclosing fully the relationship of Economics with history, law, politics, consolidating theoretical knowledge in practice. At the same time, the content of economic education in the school should be made as an integral system, providing continuous improvement, flexibility of education forms, creative approach, focused on the development of socio-economic methods of transformation of reality. Currently developed author's programs on economic education of schoolchildren are largely integrated with such subjects as ecology, history, geography, etc., covering their economic component. The increased demand for economic knowledge has led to new forms of economic education. Such forms, first of all, include teaching the basics of economic theory and applied Economics in institutions of additional education, in full-time and part-time economic and mathematical schools, schools of "Young Entrepreneur", "Young Manager", etc., the use of distance learning, the organization of training courses in economic universities. However, the analysis of school economic education conducted in the study allows us to conclude that a special course is needed that identifies the main parameters of a certain norm of economic education, taking into account the real possibilities of students, the state of the socio-cultural environment, a course that gives a holistic view of the economic system, production, exchange, distribution and consumption of goods and services.

The main *purpose* of economic training in **basic vocational school** is to provide students with the necessary amount of economic knowledge, skills and abilities for future professional activity in a market economy; awareness of the social values of the economic sphere and understanding of the meaning of the current economic laws, their social and personal importance. These goals define the following *tasks* of economic training: the formation of a basic level of economic knowledge necessary for the orientation and social adaptation of students in the context of changes in Russian society, as well as for the professional and economic orientation of graduates.

The **secondary vocational school** aims to develop the capacities, knowledge, abilities and skills of competent economic decision-making mid-level specialist in the management of production and team. These goals define the *tasks* of economic training: development of practical skills of responsible economic decision-making; formation of the ability to self-development, self-education, education of students' initiative and activity, independence in decision-making; formation of the subject system of knowledge, mastering the basic economic theories, categories, concepts, laws, conceptions, mastering the basic methods and techniques of rational and effective economic activity; the formation of a comprehensive generalized system of knowledge based on interdisciplinary connections of economic disciplines; the formation of economic thinking, which manifests itself in a logically complete representation of the economy, its basic processes, laws, as well as in the mental ability of a person to economic transformation of various spheres of management.

In **higher education**, the main *objectives* of economic training are the expansion and deepening of previously acquired economic knowledge, abilities and skills in the process of economic training; development of economically significant qualities of the individual, needs, interests, motives, value orientations; manifestation of economic competence in behavior and activity. The main *tasks* of economic training is the formation of students' economic competence associated with the development of a culture of economic thinking (development of adequate ideas about the essence of economic phenomena and their relationship, providing the ability to make reasoned judgments on economic issues, gaining experience in the analysis of specific economic situations).

Discussion. The *activity component* in the model of formation of economic competencies focuses on the fact that in the domestic system of education in relation to the vocational school there was a long-term practice of compiling the qualification characteristics of a specialist, which fixed the requirements for knowledge, skills and abilities of graduates of various specialties, where in addition to the knowledge paradigm there were the terms "readiness", "ability", "responsibility", "understanding" and "worldview", expanding the close framework of such a paradigm.

At the same time, the principles of the specialist model development were subjected to critical analysis and improvement. Thus, N.F. Talyzina points out that "the description of the purpose of education (specialist model) means the representation or system of typical tasks, or a system of adequate skills (activities)". The structure of the specialist model should include: "a) tasks (activities) determined by the peculiarities of the century; b) tasks due to the peculiarities of the socio-political system; c) tasks dictated by the requirements of the specialty". These general requirements to clarify the aims of education are also valid today, contributing to the modernization of education.

The need to describe the personality traits of a professional school graduate in terms of the competence approach is long overdue, and the Bologna process requires a common understanding of the content of qualifications and degrees in all programs of the participating countries and as a priority direction of joint efforts calls the definition

of general and special competencies of graduates. S. Smirnov points out that "it is impossible to reduce all the reforms in education only to the Bologna process. Russia should have its own national educational policy and, in parallel with participation in the Bologna process, form its own specific education system, based on domestic needs and focusing on global trends". At the same time, the fundamental changes in society and the peculiarities of the Russian education system require the rapid development and solution of many problems, and the Bologna process could become a "good companion, providing a solution to the tactical problems facing the Russian education". One of these tactical tasks is the description of the qualities of the graduate's personality in terms of the competence approach and the definition of ways of forming these qualities.

The competence approach developing in the last decade in the European and Russian educational spaces is considered by all its researchers as one of the necessary new conceptual resources for the revision of traditional goals, theory and practice of vocational education, adequate to the rapidly changing world, as a tool for updating education and achieving its measures and standards of modern quality. Actualization of interest in this phenomenon on the part of the domestic academic community is associated with the signing of the Bologna Declaration by the Russian Federation (September 2003). The competence-based approach acts as a new approach to goal-setting in education, and competency and competence are approved as new target categories, which mean the shift of professional education from the subject-centered orientation of the educational process to its student-centered orientation. The most important factor in the recognition of the competence approach is the transfer of emphasis from content to results, from knowledge to personal development. According to European scientists, the trend is that learning outcomes are usually expressed in terms of competencies or skills and competencies. The European project "Tuning education structures in Europe" (TUNING) argues that information on the aims of education expressed in the language of competences provides a more holistic view of educational programs, based on the premise that degrees (qualifications) can be internationally comparable and compatible if what the holders of these degrees are able to accomplish is comparable with the relevant academic professional profiles.

The main idea of the activity approach in education is not connected with the activity itself, but with the activity as a means of formation and development of the student's personality. This means that in the process and as a result of the use of forms, techniques and methods of training, not a robot is born, programmed to clearly perform certain types of actions, activities, but a person capable of choosing, evaluating, programming and designing those activities that are adequate to its nature, satisfy its needs for self-development, self-realization. Thus, as a common goal, we see a person who is able to turn his own life activity into a subject of practical transformation, to relate to himself, to evaluate himself, to choose the ways of his activity, to control its course and results.

In our opinion, for the training of practice-oriented specialists in demand in the labor market, the *activity-competence approach* is necessary. In contrast to the traditional education focused on the assimilation of knowledge, practice-oriented education is aimed at acquiring in addition to knowledge, abilities, skills, practical experience. Education cannot be practice-oriented without the acquisition of experience, the level of which is more accurately determined by the methods of competence-based approach. The activity approach is directed to the organization of the learning process, technologies of practice-oriented education, where the whole learning process becomes activity-oriented. A competence-based approach is focused primarily on achieving certain results, the acquisition of significant competencies. The acquisition of competencies is impossible without the acquisition of experience, i.e. *competencies* and *activities* are inextricably linked. Competencies are formed in the process of activity and for the sake of future professional activity. Under these conditions, the learning process takes on a new meaning; it turns into a process of *learning/studying*, i.e. the process of acquiring knowledge, abilities, skills and experience in order to achieve professionally and socially significant competencies. In the report of the International Commission on Education for the XXI century "Education: the hidden treasure" Jacques Delors called four times the verb "learn": learn to know, learn to live together, learn to do, learn to be. Hence, it is the activity-competence approach that can become an effective methodology for building practice-oriented education in the XXI century.

Conclusion. The *content component* of the model involves the formation of students' economic competencies in the form of key, professional and additional economic competencies at different levels of professional education, taking into account training in economic and non-economic specialties.

The basis of the classification of economic competence is the modules of the studied disciplines:

Module 1 – general humanitarian and socio-economic disciplines;

Module 2 – general professional disciplines;

Module 3 – special courses (professional modules).

Taking into account the revealed basis of classification we defined economic competence through:

    key economic competencies;

    professional economic competencies;

additional economic competencies.

Key economic competencies include the basic economic knowledge necessary to adapt to professional activities in market conditions.

Professional economic competencies imply the ability to apply economic knowledge in practice, the ability to assess new economic situations and take optimal economic decisions on them.

Additional economic competencies are considered by us as the ability of creative economic behavior, the ability to effective behavior in the labor market, the ability to professional growth and continuous economic self-education, the ability to apply economic knowledge systematically in investment projects; these competencies are formed in the process of studying the students' elective courses and optional subjects.

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"Kreutzer Sonata" l. N. Tolstogo in the context of social discourse of the XIX Century: social and ethical aspect

"Sonata Kreutzer" l. N. Tolstogo en el contexto del discurso social del siglo XIX: aspecto social y ético

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ABSTRACT

"Kreutzer Sonata" L.N. Tolstoy is one of the key works of the late XIX century. The publication of the story served as an impetus that caused a wide discussion of the problems of family, marriage, gender, and the status of women. The ban on censorship only contributed to an increase in interest in the story. Kreutzer's sonata was read not only in capitals and large cities, but also in remote counties. The object of discussion was family values based on the concepts of marriage set forth in the Bible and the teachings of the Holy Fathers. The words of the main character of Pozdnyshev show flaws in Orthodox marriage.

Keywords: L.N. Tolstoy, The Kreutzer Sonata, social discourse.

RESUMEN

«Kreutzer Sonata» L.N. Tolstoi es una de las obras clave de finales del siglo XIX. La publicación de la historia sirvió como un ímpetu que provocó una amplia discusión sobre los problemas de la familia, el matrimonio, el género y la condición de la mujer. La prohibición de la censura solo contribuyó a aumentar el interés en la historia. La sonata de Kreutzer se leyó no solo en capitales y grandes ciudades, sino también en condados remotos. El objeto de discusión fueron los valores familiares basados en los conceptos de matrimonio establecidos en la Biblia y las enseñanzas de los Santos Padres. Las palabras del personaje principal de Pozdnyshev muestran fallas en el matrimonio ortodoxo.

Palabras clave: L.N. Tolstoi, La sonata de Kreutzer, discurso social.

Introduction.

"Kreutzer Sonata" L.N. Tolstoy was a momentous event in the socio-political life of the end of the 19th century, which caused a wide public resonance not only in our country, but also abroad. Its name corresponds to the name of the chamber sonnet of Ludwig van Beethoven, which indicates the particular importance of this musical institution in the context of the story (Fisenko, 2015: Fisenko, 2015: Fisenko et al, 2019). Exact quotes of the Gospel texts, taken as an epigraph to the tests, speak about the philosophical perception of the problem of the story, set the moral reference point of the work. The story was initially banned by censorship. Despite this, it spread throughout the country and in "distant provincial backwoods, almost everyone belonging to the so-called society considered it their duty to get out sometimes with great difficulties to read this work". Permission to publish the story was obtained only after a personal meeting between the wife of the writer Sofia Andreevna and Alexander III (Adonina et al, 2018: Azimov & Schukin, 2009: Kosareva et al 2019).

Discussion of the problem.

Discussions related to the release of the novel "The Kreutzer Sonata" by L.N. Tolstoy.

Immediately after the release of the story (1891), both enthusiastic and sharply criticizing articles appeared in the press regarding the problems of the family and marriage, the status of women, discussed by the heroes of the Kreutzer Sonata. V.A. Zhdanov in his work "Love in the Life of Tolstoy" traced the evolution of the writer's views on family and marriage, examining the family life of Tolstoy. The researcher believed that the "Sonata" condemns vices and glorifies morality, condemns "selfish love that interfered with the continuation of the family" (Gez, 1985). The publication of the story caused the appearance of articles on the status of women in Russian society, which has been developing for a long time, ideas about Christian marriage, male and female virtues. In Russian society, family values were based on Christian concepts of marriage, which were set forth in the Bible and the teachings of the Holy Fathers. By the end of the XIX century. the need has ripened for reforming the institution of the family. This fact was also recognized among the clergy, but there was no unity of opinion. In family matters, the Church defended the Orthodox canons. In his works, Tolstoy reflected in many respects the opposition to the Church views on the problems of Christian marriage, which led to the discontent of the clergy. So, in the sermon of the Kharkov archpriest Butkevich, it was said that Tolstoy's works were distinguished by "destructive power and corrupt character", and "Kreutzer's sonata" was characterized as "clumsy, dirty and immoral story" (Opulskaya, 1979). Beginning criticism of the views of the writer subsequently resulted in the "Definition" of the Synod. As far as the writer was concerned, the problem of family relations raised by him, we can judge from his diary entries: "And then I wrote and write a story, a story about carnal love, sexual relations in the family. And this is more serious. Maybe not necessary And as always, when busy with good things, in this direction, supporting him, external events take shape. The other day I received letters and brochures from shakers from America. Do you know their teachings? Especially against marriage, i.e. not against marriage, but for the ideal of purity beyond marriage". For women and sexuality, Tolstoy throughout his work was controversial. Gradually he moves away from the denial of marriage. This can clearly be seen in the example of his late work. Tolstoy sees the meaning of a woman in childbirth and helping her husband (see L.N. Tolstoy "The Truth About Women"). Only a woman can give birth to a man, therefore, a woman's life is comprehended by the call "to give birth, feed and raise the greatest number of children who are able to work for people according to her worldview" (see L.N. Tolstoy "On Women"). To "grasp the worldview of her time", a woman does not need special education, she does not need to participate in social work, she only needs to "read the Gospel and not close her eyes, ears and, most importantly, hearts". Men and women are equalized before God in the call to serve him, but their forms of service are different. Thus, the work of the writer "Sexual Lust" and "On Women" is permeated by the idea of keeping the body and soul in chastity, as it "gives incomparably more benefits than even a happy marriage" (L.N. Tolstoy "Sexual Lust").

Disclosure of the views of L.N. Tolstoy on the "family issue".

The basis for the plot's concept was a letter from an unknown woman, which was received by Tolstoy in February 1886: "So, the main idea, rather, the feeling", Kreutzer sonata "belongs to one woman, a Slav who wrote me a comic-writing letter, but remarkable in content about the oppression of women by sexual demands".

In the "Kreutzer Sonata" L.N. Tolstoy innovatively develops the theme of family and marriage, raises the problem of sexual relations between a man and a woman, shows the flaws of Orthodox marriage, gives a "new" interpretation of Christian dogmas (through the lips of the hero of Pozdnyshev), which causes a lot of controversy. The main opponent of Tolstoy, Archbishop Nikanor called Tolstoy the discoverer of the topic of sexual relations, and in the article "Conversation on Christian Matrimony Against Gr. L. Tolstoy "compares the "Kreutzer Sonata" and the novel by N. G. Chernyshevsky "What to do?". Nikanor believed that the Kreutzer Sonata was harmful. "In our judgment, this new gospel is the word of a madman who decisively survives from the mind". M.I. Spassky admired the "Kreutzer Sonata", believing that Tolstoy was able to arouse highly moral feelings: even young men undergoing debauchery created circles in order to maintain physical purity before marriage. The writer expressed his view of the modern family in the words of his hero Vasily Pozdnyshev: "Our people get married without seeing anything other

than copulation in marriage, and either deception or violence comes out. When cheating, it is easier to tolerate. Husband and wife only deceive people that they are monogamous, but live in polygamy and polygamy. This is nasty, but still coming; but when, as it most often happens, the husband and wife made an external obligation to live together all their lives and from the second month they already hate each other, want to break up and still live, then that terrible hell comes out from which they get drunk and shoot kill and poison themselves and each other" (Nikanor, 1890).

Thoughts L.N. Tolstoy regarding the meaning and significance of marriage had a public outcry. Many modern researchers believed that the concept of "universal chastity" is connected with the mental state of the writer at that moment and his personal biography. The heroes of the "Kreutzer Sonata" touch upon many aspects of the sexually reproductive side of the marriage: taboo of sexual relations during pregnancy and lactation, contraception, the problem of love as the basis of marriage, divorce and marital fidelity. Through the lips of heroes, the writer conveys to his readers his views: "And fear must be the first thing in a woman"; "As she, Eve, the woman, was created from the rib of a husband, she will remain until the end of the age"; "We need to shorten the female gender ahead of time, otherwise everything will be lost"; "In our country, people marry without seeing anything other than copulation in marriage. And it's either deception or violence ", etc. The debates that unfolded on the pages of the press prompted Tolstoy to justify his views and in 1890 the writer presented to the public an "Epilogue to the Kreutzer Sonata", in which he summed up his thoughts on marriage: "There can never be a Christian marriage and never was".

The ideal of a Christian is love of God and neighbor, is renunciation of oneself to serve God and neighbor; carnal love, marriage, is self-service and therefore, in any case, is an obstacle to the service of God and people, and therefore, from the Christian point of view, it is a fall, a sin". Love for God and neighbor implies renunciation of oneself in their name. This is the ideal of a Christian. Marriage does not contribute to the service of God and people. The gospel reflects the ideal of complete chastity: a married man does not need to divorce his wife to marry another, a person (married and unmarried) has a sin to look at a woman as an object of pleasure, an unmarried man does not have to marry to be chaste. According to the writer, it is important to understand that "abstinence, which is a necessary condition for human dignity in an unmarried state, is even more necessary in marriage". M.I. Spassky, having analyzed from the point of view of the Church the provisions cited by L.N. Tolstoy in the "Afterword" concludes: "Only he could, from the fact that Pozdnyshev's marriage was a blasphemous insult to the sacrament of marriage, deduce that in general Christian marriage is a deception and a lie". Thus, not understanding the essence of the subject of love and accusing the Church of deceit. According to Tolstoy, family ties do not justify sexual passion. Sexual (or carnal love) is the strongest, "because if passions are destroyed and the last, most powerful of them, carnal love, the prophecy will be fulfilled, people will unite together, the goal of humanity will be achieved, and there will be no need for him to live". Awareness of one's spirituality is necessary to combat "lust," only in this case, sexual passion will appear to be "what it is: a humiliating animal property". Children are atonement for sexual sin, and "a marriage consisting in giving birth and raising children is mediocre service to God through children" (see: L. Tolstoy About Women "This marriage, with its ensuing consequence – the birth of children – defines a new, more limited form of service to God and people for those who marry. Before marriage, a person directly in the most diverse forms could serve God and people; marriage, however, limits his area of activity and requires him to return and educate offspring descending from marriage, future ministers to God and people".

However, marriage is not a means of having children. It is possible to educate ministers to God and society by adopting and adopting children: "it is much easier to maintain and save those millions of children's lives that perish around us from lack of, not to mention spiritual, but material food". According to V.A. Soloviev, using the example of the Pozdnyshev family, Tolstoy demonstrated what marriage should not be (Soloviev, 1893; Spassky, 2018). An even greater crime of morality is sexual intercourse, in which the possibility of having children is prevented, and the severity of the consequences is transferred to the woman. The writer concludes that abstinence is also necessary in marriage. In carnal relationships, the birth of children is perceived as a hindrance to the continuation of love relationships. Intemperance during pregnancy and lactation destroys the "mental strength of a woman". Russian philosopher and theologian A.F. Gusev approached Tolstoy's understanding of the family somewhat differently. He noted that Tolstoy acknowledged the fact of the existence of one percent of marriages: "those who" believe in the sacrament of marriage "and" go to church "do not look" as an empty formality "are happy in family life" (Gusev, 2012). L.N. Tolstoy condemned premarital sexual relations and opposed the widespread assertion in society that sexual intercourse could be good for health: "I heard that my struggles and pains subside after that, I heard it and read it, I heard from the elders that it would be good for health OK; I heard from my comrades that there is some merit in this, youth". Parents, under public influence, "institute debauchery". The author concludes: "So I wanted to say that this is not good, because it cannot be that for the health of some people it would be possible to destroy the bodies and souls of other people, just as it cannot be that for the health of some people it is necessary was to drink the blood of others. "When solving pedagogical problems, parents should "set other goals for themselves, except for a beautiful, well-groomed body", in which sensuality is "kindled" early and "terrible sexual vices" are formed. The writer also opposes chanting in novels, songs and poems of carnal love. Men and women should "stop

thinking that carnal love is something especially elevated on the contrary, falling in love and connecting with the object of love (no matter how hard they try to prove the contrary in poetry and prose) never makes it easier to achieve a worthy person's goal" (Rumyantseva et al, 2918).   .

Summary

Thus, L.N. Tolstoy in the "Kreutzer Sonata" raises the socio-ethical aspect of marriage and family relations. Numerous critical articles indicate that this story was perceived as a challenge to public opinion. The significance of the story lies in the fact that it caused a public outcry. Writers, poets, philosophers, clergymen and statesmen drew attention to the problems of family and marriage.

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La administración pública y sentido de bienestar para el progreso

The public administration and sense of welfare for progress

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Resumen

Con este artículo, se pretende hacer una revisión y análisis del beneficio de la modernización y /o reforma de la administración pública; tiene como objetivo reflejar los cambios que se pueden realizar en la administración pública con el sentido de generar bienestar en la sociedad. Este artículo surge por la imagen poco favorable de la administración pública en los países de Latinoamérica y las dificultades de estos para generar bienestar para el progreso. Es imperativo definir y diferenciar progreso y bienestar para así generar cambios efectivos y sostenibles que permitan establecer mecanismos que conciban bienestar a la sociedad por medio de la mejora de sus procesos y que ayude a crear un estado de satisfacción en las personas a través de una gestión pública eficiente, con recurso humano capacitado y un servicio orientado hacia el logro de resultados basados en principios éticos y sentido de pertenencia con el fin de reorientar la política pública.

Palabras Clave: Administración pública, Bienestar, Progreso, Ciencias sociales, Gestión pública, Estado.

Abstract

With this article, we intend to review and analyze the benefits of modernization and / or reform of the public administration; in this sense, the objective is to reflect the changes that can be made in public administration with the purpose of generating well-being in society. This article arises from the unfavorable image of the public administration in the countries of Latin America and the difficulties of these to generate welfare for progress. Become imperative to define and differentiate progress and well-being in order to generate effective and sustainable changes, that allow establishing mechanisms that conceive well-being to society through the improvement of their processes and that help to create a state of satisfaction in people through a management efficient public, with trained human resources and a service aimed at achieving results based on ethical principles and a sense of belonging in order to reorient public policy.

Keywords: Public administration, Welfare, progress Social sciences, Public management, State.

Introducción

La administración consiste en coordinar las actividades de trabajo de modo que se realicen de manera eficiente y eficaz con otras personas y a través de ellas (Robbins y Coulter, 2005). En el caso específico de la administración pública (AP) esta tiene la potestad de generar procesos para diseñar y mantener un entorno gobierno-empleado en donde los individuos cumplan eficientemente objetivos específicos para generar un estado de bienestar entre gobierno- ciudadano y gobierno – empresa.

Según (Gómez, 2011:43) América Latina ha implementado reformas administrativas para aumentar las capacidades de respuesta a las necesidades fundamentales de los distintos países enmarcados en la búsqueda de bienestar y progreso desde hace más de medio siglo. Por lo que se ha puesto en marcha conocimientos orientados a fortalecer la AP, intentando convertirla en un instrumento adecuado enmarcado en dar respuestas rápidas a las exigencias del impulso de países hacia el cumplimiento de los programas de gobierno en la región.

En la actualidad, el ciudadano exige más que nunca a los gobiernos regionales y/o nacionales que sean tan eficientes como sea posible en la administración y gestión de los recursos públicos por medio de servidores públicos con un compromiso hacia el servicio público y con alto nivel de desarrollo de relaciones interpersonales e integridad institucional, lo que genere una capacidad de atención de problemas a tiempo; creatividad para gestionar procedimientos de calidad y así generar un sentido de beneficio y progreso.

Los gobiernos latinoamericanos actualmente coinciden en la importancia de contar con un servicio civil altamente capacitado, especialmente, en sus directivos. En América Latina, esta relevancia se puede observar a partir de los lineamientos plasmados las Cartas Iberoamericanas de la Función Pública y los documentos estratégicos del CLAD (CLAD, 2003; CLAD, 2016).

Por medio de este artículo, se pretende dar un enfoque teórico que tiene como objetivo analizar los avances en la administración pública y las bondades en procura del bienestar para el progreso de un país y su perpetuidad en el tiempo.

El Problema y su Significancia:

La falta de ética en la política ha generado actitudes deshonestas como el clientelismo, el nepotismo, injusticia, ocasionando a la vista una impunidad cada vez más vergonzosa en muchos países de Latinoamérica; llevándolos a un nivel de corrupción y destrucción de sus bienes y recursos, concibiendo además un descontento por parte de sus ciudadanos; lo que afecta el prestigio de las instituciones gubernamentales. Por tal motivo, en las administraciones públicas se ha observado un elevado interés por la vigilancia de su comportamiento evidenciándose un aumento considerado en las agendas gubernamentales internacionales. A medida de que la administración pública entienda lo que implica gobernar con ética en la sociedad, el servicio público se convertirá en funcionarios competentes direccionados hacia el progreso de su nación.

Para analizar el efecto del bienestar y progreso en la administración pública es necesario definir qué significa bienestar y progreso en un mundo tan cambiante, donde las necesidades cambian rápidamente por lo tanto también las necesidades de los gobernantes y los gobernados

Es necesario que toda la AP en su conjunto generen nuevas estrategias para optimizar sus métodos y técnicas administrativas enmarcados en la satisfacción de las necesidades de las personas, las empresas y el estado por medio de una administración eficiente con un equipo humano capacitado y un servicio orientado hacia el logro de resultados basados en principios éticos enmarcados siempre en sus funciones de planeación, organización, dirección y control.

Marco Teórico y Conceptual

Entendemos por Estado como la organización jurídica y política conformada por la población, el territorio y el gobierno por lo que se puede decir que este es un término político.

Para Gómez y Arango (2012:109) el fin último del Estado es promover el progreso, el bienestar social, en condiciones de estabilidad, perdurabilidad y en armonía entre los diferentes actores sociales. Esto significa proveer bienes públicos en condiciones de equidad, seguridad y justicia. Y estos fines se alcanzan a través del funcionamiento de sus instituciones por medio de normas, procedimientos, recursos y seres humanos con motivos, sentimientos y caracteres diferentes.

Según (Guerrero, 2013:13) la administración pública (AP) como campo del saber es una de las ciencias sociales con menor grado de reconocimiento epistemológico, merced al tardío desarrollo de sus principios, a pesar de la antigüedad de su literatura. Ésta misma comprendió originalmente un volumen muy vasto de documentación oficial de enorme valor para la investigación, así como de materiales preparados expresamente para sistematizar y metodizar el desempeño de los servidores públicos.

Un pilar entre las instituciones lo constituyen precisamente las administraciones públicas como componentes del gobierno y como medios que materializan la acción gubernamental en políticas y programas que atienden las demandas y necesidades de la población (Uvalle, 2007: 86). El Recurso humano puede considerarse, como la pieza clave para la administración pública pues este le da la intención y coherencia a las políticas y programas del gobierno de turno, pues este es el que está en contacto directo con los ciudadanos, por lo que la gestión se ve influenciada por la ética determinando la eficacia de las instituciones.

Según Uvalle, 2003:150 (como se cita en Gómez y Arango, 2012) se conocen 10 premisas de un servicio público abierto, equitativo, democrático y ético, entre las que tenemos:

1. Provee trato considerado a los ciudadanos y al público en general.

2. Simplifica los procedimientos relacionados con la vida civil.

3. Vigila que las normas no inhiban las respuestas de la administración pública.

4. Evita la cultura del partidismo.

5. Evita el uso discrecional de los recursos públicos.

6. Establece la diferencia entre los cargos administrativos y políticos.

7. Diseña controles funcionales para ordenar sin frenar a la administración.

8. Diluye la impunidad en el ejercicio del cargo.

9. Escucha a la ciudadanía.

10. Formula políticas públicas de cara a la sociedad.

Es la Administración Publica el instrumento con que cuenta el Estado para administrar la voluntad de sus ciudadanos, mediante instituciones organizadas en función de las políticas de un gobierno.

Análisis y Resultados

Es importante recordar que el desarrollo de un país a través de la modernización y/o reformas de la AP depende directamente de los gobiernos y su desempeño a través de un sinfín de técnicas y estrategias basadas principalmente en el diseño y ejecución de las políticas públicas que consideren los diferentes niveles o estratos sociales y como afecta su bienestar y progreso no sólo como gobierno sino además como nación. América latina actualmente se considera como la región más desigual del mundo, a pesar de los avances que estos países han llevado a cabo en los últimos años como consecuencia de sus continuas reformas como estructuras organizacionales.

En las últimas dos décadas, distintos países de la región de América Latina y el Caribe (ALC) han dado grandes pasos para reformar sus economías y mejorar el desempeño de sus sectores públicos. Estas reformas contribuyeron al fortalecimiento de las instituciones públicas y al establecimiento de las políticas de base para alcanzar sociedades más igualitarias. A fin de sostener un crecimiento inclusivo, los países de ALC deben basarse en logros del pasado y continuar aplicando reformas de política (OCDE, 2016:9).

Es necesario que los gobiernos en Latinoamérica que no han experimentado cambios en su AP establezcan nuevas políticas que estén de la mano con la tecnología actual y las necesidades económicas del país, con la creación de nuevos empleos que generen no sólo un bienestar al ciudadano sino un crecimiento económico sostenible, garantizando de esta manera un acceso más equilibrado a servicios con costos efectivos y beneficiosos para la población. Entre las políticas que deben asumir los países de Latinoamérica está contratar un mayor número de empleados públicos y profesionalizarlos; que estén capacitados no sólo a nivel metodológico sino con posibilidades de actualizar los métodos a utilizar según las necesidades del país, con capacidad de generar por ellos mismos las soluciones a los problemas de los ciudadanos enmarcados en valores y sentido de pertenencia al puesto que están ejerciendo, es hora de poner en práctica en Latinoamérica lo que desde el siglo XX ha sido estudiado por

grandes investigadores como (Uvalle, 2003, 2007, 2009 2011; Gómez, 2011; Gómez, 2012) y que ha sido puesto en práctica en parte por los países pertenecientes a la Organización para la cooperación y desarrollo económico (OCDE) dónde se observa una mayor contratación de empleados públicos (Tabla 1, Gráfica 1) y un mayor seguimiento y control del servicio prestado por estos a su nación respectiva.

Tabla 1. Porcentaje de empleados públicos sobre el total de la fuerza de trabajo por país.

País	%
Noruega	30
Suecia	28
Francia	22
Finlandia	21
Hungría	19
Bélgica	17
Inglaterra	17
Canadá	15
Eslovaquia	15
Estados unidos	14
Australia	14
Portugal	13
Polonia	13
Holanda	13
Australia	13
España	13
México	10
Alemania	10
Austria	10
Turquía	9
Suiza	6
Corea de sur	5
Japón	5

Fuente OCDE, 2016
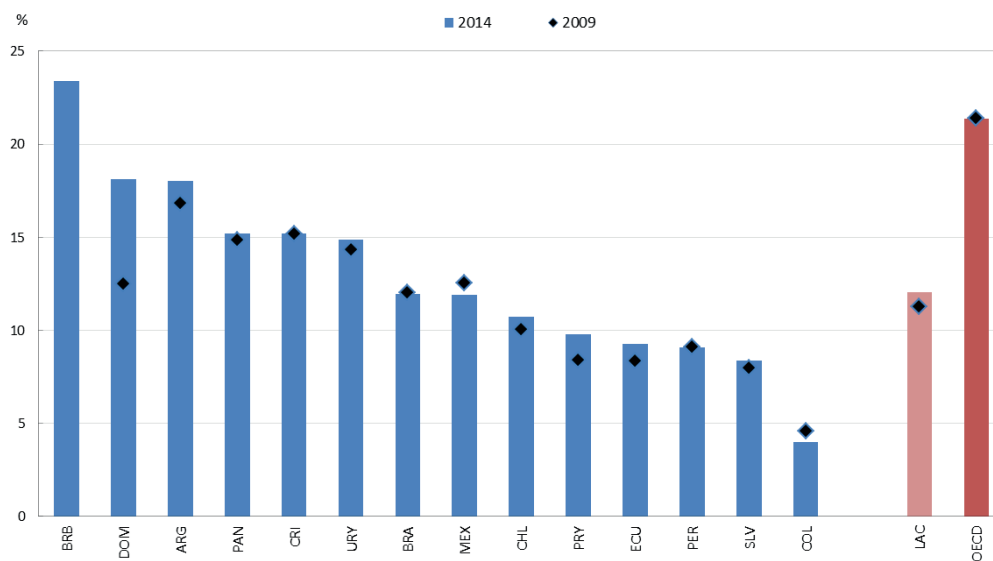
Gráfica 1. Empleo en el sector público como porcentaje del empleo total, 2009 y 2014.

Fuente: Base de datos de ILOSTAT de la Organización Internacional del Trabajo (OIT). (Según OCDE, 2016). Los datos para Argentina son de 2010 en lugar de 2009. Los datos para Brasil son 2011 en lugar de 2009. Los datos para Costa Rica son 2010 y 2013 en lugar de 2009 y 2014. Los datos de Chile, Ecuador, El Salvador, y Perú son de 2013 en lugar de 2014. Los datos para Argentina se refieren solo a las zonas urbanas.

Para discutir sobre bienestar y progreso se debe tener clara la diferencia entre estos términos que por muchos años ha confundido a la sociedad, por ejemplo desde el punto de vista económico el estado ideal de progreso y bienestar implica generar mecanismos que permitan un equilibrio en el mercado, sin embargo, a nivel social esto no implica la presencia de un estado de bienestar a la sociedad; por lo que el éxito de una buena AP no sólo debe implicar progreso económico, sino incluir además el progreso de la sociedad mediante la inclusión de estos al proceso administrativo sin distingo de raza, género, edad, nacionalidad, estatus social entre otros por lo que se debe evitar la creación de leyes discriminatorias que desconecten el progreso con el bienestar de la nación tomando en cuenta los diferentes puntos de vista del progreso y visualizarlo desde un punto de vista holístico para evitar lo que muchos investigadores llaman imaginarios sociales. Según el informe del PNUD (2016:214), para las personas en situación de pobreza por ingresos, en contraste con las de clase media es importante para su progreso contar con bienes propios, salud física y carro propio; lo que indica que una AP que tenga pretensiones de generar progreso y sensación de bienestar internamente como estado y en la sociedad debe mantener una visión holística para generar resultados sostenibles a través del tiempo y no estar enmarcados sólo en el progreso y bienestar a través del desarrollo económico.

Para generar bienestar y progreso con una visión global, los gobiernos requerirán de un continuo rediseño de sus métodos y técnicas administrativas mediante una vigilancia y control de sus políticas implementadas, para no sólo promover el crecimiento económico sino garantizar un acceso más equitativo a servicios con costos positivos a la población.

Modernización de la administración pública como herramienta de progreso.

A través del tiempo los estudios y análisis sobre AP han demostrado que para llevar a cabo una eficiente gestión que genere progreso y a la vez un sentimiento de bienestar tanto para el estado administrador como para la sociedad, es necesario una modernización bajo la idea de obtener procesos actualizados de la gestión pública en búsqueda de la eficacia operacional de las funciones estatales definidas, por lo que es necesario que el estado designe una partida para la actualización y modernización de la AP y todo lo que eso implica (Vigier, *et, al.* 2001).

El estado como gerente está obligado a realizar continuamente una actualización tecnológica y metodológica que genere un incremento en la eficacia de su gestión pública y así cumplir con su funciones como institución que se debe a un País; esto debe estar asociado con el perfeccionamiento operacional como el uso de técnicas de información (TICS), de estructuras, y/o instrumentos existentes que permitan la exploración de nuevas formas de hacer gobierno, enmarcados en la búsqueda de una buena relación entre gobierno y sociedad (gobernanza). Para Costa (1980), postergar las facilidades conspicuas de la «modernización» ha sido uno de los precios pagados para avanzar por las sendas del desarrollo económico y social. Según (OCDE, 2016:128) los gobiernos que más han aprovechado las oportunidades ofrecidas por las TIC para modernizar el sector público son aquellos que han emprendido un ejercicio de planificación (es decir, una estrategia digital). Esa modernización incluye la actualización de las técnicas y/o estrategias para conocer el alcance, estrategias efectivas de financiamiento y monitoreo que permita reconocer cuales son los derechos y obligaciones de las partes afectadas, los roles de los diferentes actores y generar una gobernanza que proporcione mecanismos de coordinación efectivos.

La interacción entre la tecnología de la información y las organizaciones es compleja y se ve influenciada por muchos factores mediadores, incluyendo la estructura de la organización, los procesos de negocios, la política, la cultura, el entorno a su alrededor y las decisiones gerenciales. (Laudon y Laudon, 2012:81)

La profesionalización Vs bienestar para el progreso.

Según (Guerra, 1992:12) en el Perú, existe una gran debilidad del aparato público a pesar de sus características (mayores diferencias sociales, mercados internos pequeños, sectores empresariales poco competitivos, etc.); por lo que queda demostrado que es importante una mayor y efectiva presencia de una AP profesionalizada para enfrentar los principales problemas y desafíos que implica el progreso.

Es importante reconocer la profesionalización en la AP y como esta puede apoyar al progreso de un país, por lo que es bueno analizar lo siguiente: Si el patrimonio de un país está conformado por su riqueza y sus bienes; y si de su buena administración depende nuestro futuro, ¿Qué características deben tener los administradores

de un país? Si estamos conscientes de que el país es nuestro mayor patrimonio, ¿Debería importarnos que esos administradores sean profesionales al realizar su trabajo?; es decir, ¿Debería importarnos que el gobierno estuviera compuesto por verdaderos profesionales de la administración pública?. ¿Debería la administración pública estar de la mano de las nuevas tecnologías de información u otro tipo de tecnología? Si estamos de acuerdo en todo lo antes expuesto, es necesario comprender que profesionalizar el servicio público implica atraer servidores públicos con preparación, experiencia, capacidades, reputación y otras características técnicas y/o de ingeniería particulares para cumplir con los intereses de la sociedad encomendados al gobierno de turno; su selección debe ser cuidadosa; siendo indispensable su formación y actualización para fortalecer su desempeño y su actuar conectados con fines exclusivamente técnicos y no políticos enfocados al bien común con un desempeño ético e imparcial; de no ser así estos deben ser separados transparente y justamente de su cargo.

Según (Gómez, 2012:2) las instituciones con una administración pública profesionalizada no solo reducen la incertidumbre en las transacciones económicas, políticas y sociales, sino que también tienen como propósito potenciar los esfuerzos y capacidades de la sociedad civil y política para conducirla a estadios de progreso colectivo y bienestar social mediante el ejercicio de la gobernabilidad democrática ejercida en acuerdos, compromisos, recursos y acciones colectivas

Es importante enfatizar que la nueva profesionalización se debe basar además en un cambio de elementos de fondo que tengan que ver con las necesidades del país y el uso de nuevas tecnologías y/o software que lleven al país a un estado de progreso óptimo que genere bienestar a sus conciudadanos; por ejemplo el uso de GPS en ambulancias permite una reducción en el consumo de combustible, por medio del establecimiento de rutas más eficaces que permitan llegar de manera más efectiva a su destino evitando zonas de abundante tráfico y por lo tanto salvar una mayor cantidad de vidas. Por lo que es necesario ver a la profesionalización bajo la visión de ser una herramienta al servicio de lo que es fundamental y beneficioso, creando la necesidad de contar con un servicio público que incluya mejoras en la calidad del servicio, y genere beneficios para la ciudadanía, con un valor añadido que vaya mucho más allá del ahorro de costos administrativos. Es de gran importancia enfatizar que todo gobierno está en la obligación de atender con eficacia y eficiencia la salud, la educación, la asistencia y seguridad social para el bienestar de la población.

Nuevas perspectivas sobre la Administración Pública y el sentido de bienestar para el progreso en Perú.

Muchos investigadores del área a nivel mundial han demostrado la importancia de generar una transformación en la administración y la gestión pública a través de la actualización de estrategias de gestión que generen bienestar en todo su conjunto; como el uso de las tics o gobierno electrónico y la continua capacitación de los que manejen estas nuevas tecnologías y de los usuarios de las mismas. Según (Brusca, 2010:184) en España la Ley de derecho de acceso electrónico a los servicios públicos, pone de manifiesto la importancia de que las administraciones trabajen bajo una administración electrónica, con divulgación de información a través de los medios electrónicos, así como la participación de los ciudadanos, por el uso de presupuestos participativos.

En Latinoamérica son muchos los países que han intentado evolucionar en su AP sin éxitos, según (Reilly y Echeverria, 2003:23) Costa Rica, Perú y Uruguay han intentado establecer instituciones de gobierno electrónico y han enfrentado obstáculos. En el caso de Costa Rica, se hicieron esfuerzos por establecer una Agencia de Digitalización Nacional (ADN) pero no logró despegar; sin embargo, en el caso de Perú, el Instituto Nacional de Estadística e Informática (INEI, 2016:3) generó un Plan estratégico de gobierno electrónico (PEGE) enmarcado en la Ley marco de la modernización de la gestión del estado N° 27658, donde: se "Declara al estado en proceso de modernización con el fin de optimizar el uso de los recursos públicos e influir en la creación de un estado más efectivo, inclusivo, transparente y proactivo que acerque el ciudadano con los servicios e información que presta el estado". En este plan se plantean cinco (5) objetivos estratégicos de planificación entre las que están: Lograr el desarrollo y la prestación de mejores servicios para la sociedad a través de la interoperabilidad entre las entidades del estado, el sector privado y la sociedad civil, acercar el estado al ciudadano, garantizar la integridad, confidencialidad y disponibilidad de la información, fomentar la inclusión digital de todos los ciudadanos respetando la diversidad cultural y el medio ambiente, y generar un marco legal que permita hacer un seguimiento y control de este plan estratégico. Con la elaboración de este plan estratégico se evidencia el nuevo enfoque que se tiene como país para mejorar la AP con el fin de incluir a todos los sectores encargados de generar progreso y bienestar.

Conclusiones

El Estado para garantizar el progreso y el bienestar social en la nación y generar estabilidad entre los diferentes actores sociales debe poner en práctica una gerencia de vigilancia y control que garantice que se va por el mejor camino.

La sociedad debe ser educada con valores organizacionales como el respeto, honestidad y responsabilidad que permitan ser aplicados con el fin de reducir los conflictos que vayan en contra de la buena administración y gestión pública como pueden ser (la corrupción, el tráfico de influencias, el mal servicio, entre otros).

Todo servidor público que se integre a la AP debe asumir su responsabilidad con vocación de servicio y sentido de pertenencia, con competencias perceptibles o no, pues son ellos los que mantienen el primer contacto con la ciudadanía, por lo que se debe acceder a estos cargos por meritocracia, donde prevalezca el conocimiento y habilidades y no la influencia de la política que le permita estar lejos de intereses personales.

Los administradores públicos al asumir mayores responsabilidades ante la sociedad, se convertirán en un instrumento primordial para la defensa del patrimonio público.

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The Role of Project Resources on Construction Project Development in the UAE

El papel de los recursos del proyecto en el desarrollo de proyectos de construcción en los EAU

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ABSTRACT

The main purpose of this paper is to investigate the impact of project resources on project development in the construction projects in the United Arab Emirates (UAE). This study is using the quantitative approach. The main test used are the correlation test to find out the direct effect of the independent variable on the dependent variable. The data are collected using a survey questionnaire instrumentation. The total sample number were 300 participants from the construction industry in UAE. The finding confirmed that project resources influence the construction project development positively and significantly.

Keywords: project resources, project development, construction industry, UAE.

RESUMEN

El objetivo principal de este documento es investigar el impacto de los recursos del proyecto en el desarrollo del proyecto en los proyectos de construcción en los Emiratos Árabes Unidos (EAU). Este estudio está utilizando el enfoque cuantitativo. La prueba principal utilizada es la prueba de correlación para descubrir el efecto directo de la variable independiente en la variable dependiente. Los datos se recopilan utilizando un cuestionario de encuesta de instrumentación. El número total de muestras fue de 300 participantes de la industria de la construcción en los EAU. El hallazgo confirmó que los recursos del proyecto influyen en el desarrollo del proyecto de construcción de manera positiva y significativa.

Palabras clave: recursos del proyecto, desarrollo del proyecto, industria de la construcción, EAU.

I.   INTRODUCTION

In general, construction materials have been provided from raw material resources that have a mediatory broad supply and are not likely to be exhausted for the time being (Shrapnel, 2006). In any case, the extraction and extraction of raw materials can have environmental effects, for example, the disturbing and riparian influence and the impacts of pollution. In addition, there are specific materials that require exceptional thinking. For example, the abuse of wood harvested in a non-economic way, especially in tropical areas, can weaken the suitability of the vegetation of the neighborhood and leave the scenes helpless in the face of instability. More current construction materials, for example, steel, aluminum and polymeric materials include generous extraction and assembly forms with related environmental impacts. Construction materials represent approximately 50% of all materials used and a comparative extension of most of the waste created throughout (Environment, 2011).

It can help avoid the assembly and supply of new construction materials by amplifying the reuse and reuse of devastation materials. In fact, the urban condition refers to a huge reserve of resources that have been acquired in the past and that could be used to maintain a strategic distance from the part of the environmental damage caused by the development of new buildings. In an extremely expansive sense, the World Bank (2001) commented on these resources as a legacy of past eras. Communicated basically, previous networks have paid the cost of increasing manufactured resources in terms of cost, time, resources and vitality, and the resulting ages can benefit from this.

In fact, the use of resources such as the reuse of construction pieces or the reuse of destruction materials for more established structures and structures have already taken place since the beginning of construction. There are numerous illustrations that include the reuse of labor of the buildings of pharaohs spent in antiquated Egypt (E, 2008), the supply of materials of the Great Wall of China and the use of stone of the Wall of Adriano. In the United Kingdom by neighborhood dignitaries after the flight of the Romans. Despite the fact that the dismantling of old structures would not be considered adequate at present, the standard for reusing materials from less notable structures has positive environmental focal points by maintaining a strategic distance from the later abuse of ordinary resources.

Development projects contain several room exercises and related exercises. The rapid changes in the conditions of this period force to meet various budgetary, legitimate, moral, ecological and calculated requirements. They are really, financially and socially associated within the earth, as with other associations, structures, and frameworks. These projects use bulky resources. However, they have integrated problems, vulnerabilities, and dangers. This provision of the position of the issues related to resources, similar to the amount required, "where they will originate from," "when they should be listed on the site," where they should be accommodated, "how to improve their use 'and' when to deactivate '.

When all is said, development projects are of great value and use colossal resources of men, materials, and machines. Significant work includes overwhelming speculation, from several thousand rupees to a couple of thousand rupees, the use of abnormal state innovation and an open model is needed for viable management of resources.

Due to the resource-driven nature of development management, resource management is an extremely problematic task. The development administrator must develop a strategy to coordinate and control the resources of workers, machines, and materials in a facilitated and timely manner in order to transmit a project within the limited funding and time limit. Subsequently, next to a center of procedures and innovation, a resource use center must be satisfactorily attended to describe a development strategy or activity in a project plan (Beng et al., 2017).

This study is developed based on the vital role of project resources in the development of construction projects of the United Arab Emirates construction industry. This study will contain theoretical background of the variables used, methodology used, and the findings of the tests. Finally this study will be ended with a conclusion.

II.   Project Recourses

Resources are the different means or help that is used to achieve an end or satisfy a need. Also, it can be understood as a set of elements available to solve a need or carry out a company such as natural, human, and forestry, among others.

In the area of economy, resources are the material means available for the production of goods. Human resources is the source of work originating from people to carry out an activity or project, material resources are perceptible and concrete goods available to a company to achieve its objectives such as raw material, facilities, tools, and so on.

In the area of grammar, there are literary resources that are used by authors to generate certain effects or embellish texts, specifically are the way to use words accompanied by some phonic, grammatical or semantic features, such as onomatopoeia, alliteration, anaphora, among others. In the same way, graphic resources are used to complete and understand the exposed information, such as conceptual maps, tables, graph, and so on (Elbanna, 2016).

The concept of resource has been applied in various fields, in particular, with respect to economics, biology, computer science, land resource management, and human resources. In addition, it is related to the concepts of competition, sustainability, and environmental conservation.

Resources have three main characteristics: utility, 2) limited availability and 3) depletion or consumption potential.

The resources have been categorized as biotic and abiotic, renewable and non-renewable, potential and real, in addition to more complex classifications.

From a traditional point of view, one would think that the resources available to Project Managers are limited to monetary resources and human resources. We could also include in this obvious vision the tools, software, utilities in general that are used in the daily management.

Thus, there are several types of project resources that are considered as a resource system, considering the resources classified in five different categories: physical resources; Human Resources; intellectual property (IP), software and methods; "ecosystem"; and financial resources.

1. Physical resources are tangible property and include facilities, offices, warehouses, land, machinery, equipment, and tools. Some resources (for example, manufacturing facilities and distribution centers) reflect large investments that only occur every 20 years or more. Others, such as disposable tools, may require little investment and can be changed frequently.

2. Human resources are the employees that make up the workforce of operations. Individual employees differ in their skills, knowledge, training, capacity, flexibility and employment conditions. They also differ in the role they play.

3. Intellectual Property, software, and methods are resources based on knowledge of the operations function. They are the collective knowledge resident in the organization, not by individual employees. Patented and proprietary designs, trade secrets, software, organization systems, processes, techniques, and information are included in this category. The Google search algorithm or the Windows source code in Microsoft are two examples of this kind of valuable resource.

4. The ecosystem of resources, which are the relationships with suppliers, distributors, customers, and partners, which collectively constitute the company's business ecosystem. Let us realize that almost always strong alliances between collaborators, suppliers, and customers are a very important asset for our success, and therefore they are an available "resource".

5. Financial resources, which are the types of funds available, including cash, cash generated by operations, and funds available from financial markets. These resources are generally not considered part of the operations, however, they can be decisive in enabling or restricting the application of the strategy. For example, an investment of $ 500 million in automation can be financially and strategically prudent, as it can improve efficiency and reduce costs, but it will not happen if Operations does not have the funds to invest.

III.   Project Development

Construction project development is a business procedure, which shades exercises ranging from reshaping and re-leasing existing structures to buying a raw land and displaying land that has been created or packaged for others. Land designers are general populations and organizations that facilitate these exercises and change ideas from paper to real ownership. Land development is not quite the same construction, though many engineers deal with construction procedures (Buvik & Rolfsen, 2015).

Developers do not go out on a party to create or re-design the land and get the best rewards. Usually, engineers buy a lot of land, decide to promote the property, build a building system and form a structure, receive basic support and finance, assemble structures, rent, supervise and finally offer them. Sometimes the property engineers will just adopt some part of the procedure. For example, a few designers source the property and get the plans and permits confirmed before submitting the property with plans a thus allowing for the manufacturer's superior cost. On the other hand, the engineer in addition to the manufacturer may purchase the property with plans and permit set up so that they do not have a negligent risk of obtaining a support arrangement and construction can begin to develop quickly (Walker, 2015).

Designers work with a wide range of partners along with each offering for this procedure, including modelers, city organizers, engineers, surveyors, controllers, temporary workers, legal advisers, hire specialists, and so on. In planning the country and country planning in the UK, "development" is characterized by country law and country planning S55 1990 (Wapwera & Egbu, 2013). A construction project is under three times of pre-construction and construction. Along these stages, indeed there vary exercises done to complete the yield and places ready because of the proprietor. Consequently, it really is fundamental that the building task meeting, approximately a level that is well known is specific measures their execution into the exercises or sub-outlines finished all through the development project. Project execution can be looked at by virtue a method together with the closeness for the framework. All together for the entire project accumulating to push, it really is a crucial for aggregate individuals to obtain a handle on and view the performance this is certainly specific or tips of the job (Yang, Huang, & Hsu, 2014). As showed by Hassanain, Assaf, Al-Ofi, and Al-Abdullah (2013), bunches have existed one hundred thousand decades earlier, even prior to your own duration of Hammurabi irrespective of the bunches built for the midst of the time that is right minimal gatherings that are scaled. The Industrial Revolution in the

1700s changes that are underwent structures that are authoritative plans of the task, which led to the beginning of constant management. Around the sixties, associations made gatherings that are practical gatherings being nonetheless in reality up 'til now divided. A bit for the association collecting after business War II, Japanese associations overhauled the gathering principles by making every worker, in every limit, at each degree. Various associations' modifications which can be skilled moving towards self-facilitated gatherings and gathering based administration structures starting within the 1980s. Later in the course of this proper time around, reengineering was unmistakable and trigger anything numerous allude to being an association that is large is performing. Over time, there was an electrifying addition to the example toward execution of even more gatherings to deal with diverse conditions that are respected. Individuals started initially to understand the hugeness of collaborating and coordinating because of the products which are last inconceivably enhanced than working only or since a bound together unit. Based on to Parker (2011), gatherings and effort that is synchronized presently for the part that will be various, and have a tendency to be delving set for the bargain that is finished overpower the way work is completed. Both have really grabbed centrality as open and components that are private the liberal favorable situations of these tasks. A gathering isn't more a social event of men and women employed in a region that is actually utilizing that is comparative equipment, overseeing comparable clients in the territory that is comparable. Nowadays, it provides people from various associations, arranged all over with an believe that is continuing is abnormal of meant for any success of normal targets. Relative to Stoller (2011), bunches tend to be regular in associations and stipulate responsibilities which can be vital that is regarding is hierarchical.

IV.   Methodology

This study has used the quantitative approach (survey method) in order to collect the primary data. The type of this study follows the analytical technique. In this way, the study has already imposed some assumption that is tested and analyzed, this assumption is called the study hypothesis. This hypothesis is imposed with regard to the study's question. This study has used a random sampling approach, by applying to Krejcie and Morgan (1970), the random distribution of questionnaires to the sample was conducted. select the respondents for the questionnaire survey; this approach is one of the sampling design possibilities, in this approach each member of the population has an equivalent opportunity to be selected as a respondent.

And for the samples of this study according to the sample size table of Krejcie and Morgan (1970), 300 respondents managers in the middle management level from different construction companies is selected.

The data collection instrument is going to collect data for the study, and then the collected data are used for analyzing purpose. The analysis of the data is determining the findings and results of the study.

The descriptive statistical analysis was used in order to determine the mean and standard deviation of each variable in the study. The questionnaire's reliability was measured by implementing the Cronbach Alpha test to measure the internal consistency of variables constructs. Along with the study objectives, correlation and multiple regressions were used for inferential statistics.

V.   Results

The fist test that was implemented to the study's collected data was the demographic backgrounds of the study's sample. This test was formulated for the purpose of ensuring that the random sampling method was used in the process of distributing the questionnaires among the study's population. The demographic backgrounds test has used 5 main classifications, which were gender, age, education level, income level, and experiences. The following table 1 shows the results of the demographic backgrounds results.

Table 1 Demographic Background (N = 300)

Category	Frequency	%	Category	Frequency	%
Gender			**Education level**		
Male	247	82.3	Diploma	41	13.9
Female	53	17.7	Bachelor	151	50.4
Age			Master	108	35.7
17-25 yrs	62	20.7	**Income level USD**		
26-30 yrs	84	28.2	500 - 750	12	4.1
31- 35 yrs	45	15.0	751- 1,000	59	19.7
36- 40 yrs	28	9.5	1,001 and above	229	76.2
> 40 years	81	29.6	**Experience (Yr)**		
			1 to 3	60	20.1
			4 to 6	92	30.9
			7 to 9	148	49.0

In accordance to the data obtained from the questionnaires, this classification had two major categories, which are male and female. The obtained results are showing the followings:

- The Male category had 82.3% with n=247 participants.

- The Female category had 17.7% with n=53 participants.

In accordance to the data obtained from the questionnaires, this classification had five major categories, which are 17-25 yrs, 26-30 yrs, 31- 35 yrs, 36- 40 yrs, and > 40 years. The obtained results are showing the followings:

- 17-25 yrs had 20.7% with n=62 participants.

- 26-30 yrs had 28.2% with n=84 participants.

- 31- 35 yrs had 15.0% with n=45 participants.

- 36- 40 yrs had 9.5% with n=28 participants.

- Above 40 years had 29.6% with n=81 participants.

In accordance to the data obtained from the questionnaires, this classification had three major categories, which are the Diploma, Bachelor, and Master. The obtained results are showing the followings:

- The Diploma category had 13.9% with n=41 participants.

- The Bachelor category had 50.4% with n=151 participants.

- The Master category had 35.7% with n=108 participants.

In accordance to the data obtained from the questionnaires, this classification had three major categories, which are the 500 - 750, 751- 1,000, and 1,001 & above. The obtained results are showing the followings:

- The 500 - 750 category had 4.1% with n=12 participants.

- The 751- 1,000 category had 19.7% with n=59 participants.

- The 1,001 and above category had 76.2% with n=229 participants.

In accordance to the data obtained from the questionnaires, this classification had three major categories, which are 1 to 3, 4 to 6, and 7 to 9. The obtained results are showing the followings:

- 1 to 3 years had 20.1% with n=60 participants.

- 4 to 6 years had 30.9% with n=92 participants.

- 7 to 9 years had 49.0% with n=148 participants.

After the demographic background test, the reliability test was conducted to ensure that there is internal consistency among the variables' items. The reliability test was conducted using the Cronbach Alpha value. The Cronbach Alpha for project resources was 0.880 and 0.790 for project development. This result means that there is accepted internal consistency for these two variables. The following table 2 shows these results.

Table 2: Cronbach's Alpha and Composite Reliability

Constructs	Cronbach's alpha (> 0.7)	Composite Reliability (> 0.7)
Project Resources	0.880	0.898
Project Development	0.790	0.810

The third test applied to the study was the correlation test. The aim of the correlation test is to find out the type of relationship between the independent variable (project management) and the dependent variable (project development).

The correlation test has identified that project resources influence the project development positively and significantly at the level of (β=0.226, t=2.151, p = 0.032). The following table 3 shows the results.

Table 3: Summary of the Correlation Test

Hypothesis	Relationship	Std Beta	Std Error	t-value	p-value
H1	PR -> PD	0.226	0.105	2.151	0.032

Key: PR = project resources and PD: Project development

*significance at confident level 90% and significance level 10%

According to the previous studies, In fact, the use of resources such as the reuse of construction pieces or the reuse of destruction materials for more established structures and structures have already taken place since the beginning of construction. There are numerous illustrations that include the reuse of labour of the buildings of pharaohs spent in antiquated Egypt (E, 2008), the supply of materials of the Great Wall of China and the use of stone of the Wall of Adriano. In the United Kingdom by neighbourhood dignitaries after the flight of the Romans. Despite the fact that the dismantling of old structures would not be considered adequate at present, the standard for reusing materials from less notable structures has positive environmental focal points by maintaining a strategic distance from the later abuse of ordinary resources.

Development projects contain several room exercises and related exercises. The rapid changes in the conditions of this period force to meet various budgetary, legitimate, moral, ecological and calculated requirements. They are really, financially and socially associated within the earth, as with other associations, structures and frameworks. These projects use bulky resources. However, they have integrated problems, vulnerabilities and dangers. This provision of the position of the issues related to resources, similar to the amount required, "where they will originate from," "when they should be listed on the site," "where they should be accommodated, "how to improve their use 'and' when to deactivate".

VI.   CONCLUSION

This study investigates the impact of project resources on the construction project development in the UAE. Due to the rapid development in the construction industry in the UAE, construction companies strive to maintain its position within the market. Investigating factors that boost project development helps to create an integrated construct that improves the expected outcome of the project. This study provides insight for effective project development model linkage to the project resources, this insight presents by suggesting a conceptual framework. The result of this study has shown that there is a significant and positive impact of the project resources on the construction project development.

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The cultural reflections of multicultural student structure: the case of the Near East University

Las reflexiones culturales de la estructura estudiantil multicultural: el caso de Near East University

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ABSTRACT

In this research, is based on the common or at least great similarities between the problems of large- and small-scale habitats in the geographies where cultural interactions are experienced, the cultural structure of the Near East University, which is blended with more than 100 countries and thus culture, in the multicultural living area has been examined. Higher education in North Cyprus, which carries the mission of an educational island, is in an important process of development. North Cyprus, where almost one-third of the official population comes from, carries the impact of multicultural life. In this study, the interview method was used in Qualitative Research Methods. Stewart and Cash (1985) defined the interview as a serious process of mutual and interactive communication based on the way of asking and answering questions for a predetermined and serious purpose Stew. Student at the Near East University, who is from Nigeria, Zimbabwe, Turkey, Jordan, Egypt, Iraq, attended by 20 students from different countries such as Iran. The students were asked open-ended questions and analyzed in terms of their ability to express themselves freely and analyzed by qualitative research method.

Keywords: Multiculturalism, higher education, culture, conflict, migration

RESUMEN

En esta investigación, está basada en las similitudes comunes o al menos grandes entre los problemas de los hábitats a gran y pequeña escala en las geografías donde se experimentan las interacciones culturales, la estructura cultural de la Near East University, que se combina con más de 100 países y, por lo tanto, se ha examinado la cultura en el área de vida multicultural. La educación superior en el norte de Chipre, que lleva la misión de una isla educativa, se encuentra en un importante proceso de desarrollo. El norte de Chipre, de donde proviene casi un tercio de la población oficial, tiene el impacto de la vida multicultural. En este estudio, el método de la entrevista se utilizó en los métodos de investigación cualitativa. Stewart y Cash (1985) definieron la entrevista como un proceso serio de comunicación mutua e interactiva basado en la forma de hacer y responder preguntas con un propósito predeterminado y serio. Estudiante de la Near East University, que es de Nigeria, Zimbabwe, Turquía, Jordania, Egipto, Iraq, al que asistieron 20 estudiantes de diferentes países, como Irán. A los estudiantes se les hicieron preguntas abiertas y se analizaron en términos de su capacidad de expresarse libremente y se analizaron mediante un método de investigación cualitativa.

Palabras clave: multiculturalismo, educación superior, cultura, conflicto, migración.

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Introduction

Our developing world is also changing. Change, as a dictionary meaning, "value as a previous situation or varieties of existence" finds value. Change is a vital differentiation in which all societies cannot escape and sometimes they do not want to escape. For this reason, all nations and people communities, both traditional and / or local, and modern and / or universal, will not avoid social differentiation. Although multiculturalism was used as a concept in Switzerland in 1957 for the first time in the world, it became widespread in Canada in the late 1960s, and this concept was rapidly spread to other English-speaking countries (Sengstock, 2009, Shayakhmetova & Chaklikova, 2018; Matandare, (2018).

The migration of the populations that have been going on at a fast pace in the world has brought with them constant or constant change of time and cultural harmony and confrontations. Many villages, towns, cities, and country stagnant had to meet with different cultures and then a rapidly changing group of people. But the shape, form and numeracy of this change differed according to the attractiveness of the target settlements.

Especially in countries with small populations (in this case, TRNC is one of the most suitable examples), the rate of population growth is very significant. According to the data of the Ministry of Interior, the population of the Near East University, which is the country where the Near East University is located, is 350 thousand. A country with a population of 350 thousand, 150 countries, a total of around 100 thousand foreign students host the pains of multicultural life at the same time.

 The social structure, constantly changing and developing in a continuous movement, is forced to change by social elements within its structure and which have different characteristics and activities. These elements are often transformed with the speed of quantitative and qualitative developments in the economy, advances in technology, and demographic formations.

According to Castles and Miller (2009: 10), there are five forms of migration. These are accelerated migration as a result of the increase in the number of immigrants involved in migration, differentiation of migration as a result of the emergence of different immigrant classes in the migration processes, women's migration with the inclusion of half of the immigrants in the international migration movements, the politicization of migration as a result of the migration to the international agenda, the migration of the immigrant countries. It is the transformation of migration with transit country position.

However, the dynamics of the society have been renewed with great speed, depending on the foreigners who have recently penetrated other societies. No one has the right to criticize the value of another. The limit of self-realization can be achieved by securing an equal chance for others to accomplish this (Taylor, 1995; Ahmadi, et al, (2014; Melo, et al, 2017; Radhy, 2019).

The structure of the society and the individual in the study areas of sociologists is of utmost importance to reveal the change. The behavior of the individual in the society is very important in terms of forming the society. New norms, values, changes in material elements and symbols take place between the different perceptions of social man and thus society.

Changes in small groups on behalf of the science of sociology and temporary (Popular Culture) changes such as fashion may not be of great importance. However, one of the main problems is to examine the behavioral changes and the consequences it creates, which are important for communication science. While investigating the change dynamics of societies, the factors that cause change cannot be excluded. While the change processes of the communities are inevitable, the change in the interaction and the result of communication, which is one of the reasons for these changes, is seen as the factors to be examined.

Those who migrate to a new place or who have to stay there for a short period of time (those coming to the country for temporary work, asylum seekers, those who are in the country of study, or for any other reason) need information about destroying anxiety and uncertainty. This will not pose a big problem for similar cultures, which can create a distressing situation for people living in different cultural settings. These people's troubles and treasures are not just economic or vital concerns. These people also experience concerns about maintaining their lives due to intercultural changes.

In different cultural settings, migrants face many problems, not only by the governance system regulated by different laws and rules, but also by people with different cultural understandings. Those who migrate to different cultural settings may have different perceptions about the host country and may not agree on the common point within themselves. This makes it difficult for the host countries to adopt a common approach to all refugees who take refuge in them. Therefore, host countries have to behave differently to immigrants with different cultural backgrounds.

Language of the culture the language of human

Multicultural social rights are also related to human rights and sanctity of human rights outside the constitutional order. Perhaps each person in the living community must live by recognizing that they reflect different cultures, but by recognizing that they are candidates for another culture. It may be natural for individuals in communities to be alienated and / or personalized or compared to cultures that do not have their own cultural characteristics, but conflicts are inevitable as soon as the trial situation is entered. It would not be wrong to say that the results of alienation in large masses and cultural differences of ethnic groups are more radical. However, it is possible to say that there are more tolerance levels and tolerance in smaller communities and especially in communities where relations and contacts are experienced more.

Especially in societies where high level of development and universal values are internalized, tolerant view and capacity to understand cultures develop accordingly. From this point of view, one of the most important universities of the Turkish Republic of Northern Cyprus, which can be seen as a realistic part of the big picture, is the Near East University and its campus, its ethnic origins, vital environments, religious beliefs, food cultures, daily habits, languages, religions, all of them and so on. It is worth examining as an important center where habits differ.

Made in this investigation, this campus that has collected more than 100 countries, students, Middle East, Asia, Europe, the Arabian Peninsula and a full cultural structure with students from Turkey and seen as multiculturalism inspection area properties. Especially in Turkey and TRNC students' cultures are big problems do not happen in the process of harmonization of its proximity to one another.

Social and family structures to one participant stating that the importance of Turkey and Cyprus to the students coming from different regions, could meet in a common communication within the same class, and himself, with students switching to more communication stated that it provides. (Kasımoğlu; 2012)

It is inevitable that the cultures experienced with migration across the world are affected. However, these processes of change may be painful and sometimes problematic for the affected and affected cultures. In this sense, it is seen that the adaptation of the students of African origin to the cultural behaviors specific to the TRNC is more troubling than the students from the Middle East countries.

During the meeting with African students, they stated that they are very happy to be living and studying in this country and they are among the lucky individuals studying here. The biggest problem they experienced during the adaptation process is that although they are extremely normal, they express some of the things that are disturbed here. For example, when we were cooking at home, we wouldn't have thought whether this smell would disturb the environment or our neighbors in our own country; but we were reminded that we should not ignore this in this country. (!) This experience was important to us. Now we have chosen to be in harmony with our neighbors. Because even if we move out of this house, we'll have the same problem in other houses. For example, while cooking or listening to music (they say they have trouble with neighbors because of loud voices), keep the environment in mind and cut the sound of music a little more. Along with complaints, our compliance problem is also decreasing. However, the neighbors are more understanding. In this case, the problems almost disappear. Thus, a bit we are demonstrating some neighbors tolerance and resolving the problem. They are saying their opinions.

In addition to all these adaptation problems, the problems of their friends studying in European countries are higher. Some of the students (especially Muslim students) who stated that they were having difficulties in performing their worship by their religious beliefs stated that they did not feel uncomfortable here.

Negative reflections of the dominant or widespread culture, especially in the negative reflections of economic culture is recorded. The meat prices are very suitable for the places where they come from and their meat is defeated in their own culture.

Migration and adaptation

Migration movements have changed and differed in a numerically and factually unpredictable manner. In a world that has become globalized and transformed into a small village, mobility has expanded and increased with the mobility of migratory movements. This situation led to the diversity of the target, source and transit countries in the migration processes. This situation has also caused changes in the types, causes and consequences of migration. (T.C. Kalkınma Bakanlığı, 2014: 3)

Although the negative aspects of the differences in religious beliefs in Europe and compliance problems are always at the forefront, it is possible to see places where religious differences do not become problematic.

Tolerance, different cultures and religions to respect the universal values of the reflexes to be in the European peoples are expected to live in particular, especially in the religion of Islam and rights and worship restrictions

in the areas of the European countries, unfortunately, more often seen. The two paradoxical concepts, such as development and intolerance, come side by side, and the groups of more than 100 different countries from the TRNC Near East University and Christian-Muslim groups lived freely in the sense of religious beliefs. It is seen.

In particular, it is seen that the ceremonies and worship of the students of Christian religion, as a result of their religious beliefs, are not favored by any major culture, and on the contrary, places of worship are occasionally provided by the main culture.

This is because learning environments gradually become places where interaction with different cultures is inevitable. Teachers have an important function in the effective management of cultural differences in the learning environment. For this reason, teachers need to have knowledge about creating a learning environment that supports multiculturalism and organizing the classroom environment in a way that will bring about various ideas (Banks, 2013).

Ethnocentric individuals are the evaluation of other social communities according to their own ethnic group or culture, especially according to language, life, age and religion. These ethnic distinctions and subdivisions serve to define the unique cultural identity of each ethnicity. Ethnocentric views may cause conflicts at extreme points. Political incompatibilities can result in war, terrorism and even genocides. (Meydan Larousse, Great Lûgat and encyclopedia, 4th volume, ethnocentrism)

One of the serious problems experienced in multicultural settings is the prejudices of individuals or groups on each other. These prejudices can lead to communication disruption, interdependence and conflicts. Prejudice is one of the biggest obstacles to integration in these teams. Behfar et al. (2006: 233).

We tried to look at some of the troubles that emerged with the formation of a multicultural structure throughout the Turkish Republic of Northern Cyprus and the Near East University.

An African student from the Near East University said: The country we come from is very different in terms of its economic and political conditions, ethnicity, cultural structure and languages. The group we define as African migrants in North Cyprus includes those who come from African countries and often come with black identities and choose to live long-term with their student identities. Our countries are different, but sometimes we are united here by being an African, Ül he says. A Nigerian student who speaks of the problems, he says, is important for them to have mosques in Cyprus and to live their religious freedom freely. However, in the Turkish Republic of Northern Cyprus where there is a great deal of freedom in terms of religious freedoms, there are very few sacred places that can be worshiped according to Christian beliefs. by renting these cultural and religious requirements. An African student we are talking with says they want a lot of money when they talk to the owners of the store they are going to rent. But then when they told the shopkeeper that they wanted to use them for religious reasons, the shop owners stated that they made a discount on the rent and said that they were happy.

In addition, another Christian Nigerian said that although they were Christians, they had no problems realizing their worship, and that the majority of the situation in a Muslim country showed the development of that country. It is stated that the students talk about this issue and they are welcomed by emphasizing the development and tolerance of the country. However, the same students still live in their religious understanding, but from time to time they cannot find culture-based living conditions here.

Christian and / or Muslim students, who expressed problems in house leases, tell that they had problems with their hosts during or after their studentship. Especially in order to stay in a house sometimes 8-10 people have to come together to say that the students have difficulty in understanding why they find it inappropriate. In addition, the issues of cleanliness, noise, friendship, alcohol habits and traffic mismatches are also the main actors of the disputes.

For these immigrants, being African is a much less insignificant identity in their own country, and when they come to Cyprus, a supra-identity, the ken African daha identity, begins to form. African immigrants say that they do not feel the importance of unity and solidarity in their own countries.

The ones from Africa say almost brother without making any distinction between the countries. As a matter of fact, this group or a group of people consists of tribes or ethnic groups that can be called enemies in Africa. However, these divergences abroad are replaced by solidarity.

The prejudices in multicultural teams are mostly in the context of gender, religion and active origin. These prejudices are reflected in team and relationships, and as a result of various problems arise naturally. Behfar et al. (2006: 233)

One of the problems that arise is that students want to live the same way in the Turkish Republic of Northern Cyprus, which is another country. It is natural to see that life styles of different cultures are not compatible with each other. However, it can be said that the problems that arise are mainly due to the efforts of different ethnic groups, religious beliefs and cultures to dominate each other. However, empathy and educational saturation, which is one of the important facts of communication, can be solved through peaceful and understanding when conflicts are put into use here.

Especially in multicultural groups, we stated that groupings were seen in them and they affected the functioning and performance of the teams. Especially when a group feels more superior to the other group, it makes the other side feel and the prejudices that exist between the groups are damaging the effectiveness of the team. On the other hand, being together with different individuals in the team may cause some negative consequences such as not feeling tension and not being comfortable. They need to be managed in some way. Especially in the groupings, the strong group may want to keep the other group under control and the other non-dominant group cannot reveal their creative potential because they do not feel comfortable. (Dalyan 2004, p.102),

The things that cultural images are predominant are on the side of culture that we can see more. Individuals with the same culture have the same meanings as the words, words, hearing or what they see. The answer to the question of why this is so is hidden in the invisible cultural infrastructure. Many cultural elements have chosen symbols and provided associations through these symbols. (Religious symbols, greetings, food culture, spiritual senses, etc.)

Multiculturalism also informs people of diversity within their own culture. When the differences between cultures are tried to be seen, they are sought in the culture grown in differences and the ways to be more fair to them are learned. The dialogue between cultures creates a space for critical and independent thought and strengthens the tolerant approach of the parties. (Milena et al. Istanbul 2009, p.12.)

It is a proven fact that people can live together, no matter how different their cultural structures and lifestyles. Migrants and / or post-occupants are the most important indicators of this in many countries.

The form of cultural pluralism, which is basically called multiculturalism, is a political movement that has begun to develop as a liberal pluralistic society. In this sense, this concept has emerged as an expression of a political and social system that expresses that there is no problem in the existence of different cultural traditions on the basis of equality regardless of their cultural origin (Erdoğan, 1998: 195).

Multiculturalism can become a problem where conflicts between groups on values and their interpretation are not easily reconcilable within a social structure. (Milena et al. Istanbul 2009, p.12.)

Conclusion

When multicultural life becomes an inevitable life-cycle, it is sometimes seen that the opposites dissolve in the same pot and that the ends of the pointed views are rasped. The Near East University and its multicultural life form, which can be described as the almost one-on-one reduction of the large picture that appears, can be seen as a platform where changes and differences are accepted or contrasts can be minimized.

The students in different beliefs and cultures participated in the research, how they responded to detailed and open-ended questions, how cultural differences were met in the same living environment, and how opposites, contradictions and beliefs that could be seen as incompatible could live together. According to the research, it can be thought that the beliefs in which they can live together seem to be peaceful, compatible with the reality of tolerance, often with a non-written agreement among themselves. Consequently, in contrast to an understanding where cultural differences are not seen or ignored, the prevailing conception of an understanding that reduces the interactions between different lifestyles centered on culture and faith, to a level that can be said to be negligible, is seen as the most important factor that hinders conflicts and contradictions.

The fact that religion-based disagreements in Europe and some other continents are seen as a different color and a different way of life in the TRNC, which is a small island country, is an important indication that a peaceful way of life is adopted by all different religious groups. The groups of students who are more interested in their partners rather than differences, especially in dormitory buildings, take care not to interfere in their habitat and culture.

The problems encountered in the example of Near East University instead of the religious beliefs that cause the most problems in the areas of immigration and common living, are mostly seen as disagreements in cleaning, order, food smells, noise and rest times. One of the important issues in which compliance is observed is that the imbalance in economic life can be tolerated by the parties. The fact that other groups who are in need of economic support and other groups are assisted is an important dimension that should not be overlooked.

This research carried out in the Near East University, which is one of the multinational universities where multicultural life can be seen as the best indicator, increases in parallel with the increase of tolerance of individuals and tolerance of cultural differences. From this point of view, no matter how much intercultural variability is, interpersonal communication and cohesion make the differences more bearable and sustainable.

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Russian translation reception of Robert Burns's poem "John Anderson my Jo"

Recepción de la traducción al ruso del poema de Robert Burns "John Anderson my Jo"

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ABSTRACT

The article considers the history of Russian translation reception of Robert Burns's poem "John Anderson my Jo" in the middle of the 19th – the beginning of the 21st centuries. The first translation of this work into Russian made by M. L. Mikhaylov in 1856 became an undoubted creative triumph of the interpreter, having considerably predetermined the interest of Russian criticism in "John Anderson my Jo" and stimulated the emergence of the subsequent interpretations. In the next years P. I. Veynberg (1869), V. M. Mikheyev (the 1880-s), A. M. Fedorov (1896), S. Ya. Marshak (1938), S. A. Orlov (1939, 1959), S. B. Bolotin and T. S. Sikorskaya (1954), S. Sapozhnikov (2014) translated Burns's poem. Comparison of the translations of different years allows seeing the specifics of each of the interpretations caused both by features of creative identity of Russian interpreters and distinctions connected with the evolution of approaches to poetic translation in the course of literary development. Burns's poem "John Anderson my Jo" was mentioned by I. S. Turgenev in his letter to P. Viardot of November, 23 (December, 5), 1870; K. I. Turner, R. Ya. Right-Kovaleva, S. A. Orlov, Ye. S. Belashova, A. A. Golikov etc. wrote about it in their researches. The poem "John Anderson my Jo" became one of the most popular Burns's works in Russia thanks to the achievements of Russian translators.

Keywords: Robert Burns, Russian-English literary relations, poetic translation, reception, tradition, cross-cultural communication

RESUMEN

El artículo considera la historia de la recepción de la traducción al ruso del poema de Robert Burns «John Anderson my Jo» a mediados del siglo XIX, principios del siglo XXI. La primera traducción de este trabajo al ruso hecha por M. L. Mikhaylov en 1856 se convirtió en un triunfo creativo indudable del intérprete, habiendo predeterminado considerablemente el interés de la crítica rusa en «John Anderson my Jo» y estimuló el surgimiento de las interpretaciones posteriores. En los años siguientes P. I. Veynberg (1869), V. M. Mikheyev (los 1880-s), A. M. Fedorov (1896), S. Ya. Marshak (1938), S. A. Orlov (1939, 1959), S. B. Bolotin y T. S. Sikorskaya (1954), S. Sapozhnikov (2014) tradujeron el poema de Burns. La comparación de las traducciones de diferentes años permite ver los detalles de cada una de las interpretaciones causadas tanto por las características de identidad creativa de los intérpretes rusos como por las distinciones relacionadas con la evolución de los enfoques de la traducción poética en el curso del desarrollo literario. El poema de Burns "John Anderson my Jo" fue mencionado por I. S. Turgenev en su carta a P. Viardot del 23 de noviembre (5 de diciembre) de 1870; K. I. Turner, R. Ya. Derecha-Kovaleva, S. A. Orlov, Ye. S. Belashova, A. A. Golikov, etc., escribieron sobre esto en sus investigaciones. El poema "John Anderson my Jo" se convirtió en una de las obras más populares de Burns en Rusia gracias a los logros de los traductores rusos.

Palabras clave: Robert Burns, relaciones literarias ruso-inglesas, traducción poética, recepción, tradición, comunicación intercultural.

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1. Introduction

The poem "John Anderson my Jo" was written by Robert Burns in Ellisland in 1789; it was not absolutely traditional for the creative work of the Scottish poet, who, having hardly reached the age of thirty years old, unexpectedly began to reflect on the end of life and death. In spite of appearing of the first translation of the poem made by M. L. Mikhaylov in 1856, the interest in it in Russia was very limited initially. Many Russian readers learned about Burns's work thanks to their knowledge of European languages; it, in particular, can be said about I. S. Turgenev, who wrote in the letter to Pauline Viardot of November, 23 (December, 5), 1870: "<…> j'ai tout mon beau et cher passé de 27 ans à garder – c'est aussi un trésor et cela m'inspire du respect. Et cela sera ainsi comme pour "Joe Anderson my Joe" de Burns – nous descendrons la colline ensemble" [<…> I have to keep all my wonderful and dear 27-year-old past – it is a treasure too, and it commands my respect. And we will experience the same as in Burns's "Joe Anderson my Joe", and we will go down the hill slope together] (Turgenev 1994: 268, 350).

In the next years the translations of Burns's poem were made by P. I. Veynberg (1869), V. M. Mikheyev (the 1880-s), A. M. Fedorov (1896), S.Ya. Marshak (1938), S. A. Orlov (1939, 1959), S.B.Bolotin and T. S. Sikorskaya (1954; Taubaye et al, 2018; Sadeghpour et al., 2017; Golkar, et al, 2014; Gamarra, et al, 2018; García-Santillán, 2019), S. Sapozhnikov (2014). The present article is devoted to the comparative analysis of translations of "John Anderson my Jo", finding their similarity and specifics.

2. Literature Review

Obviously, the first publication in Russian, having the analysis of "John Anderson my Jo", was K. I. Turner's article "Robert Burns" issued in 1896 – in the year of the 100th anniversary from the date of the Scottish poet's death. K. I. Turner considered "John Anderson my Jo" one of the songs concerning house life, describing "with all sympathy of soul, sensitive to all kind and sacred in nature of a person, a story of gentle attachment, the strength of which was not weakened by years, the constancy of which was not shaken by misfortunes" (Turner 1896: 114). The researcher offered a short retelling of the poem, quite precisely transferring its main idea: "The old wife reminds her husband the past days of their first acquaintance, when his curls, now white as snow, were black as raven, when his forehead, now cut up by wrinkles, was white and smooth. She reminds him those cheerful, pleasant days they had together in their youth and calls blessing on her old man's head "covered with snow", finds a consolation in that thought that as they climbed the mountain of life together, so now they will go down the hill hand in hand and will fall asleep together, having reached the pier" (Turner 1896: 114).

Professor S. A. Orlov, a famous researcher of Burns's creativity, who translated "John Anderson my Jo" twice, in 1939 and 1959, separately argued on this penetrating lyrical etude of the Scottish poet in his book "The National Poet of Scotland (to the 200th Anniversary since the Birth of R. Burns)" (1959): "The poet shows so much deep feeling, so much respect for the person, glorifying friendship and humanity. Addressing to his friend – John Anderson, whose black hair was snowed by time, the poet pronounces the words of love and fidelity, amity and friendship. Sincerity and lyricism, passion of feelings and vitality, total absence of sentimentality or affectation, lucidity of mind and clarity, musicality and special literary expressiveness – such is the song by Burns" (Orlov 1959: 17).

A unique colour of the poem "John Anderson my Jo", one of Burns's best, was underlined by R. Ya. Right-Kovaleva in her book "Robert Burns" published in 1965 in the series "Life of Outstanding People": "If Burns wrote only one this song, his name would be remembered forever: so inseparably, smoothly and strongly the words matched up the old motif, so quiet and eternal love of two people, who grew old together, is transferred in them" (Right-Kovaleva 1965: 216). The author of the article "Scottish Folk Songs in Robert Burns's Interpretation (Questions of Language and Style)" (1982) A. A. Golikov was especially interested in the form of Burns's song – two eight-line stanzas, assuming aspiration "to extreme laconism and simplicity" (Golikov 1982: 118).

Many articles give estimates of the first translation of Burns's song created by M. L. Mikhaylov (Burns 1856). In particular, S. A. Orlov in his research "Burns in Russian Translations" (1939) called M. L. Mikhaylov's translation "the best of all Russian translations of this poem": "Deep lyricism, the thought of inviolability of feeling of attachment and friendship are transferred in the translation with great strength" (Orlov 1939: 238). According to Ye. S. Belashova in her thesis "Robert Burns in S. Marshak's Translations" (1958), M. L. Mikhaylov's translation has great proximity to the original; the interpreter managed to recreate deep lyricism and warmth of the tone of the original, to keep metaphors and periphrases, because of what "Russian poems are not less poetical than Burns's ones" (Belashova 1958: 92). An enthusiastic assessment is given to this translation by Yu. D. Levin, who included it in full into the monograph "Reception of English Literature in Russia: Researches and Materials" (1990), having commented on it as follows: "Mikhaylov, in effect, was the first to recreate Burns in Russian adequately, transferred vital humanistic pathos, dramatic nature of his poetry and originality of the poetic form. Under Mikhaylov's hand "Russian Burns" gained authenticity, which he had not had earlier" (Levin 1990: 240).

3. Materials and Methods

The material for the analysis are translations of Robert Burns's poem "John Anderson my Jo" made by M. L. Mikhaylov (1856), P. I. Veynberg (1869), V. M. Mikheyev (the 1880-s), A. M. Fedorov (1896), S. Ya. Marshak (1938), S.A.Orlov (1939, 1959), S. B. Bolotin and T. S. Sikorskya (1954), S. Sapozhnikov (2014). Methodologically, the research relies on Alexander N. Veselovsky, Alexey N. Veselovsky, V. M. Zhirmunsky, M. P. Alekseyev, Yu. D. Levin, A.V. Fedorov, Ye. G. Etkind's fundamental works, etc. and also on the works of Russian researchers, studying the aspects of Burns's biography and creativity, perception of Burns's heritage in Russia, including those directly connected with the poem "John Anderson my Jo" (K. I. Turner, S. A. Orlov, A. A. Golikov, A. A. Yelistratova, B. I. Kolesnikov, Ye. S. Belashova, D. N. Zhatkin, etc.). In the course of studying of the research problem comparative-historical, comparative and historical-typological approaches and also methods of the complex analysis were used.

4. Results

Burns's poem is written in iambus, with *abab* rhyme. This size is kept in all Russian translations, with the exception of the translation of P. I. Veynberg, who used amphibrach. The two-octave structure of the original is recreated by M. L. Mikhaylov, P. I. Veynberg, V. M. Mikheyev, S. Sapozhnikov; A. M. Fedorov, S. Ya. Marshak, S. B. Bolotin and T.S. Sikorskya offered four stanzas-quatrains, what also does not contradict the original; S. A. Orlov has no graphic division into stanzas.

Because of the use of such peculiar lexicon as *cherep gol [the skull is bear], vzglyad potukh ot muk [the look went out because of torments], v odnom grobu [in one coffin]* V. M. Mikheyev's translation was deprived of Burns's irony, which, however, was easily kept by A. M. Fedorov, S. Ya. Marshak, S.A.Orlov (in the first edition), S. Sapozhnikov, who only used a lexeme *lisiy* or *pleshiviy [bald]* for the description of the head of the old hero. An unsuccessful selection of lexicon (*ne ispeshchryon [not speckled], osnezhyon [snowed]*) in A. M. Fedorov's translation led musicality of Burns's poem to loss.

Ye. S. Belashova noted P. I. Veynberg's rough deviations from formal features of the original (Belashova 1958: 107). P. I. Veynberg translated this song together with two more works by Burns – "The Jolly Beggars: A Cantata" (1785) and "Lord Gregory, A Ballad" (1793). The translations were made for the publication in "Otechestvenniye zapiski", about what P. I. Veynberg reported to N. A. Nekrasov at the end of May – beginning of June, 1868 (Pisma k N. A. Nekrasovu <…> 1949: 178; Zhatkin 2016: 22). However, N. A. Nekrasov chose only two translations (Burns 1868b: 325–336; Burns 1868a: 622), did not print "John Anderson my Jo", and it was published in the journal "Delo" in 1869 (Burns 1869: 183).

According to Ye. S. Belashova, S.Ya.Marshak in this case (as well as in many others) skillfully found the main thing, defined the song originality, consisting in deep lyricism of Burns's comparisons, and subordinated all means of Russian to its identification (Belashova 1959: 11). Speaking about S. Ya. Marshak's translation, S. R. Mayzels noted that "in different editions there are discrepancies in the first verse: "Джон Андерсон, когда с тобой…" [Dzhon Anderson, kogda s toboy…], "Джон Андерсон, мой друг, Джон…" [Dzhon Anderson, moy drug, Dzhon…]" (Mayzels 1969: 770). However, actually, there are more discrepancies. So, the first edition printed in "Literaturnaya gazeta" in 1938 differs from the third edition (1959) only in three initial lines: "Джон Андерсон, когда с тобой / Делил я хлеб и соль, / Я помню волос твой густой / Был черен, точно смоль" (the first edition) [Dzhon Anderson, *kogda s toboy / Delil ya khleb i sol, / Ya pomnyu volos tvoy gustoy /* Bil chyoren, tochno smol] (Marshak 1938: 5) – "Джон Андерсон, мой старый друг, / Подумай-ка, давно ль / Густой, крутой твой локон / Был черен, точно смоль" (the third edition) [Dzhon Anderson, *moy **stariy drug**, / Podumay-ka, davno l / Gustoy, krutoy tvoy lokon* / Bil chyoren, tochno smol] (Marshak 1959: 216; Marshak 1969: 212).

Having compared the first and second editions of S. Ya. Marshak's translation in his review of the book "Robert Burns in S. Marshak's Translations" (1950) published in 1951, A.T.Tvardovsky considered that in the second case one of the best poems by Burns "was crippled rhythmically" (Tvardovsky 1951: 229) – with all its rather bigger accuracy the second edition of the translation enters a dissonance with standards of Russian: "Джон Андерсон, мой друг, Джон, / Подумай-ка, давно ль / Густой, крутой твой локон, Джон, / Был черен, точно смоль" [Dzhon Anderson, moy ***drug, Dzhon**, / Podumay-ka, davno l / Gustoy, krutoy tvoy lokon, **Dzhon**, / Bil chyoren, tochno smol] (Robert Berns v perevodakh S.Marshaka 1950: 140). Nevertheless, in her article "The Skill of S.Marshak, a Translator of Burns" (1960) on the example of S.Ya.Marshak's translation of the end of the first octave and the beginning of the second octave of the second edition T.B.Liokumovich showed that the translator fully mastered Burns's characteristic technique of catching up of the last words of one stanza by the beginning of the following stanza: "It gave to his poems song continuity, allowed to connect the previous thought with the subsequent one and to try to make the reader follow the course of the represented events with unflagging attention all the time" (Liokumovich 1960: 83), compare: "Теперь ты стал не тот, Джон, / Ты знал немало вьюг. / Но будь ты счастлив, лысый Джон, / Джон Андерсон, мой друг! / Джон Андерсон, мой друг

Джон, / Мы шли с тобою в гору, / И столько славных дней, Джон, / Мы видели в ту пору" (the second edition) [Teper ti *stal ne tot, Dzhon*, / Ti znal nemalo vyug. / No bud ti shchastliv, lisiy Dzhon, / Dzhon Anderson, moy drug! / Dzhon Anderson, moy *drug Dzhon*, / Mi shli s toboyu v goru, / I stolko *slavnikh dney, Dzhon*, / Mi videli v u poru] (Robert Berns v perevodakh S.Marshaka 1950: 140) – "Теперь ты снегом убелен, – / Ты знал немало вьюг. / Но будь ты счастлив, лысый Джон, / Джон Андерсон, мой друг! / Джон Андерсон, мой старый друг, / Мы шли с тобою в гору, / И столько радости вокруг / Мы видели в ту пору" (the first / third edition) [Teper ti *snegom ubelen*, – / Ti znal nemalo vyug. / No bud ti shchastliv, lisiy Dzhon, / Dzhon Anderson, moy drug! / Dzhon Anderson, moy *stariy drug*, / Mi shli s toboyu v goru, / I stolko *radosti vokrug* / Mi videli v u poru] (Marshak 1938: 5; Marshak 1959: 216; Marshak 1969: 212). Differences in addresses can be seen in the second and third quatrains of the second and first / third editions, and S.Ya.Marshak finally refused literal following to the original characteristic of the second edition.

In different years S. A. Orlov created two very different translations of Burns's song – "Dzhon Anderson, moy drug" ("John Anderson, my Friend", 1939) and "Dzhon Anderson" ("John Anderson", 1959). In his article "In Languages of Peoples of Our Country (Burns "John Anderson")" (1972), presenting the translations of the poem in languages of peoples of the USSR (Ukrainian, Belarusian, etc.), S. A. Orlov reproduced his translation in the initial form that demonstrates that by the end of his life he returned to the early edition printed in 1939 (Orlov 1972: 110–111). S. B. Bolotin and T. S. Sikorskaya's translation created in 1954 partly correlated in tonality with S. A. Orlov's translations differs in some licence and philosophical character.

Let us note that most of the latest translators of Burns (Ye. D. Feldman, Yu. V. Knyazev, S. A. Aleksandrovsky, etc.) did not interpret Burns's text (at least, we do not know any published variants). And only S. Sapozhnikov, who set the task to present full Burns to the Russian reader, translated two significantly differing versions of the poem at once: the "early" one, presenting a dialogue (included into the second part of Thomas Percy's collection "The Reliques of Ancient English Poetry" published in 1765), and the "late" one – a monologue of a wife, reproaching her old husband with laziness and sexual infirmity, which enjoyed special popularity in Burns's days (Burns 2014: 1018–1021). This late variant, in fact, can be considered the Scottish national song; Burns's authorship in this case is challenged by researchers, but not by S. Sapozhnikov, specifying in comments on the translation: "…an obscene version of "John Anderson my Jo", the intonation of which is much warmer and softer. Numerous versions of the national song with the same name were popular in the middle of the 18th century, and here Burns approaches to their everydayness and sexual egoism much closer" (Burns 2014: 1165). However, in fact, there was a traditional text of the Scottish national song and its interpretation created by Burns in 1789 for "The Scots Musical Museum" of James Johnson: "Burns's interpretation, entering into a controversy with the traditional text, well-known to his listeners, approves a much higher level of culture of human relations: there are no complaints, hidden irritation, offensive sneers; instead of it there is a motif of pride, fidelity, attachment to each other of the people, who had lived long and hard life together" (Arinshtein 1982: 625). "The Caledonian Pocket Companion" of James Oswald was a melody source for Burns's composition; the publication took place in the collection "The Songs of Robert Burns" by James Chalmers Dick in 1903.

In the original both octaves begin with the address to John Anderson and come to an end almost in the same way, what in combination with alliteration of sounds [d] and [n] creates a song basis of the work: "Joh*n* A*nd*erso*n* my *j*o, Joh*n* / <…> / Joh*n* A*nd*erso*n* my *j*o" (Burns 1865: 160). M. L. Mikhaylov and A. M. Fedorov partly broke this structure: "Джон Андерсон, сердечный друг! / <…> / <…> сердечный друг! / Джон Андерсон, сердечный друг! / <…> / <…> сердечный мой!" [Dzhon Anderson, serdechniy drug! / <…> / <…> serdechniy **drug**! / Dzhon Anderson, serdechniy drug! / <…> / <…> serdechniy **moy**!] (Mikhaylov 1958: 151); "Джон Андерсон, мой милый! / <…> / Джон Андерсон, мой Джон! / Джон Андерсон, друг славный, / <…> / Джон Андерсон, мой Джон!" [Dzhon Anderson, **moy miliy**! / <…> / Dzhon Anderson, moy Dzhon! / Dzhon Anderson, **drug slavniy**, / <…> / Dzhon Anderson, moy Dzhon!] (Iz Bornsa <…> 1896: 289). P.I.Veynberg accurately repeats "Джон Андерсон, милый мой Джон" [Dzhon Anderson, miliy moy Dzhon] (Burns 1869: 188) at the beginning and end of each of two stanzas. V.M.Mikheyev, S.Ya.Marshak, S.B.Bolotin and T.S.Sikorskaya, S.Sapozhnikov are almost accurate as he: "Джон Андерсон, мой друг Джон / <…> / Джон Андерсон, мой друг!" [Dzhon Anderson, moy drug Dzhon / <…> / Dzhon Anderson, moy drug!] (Zhatkin 2016: 333); "Джон Андерсон, мой старый друг / <…> / Джон Андерсон, мой друг!" (the third edition) [Dzhon Anderson, moy stariy drug / <…> / Dzhon Anderson, moy drug!] (Marshak 1959: 216; Marshak 1969: 212); "Джон Андерсон, ты помнишь, / <…> / Джон Андерсон, мой друг!" [Dzhon Anderson, ti pomnish, / <…> / Dzhon Anderson, moy drug!] (Bolotin, Sikorskaya 1954: 358); "Джон Андерсон, родной, Джон / <…> / Джон Андерсон, родной" [Dzhon Anderson, rodnoy, Dzhon / <…> / Dzhon Anderson, rodnoy] (Burns 2014: 557). S.A.Orlov begins and finishes octaves differently, and his final line is especially peculiar: "Джон Андерсон, мой милый Джон, / <…> / Твоя, мой милый Джон! // Джон Андерсон, мой милый друг, / <…> / Дай руку мне, мой милый Джон, / И вот моя рука!" (the first edition) [Dzhon Anderson, moy miliy Dzhon, / <…> / Tvoya, moy miliy Dzhon! // Dzhon Anderson, moy miliy drug, / <…> / Day ruku mne, moy miliy Dzhon, / I vot moya ruka!] (Orlov 1939: 248–249); "Джон Андерсон,

давным-давно / <…> / Твоя, мой милый Джон. // Джон Андерсон, мой верный Джон, / <…> / Дай руку мне, мой милый Джон, / И вот – моя рука!" (the second edition) [Dzhon Anderson, **davnim-davno** / <…> / Tvoya, moy miliy Dzhon. // Dzhon Anderson, **moy verniy Dzhon**, / <…> / Day ruku mne, moy miliy Dzhon, / I vot – moya ruka!] (Orlov 1959: 31). Alliteration is perfectly reflected in M.L.Mikhaylov's translation (Джон, Андерсон, сердечный, друг [**D**zho**n**, A**nd**erso**n**, ser**d**ech**n**iy, **d**rug]), in the second edition of S.A.Orlov's translation (Джон, Андерсон, давным-давно [**D**zho**n**, A**nd**erso**n**, **d**av**n**im-**d**av**n**o]) and also in S.Sapozhnikov's translation (Джон, Андерсон, родной [**D**zho**n**, A**nd**erso**n**, ro**dn**oy]).

Burns's colouristic antonymic couple *like the raven – like the snaw* designed to oppose youth and an old age, when comparing hair colour of the hero with raven and snow, found reflection in all Russian translations, and M. L. Mikhaylov, P. I. Veynberg, A. M. Fedorov found it possible to accent emergence of wrinkles on the face, forehead, what is not mentioned in the original: "When we were first acquent / Your locks were *like the raven*, / Your bonnie brow was brent; / But now your brow is beld, John, / Your locks are *like the snaw*; / But blessings on your frosty pow" (Burns 1865: 160) – "Как я сошлась с тобой, / Был гладок лоб твой и как смоль / Был черен волос твой. / Теперь морщины по лицу / И снег житейских вьюг / В твоих кудрях; но – бог храни / Тебя <...>" [Kak ya soshlas s toboy, / Bil *gladok lob tvoy i kak smol* / Bil *chyoren* volos tvoy. / Teper *morshchini po litsu* / I *sneg* zhiteyskih vyug / V tvoikh kudryakh; no – bog khrani / Tebya <...>] (Mikhaylov 1958: 151), "Когда мы сошлися с тобой, / Твой волос был черен, как смоль, / И лоб – без морщины одной. / Но нынче морщины на лбу, / И волос как снег убелен… / Спаси твою старость, Господь" [Kogda mi soshlisya s toboy, / Tvoy volos bil *chyoren, kak smol* / I *lob – bez morshchini* odnoy. / No ninche *morshchini na lbu*, / I volos *kak sneg ubelyon*… / Spasi tvoyu starost, Gospod] (Burns 1869: 188), "Когда, мой друг, с тобой / Сошлись мы, – темен волос был / И светел – облик твой. / Теперь твой череп гол, Джон, / Твой взгляд потух от мук, / И волос бел – но мир тебе" [Kogda, moy drug, s toboy / Soshlis mi, – *tyomen* volos bil / I svetel – oblik tvoy. / Teper tvoy cherep gol, Dzhon, / Tvoy vzglyad potukh ot muk, / I volos *bel* – no mir tebe] (Zhatkin 2016: 333]), "Когда сошлись мы, Джон, / Твой волос густ был, черен / И лоб не испещрен. / Теперь ты, Джон, стал лысым, / Твой волос оснежен. / Но будь благословен он" [Kogda soshlis mi, Dzhon, / Tvoy volos gust bil, *choyren* / I *lob ne ispeshchryon*. / Teper ti, Dzhon, stal lisim, / Tvoy volos *osnezhyon*. / No bud blagosloven on] (Iz Bornsa <…> 1896: 289), "Подумай-ка, давно ль / Густой, крутой твой локон / Был черен, точно смоль. / Теперь ты снегом убелен, – / Ты знал немало вьюг. / Но будь ты счастлив, лысый Джон" (the third edition) [Podumay-ka, davno l / Gustoy, krutoy tvoy lokon / Bil *chyoren, tochno smol*. / Teper ti *snegom ubelyon*, – / Ti znal nemalo vyug. / No bud ti schastliv, lisiy Dzhon] (Marshak 1959: 216; Marshak 1969: 212), "Как ты меня любил, / Ты черен, словно ворон, был, / И вот ты лыс, мой Джон! / Седая бровь еще черна, / Ты снегом опушен, / Благословенна седина" (the first edition) [Kak ti menya lyubil, / Ti *chyoren, slovno voron*, bil, / I vot ti lis, moy Dzhon! / Sedaya brov yehshchyo cherna, / Ti *snegom* opushyon, / Blagoslovenna sedina] (Orlov 1939: 248–249); "Ты знал мою любовь… / Чернее ворона крыла / Была густая бровь… / И вот уже, мой милый Джон, / Ты снегом опушен… / Благословенна седина" (the second edition) [Ti znal moyu lyubov… / *Cherneye vorona krila* / Bila gustaya brov… / I vot uzhe, moy miliy Dzhon, / Ti *snegom* opushyon… / Blagoslovenna sedina] (Orlov 1959: 31) (lines 1–4 of the fragment markedly differ in different editions), "как жизнь для нас цвела, / и смоль кудрей была черней / вороньего крыла? / А нынче кудри, словно снег, / окончен жизни круг, / но будь благословен навек" [kak zhizn dlya nas tsvela, / i *smol* kudrey bila *cherney / voronyego krila*? / A ninche kudri, *slovno sneg*, / okonchen zhizni krug, / no bud blagosloven navek] (Bolotin, Sikorskaya 1954: 358), "Все помню о былом: / Ты черной смоли кудри / Над чистым нес челом; / Теперь твой лоб плешив, Джон, / А кудри – снег сплошной. / Но счастлив с вьюжной будь башкой" [Vsyo pomnyu o bilom: / Ti *chyornoy smoli* kudri / Nad chistim nyos chelom; / Teper tvoy lob pleshiv, Dzhon, / A kudri – *sneg* sploshnoy: / No schastliv s vyuzhnoy bud bashkoy] (Burns 2014: 557). In M.L.Mikhaylov's, S.Ya.Marshak's and S.Sapozhnikov's translations there is an image of *vyuga [a blizzard]* reflecting difficulties of life and character of the hero, and in S.B.Bolotin and T.S.Sikorskaya's free interpretation the philosophical image of *krug zhizni [a circle of life]* appears.

Burns emphasized inseparability of heroes both in youth and in an old age by means of repetition of a personal pronoun *we* and the use of an adverb *thegither (= together)*, set expressions *wi' ane anither (= with one another)*, *hand in hand*: "*We* clamb the hill *thegither*; / And mony a canty day, John, / *We*'ve had *wi' ane anither*: / Now *we* maun totter down, John, / And *hand in hand we*'ll go; / And sleep *thegither* at the foot" (Burns 1865: 160). M.L.Mikhaylov preserved significant set expressions and repetition of a pronoun *mi [we]*: "Мы вместе в гору шли, / И сколько мы счастливых дней / Друг с другом провели! / Теперь нам под гору плестись; / Но мы рука с рукой / Пойдем – и вместе под горой / Заснем…" [*Mi vmeste* v goru shli, / I skolko *mi* schastlivikh dney / **Drug s drugom** proveli! / Teper *nam* pod goru plestis; / No *mi* **ruka s rukoy** / Poydyom – i **vmeste** pod goroy / Zasnyom...] (Mikhaylov 1958: 151). In spite of preserving of these details of the poetic description, Burns's expression is lost in A.M.Fedorov's translation, some descriptiveness, monotony appeared: "Вдвоем мы в гору шли / И много дней веселых / Мы вместе провели. / Теперь идем мы книзу, / Пойдем вдвоем под склон / И там уснем мы вместе»" [***Vdvoyom*** *mi* v goru shli / I mnogo

dney vesyolikh / *Mi* **vmeste** proveli. / Teper idyom *mi* knizu, / Poydyom **vdvoyom** pod sklon / I tam usnyom *mi* **vmeste**»] (Iz Bornsa <…> 1896: 289). This feature of the original practically remained out of P.I.Veynberg's attention: "Мы на гору лезли вдвоем, / И много веселых минут / В пути проживали своем. / Теперь поплетемся мы вниз, / И тихо на путников сон / Сойдет у подошвы горы" [*Mi* na goru lezli **vdvoyom**, / I mnogo vesyolikh minut / V puti prozhivali svoyom. / Teper popletyomsya *mi* vniz, / I tikho na putnikov son / Soydyot u podoshvi gori] (Burns 1869: 188). S.Sapozhnikov reduced the quantity of set expressions almost twice: "Вдвоем мы лезли в гору, / И уйма славных дней, Джон, / Нам выпала в ту пору; / Теперь сползти бы вниз, Джон, / Рука в руке с тобой, / И вместе там, внизу, уснуть" [**Vdvoyom** *mi* lezli v goru, / I uyma slavnikh dney, Dzhon, / Nam vipala v tu poru; / Teper spolzti bi vniz, Dzhon, / **Ruka v ruke s toboy**, / I **vmeste** tam, vnizu, usnut] (Burns 2014: 557). V.M.Mikheyev, as well as S.Ya.Marshak, kept the most part of characteristic set expressions of the original, however, his final image turned out too direct and gloomy: "С тобой мы в гору шли, / И много светлых дней, Джон, / Мы вместе провели. / Идем мы под гору, мой Джон, / Ужель друг другу рук / Нам не подать в одном гробу" [**S toboy** *mi* v goru shli, / I mnogo svetlikh dney, Dzhon, / *Mi* **vmeste** proveli. / Idyom *mi* pod goru, moy Dzhon, / Uzhel **drug drugu ruk** / *Nam* ne podat v odnom grobu] (Zhatkin 2016: 333); compare: "Мы шли с тобою в гору, / И сколько радости вокруг / Мы видели в ту пору. / Теперь мы под гору бредем, / Не разнимая рук, / И в землю ляжем мы вдвоем" (the third edition) [*Mi* shli **s toboyu** v goru, / I skolko radosti vokrug / *Mi* videli v tu poru. / Teper *mi* pod goru bredyom, / **Ne raznimaya ruk**, / I v zemlyu lyazhem *mi* **vdvoyom**] (Marshak 1959: 216; Marshak 1969: 212). On the contrary, in both variants of S.A.Orlov's translation the ending is excessively optimistic: "Ты не забыл о том, / Как шли, не размыкая рук, / Мы жизнь с тобой вдвоем. / Теперь мы под гору бредем, / Уж смерть недалека… / Дай руку мне, <…>, / И вот моя рука!" (the first edition) [Ti ne zabil o tom, / Kak shli, **ne razmikaya ruk**, / *Mi* zhizn **s toboy vdvoyom**. / Teper *mi* pod goru bredyom, / Uzh smert nedaleka… / Day **ruku** mne, <…>, / I vot moya **ruka**!] (Orlov 1939: 249); "Забыть ли юность нам! / И если жизнь – огромный холм, / Мы шли, обнявшись, там. / Теперь мы под гору бредем – / Уж смерть недалека… / Дай руку мне, <…>, / И вот – моя рука! (the second edition) [Zabit li yunost *nam*! / I yesli zhizn – ogromniy kholm, / *Mi* shli, **obnyavshis**, tam. / Teper *mi* pod goru bredyom – / Uzh smert nedaleka… / Day **ruku** mne, <…>, / I vot – moya **ruka**!] (Orlov 1959: 31). S.B.Bolotin and T.S.Sikorskaya introduced images of *tikhiy lug [a silent meadow]* and *tesniy dom [a close house]*, which gave another sounding to Burns's idea: "мы рядом в гору шли, / и столько дней, счастливых дней / сияло нам вдали? / Теперь мы рядом вниз бредем / с горы на тихий луг / и рядом ляжем в тесный дом" [*mi ryadom* v goru shli, / i stolko dney, schastlivikh dney / siyalo *nam* vdali? / Teper *mi* **ryadom** vniz bredyom / s gori na tikhiy lug / i **ryadom** lyazhem v tesniy dom] (Bolotin, Sikorskaya 1954: 358).

5. Discussion

In A.I.Palladin's notes (1954) for S.B.Bolotin and T.S.Sikorskaya's translation it is specified that Burns "often composed his songs to the existing national tunes. So the song "John Anderson" was written, Burns liked to sing it" (Palladin 1954: 391). S.A.Orlov in his book "The National Poet of Scotland (to the 200th Anniversary since the Birth of R.Burns)" (1959) enthusiastically spoke of music of the lyrics in this song: "Three components of a song – a thought, inter syllabic pauses and a melody are harmoniously connected with each other. Burns carefully finishes the song, trying to obtain extreme harmony, integrity and coherence. Richness of alliterations, melodiousness, frequent repetitions, lyricism with surprising clarity and clearness of the thought defines beauty and unique charm of his songs" (Orlov 1959: 17–18). S. A. Orlov agrees with the English criticism, calling songs by Burns the very music, and is not surprised at attention of many outstanding composers (R. Schumann, F. Mendelssohn, etc.) to his lyrics (Orlov 1959: 18). In the 20th century Burns's song entered Russian musical art: in S. Ya. Marshak's translation it was set to music by G. V. Sviridov (performers Yefrem Flaks, Alexander Vedernikov, Victor Kalikin), Yu.A.Levitin (the performer Mikhail Riba), M.V.Milman (the performer Boris Deyneka), in S. B. Bolotin and T. S. Sikorskaya's translation – by D. D. Shostakovich (the performer Elena Ivanova).

Motifs of Burns's work are present in the original poem "Moy drug, khvala tebe i chest!.." ("My friend, praise to you and honor!..", 1970) of the modern poet-translator Ye.D.Feldman, who translated more than four hundred texts of Burns. This song contains ten stanzas, practically each of which comes to an end with the address "Джон Андерсон, мой друг!" [Dzhon Anderson, moy drug!] (Feldman 1970: 335–336); after the second and final stanzas a peculiar refrain of six lines is introduced: "Ты в этой жизни, / Может быть, / Богатства не скопил, / Но дай Бог всякому / Прожить, / Как ты свой век прожил!" [Ti v etoy zhizni, / Mozhet bit, / Bogatstva ne skopil, / No day Bog vsyakomu / Prozhit, / Kak ti svoy vek prozhil!] (Feldman 1970: 335–336). Ye.D.Feldman distinctly shows the peasant life of the hero ("Земля добрела и цвела, / Когда вставал за плуг" [Zemlya dobrela i tsvela, / Kogda vstaval za plug]; "Ведь от зари и до зари, / Не покладая рук, / Трудился в поле с юных лет" [Ved ot zari i do zari, / Ne pokladaya ruk, / Trudilsya v pole s yunikh let]; "Превыше всех заслуг / Ты ставил наш крестьянский труд" [Previshe vsekh zaslug / Ti stavil nash krestyanskiy trud] (Feldman 1970: 335)), and oppositions, comparisons are introduced: "Глядишь, пришёл иной с войны, / Добра награбив тюк. / А ты – по-прежнему бедняк" [Glyadish, prishyol inoy s voyni, / Dobra nagrabiv tyuk. / A ti – po-prezhnemu bednyak] (Feldman 1970: 335–336); "Сидит богач на сундуке, / Надулся, как индюк. / Последний грош ты дал вдове" [Sidit bogach na sunduke, / Nadulsya, kak indyuk. / Posledniy grosh ti dal vdove

/ Posledniy grosh ti dal vdove] (Feldman 1970: 336).

6. Conclusions

Thus, each of Russian translations of Robert Burns's song "John Anderson my Jo" made by M. L. Mikhaylov, P. I. Veynberg, V. M. Mikheyev, A. M. Fedorov, S. Ya. Marshak, S. A. Orlov, S. B. Bolotin and T. S. Sikorskaya, S. Sapozhnikov is peculiar and unique. Translators S. Ya. Marshak and S. A. Orlov made several attempts of interpretation of Burns's song, and the last one was not only the interpreter, but also the researcher of "John Anderson my Jo" and studied not only the original, but also its numerous translations into languages of peoples of the USSR in detail. The popularity of Burns's song in Russia is also demonstrated by appearance of the original poem "Moy drug, khvala tebe i chest!.." ("My friend, praise to you and honor!..") created after it by Ye. D. Feldman in our days.

Acknowledgements

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Characteristic of personnel readiness for conflict management in the organization

Característica de la preparación del personal para la gestión de conflictos en la organización

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ABSTRACT

The analysis of the personnel competence, reflected in the professional standards, allows us to identify the main areas of training that have a positive impact on the challenges of the external environment. At the same time, employees of the organization, as a rule, have different professional training and practical experience. From this perspective, the phenomenon of in-house training of the personnel is updated, under which the training is carried out on the basis of the organization and aimed at achieving the objectives to develop it. Communication, as a mechanism of using communicative skills that can have both positive and negative effects, occupies a leading position in the professional activities of the personnel. Thus, it is connected, in most cases, with conflicts, in particular, the lack of personnel preparedness and readiness to manage them. Researchers are actively engaged in finding the ways to prevent and resolve conflicts, using various forms of post-graduate training, including in-house training of adult audience.

Keywords: personnel readiness, positive impact on the challenges, communication

RESUMEN

El análisis de la competencia del personal, reflejado en los estándares profesionales, nos permite identificar las principales áreas de capacitación que tienen un impacto positivo en los desafíos del entorno externo. Al mismo tiempo, los empleados de la organización, por regla general, tienen diferente formación profesional y experiencia práctica. Desde esta perspectiva, se actualiza el fenómeno de la capacitación interna del personal, en virtud del cual la capacitación se lleva a cabo sobre la base de la organización y dirigida a lograr los objetivos para desarrollarla. La comunicación, como mecanismo para utilizar habilidades comunicativas que pueden tener efectos tanto positivos como negativos, ocupa una posición de liderazgo en las actividades profesionales del personal. Por lo tanto, está relacionado, en la mayoría de los casos, con conflictos, en particular, la falta de preparación y preparación del personal para manejarlos. Los investigadores participan activamente en la búsqueda de formas de prevenir y resolver conflictos, utilizando diversas formas de capacitación de posgrado, incluida la capacitación interna de la audiencia adulta.

Palabras clave: preparación del personal, impacto positivo en los desafíos, comunicación.

1. Introduction
1.1. Introduction to the problem

According to A. M. Zimichev, E. A. Klimov, N. V. Kuzmina and others, professional activity takes a special place among the diverse activities of the person. Since it constitutes the basic form of a person's activity, a significant part of human life is devoted to it. The majority of people find this type of activity as the only opportunity to satisfy the whole range of their needs, to reveal their abilities, to assert themselves as an individual and to achieve a certain social status.

By identifying the role of conflict in the lives of people and society, studying its positive functions and understanding it as an important component of personality development, modern researchers have shifted the focus from resolving a conflict, which involves complete freedom from it, to managing a conflict and defining effective strategies for the behavior of the participants in conflict situations [22,26]. In these terms, the forming of the employee's readiness to manage conflicts becomes relevant for various fields of activity, including professional one. The forming of personnel readiness to manage conflicts in professional activities can be described as systematic accumulation of positive quantitative and qualitative changes, including knowledge, skills, and personality traits, acquired in the in-house training system that can ensure constructive interaction between the employees in the conflict management process.

One of the important aspects for the organization of this type of training is the forming of the personnel readiness to manage conflict according to the structure of this type of readiness. This involves identifying a number of components, determining their content and clarifying their functions, which will allow us to organize a targeted process of its forming.

1.2. The urgency of the problem

In terms of social change and the growing economic contradictions, the level of conflicts among employees significantly increases in the organization. The presence of conflicts in the process of professional activity of the person is a constant, objective and inherent phenomenon. Without proper management, conflict situations can grow in a destructive way and have a significant impact both on the psychological safety of individual employees and on the effectiveness of the organization as a whole [20, 27, 28]. This determines the need of the organization in shaping the readiness of employees to manage conflicts in their professional activities.

It is established that to a certain extent, this problem is solved with the use of in-house training opportunities, which make it possible to organize the educational process according to the requirements of your organization. Modern in-house training has a sufficiently high potential, which is currently not used in full, because it is often limited to specific professional areas without affecting the social problems of improving the activities of the organizations. One of these areas, allowing to significantly rise the efficiency of the organization is the forming of the employees readiness to manage conflicts in the process of professional activity.

1.3. Study of a problem

In terms of the historiography of the problem that has had a significant impact on its current state, the scientific data of researchers were taken into account in the following main areas using periodization: the forming and development of in-house training (the second half of the 19th century - the beginning of the 20th century); history of conflict studies (beginning of 20 to the present); the birth and development of management theory (end of 20th century to the present). Additionally, this article uses data from the research on the current state of the issue of the forming of employees' readiness for conflict management in a professional activity of the organization (end of the 20th century -21st at the beginning).

A large number of psychological and pedagogical studies are devoted to the problem of the forming of conflict management readiness, in which the problems of activity readiness of an individual are considered (N. D. Levitov, A. R. Luria, G. Walter, A. A. Ukhtomsky and others), professional readiness (I. A. Zimnyaya, N. V. Kukharev, L. M. Mitina and others), general management theory (V. G. Afanasyev, I. Ansoff, M. Meskon, G. Hale, etc.), conflict management in professional activity (T. A. Artemova, F. M. Borodkin, N.M. Koryak, L. N. Chumikov, U. Yuri, and others).

At the same time, despite the great interest of the researchers to the issues listed above, the problem of the forming of the employees readiness for conflict management at the organization in the process of in-house training remains insufficiently developed.

Historiographical analysis of the problem showed that under current assumptions, demonstrating the relevance of the problem, as well as possibilities for its solutions, the problem was not posed as an independent subject of the study. It remains insufficiently developed, in particular, in the process of postgraduate in-house training of the

employees in the organization.

The following issues remain underdeveloped: the structure of the personnel readiness to manage conflicts in their professional activities in the organization, its component composition and informative content; scientific approaches to the forming of readiness for conflict management.

This circumstance determined the choice of the research topic.

1.4. Hypothesis

The article suggests that the forming of readiness for conflict management among employees of the organization in the process of in-house training will be effective on the basis of systematic, environmental, personality-activity approaches which are the basis for determining the structure, content and functions of this type of readiness.

2. Methods

The article uses a methodology based on a combination of systemic, environmental, and personal activity approaches. The choice of these approaches is determined by the following aspects: the purpose of the research is to clarify the essence, structure and content of readiness to manage the conflict of employees of the organization in the process of in-house training, which allows you to perform a systematic approach; conflict management, its resolution, anticipating, etc. directly depends on the organization's environment, which is provided by the environmental approach; change in personal qualities, taking targeted actions and carrying out a special type of activity focuses on the application of the ideas of the personal activity approach.

To study the identified problem, we have used system analysis methods such as structural and functional ones to identify the nature and structure of the personnel readiness to manage conflict and form the components of readiness under the subsequently targeted control. In terms of the environmental approach, we have analyzed the organization's environment, which implied the identification and organization of the effective functioning of the pedagogical parameters of the environment in which the in-house personnel training takes place. The environmental approach allows us to apply a method of the indirect management of the in-house training process. The personal activity approach is employed by using the analysis of the individual psychological characteristics of the person: motivation, adaptation, abilities, intrapersonal and interpersonal skills, level of aspirations, self-esteem, cognitive style and by taking all these features into account when designing the teaching process in the context of in-house training for adults. A historiographic method was used as well, which allowed us to determine the main stages and results of the research of the problem. The following empirical methods were used: observation, the study of pedagogical experience, testing, questioning, survey, and others.

This allows us to provide the analysis of the current state of the problem of forming the personnel readiness to manage conflict, to predict new trends in the study of the problem, and also to develop technologies for the forming of this type of readiness in the process of in-house adult education.

3. Discussion

Based on the above-mentioned scientific approaches and methods, we have made an analysis of the problem of the forming of the personnel readiness to manage conflict in their professional activities.

The problem of the readiness of the individual to professional activity was studied by the researchers from the standpoint of various approaches and is interpreted by them as a short-term or long-term state in which the physical and mental resources, that are necessary to effectively stimulate the activity, are activated (E. P. Ilyin, K. K. Platonov, A. A. Ukhtomsky and others) [7, 14, 21]; manifestation of personality qualities in the process of a specific activity (K.A. Abulkhanova, B. G. Ananyev, L. I. Bozhovich) [1, 3, 5].

Single issues of professional readiness of the expert considered in modern foreign studies (G. Moskowitz, J. L. Holland). The authors believe that the personal qualities of an individual, manifested in his readiness for activity, prevail over education and qualifications [23, 24].

We share the view on the understanding of readiness for professional activity of such scholars as E.A. Klimov, J. Raven, A.V. Silkin and others who interpret it as a complex personal forming, which includes the system of professional and personal significant qualities, which allow the individual to quickly adapt to new professional conditions, achieve success in their professional activity and determine the direction of the personal professional growth of the employee [8, 15, 18].

Taking into account the definition of the concept of readiness, which is closely related to a specific activity, in our case, personnel conflict managing suggests that they have formed components of management activities based on

an understanding of the nature of the conflict, ways and means of managing it and building relationships in a conflict-prone environment in accordance with strategic goals organization activities [11,29].

We define conflict management as the purposeful impact on its course in order to change its development. At the same time, depending on the goals of conflict management, its development can both be suppressed and stimulated.

In pedagogical theory and practice scholars consider various aspects of the problem of forming the personnel readiness to manage conflict in the organization. So, in particular, when we theorize and methodize conflict management, we take into account the fact that this is a branch of scientific knowledge that develops at the junction of a number of scientific disciplines - conflict resolution studies, social psychology, social management theory, organization theory, and pedagogy.

In pedagogical terms, from the point of view of E.E. Tonkov, the leading goal of conflict management for an employee of the organization is a positive change in the interpersonal relationships of the participants in a conflict interaction [20]. Proceeding from this, we consider the pedagogical aspect of conflict management to be a purposeful poly subjective process of development and a positive change in the interpersonal relations of participants in conflict interaction during professional activity[11].

The analysis of the research on the issue and the generalization of various points of view of the scholars has formed our understanding of the employees readiness to manage conflicts as an integrative quality of an individual which presents a system of motivational, cognitive, emotional and operational activity components. These components provide a targeted impact on the course of the conflict in order to change it and neutralize, the degree of which determines the readiness of an employee to manage conflicts in the process of professional activity.

We consider the motivational component of the personnel readiness be the basis for the forming of all other components, since the success of a professional activity is determined, first of all, by the appropriate orientation of the individual towards it [10, 17]. This component includes: needs and their corresponding motives (improving the quality of their own professional activities; the desire to master the theory and practice of conflict management; increasing professional competence in conflict management), interests (employee's interest in conflict management in professional activities; striving for finding productive ways to manage conflict; striving for personal self-development, self-realization in professional activities); employee's value orientations (accepting the value of mastering conflict management, awareness of the need to manage conflict; awareness of the importance of mastering the theory and practice of conflict management), which together reflect the psychological basis of readiness to manage conflict.

Since the forming of employees readiness to manage conflicts requires a large amount of knowledge about this phenomenon, the cognitive component of readiness is also important. It includes the necessary knowledge about the subject of conflict management, in particular, the knowledge about the readiness for conflict management; the information on the general principles of conflict management, which allows to diagnose the presence and causes of conflicts, to determine how to manage conflict effectively; the basics of management that allows to have a targeted impact on conflict interaction in order to prevent or resolve it; fourthly, the knowledge of methods and practical techniques that allow to carry out conflict management in the process of professional activity.

The researchers in the field of conflict management also pay great attention to emotions (A. Ya. Antsupov, L. A. Kozer, V. P. Ratnikov, A. I. Shipilov, and others). The emotional component in the employee's readiness to manage conflict implies the availability of emotional intelligence, emotional creativity, emotional culture, determining an adequate understanding of a communication partner, the ability to regulate their own emotions, not to respond with aggression in an unexpected situation, to mobilize in non-standard situations, adjusting their attitude and behavior [4, 9, 16].

The social skills identified by K. Saarni are greatly significant for us, too. They contribute to the development of the emotional component of the employee readiness to manage conflicts in the process of professional activity and include: the awareness of one's own emotional states; the ability to distinguish the emotions of other people; the ability to use the vocabulary of emotions and forms of expression adopted in a given culture (or subculture); the ability of empathic inclusion in the experiences of other people; the ability to cope with their negative experiences using self-regulation strategies that minimize the intensity or duration of such experiences (remove the "burden of experiencing") [25,30].

Operational and activity component characterizes the activities of an employee in conflict management, integrating the content of the above components. This component is also manifested in the skills required for an employee to manage conflict in the process of professional activity. The degree of the development of this component reflects the practical readiness of the employee to manage conflicts during their professional activity.

Determining the component composition of these skills, we have analyzed the classification of the skills, built according to the functions of the activity (N. V. Kuzmina, A. M. Zimichev, G. G. Noskova, and others) [2, 13], the stages of conflict management (E. V. Burtovaya, L.N. Tsoi, and others.) [6, 22], the logic of management (D.A. Novikov, and others) [12].

Definite skills were identified in the structure of readiness for conflict management in professional activities in the order of their use in the conflict management process. The following skills are related to them: determining the conflict situation; determining the type of conflict, its specific characteristics, causes, parameters and participants; determining the stages of the conflict; identifying and using means of influencing conflict; making conclusions on the analysis of the conflict and the peculiarities of its resolution to change the relations in the organization and determining the ways of their own improvement. Each component of employee readiness to manage conflict has corresponding functions: motivational – stimulating function – the forming of psychological readiness for employees to manage conflict in the process of professional activity; cognitive – informing and orientation functions – the acquisition by an employee of a certain system of knowledge on conflict management in the course of professional activity; emotional – informational, evaluative, regulatory, ensuring an adequate understanding of a communication partner, the ability to regulate one's emotions, not to show aggression and mobilize in non-standard situations; operational activity component performs regulatory and evaluation functions of conflict management among employees and is developed through appropriate skills.

The in-house training involves the development of scientific and pedagogical support, which we consider as set of substantive, organizational, pedagogical and procedural tools that are necessary for organizing and developing the process of forming the employees readiness to manage conflicts in their professional activity, which we consider as a further research perspective.

4. Conclusion

The analysis of the research on the issue has revealed its relevance due to a significant increase in the conflict potential in the professional activities through the change in social and economic conditions, insufficient readiness of the personnel to respond adequately to the circumstances of the professional environment, and insufficient theoretical and methodological development of these issues in the theory and practice of postgraduate education.

In modern scientific literature, the readiness of an individual to the professional activity is understood as a complex personal forming, which includes the system of professional and personal significant qualities, which are entirety responsible for the rapid adaptation to new professional conditions, the success of the professional activity, and determine the direction of the personal professional growth of the employee.

Management in social systems is determined to be understood as a conscious, purposeful impact on the social system as a whole or on its individual elements and it is based on the use of inherent in the system of objective laws and trends, the purpose of which is to streamline the organization of the system, to achieve its optimal functioning and development.

In accordance with this, it has been established that the readiness of an employee to manage conflicts is an integrative quality of an individual and has a systemic organization and serves as an aggregate of motivational, cognitive, emotional, and operational activity components.

The findings state that the forming of the personnel readiness to manage conflicts in their professional activity can be carried out efficiently within the framework of in-house training, conducted on the basis of the organization, taking into account the systematic, environmental, and personal activity approaches.

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Impact of Bankruptcy Risk and Competition on Profitability in the Iranian Banking System Using BOONE Indicator: Generalized Method of Moments

Impacto del riesgo de bancarrota y la competencia en la rentabilidad del sistema bancario iraní utilizando el indicador BOONE: método generalizado de momentos

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ABSTRACT

The purpose of this study is to investigate the question that how is the impact of bankruptcy risk and improving competitive conditions on the profitability of commercial banks. We have studied the balance sheet information of 30 commercial banks, which include all Iranian banks, during the period 2006-2017. In this paper, the BOONE indicator is used to estimate competition, and to estimate profitability, two methods of rate of return on asset (ROTAB) and net interest margin (NIM) are used. The data analysis method in this study was based on the generalized least squares (GMM). The results showed that in the rate of return method, the impact of competition on the profitability of commercial banks, both in the deposit market and in the non-interest income market, was inverse and significant, and in the facility market, it has a positive and significant impact on the profitability of the banks.

Keywords: Profitability of Banks, Competition, Bankruptcy Risk, Panel Data, Stata.

RESUMEN

El propósito de este estudio es investigar la cuestión de cómo es el impacto del riesgo de bancarrota y mejorar las condiciones competitivas en la rentabilidad de los bancos comerciales. Hemos estudiado la información del balance de 30 bancos comerciales, que incluyen todos los bancos iraníes, durante el período 2006-2017. En este documento, el indicador BOONE se utiliza para estimar la competencia, y para estimar la rentabilidad, se utilizan dos métodos de tasa de rendimiento del activo (ROTAB) y margen de interés neto (NIM). El método de análisis de datos en este estudio se basó en los mínimos cuadrados generalizados (GMM). Los resultados mostraron que en el método de la tasa de rendimiento, el impacto de la competencia en la rentabilidad de los bancos comerciales, tanto en el mercado de depósitos como en el mercado de ingresos sin intereses, fue inverso y significativo, y en el mercado de instalaciones, tiene un Impacto positivo y significativo en la rentabilidad de los bancos.

Palabras clave: Rentabilidad de los bancos, Competencia, Riesgo de quiebra, Datos del panel, Stata.

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INTRODUCTION

Since the economic growth and development of any society requires the organization of financial markets to increase the competitiveness of banks and to expand capital markets and to attract people's liquidity and to direct them to productive activities and to create the necessary facilities for public participation, therefore, measures should be taken so that the banking system, as one of the most important and fundamental part of the economy of society, can play its role and place in economic activities (Gholi Begloo, 2008) in order to prevent the transfer of banking system risks by applying hedging strategies to other economic sectors and the devastating impacts on the macroeconomics of countries (Nagahi, Nagahisarchoghaei, Soleimani & Jaradat, 2018). The purpose of this paper is to answer the question whether it is possible to prevent increase in the credit risk of banks, which reduces their profitability and ultimately leads to their bankruptcy, by applying certain rules in order to create and improve healthy competitive conditions. It is also worth asking whether the indicators of competition and bankruptcy risk have the same impacts in different banking markets. There have been many studies on the impacts of bankruptcy risk or competition on banks 'performance, but unfortunately, no new studies have been conducted to estimate the impacts of these variables on banks' profitability in various banking markets such as facility, deposit and non-interest income. The facility market mainly refers to the bank's interest and shared income with customer. Whereas the non-interest income market is focused on non-shared income. Finally, the deposit market refers to the methods used by banks to attract resources and deposits (transfer it to the findings section). In this study, we attempt to show that, unlike the expectations, the impacts of competition and bankruptcy risk are different in the banking markets.

This paper consists of the following sections:

Section One: Introduction

Section Two: Literature Review

Section Three: Research Methodology

Section Four: Findings and Results Analysis

Section 5: Discussion and Conclusion

Literature Review

In the theoretical literature, banks' performance model is examined from two perspectives:

A- The section of efficiency- which measures the efficiency of banks in terms of bank financial performance by determining the input and output variables (Eslami et al., 2011).

B- The section of performance indicators, which assesses the bank by determining criteria in both financial and non-financial sectors. The non-financial sector includes the areas of customers, employees, and branches, and the financial sector examines profitability and risk indicators.

In the financial sector of profitability indicators, several indicators have been used in Iran and around the world, such as methods of Return On Assets (ROA), Net Interest Margin (NIM), Return On Investment (ROI), Return On Equity (ROE), and Economic Value Added (EVA). But there are many studies that their used methods to estimate profitability are based on two profitability indicators: 1) rate of return on assets and 2) net interest margin. These two indicators have in many cases been used to estimate banks' profitability (Tan, 2014 and 2016; Tan & Anchor, 2016; Nagahisarchoghaei, Nagahi & Soleimani, 2018). The rate of return on assets reflects the power of banks to make a profit through real and financial capital resources. The net interest margin method (Tan & Floros, 2012), which is slightly different from the method of return on assets, previously focused on banks 'profitability through profit-making activities, but later in the functions of banks' profitability it changed to return on income producing assets method. The net interest margin method is obtained by dividing the net interest margin by income producing assets and shows to what extent the management has been able to use income producing assets to make interest income. The ratio of return on assets also reflects the profit from each currency unit of assets, and on the other hand, shows the ability of management to make good use of the bank's real capital and financial resources in creating profit. The ratio of total return on assets is obtained by dividing the net interest by total assets.

Since competition is one of the main components for evaluation of the banking system performance. Therefore, one of the most important indicators of evaluation of the banking system performance has been the measurement of competition factor. Although in theoretical models, using the interbank competition indicators seems easy, empirical estimates show that it is very difficult to find a suitable indicator to measure the level of competition between banks. In the empirical literature, three different groups of indicators have been used to estimate the degree of competition between banks (Beck, 2008):

1) Structural market estimators, such as concentration ratio, number of banks, and Herfindahl-Hirschman index.

2) Competition estimators; including the most commonly used competition estimators, the H-statistic, the Lerner index, and the BOONE indicator.

3) Regulatory estimators: In these indicators, market competition depends on both the competing banks and the different types of barriers to market entry and exit. Due to the difficulty of quantifying some of these variables (such as country-

specific information and contractual characteristics), and the lack of access to needed information, especially in Iran, it is less commonly used. But in comparison of the model of estimated variables with the BOONE indicator, not only can it estimate competitive conditions in different banking markets, but also less data is required to estimate it (leuvensteijn, Bikker, Rixtel, & Sorensen, 2007).

In general, research on competition and profitability can be categorized into the following categories: The first category believes in liberalizing interest rates to improve competitive conditions and increase banks' profitability. For example, the positive impact of interest rate liberalization on bank profitability as an indicator of competition is strongly corroborated by Ding et al.[1] (2017). The second group, such as Shelvin and Wu (2015), assess the interest rate liberalization factor in the short run in increasing the level of competition and profitability of banks to be positive, but on the other hand, they believe that interest rate liberalization in the long run will increase uncertainty, risk and instability in the market. The third category, such as Salatin and Zahedi (2017), believe that economic liberalization, or the transfer of a large part of the economy to the free market, if appropriate laws and regulations are implemented, can play an important role in laying the groundwork and proper function of institutions, markets and the performance of banks. The fourth category, such as Googerdchian et al. (2010), found no significant relationship between economic liberalization and improved bank performance in Iran. They also stated that bank interest rate had no significant role in explaining banks' profitability due to the specific conditions of the Iranian banking system. Findings of the fifth category, such as Shahikiatash et al. (2015), show that the greater the market share of banks as a result of competition, the greater the profitability of banks.

Seyyed Abadi (2016), in a study entitled "Competition, Efficiency and Growth in Banking", investigated the relationship among competition, efficiency and growth in the banking industry and provided a model for it. For this purpose, data of eight sample banks between 2006 and 2015 has been investigated, in which the variables are used as follows: competition as an independent variable, efficiency initially as a dependent variable in a model probability and as an independent variable in the second model, and eventually, growth as a dependent variable. The simultaneous equations model has been used to analyze the data. The results indicate that there is a direct and significant relationship between competition and efficiency in the banking industry, also there is a direct and significant relationship between efficiency and growth of banks.

Poostinchi (2013), in his research, has focused on "the impact of competition in the banking industry on overdue claims of banks". In this paper, he considers overdue claims of banks as one of the main sources of their risk and assumes competition in the banking industry as one the factors affecting overdue claims of banks. For this purpose, a panel data model consisting of 18 banks operating throughout the period (2005-2011) is used. The results show that there is an inverse relationship between competition in the banking industry and overdue claims. Loan-to-asset ratio, profitability-to-asset ratio, total assets, and economic freedom also have a direct and significant impact on these claims.

Berger, Alan   Klapper, Laura, and Turc Alice, Rima (2008), in a study entitled "Banking Competition and Financial Stability", propose that, according to the traditional "competition-precision" view, banks with high market power totally have less risk. By examining the statistical data of the research, they have found that market power increases credit risk (facility) and this risk may be partly offset by the high proportion of capital of equity holders.

Marques lbanez, David, and Leuvensteijn, Michael (2017), examining the crisis of the 2007-2009 period, banks that benefit from high levels of stock exchange activities in highly competitive markets are expected to also have high levels of risk in their portfolio of facilities, and these banks will have little incentive to monitor the quality of giving the facilities (Anne and Burton, 2014). And this study considers the role of central banks to be very important in the use of various supervisory tools to control banking behaviors.

In summary, the current study complements the scientific gap and empirical literature in three cases: 1) It tests the impact of competition in different markets of the banking system in Iran. 2) It also examines the concurrent impacts of competition and bankruptcy risk on profitability in different banking markets. 3) It also uses the BOONE indicator for the first time in Iran to estimate the competition index in the banking markets.

METHODOLOGY

In this research, in order to estimate the impact of bankruptcy risk and competition on banks' profitability, we used balance sheet information of 30 commercial banks including all Iranian banks over the period 2006-2017. The independent and dependent variables of the model used in the bank profitability equation and their collection method are as follows:

A) Banking variables

1) Rate of return on asset; ratio of pre-tax profit to total assets

2) Net interest margin; ratio of net income to income producing assets

3) Bank size; natural logarithm of total assets

4) Diversity of banking services; ratio of non-interest income to net income

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[1] Ding, N., Fung, H., & Jia).2017)

5) Liquidity; ratio of cash assets to total assets

6) Public expenses of banks; ratio of public expenses to total assets

7) Capital; capital adequacy ratio

8) Credit risk; ratio of overdue facilities to total facilities

9) Bankruptcy risk; standard deviation of ROTAB / [Assets / Capital + ROTAB]

B) Banking system variables:

1) Competition; BOONE indicator

2) Banking sector development; the ratio of banking sector assets to gross domestic product (GDP)

3) Capital market development; the ratio of banks' capital to GDP

C) Macroeconomics variables

1) Inflation rate; annual inflation rate

2) GDP growth rate; GDP annual growth rate at current price

It should be noted that the method used to estimate these variables is based on the research of Tan (2017). The reasons for using the BOONE competition indicator in this study are as follows:

1) This indicator is based on the assumption that more efficient banks have more power in increasing market share and expanding the size of the bank, and will lead to more profitability for that bank,

2) The main issue of this indicator is the efficiency-structure hypothesis, which states that competition improves the performance of efficient banks against inefficient banks. Therefore, this method was used to estimate the competition indicator which has not been used in Iran so far.

In this study, we used two methods for estimating profitability, one of which is the net interest margin, which has been used in many researches in Iran, and the other one is the rate of return on asset (ROTAB), which has been used in a limited number of studies in Iran. We won. The reason for this choice is that, in similar methods, such as ROA, net income after taxes is used, whereas profit before tax seems to be used, because in cases such as penalties or tax incentives, or because of transitional losses from prior periods, the amount of profit may be greatly affected, which may have nothing to do with current performance of the company. Therefore, in this study we used profit before tax to obtain right and accurate information of companies. The method of estimating competition indicator in this research is by using BOONE indicator and according to simple equation (1).

$$(1) \qquad \text{LN}(MC_{ki}) \, \beta + \, \alpha \, = \, \text{LN}(MS_{ki})$$

Where;

MS_{ki}: market share of bank i in market k

MC_{ki}: final cost of bank i in market k

C: constant

B: coefficient of equation, or BOONE competition indicator

It is worth noting that firstly the final cost is estimated using the cost function logarithm and three product types (total loans, total deposits and non-interest income), and two types of intra-data prices (money price, capital price). Their market share is then calculated in each market. Using the cost function logarithm is shown below:

$$\text{Ln}(C/W2) = \delta 0 + \sum_j \text{LnY}_{jit} + 2/1 \sum_j \sum_k \delta_{jk} \text{LnY}_{jit} \text{LnY}_{kit} + \beta_1 \text{Ln}(W1/W2) + 2/1 \, \beta_{11} \text{Ln}(W1/W2)_{it} \text{Ln}(W1/W2)_{it} + \sum_j \text{LnY}_{jit} \text{Ln}(W1/W2) + \varepsilon_{it} \qquad (2)$$

Where;

C: total cost of bank

Y: Indicates three types of banking products: total deposits, total loans and non-interest income.

W: Includes two prices as follows:

W1: The price of money, which is obtained by the ratio of interest costs to total deposits.

W2: The price of capital, which is obtained by the ratio of non-interest costs to fixed assets.

These two prices are borne out by the fact that non-interest costs also include workforce costs (Hasan & Morton, 2003). In other words, the price of capital considers factors related to the physical price of capital, such as the price of human capital. This linear uniformity is obtained by standardizing the dependent variables of W1 and W2.

In the following, the final cost of loans, deposits and non-interest income is obtained by the first derivative of Equation (2) relative to the dependent variable (Y_{ilt}, Y_{idt}, Y_{int}) and in relation to the loan product, according to Equations 3 to 5.

$$MC_{ilt} = [(C_{it} / W_2) / Y_{ilt}] * (0/29) / Y_{ilt} \quad (3)$$
$$MC_{idt} = [(C_{it} / W_2) / Y_{idt}] * (0/24) / Y_{idt} \quad (4)$$
$$MC_{int} = [(C_{it} / W_2) / Y_{int}] * (0/34) / Y_{int} \quad (5)$$

Where; MC_{ilt}, MC_{idt}, MC_{int}, respectively, are final cost of bank i in the facility market, deposit and non-interest income in year t.

And Y_{ilt}, Y_{idt}, and Y_{int}, respectively, are the symbols of the total facilities of bank i, the total deposits of bank i, and the total non-interest income of bank i in year t.

C_{it}: Total cost of bank i in year t

W2: The price of capital, which is obtained by the ratio of non-interest costs to fixed assets.

And finally, using the general equation of profitability function (Tan, 2017) as Equation 4-1, we estimated the impact of competition and bankruptcy risk on the Iranian banking system:

$$\pi_{it} = C_{\bar{v}} + \sum_{j=1}^{j} \beta j \, X_{it}^{j} + \sum_{l=1}^{l} \beta l \, X_{it}^{l} + \sum_{m=1}^{m} \beta m \, X_{it}^{m} + {}_{it} + \mu_{it} \quad (6)$$

Where;

i: symbol of year

t: symbol of a particular bank

π_{it}: Indicates the profitability index for a particular bank in a particular year.

C: constant

X_{it}: symbol of the independent variables of the model that fall into three categories;

X_{it}^{j}: Intra-bank variables, including credit risk, liquidity, capital stock, bankruptcy risk, bank size, non-operating costs and diversity of banking services.

X_{it}^{l}: Banking industry variables, including: competition in different banking markets, capital market development, banking sector development.

X_{it}^{m}: Macroeconomic variables include inflation rate and GDP growth rate. The unobservable impact of each bank and their specific features are also shown by υit and μit.

Also, βi, βj and βm are estimated coefficients of the model.

Research findings:

This study, using balance sheet information of all Iranian banks during the period 2006 - 2017, has investigated the impact of competition and bankruptcy risk on the profitability of commercial banks. According to Table 1, there are a total of three different types of banks in terms of ownership in Iran, namely, eight state-owned banks, 17 private banks, and finally six privatized banks (which initially were state-owned banks but they have become private banks as the result of the implementation of Article 44 of the Constitution).

Table 1. Names of banks separately sorted by their type of ownership, Source: Website of Central Bank of Islamic Republic of Iran

Privatized banks [2]	Private banks		State-owned banks
Tejarat	Iran Zamin	Eghtesad Novin	Melli
Refah	Hekmat Iranian	Ansar	Sepah
Sina	Tourism	Parsian	Keshavarzi
Saderat	Day	Pasargad	Maskan
Qarz Al-Hasaneh Mehr Iran	Middle East	Ayandeh	Tose'e Ta'avon
Mellat	Qarz Al-Hasaneh Resalat	Day	Sanat Va Madan
	Ghavamin	Saman	Export Development
	Shahr	Sarmayeh	Post bank
		Karafarin	

Source: Central Bank

Figure 1 shows the growth trend of the assets of different types of banks during the period 2006-2017. According to Figure 1, the assets of all banks, whether state-owned, private, or privatized, have been growing at relatively similar trends over the period under study.

Figure 1. Growth trend of the assets of different types of banks during the period 2006-2017
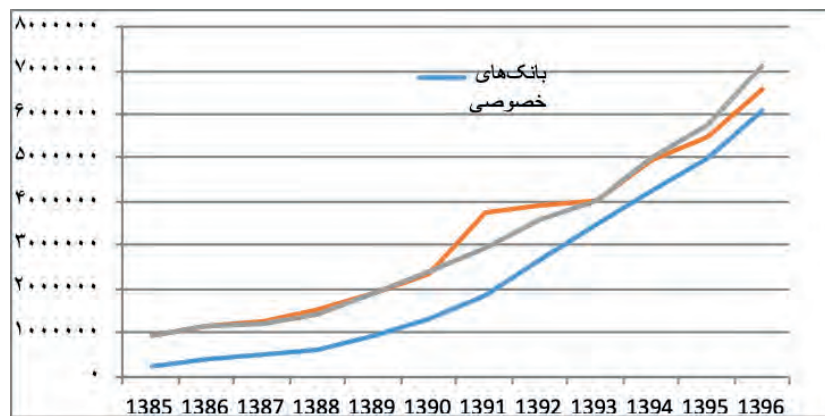
Source: Found by the researcher

Table 2. Banks' share of Iranian banking system assets separately sorted by type of ownership

Percentage of shares			The amount of assets in billion rials			
State-owned banks	Private banks	Privatized banks	State-owned banks	Private banks	Privatized banks	Total assets of the banking system
0.45	0.17	0.44	946,400	231,047	929,289	2,106,737
0.43	0.20	0.43	1,166,098	375,213	1,163,231	2,704,542
0.41	0.17	0.42	1,221,492	516,582	1,275,310	3,013,384
0.40	0.20	0.43	1,431,895	612,542	1,538,997	3,583,433
0.40	0.22	0.40	1,912,495	923,111	1,892,318	4,727,924
0.39	0.22	0.39	2,391,708	1,326,656	2,358,671	6,077,035
0.35	0.11	0.44	2,960,322	1,846,814	3,765,920	8,573,056
0.35	0.26	0.39	3,596,365	2,662,842	3,920,185	10,179,393
0.35	0.30	0.35	4,015,514	3,453,970	4,010,216	11,479,700
0.35	0.30	0.35	5,009,566	4,257,884	4,949,437	14,216,887
0.35	0.31	0.34	5,735,821	4,988,260	5,482,391	16,206,472

2 . According to the Central Bank, Qarz Al-Hasaneh Mehr Iran Bank in 2013 was excluded from the specialized banks group and included in the non-state banks group. Also in 2013, the statistics of 6 banks of Iran Zamin, Qarz Al-Hasaneh Resalat, Middle East, Ghavamin were added to the monetary and banking statistics of the country. Also Shahr Bank and Tourism Bank since September 2011, and Hekmat Iranian Bank since September 2012, have joined private banks and Iran Zamin Banks, Qarz Al-Hasaneh Resalat, Middle East, Ghavamin, Ayandeh have been private from the beginning. Sina Bank announced its foundation on the last work day of 2008. Shahr Bank is one of the private banks in Iran, which opened on March 7th, 2009. Iran Zamin Bank is one of the private banks in Iran that received its operating license from the Central Bank in May, 2011. These banks became private on these dates: Tourism Bank in December 2010, Ansar Bank in June 2010, Qarz Al-Hasaneh Mehr Iran Bank in 2009. Saderat Bank on June 9, 2009, for 51%, Tejarat Bank in 2009. In 2008, the government, by law, transferred 6 percent of its shares of Refah Bank to Social Security Insurance (Tamin Ejtemaeei) for paying debts. 5% of Bank Mellat was handed over to the private sector in February 2008.

0.36	0.31	0.33	7,090,234	6,088,480	6,540,921	19,719,635

Source: Balance Sheet of banks

Table 2 shows the amount of assets and the share of assets of each type of bank, including state-owned, private and privatized banks versus total assets of the banking system. It is noteworthy in this table that given the competitive conditions prevailing in the Iranian banking system, statistics show that the share of assets of all banks, including state-owned, private or privatized, during the period under study, was increasing at a similar rate. But their market share difference is noticeable. So that, the market share of state-owned banks from the banking system's asset market declined from 45% to 36% during the period under study and the share of privatized banks declined from 44% to 33%. Only the share of private banks' assets rose from 17% to 31%.

Table 4. Explanation of sections and periods

Number of sections	30
Number of years under study	12
Number of periods under study for each section	12
Absolute frequency	30
Relative frequency in percentage	100
Cumulative frequency	100

In this research, after estimating the variables, the data of different banks are entered into the model using panel data method, and then using the dynamic panel method (GMM), while solving the problems related to autocorrelation and variance heterogeneity, we will investigate the impact of competition and bankruptcy risk on bank profitability. In this paper, since the competition indicator is estimated in all three markets, including the facility market, the deposit market and the non-interest income market, and because the banks' profitability function is obtained in two ways; one is the rate of return on asset method and the other is the net interest margin method; therefore, in general, this research has six models as follows:

Model One: Profitability through the rate of return on assets in the facility market

Model Two: Profitability through the rate of return on assets in the deposit market

Model Three: Profitability through the rate of return on assets in the non-profit market

Model Four: Profitability through the net interest margin in the facility market

Model Five: Profitability through the net interest margin in the deposit market

Model Five: Profitability through the net interest margin in the non-profit market

Panel data analysis is one of the new and applicable issues in econometrics because panel data provides a highly information-rich environment for the development of estimation techniques and theoretical results. Also, because fixed and random impact estimators are not able to present a subject entitled stability, introspection and autoregressive profit when estimating bank profitability is considered. Therefore, in this study we use the generalized method of moments to estimate the profitability function equation.

According to the results of Table 13, the null hypothesis of the test cannot be rejected and, consequently, the validity of the instruments is confirmed. Therefore, using the generalized method of moments to eliminate the autocorrelation and variance heterogeneity will not cause any problem in analyzing the results of the models.

Table 13: Sargan test results to verify the validity of the instrument of generalized method of moments data

	Statistic	Value	p_value	Result
Model one	Sargan	1	19.92	Validity of instrument
Model two	Sargan	1	16.54	Validity of instrument
Model three	Sargan	1	17.87	Validity of instrument
Model four	Sargan	1	17.06	Validity of instrument
Model five	Sargan	1	17.2	Validity of instrument
Model six	Sargan	1	18.25	Validity of instrument

According to the results of Table 13, the null hypothesis of the test cannot be rejected and, consequently, the validity of the instruments is confirmed. Therefore, using the generalized method of moments to eliminate the autocorrelation and variance heterogeneity will not cause any problem in analyzing the results of the models.

Table 14: Autocorrelation test results for the data of generalized method of moments

	Statistic	Value	P-value	Result
Model one	Autocorrelation	0.2	0.2	Lack of autocorrelation
Model two	Autocorrelation	0.2	-1.17	Lack of autocorrelation
Model three	Autocorrelation	0.3	-1	Lack of autocorrelation
Model four	Autocorrelation	0.18	-1.33	Lack of autocorrelation
Model five	Autocorrelation	0.2	-1.18	Lack of autocorrelation
Model six	Autocorrelation	0.18	-1.31	Lack of autocorrelation

According to the results in Table 14, no first- or second-order autocorrelation is confirmed in the models. But because all six research models have variance heterogeneity, we use the generalized method of moments to solve the variance heterogeneity problem.

Table 12 - Value and direction of impact of variables on profitability (ROTAB) in different banking markets

ROTAB profitability function	p-value of facility market	Impact factor	p-value of deposit market	Impact factor	p-value of non-interest income market	Impact factor
ROTAB_L1	0.000	0.24	0.000	0.14	0.2	Insignificant
Bank size	0.002	0.004	0.003	0.004	0.06	0.0057
Liquidity	0.2	Insignificant	0.018	-0.029	0.03	-0.03
Capital adequacy rate	0.06	0.0001	0.6	-0.00002	0.1	Insignificant
Credit risk	0.2	Insignificant	0.4	Insignificant	0.002	-0.00014
Bankruptcy risk	0.000	0.0004	0.000	0.0005	0.000	0.0006
Banking sector development		Insignificant		Insignificant	0.003	0.08
Capital market development	0.009	-1.7	0.000	-2.22	0.1	Insignificant
Inflation rate	0.000	0.0002	0.03	0.00007	0.09	0.0001
GDP growth rate		Insignificant	0.2	Insignificant	0.6	Insignificant
Competition indicator	0.000	0.16	0.000	-0.1	0.000	-0.022

The results of Table 12 show that in the method of profitability of the rate of return on assets, the impact of variable with distributed lag of profitability on the facility and deposit markets is quite significant. As a result, it indicates that the profitability of banks in these markets is strongly related with profitability in the previous period of banks. While this relationship, unlike expectations, is not significant in the non-interest income market. Also, contrary to the research hypothesis, profitability of banks has a significant relationship with bank size, bankruptcy risk, inflation rate, competition indicator in all three markets. The results of this model, while confirming the theories of Pozzar et al. (2010), confirm the significant relationship of competition indicator on bank profitability in all three markets. But it shows the positive relationship between competition in the facility market and its negative relationship with profitability in the other two markets.

Table 15 - Value and direction of impact of variables on profitability (NIM) in different banking markets

NIM profitability function	p-value of facility market	Impact factor	p-value of deposit market	Impact factor	p-value of non-interest income market	Impact factor
NIM_L1	0.000	0.19	0.000	0.14	0.000	0.19
Bank size	0.006	-0.019	0.8	Insignificant	0.004	-0.018
Liquidity	0.000	0.97	0.000	0.81	0.000	0.94
Capital adequacy rate	0.000	-0.04	0.000	-0.04	0.000	-0.04
Credit risk	0.37	Insignificant	0.5	Insignificant	0.4	Insignificant
Bankruptcy risk	0.000	-0.001	0.000	-0.0005	0.000	-0.001
Banking sector development	0.2	Insignificant	0.000	-0.0008	0.04	0.00017
Capital market development	0.07	0.39	0.03	0.41	0.1	Insignificant
Inflation rate	0.6	Insignificant	0.002	-13.14	0.97	Insignificant

GDP growth rate	0.01	-0.0004	0.04	-0.0004	0.004	-0.0005
Competition indicator	0.002	0.0005	0.04	0.0003	0.003	0.0005
Bank size	0.7	Insignificant	0.000	-0.47	0.2	Insignificant

The results of Table 15 show that in the NIM profitability method, the variable with distributed lag of profitability, liquidity, GDP growth rate has a positive and significant relationship with profitability of banks in all three markets. The results of this research are consistent with the findings of Shahchera and Jawzadani (2012), who believed in a positive and significant relationship between economic growth rate and bank profitability. It is also consistent with the results of Tan's research (2017), in which the relationship between bank size and profitability was negative and significant. The relationship of the variables with distributed lag of the dependent variable in both methods, and the bankruptcy risk variable with the profitability completely indicate the findings of Tan (2017) and the same results are established in the US banking system. Also, public expenses, credit risk, and inflation rate in all three markets have a significant and negative relationship with profitability. Therefore, according to the results, profitability in this method depends on the profit of the previous period, the liquidity of each bank and the economic growth rate. The results of these studies are similar to those of Chavoshi Rad et al. (2014) and Khoshtinat et al. (2016), which showed the positive relationship of bank size, liquidity, and the inverse relationship of bank costs with profitability measures (net interest incomes and return on bank assets).

CONCLUSION AND SUGGESTIONS

As can be seen in the circulars of Iran's central bank, there has been no attempt to improve the competitive conditions in any of the facility and deposit markets and even non-interest income market. As a result, it is recommended that they follow the same policy. Because, according to the results of this study, competition has no significant impact on banks' profitability in the net interest margin method. In addition, in the rate of return on assets method, it has a positive and significant relationship with bank profitability only in the facility market, and even in the other two markets, the relationship is negative. Therefore, it seems that the requirement of the banking system to comply with banking rules and regulations in banking activities, to create and improve the competitive conditions of banks, is a priority. In terms of traditional income producing activities, this part of incomes still holds a larger share of bank incomes. However, different ways of making income in Iranian banks have been partly affected by business cycles such as inflation and recession. As a result, methods of making income in Iran seem to require a shift from traditional methods to non-interest incomes, which not only reduces bank risk but also increases the profitability of banks. The findings of this study provide a great deal of information to the Central Bank of Iran and other legislative authorities, so that they can adopt appropriate policies on the Iranian banking system as follows.

1) Because the relationship between bankruptcy risk and bank profitability is positive and significant in both methods, as a result, legislative authorities should delegate the necessary powers to bank managers, so that they can increase bankruptcy risk when necessary. For example, bank managers are encouraged to invest in other companies, or to buy bonds, or to use central bank reserves.

2) Since the impact of banks' credit risk on profitability is inverse, therefore, it is recommended that policies be adopted so that banks become serious in identifying and validating applicants of facilities, and that they refuse to increase credit risk by giving facilities to persons without competence and credit. It is also recommended that bank officials be more subject to banking law and regulations in this regard.

3) Also, due to the positive impact of the banking sector development on the profitability of banks, the more the commercial banking sector develops, the more profitability of commercial banks will be. Therefore, it is recommended that the legislative authorities adopt appropriate policies to develop the banking sector.

4) The capital market development also has an adverse effect on the profitability of banks, and policies should be adopted so that the capital market operates alongside the banking system rather than against it.

5) Also, according to the suggestion of Tan (2017), the remuneration of the banking staff should be increased in order to teach the banking knowledge and experience to the public and make them eager to participate in banking activities.

6) Due to the small share of non-interest incomes compared to the other two markets, the methods of making income in Iran, in order to reduce bank risk and increase the profitability of banks, need to change from traditional methods to non-interest incomes.

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The metaphorical image of a person in the Russian prose during the first half of the XX Century

La imagen metafórica de una persona en la prosa rusa durante la primera mitad del siglo XX

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ABSTRACT

The originality of the author's individual metaphor in the Russian prose during the first half of the XX century was researched in the article. The specific of the metaphorical description of the inner world of a person and his social existence were considered in the works of I. A. Bunin, V. V. Nabokov, M. M. Prishvin, I. S. Shmelev.

Keywords: literary text, Russian prose, XX century, metaphor, metaphorical image

RESUMEN

En el artículo se investigó la originalidad de la metáfora individual del autor en la prosa rusa durante la primera mitad del siglo XX. Lo específico de la descripción metafórica del mundo interior de una persona y su existencia social se consideraron en las obras de I. A. Bunin, V. V. Nabokov, M. M. Prishvin, I. S. Shmelev.

Palabras clave: texto literario, prosa rusa, siglo XX, metáfora, imagen metafórica.

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Introduction

In modern humanitarian science, a metaphor is considered not only as an ornamental decoration, obligatory for a literary text, but also as the most important means of the world and a person description and author conceptualisation: "this is not just an artistic means or a feature of style, it is a special paradigm of thinking" [8]. Metaphorization plays a special role in the creative understanding of being, possessing tremendous potential in the "record" of the semantics of words and its figurative-semantic increment. The metaphor, being the most important element of works of fiction, actualizes distant and unobvious associative connections in the reader's mind, allows for many individual interpretations [1] and conveys the author's vision of reality, acting as the means of imaginative representation of the writer's worldview system.

Problem formulation

One of the main directions in a literary text study, in our opinion, is the analysis of the metaphorical system presented in it. Let us analyze the features of the individual author's metaphor, which allows one to consider the known through the already known and to interpret the known well at first glance through non-traditional comparisons, in the prose texts of the 20th century classics: I.A. Bunin, V.V. Nabokov, M.M. Prishvin, I. S. Shmelyov.

Main part

In Russian prose of the first half of the 20th century, the model of metaphorical transfer of physical characteristics of material objects the state of the human inner world has high productivity. In accordance with it, sensory phenomena are interpreted by referring to such external characteristics of objects as shape, size, structure, density, temperature, color, smell, etc. Symbolic binary oppositions are expressed in the metaphorical units presented below that express stereotypical ideas about the various properties of objective realities that are especially significant in the process of human interaction with the surrounding world.

1. Warm / hot - cold: He remained cold [3, V. 2, p. 197]; The one who has good nerves will win. What about our brother? At first, how hotly we take, and then into the bushes, well, we are tired of him, they say [2, V. 4, p. 476]; The chill of vigorous life-giving pride [3, V. 3, p. 60].

2. Sweet - bitter: The secret that was beating sweetly in her strived outside ... [7,9]; In order to preserve the memory of this hour better, I find a bitter joy to write about it in a book which is so often in front of my eyes [2].

3. Light - dark: A word lives, burns, glows in every soul [5]; She ... didn't answer right away that she was happy and loved him very much, but their happiness was "dark", and she does not dare to look at the light of God, she is very ashamed [7].

4. Clear - vague: He looked at her confusedly: she was so simple, clear, affectionate, and trusting [7]; With a vague, revengeful thought [3]; With vague sadness [Ibid., p. 287].

5. Pure - dirty: She remained the same, attracting by the purity emanating from her and this indefinable femininity [7]; It is dirty to invent [2].

6. Light - heavy: I fell to her, and it became easy for me, as if she had forgiven [7]; He avoided even the slightest separation [2].

7. Sharp/prickly - blunt: I looked at him calmly and stupidly [2]; All his <Martyn — A. Ch.> feelings were sharpened [3]; The joy is sharp and prickly [5].

8. Soft - hard: The father Nicephorus had soft, thoughtful eyes [7]; ... This external improvement is a complete trifle, of course, in comparison with an internal one, similar to installing a lever that raises a stagnant past to re-evaluate it in the light of the future. Without this firm place, the writer is simply a chatterbox without mind [5].

A peculiar modification of this metaphorical model can be considered such a model as the change in the physical characteristics of objects → the changes that occur in the inner world of a person. The internal form of most of these metaphorical words reflects the associations between various changes in objects that occur spontaneously or under the influence of external factors, and the emergence and development of a person's emotional reactions: He was not drunk, but he could not be called sober either. Apparently, his thirst passed away, but everything in him was twisted, shaken by a hurricane, thoughts wandered, searched for their homes and found ruins [3]; When I

arrived in Baturino, my mother even threw up her hands, seeing my thinness and the expression of tired eyes [2].

The metaphor is actively involved in the processes of text generation, forming the composition, the ideological content, and the style of works. The use of metaphorical nominations leads to the diversity of meanings, allows to connect the author's intention and national-cultural traditions. So, in order to characterize the polysyllabic inner world of a man, the use of "fiery" vocabulary is traditional for Slavic culture. "Both soul and life, and private manifestations of life: hunger, thirst, desire, love, sadness, joy, anger were presented to the people and depicted in language as fire" [8,10,11]. Russian prose of the first half of the 20th century offers a whole series of metaphorical words - the nominations of fire, processes and products associated with it - which reflect the national and cultural originality of human states, feelings and thought description: Martyn saw the lights running in her eyes [3]; Fire of the soul [5]; She was in awe, flushed with shame, and lights were flashing in her eyes [7]; I ...burned with indignation [2]; The ruby intoxication of sin [3].

The semantics of the lexeme "fire" in Christian culture has a dual nature: it is considered both destructive and purifying power. In the works by Ivan Bunin, fire, as a rule, appears as a terrible force, the fire element carries death in itself, sows evil, giving rise to an apocalyptic perception of life in a person. This is especially pronounced, for example, in the story "Devouring Fire", where the narrator details the cremation of the young heroine. The semantics of the image are expanded to the extreme due to metaphorical components that convey the state of a person experiencing fear of death and suffering from the sense of being transience. But in Mikhail Prishvin's prose, the metaphorical image of fire has positive connotations characterizing the abstract concepts of the emotional, psychological and intellectual and spiritual life of a person: Woe, accumulating in one soul more and more, may flare up like hay on some beautiful day, and may burn with the fire of extraordinary joy [5]; Oh my God! What joy the old woman had from my words! And this was not the former joy, but pure folklore, or calm fire at the site of the past struggle [5]. Fire can also serve as the designation of the origins unifying people - self-sacrifice, love, kindness [6]: There are people around me who have thrown all their best into a common fire, so that it burns for everyone, and what can I say if I covered my light with my palms and carry it and save it for a while when everything burns out, goes out, and it will be necessary to light a new fire on the earth [5].

The use of metaphorical models in Russian literature of the first half of the 20th century, in which the sensual manifestations of a person are interpreted by referring to the external and internal characteristics of objects, is conditioned by the specificity of the national-cultural context, the peculiarities of the Russian language consciousness and the personal picture of the author world. In the examples considered, the basis of semantic derivation logic is the transformation of figurative representations of feelings, emotions, and experiences in Russian culture. The writers emphasize such an important property of the human inner world as its effect on all aspects of human life: physiological, mental, private and social.

The following metaphorical vectors can be used to characterize figuratively the existence of a person in society: in a figurative sense, a person can move forward or retreat, find his own path or "go with the flow: "As a writer, it's the most expensive thing for me - to feel the time, roll like a drop along a thread of time and not fall at the end" [5]. In the secondary meanings of a number of words, provided that they have a regular polysemy, the differential and associative features that are inherent in the word in its primary meaning are usually preserved (albeit in a slightly different form). This allows you to reproduce more accurately the specifics of the changes occurring with a person. For example, in the context discussed above, the semantic signs "speed", "lightness", "roundness" are very significant for a metaphorical word, creating an aesthetic sensation necessary for the author, establishing close ties with linguistic semantic traditions.

Social life, its most diverse spheres and manifestations in the Russian language picture of the world, have various geomorphic and biomorphic features. The social being of a person in the Russian prose of the first half of the 20th century is often described using the names of the earth surface and landscape: I look at the rye and see the field of new people ... I just really want to rise higher myself and witness the victory of our cause throughout the human field [5]; the names associated with the body of water or water flows: Pedestrians avoid the middle of the boulevard for some reason, preferring to flow along the windows [3]; In Monte Carlo, where the most selective society flocks during this period [2]; the names of the plant world: Humans are the leaves from the entire human tree [5,12,13].

Often, the metaphorical image of a person in the Russian literature of the first half of the 20th century is associated with the acquisition of an evaluation function by the lexemes, dating back to Orthodox ideas, to gospel parables: I read today about the ways the sower sowed one seed on good ground, and the other on stony ground. Reading these words, while people were leaving us for the greatest war, I understood these people as seeds ... And now I have the following question: can I, like in the story about the sower, neglect the weed seeds? After all, then, as a chronicler, I will tear myself away from the truth of life if I do not say anything about weeds [5].

A multidimensional image of the world unfolds in the art space of Russian literature of the first half of the 20th century, revealing a complex system of relations between a man and nature, a man and society, a man and history,

a man and language, a man and the Creator. The key means by which aesthetic and worldview problems are solved in the texts by I.A. Bunin, V.V. Nabokov, M.M. Prishvin, I.S. Shmelyov, is an individual author's metaphor in our opinion. It becomes a universal way of a person's image creation, realistic, often naturalistic and at the same time possessing a powerful mythological subtext and philosophical content. The semantics of metaphor in the works by I.A. Bunin, V.V. Nabokov, M.M. Prishvin, I.S. Shmelyov is based on national archetypes and normal constants, of course, but at the same time it finds a huge aesthetic and semantic resource to go beyond the logical and rational description of a person and mental traditions that have developed in Russian culture.

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Empirical evidence of job satisfaction among employees at sharia compliance hotel

Evidencia empírica de satisfacción laboral entre los empleados del hotel de cumplimiento de la sharia

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ABSTRACT

Nowadays, there are growing demands of sharia compliance hotels in Malaysia due to increasing number of Muslims visitors in this country. Basically, the ultimate aims of sharia compliance hotels establishment are to fulfill customer needs in the area of halal accommodation and food providers. Most of the research in this area are focusing on success factors towards increasing customer's satisfaction and lack of empirical evidence on study of employee satisfaction. Therefore, the purpose of this research is to determine factors that influence job satisfaction at the sharia compliance hotel. The main objective of this research is to study the relationship between work environment, reward, training, supervisor support and job satisfaction in the sharia compliance hotel. This research employed a quantitative research methodology thru questionnaire segregation. 135 copies of the questionnaire segregate in Melaka sharia compliance hotel among employees. The study used the data analysis through Statistical Package for Social Science (SPSS). The findings indicate that the work environment is the most influential and has resulted in a significant on job satisfaction among employees in Melaka sharia compliance hotel.

Keywords: Sharia Compliance hotel, Employee Satisfaction and work environment

RESUMEN

Hoy en día, hay crecientes demandas de hoteles de cumplimiento normativo de la Sharia en Malasia debido al creciente número de visitantes musulmanes en este país. Básicamente, los objetivos finales del establecimiento de hoteles de cumplimiento normativo de la Sharia son satisfacer las necesidades de los clientes en el área de alojamientos de Halal y proveedores de alimentos. La mayor parte de la investigación en esta área se centra en los factores de éxito para aumentar la satisfacción del cliente y la falta de evidencia empírica sobre el estudio de la satisfacción de los empleados. El objetivo principal de esta investigación es estudiar la relación entre el entorno laboral, la recompensa, la capacitación, el apoyo del supervisor y la satisfacción laboral en el hotel de cumplimiento normativo de la Sharia. Esta investigación empleó una metodología de investigación cuantitativa a través de la segregación de cuestionarios. 135 copias del cuestionario se segregan en el hotel de cumplimiento de la sharia de Melaka entre los empleados. El estudio utilizó el análisis de datos a través del Paquete Estadístico para Ciencias Sociales (SPSS). Los resultados indican que el ambiente de trabajo es el más influyente y ha resultado en una significativa satisfacción laboral entre los empleados del hotel de cumplimiento de la sharia de Melaka.

Palabras clave: Sharia Compliance hotel, Satisfacción de los empleados y ambiente de trabajo.

1 Introduction

In general, Malaysia there have two type of hotel, which is conventional hotel and sharia compliance hotel. As the sharia compliance hotel, there have several type of regulation that must be fulfil by both people in the organization such as top management and employee. There have several type of hotel in Malaysia that included conventional hotel and sharia compliance hotel. The reason behind Malaysia popularity as a tourist destination are due to the strategic environment and geographical area. Mentioned by Tourism Malaysia (2017), Malaysia formed with various races and ethnic with various religions that live together in peace and harmony. Sharia compliance hotel is still process of early state in Malaysia, this hotel established by Halal Malaysia portal in creating the concept based on sharia principle and the hotel's performance is a very important contribution to the economic growth of the tourism sector (Pitra and Persiaran 2018). In today competitive and global environment, the awareness of image about sharia compliance hotel is very important among the Muslim tourism that come to Malaysia. As stated in Jabatan Kemajuan Islam Malaysia (2015) the halal industry which content of halal food, logistics, consumer goods and food hotel as well as in services become important by many countries especially Malaysia. In order to meet high quality service and customer satisfaction in hotel industry, the organization need to understand the factor that influence the satisfaction on employee that work in sharia compliance hotel industry.

Although, there are similarities between the concept of Muslim Friendly Hospitality Services and Halal Hospitality services, there are some significant differences. The sharia compliance hotel have benchmarked upon certain standards and audited periodically and conform to the standards. Such as MS2610:2015 is Services for Requirements, MS1500:2009 is Halal Food for Production, Preparation, Handling and Storage. MS1900:2005 is Quality Management System for requirement from Islamic Perspective (Jais.A.S 2016). As reported by Karim, Ahmad, & Zainol, (2017) shariah compliance hotel are no sharia managers at Islamic hotels as they rely on the Islamic Manager without assigning any special posts to control the operations of the hotel. Islamic hotel and sharia compliance hotel adhering to sharia concepts have the attraction of hotel marketing teams, a marketing strategy that will help organization to gain more customers, who really want need of sharia compliance concept and experience. For the sharia compliance hotel there have a several concept such as operation that need halal food, separate floor for staff. While for design and interior is about no red-light entertainment, separate room for customer and have Qiblat sign. (Karim, Ahmad, and Zainol 2017).

Currently, the organization realize that the job satisfaction is one of the element that can increase the performance and indirectly keeping the reputation of the organization, the organization need to ensure the satisfaction their employee and their level of working in hotel industry. Based on Gordon (1999), job satisfaction is achieved when the job that employee doing reach the standards of an individual, value, expectations and able to increase the performance and commitment of employee to organization. The job satisfaction is important for the improvement performance in the workplace and can increase productivity of the employee to in hotel industry. The workplace is one of the cause of job satisfaction, while Herzberg theory (1959) is the two factor theory states have definite some of the factor can affect the workplace which is job satisfaction and other one is no related set of the factor affect dissatisfaction. The major factor that influence the employee satisfaction with their job is work environment, training, supervisor support and payment. By reference to M. Hussein, (2015), the result of factor in their research is namely, work condition, relationship between supervisor and co-worker relation.

Besides that, the issue of labor earning in the hotel industry was critically discussed in many research or studies. Based on Jung and Yoon (2012), the exchange rate for hotel workers is high. The hotel continues losing the staff or employee because of the exchange rate (Aminudin, 2013). As reported by Hassan et al., (2015) the employee turnover was at low cadre staff is above 50% per annum in the past three years. The unofficial interview with workers in the establishment when revealing that hotel performance is rather weak due to lack pf employee commitment in their job.

Due to the great growth of the hotel industry, the productivity of hotel workers is gaining attention from the public. It is important to ensure high productivity of workers (Amdan et al., 2016). People believe that employee job satisfaction directly affects their productivity. Unhappy workers tend to be less creative and productive (Othman et al., 2014). Thus, it causes additional costs to the organization's expenses. The need to improve the productivity of workers in the hotel industry is as important as raising its safety as stated in Hoboubi et al., (2017). Employees with low job satisfaction will have lower integrity that can lead to criminal incidents Akbar Hosseini (2017). Motivated by this gap, this study has aimed to evaluate the most influential factor that effect job satisfaction in Melaka sharia compliance hotel. In accordance with Munir and Rahman (2016), states that a poor working environment is a direct cause behind increased job dissatisfaction that ultimately leads to an increase in turnover rates. Therefore, to ensure that customers become loyal and trust to the organization, the employee commitment about Islamic ethical values in their daily work is important (A. Ibrahim & Kamri, 2017).

2 Literature Review

2.1 Concept of sharia compliance hotel

The concept of SCH needs to be developed based on the perspective of Islamic business conduct and not as a slogan in promotional promotions. As determined by Karim et al., (2017) the Islamic hotel concept have several characteristic such as facilities in guest room, requirement and staff uniform that follow sharia compliance rule, and health facilities in service delivery. Besides that, the concept of food and beverages, household, work dress code, kitchen, room, and facilities offered is one of the unique concept in sharia compliance hotel compare to regular hotel (Idris and Abdul Wahab 2015).

In the view of Majdah Zawawi1 and Noriah Ramli, (2016) conclude that the definition of sharia compliant hotel is a hotel that provide services that follow the sharia principles, which include the overall operation of the hotel and not only limited to the scope of halal beverages and food. Not only that, in their discovery that the hotel needs to be paid by Islamic finance as shown below. As explained by Ahmad & Zainol, (2017), Workers must cover their aurat and interior designs and designs cannot come with human or animal pictures. In the operation majority the worker is Muslim and for floor or room for the female and male staff are separate. In Islamic countries, the sharia-compliant Hotel concept can be fully achieved where Sharia is administered law. This figure show proposes that all aspect must be meet for consideration as a sharia-compliant hotel but if the organization failure to meet one of the conditions, it will cause the hotel to be rated as a sharia-compliant Hotel.

As stated in Jais.A.S, (2016), to be certified by sharia compliance, the hotel must meet the criteria that have established and meet the needs of Muslims. Certification bodies, will assess the level of readiness and compliance and provide the necessary certification. This procedure is similar to the Halal certification procedure conducted by the Department of Islamic Development Malaysia (JAKIM). Since there is no certification body that will verify the level of sharia compliance, the Malaysian Institute of Standards Research (SIRIM) becomes the sole appraisers and certification bodies using sharia compliance standards.

Another respondent explained that, at our hotel we accept two Malaysian Standards such as MS1500: 2009 (Halal-Food Standards, Preparation, Halal Food Storage by JAKIM) and MS1900: 2005 (Malaysian Standard for Quality Management System-Requirements from Islamic Perspective) to carry out the Scheme. "Instead, respondent mentions that," sharia-compliant concepts apply only to restaurants ". The hotel implements different concepts of sharia compliance hotel in Malaysia so it is timely for the government to consider developing standard guidelines for sharia compliance hotel (Norzafir Md Salleh 2014). Without sharia compliance hotel standards, the sharia compliance hotel practice appears different from one hotel to another (Salleh et al. 2014).

Before being recognized as sharia compliance hotel, Malaysia needs to follow with these standard, this sharia compliance standard is to offer special operation and alternative service to meet the need of Islamic Tourism. By using the Maslahah concept (public interest) due to sharia compliant hotel requests, it is necessary to have a black and white regulatory framework that provides standards and guidelines in developing the sharia Compliant Hotel covering the entire of the hotel and not just limited to food provided at the hotel (Mohd-Sanusi, Ismail, Hudayati, & Harjito, 2015)it important to review on Shariah companies whether different levels of companies' uncertainties (risks.

The Government of Malaysia aspires to be the center of Islamic tourism among Muslim tourists in the world and one of the major tourist destinations in the Organization of Islamic Countries (OIC) countries. The Council on the Establishment of the Islamic Tourism Council (ITC) strengthens this aspiration. To achieve the status of this Islamic tourism center, the important factor such as the introduction of Islamic hotel or Shariah compliance hotel as a form of tourism services need to become apparent. (Jais.A.S 2016).

Islamic tourism and sharia compliant hotels concepts have gained a lot of interest in travel tourism with the growth of the Muslim population. Some leading tourism industry to consider halal and non halal force Tourists from others Islamic countries and the Middle East indirectly and directly. Suppliers in the industry are beginning to promote their hotel to attract the attention of Muslims so that they fully comply with the religious needs of Muslims. Some factors that affect Muslims who truly practice Islam and who truly understand and want to follow Islam have been considered and their needs are addressed by the tourism sector in the name of Islamic Tourism (Hassan 2015).

As explained by Salleh et al., (2014) some issues have been detected such as government regulations, applications for halal certificates, and standard sharia-compliant hotels. Encourage the hotel to acquire Halal certificates for restaurants or food and beverage outlets as a good encouragement for hotels to improve the quality of their ser-

vices. Shariah compliant hotel features, it seems that this is a requirement that must be fulfilled by the sharia compliant Hotel. However, it is still not complete as this is a minimum requirement. No written rules or classifications for a sharia-compliant hotel must exist. It seems that sharia-compliant Hotel operations and developments have no significant difference with convention hotel operations. As far as the Malaysian scenario, as a Muslim majority country, is regarded as a convenient and perfect destination that allows to meet almost all the needs of Muslim tourists in the form of good service, halal food, and accommodation (Majdah Zawawi1 and Noriah Ramli 2016).

2.2 Sharia compliance regulation

i) Food and beverage

Under the hotel sector categories there have Food premises directly involve food and beverage (F & B). In Malaysia, there are certain terms of food premises by the government for legal procedures. The Department of Islamic Development, JAKIM (2011) have declare the food premises such as food and beverages, and areas and building related to business. The restaurants, cafeteria, canteens, food, commercial kitchens, breads, cakes and pastries, fast food restaurants, restaurants and hotel kitchens, kiosks, catering services and more was a space of food premises. Refers to Malaysian Halal Food Standards for Production, Preparation, Handling and Storage in the General Guidelines (MS 1500: 2009), describing the task related to process of handling, packaging, distribution, storage, preparation, slaughter, processing distribution and involvement of food sales is factor of the food premises that have any type of building or structure either permanently or constructed on any land or closed construction others. Previous confession states that combination of preparation, preservation, packaging, storage, conveyance, distribution process or sale of any food and beverage activity is a place of food premises. (Food Act, 1983).

Otherwise, the development section of the Food Act, 1983 specifies specifically the manufacturing, packaging, and any form of food handling. As explained by Karim et al., (2017) For the features of guest services, participants emphasize that the Islamic Shariah utterances must come first when staff meet hotel customers. Food and drinks at all food outlets (restaurants, lounges, room service, banquet hall and seminar hall) must be halal and halal certificates are placed at the entrance to ensure customers can enjoy food. During Ramadhan, the hotel also provides Sahoor and Ramadan buffet (breakfast) for hotel customers. To make it easier for hotel customers who like to pray in the Jemaah (together). In terms of Department of Islamic Development Malaysia (JAKIM), Halal is defined as the subject of action or action permitted by Shariah law without penalty imposed on the perpetrator (JAKIM, 2012). The meaning of halal food is the food permitted under shariah principle and fulfills the following condition as in figure 1:

Figure 1: Halal food permitted

ii) Accommodation

The hotel rooms cannot serve food or drinks that are prohibited in the refrigerator especially those involving Muslim tourists. Furthermore, the room should be separated for female and male. In additional, they also suggest that every room for Muslim tourists should have instructions for performing Qiblat or prayer, Quran and prayers translation. It could be this situation can be considered a friendly Muslim hotel. With respect to the quality of service for the hotel usually refers to well-maintained and comfortable, cleanliness, convenient location and safety deposit box including conducive room facilities. (Mohd-Sanusi et al. 2015a)it important to review on Shariah companies whether different levels of companies' uncertainties (risks.

According to Karim et al., (2017) Participants also mention the size of the guest rooms, the size of guest rooms must be spacious enough for Muslim tourists to do prayer in the room and the room decor must be fully shariah that is not human or animal form as suggested by SCM decoration may be a form of painting or geometric painting. To facilitate hotel guests who like to pray in the congregation, the management has provided a wide and luxurious prayer space for men and women complete with prayers, qiblat signatures, Quranic verses, prayer veils, sarongs for men and women and ablution areas for facilitating hotel customers to take wudu' (ablution, washing their parts of the body for prayer purposes). The hotel must arrange their room capacity properly as this will affect their hotel performance. For shariah compliance hotel, they need to provide a separate Spa and salon, different rooms or floors for unmarried couples, recreational activities for men and women and provide separate swimming pool (Idris and Abdul Wahab 2015).

iii)   *Entertainment*

As stated in Jais.A.S, (2016) Islam does not ban entertainment outright, but must be done within the limits of Shariah law. Certain musical instruments are allowed in Shariah principles. Music especially background music on public announcement system can be played, just select music that matches the image of Islamic hotel and Live entertainments allowed to be given to certain genres like traditional music and nasyid. Muslim Scholar is still divided into the use of musical instruments in entertainment.

The hotel forbids red-light entertainment like disco and pub. To maintain the management of the Islamic environment hotel decided to play azan during the prayer time and the background of the hotel's music more to the sentimental or Islamic sound (Karim, Ahmad, and Zainol 2017). Islamic values mean not to do things that are contrary to Islam, such as fornication, excessive entertainment and ignorance (Rasit et al. 2016). Based on Hassan, (2015), Muslim travelers are motivated to stay in hotels where there is no Halal activity or does not encourage such activities and entertainment to be conducted with privacy..

2.3 Factors toward job satisfaction employee in Halal hotel industry.

i) Work Environment

The result is working condition is positively influence in job satisfaction and important to management to ensure that the working environment should be safe and comfortable, and the work schedule is flexible, and employee right need to be consider of important and therefore should be promoted (M.Hussein, 2015). As determined by Mohd Said et al., (2017) the result show that the relationship between job satisfaction and working environment is accepted and the working environment is the factor that influence job satisfaction employee.

By reference to Raziq & Maulabakhsh, (2015) the different organization ensure that their employee are working in friendly and nice environment to operate until their maximum potential. Good working environment such as level of commitment, employee loyalty, productivity, develop a sense of ownership and efficiency and effectiveness among employee can increase organization effectiveness and reduce result of dissatisfied employee. Working hours, esteem needs, job safety and security, top management and relationship with co-worker is included in working environment that have be concern by employee.

In accordance with Thao & Hwang, (2017) the characteristic that differentiate the organization from others competitor is rules, regulation, procedures and policies and the action outcome of goals that using in the organization and employee. This characteristic is a set of working environment that including behaviour component, management, physical depending on the administrative and relation pattern between them philosophy. However, the direct and indirect will affect the performance at work and individual behaviour that lead to achieve the organization goals. There have a positive relationship between work environment and employee performance, which mean the employee satisfaction with their working environment in hotel (Chei et al. 2014)

By reference to Waqas et al., (2014) job satisfaction can be influenced by the quality of the physical environment in which they fulfil their duties. Whether the work is cognitive or physical, it can be done in environment that surrounded by physical and social aspects. Such as office equipment, satisfactory work space, noise, thermal environment, usability-related issues, and appropriate lighting. (Masood et al. 2014) In this research, management can work effectively by creating a comfortable environment and advanced working environment to make it, not difficult for workers to work efficiently and effectively. Workplace should be designed in such a way as to increase employee productivity and increase the welfare and health of employees. Besides that, affecting factor that improve the level of employee satisfaction is smooth communication, comfortable working conditions and teamwork are enhanced by the presence of an excellent work environment.

ii) Reward

As stated by Bustamam et al.,(2014) Reward system is consist of salary raises that is financial reward and non-fi-

nancial reward. The result will influence customer satisfaction, loyalty and impression toward the organization. The result has shown that the monthly of the employee that work at hotel industry at Klang Valley, Malaysia do not exceeding RM 2000. It show most of the respondents are not satisfied with their salary. The non-financial reward is important to reach job satisfaction among employee.

The remuneration influence of job satisfaction employee at the hotel. The result show that the management need to focus more attention not only pay in term of money paid, management need to considered the remuneration that include the financial rewards, amount paid out as a salary, bonuses amount and non-financial reward such as voucher schemes element and extra holidays (M.Hussein, 2015). The compensation plan one of the role of rewarding employee that make them perceive appreciated and motivated which lead to job satisfaction and increase probability to stay within an organization. The Financial reward is one of the most important factor and not only to fulfil the financial reward but also have a social meaning (Nyaura and Omwenga 2016).

As explained by Waqas et al., (2014) Organizations need to develop a formal reward-based system to promote engagement in employment. Acknowledgment of excellence for any related effort by any employee, the department should be rewarded as a way of supporting a certain level of performance. The reward system should be produce within an organization based on individual achievement.

iii) Training

According to Jaworski et al, (2018) the training satisfaction is one of the independent variable in job satisfaction that important predictor of job commitment and the knowledge of training method can help employee accommodation make effective resource allocation decision. The organization need to know what type of training program that they give to employee and know whether the program is given good result or not, it if where is the problem creating. (N. Veena | K. Jayanth 2018)

By reference to Thao & Hwang, (2017) training is given to new or current employee about skill they need to approach new technology and qualified for high technical and improve their efficiency to be international project. The organization need to give motivated, confident and passionate team working to give employee satisfied. Training can increase the ability of employee satisfaction by job training, job rotation, mentoring and coaching, this will make employee doing job in better way. Masood et al., (2014) defined, factor that consider as a useful tool for employee is training, that can perform their duties in following with the standard set by the organization. To get better job performance and satisfaction among employee, training sessions are required periodically to improve the skill needed to perform their duties.

As explained by Zahid et al., (2017) to increase the job satisfaction and organization commitment at workplace, the organization need to promote the culture of communication and regular program and the employee need to involved in the day-today affair to get smooth operation. To make empowerment can be more successful in organization, employee need to get specific skill, knowledge and information about overall work scope. A well training employee can make good decision toward their job and task given (Chei et al. 2014).

iv) Supervisor Support

In the view of Mohd Said et al., (2017) the result show that the relationship between supervisor support and job satisfaction is accepted and the supervisor support is the factor that influence job satisfaction employee. The study result Grobelna et al, (2016) indirect effect of supervisor support and employee was important in job satisfaction. While job demand of employee will bring role ambiguity and role conflict to unsatisfied employee and cause employee having leaving intention to leave the organization.

Based on Gok, Karatuna, & Karaca, (2015) the employee that received support from their supervisor became more identified with the organization and increase job satisfaction among employee. The supervisor play a critical role, they consider as agent of the organization to lead and assess employee and provide information about organization strategies and goals. By providing supervisor support and being fair in work it can increase employee confident that leads to job satisfaction to employee.(Qureshi and Hamid 2017). The result show employee should be treated fairly and the supervisor communicate information effectively with employee (M.HUSSEIN, 2015).

2.4 Job satisfaction

From start until now, the job satisfaction is a key to improve the performance of the organization. If employee satisfied with their work and show success with their performance it will give benefit to organization but if the employee is unsatisfied with their work and fail to show their performance, it not only affecting the themselves but it also can effect to the performance of organization.

Over the years, a lot of researcher having different approaches towards definition of the job satisfaction. As stated by N. Veena | K. Jayanth, (2018) the definition of job satisfaction is the extent to which job satisfaction is satisfied and fulfilled by the employer and general attitude toward the job. Job satisfaction is considered to be an important assessment of the work of the employee and a product of satisfaction. Employee satisfaction will impact the characteristic and as a product of satisfaction to the organization.(Zahid, Shaikh, and Zehra 2017). Besides that, according to Vijit Chaturvedi, (2016) job satisfaction is usually defined as a reaction to the attitude of the worker towards the job, based on the comparison of the actual result with the desired result. It is generally recognized as a multi-faceted form which includes the various intrinsic and extrinsic variables of employee feelings.

Next, the job satisfaction is important to employee and organization. Employee dissatisfaction with their work will cause reduce of performance. As reported by Bustamam, Teng, & Abdullah, (2014) the result show, many organization in hotel industry are unable to identify employee job satisfaction in term of reward to cultivate the employee. The employee that work for the long term will get bored and demotivated, this will lead to reducing job satisfaction and performance of employee especially hotel receptionists that lack opportunities for job rotation. The result from previous research shows the related satisfaction and positive feeling towards happiness from volunteer experience.

2.4.1 Measurement of Job satisfaction employee

The problem that happen when measuring job satisfaction is many technical problems, determining, improving, and measuring job satisfaction is not so easy, because there have a psychological effects and concerns about them. To stay away from this problem, many researcher were conducted and questionnaires were developed to address factors related to job satisfaction and to measure the level of job satisfaction. As determined by Thao & Hwang, (2017) measuring the level of factors affecting the effectiveness of employee work performance. According to the study, it will be analyzed by using multiple regression analysis using SPSS software because there are some independent variables and their influence should be seen on the performance of employees who are single dependent variables.

Since it is not a simple matter and it consists of various factors. The comparisons and judgment between various alternative can be better if the question is be detailed and easy technique, such as "Factors that are more important to you than others". Compare to asking the employee "which factor is more important to you." Analytic Hierarchy Process (AHP) is a systematic method for managing factors in a hierarchical structure; it give a comparison between the factors that influence job satisfaction and it resolve or determines factors that exceed the other factors. Relevant judgments and measurements can be made with a preference scale, derived from the assessment of these measurements, and paired comparison measurements. In this way, weight to factors can be evaluate. Simply put, this technique forces respondents to make choices between the two alternatives given at each level and allow decision makers to systematically rate various factors by comparing them to each other, in the end, to what extent the dominating factor is achieved (Unutmaz 2014).

3 Methodology/Materials

This research is based on a deductive approach. The data for this study were collected through a questionnaire survey. The questionnaire was aimed to be more objective than subjective and can find the most critical factors that can give impact of work environment in the organization towards business sustainability in hotel industry at Melaka. This paper focused on the job satisfaction among employee in Halal hotel and 135 respondents were collected from all age to answer through Halal hotel in Melaka. All the data that has been collected through questionnaire from the respondent entered into the SPSS software for analysis section.

3.1 Operationalization of Construct

The conceptual framework that is presented and defined in the literature review have been the base for the theoretical framework to be able to guide the questionnaire and to analyse the gathered empirical data. An operationalization is important in research as it confirms that the conceptual framework is answered and measured in a rigorous way based on five point of Likert scale as describe in table 1.

Table 1. Operationalization of constructs and scale of measurement

Constructs	No of items	Scale of measurement
Work environment	6	Likert Scale (1-5)
Reward	6	Likert Scale (1-5)
Training	6	Likert Scale (1-5)

Supervisor support	6	Likert Scale (1-5)
Job satisfaction	6	Likert Scale (1-5)

The responses from strongly agree in one end to strongly disagree to another end with the scoring of one to five focuses. Preceding run investigation, the score for every factor was entirely up. The higher the score demonstrates that the larger amount which it gives the management for increasing job satisfaction among employee in the hotel industry. The measurement for this research details in table 2.

Table 2. Measurement of variables

Label	Items
WE	1:I have very comfortable physical working environment in my organization. 2:My organization have a strongly consider and care for my well begin and goals. 3:My organization provide benefit to working condition and environment for their employee. 4:My organization has successfully created an employee friendly environment by integrating specialized work arrangements. 5: The security in my organization is sufficient. 6: Overall, my organisation is an enjoyable place to work.
RW	1: Compensation and reward are very important in order for me to stay with the organization 2: The reward that I get based on my performance. 3: My organization provide non-financial benefits (leave benefits, retirement plan, health benefits) to their employee. 4: In this hotel, Employee Salary increases are decided on a fair manner. 5: This hotel provide basis payment. For example overtime payment 6: My salary is satisfactory in relation to what I do..
TN	1: My company provides me the opportunity to improve my skills. 2: I have a lot of chance to learn new things in this hotel. 3: My organization frequently arranges training programs for the employees. 4: The job that I do in this organization will give me benefit in the future. 5: Effective training can change the attitude of workers in an organization. 6: I am satisfied with the training and development provided by the company
SS	1: My supervisor discuss about most important values, beliefs and mission about my work. 2: My supervisor encourages me to make the most of real skills and capacities to the jobs. 3: My supervisor encourages me to make the most of real skills and capacities to the jobs. 4: To make job decisions, my supervisor collects accurate and complete information. 5: When making decisions about my job, my supervisor offers explanations that make sense to me. 6: My supervisor gives me careful attention on working conditions.
JS	1: My job is very interesting. 2: My job has more advantages than disadvantages. 3: I feel that I am really doing something worthwhile in my job. 4: My work gives me a sense of accomplishment. 5: I really enjoy my work. 6: In general I am satisfied with my work.

4 Results and Findings

4.1 Descriptive Analysis

Respondents demographic data represents the information about gender, age, education level, position in working department and income in the month. This demographic data profile of employee that working in Halal hotel with 135 respondents. The result shows that the majority of employees were male with 52.59% about 71 respondents compared to 47.41% female about 64 respondents. The result of alpha value in table 3 for this reliability analysis between all independent variable and dependent variable is > 0.70 which is reliable.

Table 3. Measurement of variables

	Variables	Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	No of Items
Independent Variable	Work Environment	.694	.695	6
	Reward	.734	.735	6
	Training	.719	.719	6
	Supervisor Support	.740	.739	6
Dependent	Job Satisfaction	.609	.605	6

4.2 Regression Analysis

Based on Table 4 below, indicates the relationship between independent variables which are work environment, reward, training and supervisor support and only job satisfaction as the dependent variables. The result for entire summary of findings showed that the positive number of the R value. Multiple regression coefficients, R = 0.797 indicates a high degree of correlation. Therefore, the R value is more than ± 0.70 which mean it has a strong relationship and has a positive relationship. R squared shows the value of 0.635. This suggests that job satisfaction (dependent variable) is influenced 63.5% by the independent variable (work environment, reward, training and supervisor support), while the rest (100% - 63.5% = 36.5%) were influenced by the other factor or causes which were not discussed in this research.

Table 4: Model Summary of Multiple Regression Analysis

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.797[a]	.635	.624	1.197

F-test is used to determine whether the model is a good fit for the data. The significant testing is used to test the relationship between variables and the results of the significant value will tell if there is a statistically significant correlation between variables. Refer to the ANOVA in table 5 above show the significance level for this Multiple Regression Analysis test is below than p = 0.05 which is a 5% level of confidence in the results. This means less than 5% chance that the result is a coincidence for the research.

Table 5: Regression Analysis on ANOVA

ANOVA[a]						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	324.712	4	81.178	56.652	.000[b]
	Residual	186.281	130	1.433		
	Total	510.993	134			

Table 6 indicates that Beta values which mean individual independent variables influences on dependent variables. The results showed that B1 = 0.416, B2 = 0.189, B3 = 0.058 and B4 = 0.208 respectively to all independent variables. It shows that Work environment has the highest B value among other variables and strong influences on the job satisfaction with B value 0.416. It described that 41.6% variation in job satisfaction cause due to work environment with the (t=5.173, p<.001) Whereas, the supervisor support was the second higher predictor of job satisfaction with the B value 0.208 with the variation of 20.8% and t=3.173 p<.001. This was followed by reward indicates the B value 0.189 with he variation of 18.9% and t=2.126, p<.001. Training had the lowest influences on the job satisfaction, the B value 0.058 with the variation of 5.8% and (t=1.294, p>.001).

Table 6: Regression Analysis on Coefficients

Coefficients						
Model		Unstandardized Coefficients		Standardized Coefficients		
B		Std. Error	Beta		t	Sig.
1	(Constant)	3.572	1.839		1.943	.054
	Work environment	.416	.080	.470	5.173	.000
	Reward	.189	.089	.189	2.126	.035
	Training	.058	.045	.069	1.294	.198
	Supervisor support	.208	.066	.220	3.173	.002
Dependent Variable: Job satisfaction						

The unstandardized coefficient (B), the standardized coefficient (Beta), and the significant level were determined by t-test. After examining the B value, independent variable, the work environment, reward, and supervisor support was making a significant contribution to the prediction model.

The relationship can be marked as the following equation from the analysis from the Table 6 above:

$$Y \text{ (Job satisfaction)} = 3.572 + 0.416 \text{ (Work Environment)} + 0.189 \text{ (Reward)} + 0.208 \text{ (Supervisor Support)}$$

The coefficient for work environment is 0.416. It means for every unit increase in work environment, a 0.416 unit increase in job satisfaction is predicted, while other variables were set as constant. The coefficient for reward is 0.189. It means for every unit increase in reward, a 0.189 unit increase in job satisfaction is predicted, while other variables were set as constant. The coefficient for need for training is 0.058. It means for every unit increase in need for training, a 0.077 unit increase in job satisfaction is predicted, while other variables were set as constant. Lastly, The coefficient for need for supervisor support is 0.208. It means for every unit increase in need for supervisor support, a 0.208 unit increase in job satisfaction is predicted, while other variables were set as constant.

H1 : There is a positive significant relationship between work environment and Job satisfaction among employee in sharia compliance hotel.

Accept H1

From Table 6 shows the result between work environment of the independence variable and job satisfaction, which is dependent variable. The result indicated significant value of work environment, $p = 0.000 < 0.05$. It means that there is a positive significant between work environments towards job satisfaction among employee in sharia compliance hotel. Therefore, H1 is accepted in this study. The work environment positively affects job satisfaction.

H1: There is a positive significant relationship between rewards and Job satisfaction among employee in sharia compliance hotel.

Accept H1

Table 6 shows the result between reward of the independence variable and job satisfaction, which is dependent variable. The result indicated significant value of reward, $p = 0.035 < 0.05$. It means that there is a positive significant between rewards towards job satisfaction among employee in sharia compliance hotel. Therefore, H1 is accepted in this study. The reward positively affects job satisfaction.

Ho: There is no significant relationship between training and Job satisfaction among employee in sharia compliance hotel.

Table 6 shows the result between training of the independence variable and job satisfaction, which is dependent variable. The result indicated significant value of reward, $p = 0.198 > 0.05$. It means that there is no significant between training towards job satisfaction among employee in sharia compliance hotel. Therefore, H1 is rejected in this study. The training negatively affects job satisfaction.

H1: There is a positive significant relationship between Supervisor support and Job satisfaction among employee in sharia compliance hotel.

Accept H1

Table 6 shows the result between supervisor support of the independence variable and job satisfaction which is dependent variable. The result indicated significant value of supervisor support, $p = 0.002 < 0.05$. It means that there is a positive significant between supervisor support towards job satisfaction among employee in sharia compliance hotel. Therefore, H1 is accepted in this study. The supervisor support positively affects job satisfaction.

5.0 Significant Implication of the Research

This study has combined several perceived factors from literature review done by various previous researchers. Not all variables were significant in this study, but work environment, reward and supervisor support are the significant variables. The work environment, rewards, training and supervisor support is a crucial aspect that needs to be emphasized by not only the hotel industry but any other organizations as well in order to maintain and enhance employees' job satisfaction. In Malaysia as well as in other countries, there are only a few studies been carried out to evaluate the factor (Work environment, rewards, training and supervisor support) and job satisfaction of Halal hotel employee (Pitra and Persiaran 2018). As the sharia compliance hotel industry is less interested in compared to other industries despite its importance, research studies on how factors and job satisfaction interact with each other are still inadequate.

The purpose of this study is to fill the gap by presenting a comprehensive understanding of the topic mentioned in sharia compliance hotel. Based on the reliable finding as shown in previous chapter, the independent variables (Work environment, rewards, and supervisor support) are proven to be significantly affecting the job satisfaction of hotel employees. Besides that, there are compare to the Independence variable (training) that have been proven not have significantly affecting the job satisfaction. The results of this research deliver meaningful information regarding the significance of providing a satisfying work environment, reward and supervisor support and how will it affects employees' job satisfaction. Accordingly, it is useful for the policy makers, practitioners, human resource department and also the relevant personnel of hotel industry as well as the other industries. Additionally, the result is also useful as a reference for the future research.

This study has been carried out on four variables that affect job satisfaction. These four factors are work environment, rewards, training and supervisor support. This research has provided useful and reliable information for future researcher. Besides that, this research also helps manager to figure out the significance of job satisfaction among employee at sharia compliance hotel, so that, the manager can provide high quality of service and to increase the reputation of the organization in organization. Which mean the higher the job satisfaction among employee, the higher the quality given by employee to the organization.

Based on the result of this studies, the significant of the studies is work environment, reward and supervisor support. The employee will have a job satisfaction when they have a comfortable work place, the reward are given based on their performance and more importantly the supervisor support that will give a motivation to the employee to know that they get compliment from their supervisor. In addition, this research is also used to identify successful organizations. For example, employees will improve their performance when they become concerns by the organization. Hence, employees who are willing to contribute all efforts, skills, knowledge and skills to the organization. It can create positive perceptions to customers in the hotel industry.

As reported by Ministry of Tourism and Culture Malaysia, it has five objectives. This studies successfully achieved the policy based on the objectives which are the first is to strengthen the arts of the state, cultures, and heritage to improving the national unity centered on the National Cultural Policy, second is to boost the cooperation and synergy between the tourism and culture industry players to making Malaysia the favored cultural and tourist destinations. The following is to reinforce the tourism industry and cultures industry sectors to allowing the nation's economy and the forth is to endorse Malaysia's exclusivity in culture, heritage and arts as the foremost catalyst for the development in culture and tourism sectors and lastly to improve the knowledge, skill, creativity and advanced person in culture and tourism sectors.

Based on the study on the role of factor influence job satisfaction among employee at Melaka sharia compliance hotel. This policy maker have be support by the government, which they want to make sure the tourism that came to Melaka are satisfied with the environment in the hotel and feel comfortable when tourism stay overnight at Melaka sharia compliance hotel. When tourism are satisfaction, it can affect the number of tourism that come to Melaka. The government need to increase the training factor among employee at sharia compliance hotel to increase not only for employee satisfaction is also can increase the image of Melaka.

6.0 Limitation

There are several limitations in this studies. Firstly, the area of the study conducted in the city hotel industry in Melaka only. The number of respondents is small that only 135 respondents. The target respondents are too nar-

row and the range of respondents is too limited. Therefore, the data collected is too small, it may limit the accuracy of the research. Additionally, researchers also do not have enough time to research more about upgrading the level of usage of purchase services in terms of online ordering to convince consumers to use online purchase services.

Lastly, the limitation of resources also brings certain obstacles to our research. This research only use quantitative method. During this process, a set of questionnaire scale was designed and distributed to target respondents. The research noticed that some of the respondent answer the question without seriously effort. This is happening probably caused using quantitative methods in collecting data, it difficult to interaction between the researcher and the respondent is limited. Respondents cannot inquire directly to researchers and researchers cannot explain their doubts in an effort to improve their understanding and respondents may not answer questions correctly in accordance with what they think and behave.

7.0 Conclusion

This research is about an empirical evidence of job satisfaction among employees at Melaka sharia compliance hotel. As discussed in the previous chapter, it can be concluded that the job satisfaction which is the work environment, rewards, and supervisor support are directly related and significant with job satisfaction among employees at Melaka sharia compliance hotel and the training was not significant this is because some of the employee think that training cannot satisfied them. In this research, various methods were used to respond to the goals developed. Some techniques have been used to evaluate the acquired information such as group indicator mean score, assessment of validity and reliability, inferential assessment and testing of hypothesis.

In addition, to raise the job satisfaction such as work environment, rewards, and supervisor support, the sharia compliance hotel industry must acquisition the high satisfaction of their employee toward the hotel industry. It is very crucial that the organization understands their need and their employee's desires that can also attain their vision, mission and goals. Through the discussion, it showed that work environment is highly significant relationship towards job satisfaction in halal hotel industry where employee can get get comfortable physical working environment. Thus, job satisfaction can successfully create a friendly environment by integrating specialized work arrangement.

The researcher concludes this chapter had been discussed on concluding the data analysis in chapter four with providing the suggestions to enhance the empirical evidence of job satisfaction among employees at Melaka sharia compliance hotel. Besides, the research questions have been answered in the previous chapter by using the result of data analysis and also answered the research objectives of this research.

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El intercambio de patógenos como aliados en el éxito de la conquista española de América

The exchange of pathogens as allies in the success of the Spanish conquest of AmericaThe public administration and sense of welfare for progress

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RESUMEN

Este artículo fue abordado por el autor, como parte de un ensayo para la Universidad de Artes y Ciencias Sociales ARCIS de Chile, el que fue profundizado a través de los diferentes estudios sobre enfermedades prehispánicas entre ellos los de Villaseñor, (2002), durante la conquista nos indican que la inmunidad amerindia no arribó a la inmunidad por el aislamiento de América a los siglos de intercambios de patógenos que si poseían los conquistadores.

Es evidente, que algunos cronistas exageraron las cifras de mortandad que supuso la interacción de los gérmenes en la población indígena y como los españoles e ingleses posteriormente, advirtieron que las ropas contaminadas por sarampión y viruela eran la forma más efectiva para controlar la resistencia indígena. Junto al consumo no ritual del alcohol como forma de dominación. Por otro lado, gracias a las crónicas y transmisión oral se ha podido configurar una cartografía sobre prácticas chamánicas y rituales en lo que respecta a la medicina precolombina. Finalmente, podemos indicar que no se han hecho todas las investigaciones, para conocer el alcance de dichos conocimientos y su importancia en la actualidad como una alternativa sanitaria.

Palabras clave: Patógenos, enfermedades precolombinas, mortalidad amerindia, resistencia, chamanismo

ABSTRACT

This article was approached by the author as part of an essay for the ARCIS University of Arts and Social Sciences of Chile, which was deepened through the different studies on pre-Hispanic diseases, among them those of Villaseñor, (2002), during the conquest they indicate to us that the Amerindian immunity did not arrive at the immunity by the isolation of America to the centuries of interchanges of pathogens that if they owned the Spanish conquerors.

It is evident that some chroniclers exaggerated the mortality figures that the interaction of germs in the indigenous population implied and, like the Spanish and English later, they noticed that the clothes contaminated by measles and smallpox were the most effective way to control the indigenous resistance. On the other hand, thanks to the chronicles and oral transmission has been able to configure a cartography on shamanic practices and rituals in regard to pre-Columbian medicine. Finally, we can indicate that all the investigations have not been done, to know the scope of such knowledge and its importance at present as a sanitary alternative.

Key words: Pathogens, pre-columbian diseases, amerindian mortality, resistance, shamanism.

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Introducción

1. Los patógenos como factores de sometimiento y resistencia en América

La investigación hoy como factor que problematiza su justificación teórica en relación al intercambio de cepas patógenas entre conquistadores y usurpados indica elementos sustantivos para comprender como fue que terminaron sometiendo a la población amerindia y por otra deviene en una resistencia natural, como respuesta en el análisis de sus curiosidades e implicaciones desde la perspectiva del hombre americano en sus conjuntos de creencias, hoy estos han reportado inmensos avances en la comprensión del horizonte cultural de la vida del hombre americano. Algunas de las enfermedades que provocaron altas mortandades adquieren dimensiones de comprensión a la luz de las investigaciones y el conocimiento en su evolución de esos patrones de la salud. La mayoría de los estudios sobre las poblaciones amerindias por parte de los historiadores solo dan cuenta en sus análisis sobre cuestiones de índole militar, política, económicas y religiosas. Esas investigaciones no indagan las perspectivas sanitarias y ecológicas. Salvo la importante contribución del profesor F. Guerra, el que publicó su obra *Epidemiología americana y filipina 1492- 1898 (Min. de Salud, Madrid, 1999)* La que ha reportado importantes aportes. Las que resolvieron y dieron respuestas a los enigmas que provocaron las más grandes pandemias en la historia terminando todas ellas a lo largo de los siglos por ser curadas, lo que hoy hace impensable semejante mortandad en su ocurrencia. Salvo una mutación de sus cepas, como lo fue en la antigüedad americana.

En efecto, a lo largo de la historia del hombre en sus permanentes migraciones para la recolección de alimentos en la lucha por la sobrevivencia justifican esos desplazamientos también funcionando como mecanismos biológicos fortaleciendo los sistemas inmunológicos del hombre. Este podría ser definido como un sistema universal del organismo, reservado para proteger nuestra identidad biológica. Es así como el sistema inmune que posee el hombre, constituye un largo periplo evolutivo que comienza con los peces arcaicos tales como la lamprea, la que se evidencia en los registros fósiles demostrando la evidencia empírica que poseía asomos de un sistema de defensa contra enfermedades.

Para una definición más concreta, podemos señalar que la palabra inmunología proviene del latín *immunitas*, que es como se llamaba a las personas que estaban "protegidos" de pagar impuestos, tales como personal diplomático por la exención al pago de gravámenes, entre ellos a los legisladores los que poseen inmunidad en los tribunales por sus fueros.

Hace unos 40.000 años, llegaron primitivos pobladores al continente americano abandonando las tierras euroasiáticas, según Cuenca (1987) Alex Hrdlicka planteó lo que hoy conocemos con el nombre de teoría del origen único o teoría asiática. La que nos dice que los primeros pobladores que arribaron al continente americano habrían tenido un origen común, trazando su origen desde Siberia cruzando a través del estrecho de Bering en dirección hasta Alaska en la última glaciación, ello dado que dicho paso, se había transformado en un puente ocasional entre los continentes motivado por la bajada de los niveles del mar. Este puente también sería conocido como Beringia, esta migración fue permanente en repetidas y sucesivas oleadas, es así como los pobladores se fueron desplazando continente adentro hacia el sur. Estas migraciones habrían acaecido hace más de 16.000 años. Posteriormente habría acontecido una segunda migración importante. Este otro éxodo del hombre, sin duda vendría acompañado de huéspedes que traían consigo. Antes de entrar a una zona "protegida" de inmunidad al término de la era de glaciación y al aislamiento natural al ceder las aguas y cubrir el paso del estrecho.

2. La enfermedad y la medicina en las culturas precolombinas de América: la cosmovisión

Las investigaciones sobre América, por parte de los historiadores con respecto a las enfermedades precolombinas, con respecto a este interesante tema han sido abordadas de forma leve. Este argumento nos llevará ineludiblemente a un axioma demográfico en lo que concierne a la historia de América. Así lo señala Yépes, (1995) Quizás el tema de su poblamiento ha concitado las más fértiles interpretaciones. Es así como se llegó primero que todo, a conjeturar todo un imaginario con respecto a ellos, sí los naturales de América eran o no seres humanos, todo ello como debemos entender bajo el paradigma Euro-céntrico es el Papa Paulo III quien mediante la "*Bula Sublimis Deus*" de 1537, que les asignaba la condición de seres humanos y su evangelización. Las distintas concepciones en torno al origen de los nativos americanos, van desde una descendencia Atlante que habría recogido Platón de su maestro Solón en la Escuela de los Misterios de Egipto, para posteriormente ser referido en sus "*Diálogos*". Como también la descendencia de supuestos contactos fenicios en que la flota Társica del rey Hiram de Tiro que realizaban un viaje que tardaba dos años en completarse arribando con metales preciosos, piedras y maderas en sus bodegas para la construcción del Templo de Salomón. Los orígenes del poblamiento americano han seguido distintas vertientes, que no es nuestro propósito abordar en este artículo.

Con respecto a las enfermedades americanas, existen distintas opiniones en torno a ellas y un gran debate que ha perdurado por muchos siglos, en relación a la sífilis que veremos en el desarrollo de este ensayo. En efecto, como señala Moli (1994) nos indica estudios sobre la cartografía de enfermedades americanas, la presencia de *tripanosomiasis americana*, también conocida por Enfermedad de Chagas nos indica que esta podría llegar

a provocar la muerte, a consecuencia de un parásito protozoo *Trypanosoma cruzi*. Cuyos vectores son insectos *triatominos* como: vinchuca, chipo, pito, chirimacha, chinche, y barbeiro, entre otros cuya distribución endémica se halla en América Latina Continental, exceptuando las islas del Caribe. Hace algunos décadas se ha detectado su presencia en EE.UU, Canadá incluyendo algunos países Europeos también se ha revelado su presencia en el Pacífico Occidental, básicamente por la movilidad migratoria de las personas entre estas latitudes, otras enfermedades originales de América es la verruga peruana, el bocio, parásitos intestinales, disenterías, entre otras. También la *Leishmaniosis*, esta enfermedad también conocida como Kala-azar, cuyo vector es un mosquito infectado, su picadura provoca el daño de órganos internos, tales como el bazo, médula ósea e hígado. Esta enfermedad también es originaria de Oriente y Asía.

Lo cierto es que el concepto que se tenía de América era más bien idílico, tierras en que las enfermedades no afectaban a la población nativa según los cronistas hacen referencia que antes de la llegada de los conquistadores, los hombres y mujeres tenían vidas sanas y longevas según dice Nabokov (1991).

Las investigaciones arqueológicas dan cuenta que las poblaciones precolombinas, no eran azotadas por epidemias. Cabe precisar que los rangos etarios en las esperanzas de vida variaban entre los 16 y 22 años para los hombres, y 14 a 18 años para las mujeres. Estas expectativas de vida no daban pie para la ocurrencia de enfermedades asociadas a la vejez, la mayoría de la población nativa se casaban jóvenes junto con practicar la poligamia. En consecuencia como señalan Jaffee (1991) y Cassidy (1984) que las tasas infantiles de mortandad eran elevadas llegando al 40% y la expectativa de vida de esa proporción eran los 5 años, las tasas de natalidad también eran altas siendo el parto una de las razones de mayor mortalidad por las complicaciones durante el, principalmente según lo refieren (Dunn, 1968:223-224; Buikstra, 1993:305 y Jaffe, 1991: 58-60) Como también señala Austin, (1999) Según estos autores durante el siglo XVI las enfermedades graves no habrían tenido una gran ocurrencia en América. Lo cierto es que las pruebas indican que jamás existió un paraíso precolombino, como intentaban plasmar los románticos aventureros, luego de sus retornos a Europa.

3. Chamanismo Indígena

Debemos señalar que en América, no podemos hablar de una única medicina sino variadas, con características propias en los horizontes culturales donde se desarrollaron, basadas en una concepción del pensamiento mítico como discurso interpretativo de la realidad, es así como la enfermedad se asociaba al castigo de fuerzas sobrenaturales y la mediación del chamán para lograr que los espíritus protectores intervinieran en la curación del enfermo y los procedimientos físicos y metafísicos, en que la interacción es a través de Dioses-espíritus y médicos de acuerdo a su carácter mágico. Es así, como la medicina precolombina, se asentaba en las prácticas chamánicas. Los protagonistas de tales habilidades referían que eran llamados ya sea por la tradición, sea por potestades internas o las deidades quienes protegían la salud comunitaria. Estas facultades de los chamanes como nos indica Franco (2003) posibilitaban el entendimiento del espacio que los rodeaba, la esencia de la naturaleza integrada al hombre y la condición de salud, aspectos psicológicos que además permitían la sanación de quien la había perdido. Estas características están ancladas a un imperativo histórico-cultural. Por otro lado, los ceramios, los textiles y toda iconografía indígena dan cuenta de un acervo mágico religioso, lo que evidencia la exégesis de las prácticas chamánicas evidenciadas en las excavaciones arqueológicas.

Franco señala que el rescate del patrimonio cultural, ha sido un aporte al conocimiento de la medicina y al curanderismo como también lo fue en el espacio cultural andino, dado la ausencia de la escritura. En efecto, la cerámica precolombina particularmente la peruana, como lo es aquella del complejo Paracas y la evidencia forense, nos relatan prácticas de una alta medicina, como lo fueron las trepanaciones craneanas extirpando los huesos fracturados como consecuencia de golpes, utilizando anestésicos como hojas de coca, bebidas embriagantes y drogas que adormecían a los pacientes. Estas intervenciones en ocasiones tenían resultados mortales, en cuyo caso la abertura era cerrada con láminas de oro, plata o calabazas, sin embargo se aprecia en los cráneos hallados indican que muchos sobrevivieron a estas operaciones. Por otro lado Espinoza (1990) refiere el uso de conocimientos medicamentosos, en la farmacopea indígena.

Por su parte la herbolaria peruana utilizó yerbas como la Calaguala con fines antirreumáticos, anti-cefalálgica también utilizada para las afecciones pulmonares crónicas. La Canchalagua, se utilizaba para tratar acidez estomacal, anti-hepática, dispepsia y pleuresía entre otras utilidades. La Chilca se usaba para combatir las heridas supurantes, insomnio, gases entre otros usos.

A estas yerbas medicinales en su disposición naturista, se complementaban con danzas y otros rituales realizadas por médicos peruanos en Paracas, donde se practicaron operaciones quirúrgicas complejas utilizando fresas de obsidiana y tumis de oro o plata, cuyo filo útil formaban parte de la arsenalería peruana, en las que también empleaban bisturís.

Una de las enfermedades que mayor controversia ha generado en su origen, es la sífilis las características epidemiológicas no indican su origen preciso, distintas teorías intentan explicar si esta enfermedad arribó al nuevo mundo con la llegada castellana, o contactos anteriores con los vikingos. Sin embargo, algunos estudios serios apuntan a una cepa cuya datación se empina sobre los 15.000 años a.C, que podría demostrar que esta vendría de una enfermedad anterior. En efecto, la posibilidad de una mutación tendría su correlato en los estudios forenses realizados a la luz de los descubrimientos de asentamientos humanos en Europa, particularmente en los restos hallados en Pompeya que indicarían la presencia de la enfermedad, otros estudios realizados en recientes excavaciones apuntarían a que la enfermedad no procedería del Nuevo Mundo los huesos hallados en Inglaterra en el condado de Hull, donde se halla un monasterio, ha revelado que los esqueletos encontrados y fechados entre los años 1300-1450 exhibían signos atribuibles a la enfermedad, lo que fue certificado por la Universidad de Bradford como lo consigna Turnes (2005) Esto probaría la incidencia de esta enfermedad anterior al descubrimiento de América, pero al mismo tiempo que la enfermedad como hemos señalado pudo tener una mutación en el nuevo mundo para posteriormente volver a Europa, como una pandemia de mayor agresividad.

La emergencia de las dolencias intestinales por vía de la infestación por *helmintos* revelados en estudios paleo-patológicos indica que este parasito estaba presente en el intestino de momias precolombinas en Unai. Minas Gerais. Brasil, también se hallaron evidencias en Alaska en momias esquimales datándose entre los 200 a 500 años d.C contagiadas por este parásito.

Tanto Mayas como Aztecas, pensaban la vida en una permanente confrontación entre fuerzas tanto malignas como benévolas, es así como cada enfermedad tenía su correspondiente sea aquella deidad que la provocaba como otra que intervenía en la sanación del enfermo. Uno de los escritos más relevantes es el manuscrito Badiano o también llamado Libro de Martín de la Cruz, descubierto en la Biblioteca del Vaticano en 1929, el que refiere una serie de enfermedades y las formas en que ellas deben ser tratadas Gubler (2007) además indica que los indígenas aplicaban una concepción pragmática con respecto a la enfermedad, separándolas en diversas categorías atribuibles a:

1.- Causas naturales.

2.- Las de origen sobrenatural, enviadas por las deidades, espíritus o vientos, como castigo por infracciones en el comportamiento humano.

3.- Enfermedades que se atribuyen directamente a la acción de un brujo o hechicero quien obra por encargo de otra persona con la expresa intención de causar daño.

4.- La influencia de las plantas y astros como agentes de enfermedad, muy presente en los libros mayas de Chilam Balam.

5.- Dolencias por causas involuntarias como el "mal de ojo" que obedecen a la mirada fuerte de una persona borracha, embarazada, calurosa, etc.

Gubler nos refiere *"La terapia se adecua a cada dolencia medios naturales para la primera, sobrenaturales y mixtos para las demás. Estas creencias se reflejan tanto en las fuentes coloniales como en las prácticas de los terapeutas yucatecos contemporáneos, donde perviven resabios de la antigua cosmovisión maya"*

El documento cuya relevancia médica nos lega la cultura Maya en el ritual de los Bacabes, que rescata el acervo de conocimientos médicos prehispánicos en el que aparecen documentados los días más propicios para las sanaciones, ritos y procedimientos con respecto a una profunda comprensión de botánica y medicina. (Gubler, 2007)

Franco (2012) rúbrica por su parte que las prácticas mágicas en la medicina Inca, para combatir las enfermedades eran atribuidas a propósitos divinos, hechizos o venganza cuya ocurrencia eran las manifestaciones de energías descarnadas las que eran descubiertas a través de acciones mágicas y la adivinación utilizando hojas de coca, maíz y la soba de cuy (*Cavia porcellus*) una cobaya peruana.

Tanto la herbolaria como animales vivos o disecados eran utilizados por el *Sirka* quien además era el cirujano especialista en fracturas y heridos. Los distintos procedimientos estaban vinculados a la práctica de la salud tanto física como psicológica. Los medios utilizados en las prácticas chamánicas recurrían a una amplia variedad de plantas de uso medicinal, tales el sagrado maíz, las hojas de coca, quínoa y la utilización de minerales como el azufre o el arsénico y una variedad increíble para el tratamiento de los pacientes andinos, transmitidos estos

conocimientos a través de los siglos en su oralidad. El uso de las hojas de coca y su estudio, hoy demuestran que posee propiedades cuyas características van desde usos curativos como alimenticios. Por otro lado, los indígenas amazónicos desde hace 3.000 vienen utilizando el uso de la ayahuasca con fines antidepresivos, hoy algunas instituciones la consideran para el tratamiento de adicciones. Otra planta excepcional es la Wilka (*anadenanthera. sp*.)

Proviene de un árbol originario de Sudamérica y el Caribe con principios psicoactivos, conocida como *"La abuela de todas las medicinas"* Esta medicina produce un estado de ausencia de cansancio o debilidad física, su estado de latencia en el organismo induce en sus consumidores una condición de reflexión intensa, lo que se traduce en un proceso de conocimientos en los sujetos que la experimentan, entendiendo que ella está relacionada con el ambiente y hábitat de quienes se someten a sus efectos.

4. Enfermedades durante la conquista

La conquista no solo aportó al viejo mundo, alimentos y materias primas, sino que la ocupación trajo un enemigo invisible para las culturas indígenas, un arma biológica que cambiaría radicalmente la geografía poblacional de las culturas nativas en América. Sánchez (1990) nos dice, con respecto al origen de las pestilencias *"Se debe a un factor relacionado con la secuencia de los factores sanitarios que intervinieron en la conquista americana se inicia en Sevilla —ombligo del Nuevo Mundo— donde existían enfermedades infecciosas de alta mortalidad y extensa morbilidad con anterioridad al descubrimiento de Colón".* Un análisis de la Sevillana Medicina (1545) escrita por Jean d'Avignon hacia 1421, pero publicada más de un siglo después por Nicolás B. Monardes, demuestra que entre 1398 y 1420, hubo en Sevilla brotes epidémicos de gripe, viruela, sarampión, tifus, paludismo y difteria.

Es evidente, que los brotes epidémicos ocurridos con antelación a la conquista tienen un correlato lógico, como es la capacidad que tenía el viejo mundo a lo largo de los siglos y las migraciones punitivas y comerciales fortaleciendo sus sistemas inmunológicos, sin embargo estas aciagas enfermedades aparecen en América con la conquista, transmitidas por los hispanos posteriormente al descubrimiento llegando a niveles increíbles en las tasas de mortalidad. Desde este punto de vista, se puede inferir que la reciprocidad en cuanto a las enfermedades, tuvo mayoritariamente un punto de inflexión extraordinariamente más nefasto, hacia las comunidades indígenas del nuevo mundo que aquellas que portaban los españoles. Sin perjuicio de lo anterior, debemos indicar que la contribución castellana con respecto a las enfermedades, marcaría profundamente la realidad política y social de la ocupación hispana en América.

Posterior al desembarco de Colón, se produjo una catástrofe demográfica sin precedentes que afectó fundamentalmente a la Hispaniola y su ciudad Isabela fundada en honor a la Reina Isabel, esta ciudad experimentó una amplia y repentina mortalidad asociada a fiebre alta, compromiso general y finalmente la muerte denominada influenza suina (Guerra, 1985) la que fue erróneamente llamada en 1918 como "Influenza Española", según Sánchez este brote epidémico se llevaría en el siglo XX a más de 30 millones de personas y aunque los cronistas hispanos no refieren cifras exactas, algunos de ellos apasionados y menos concretos como Fray Bartolomé de las Casas, indican que la afección que también afectó a Colón causó un mayor efecto entre la población no hispana, que se llevaría una tercera parte de ella, en cuanto al número de aborígenes enfermaron a niveles geométricos.

El foco viral, en la Hispaniola (Actualmente Santo Domingo) que tenía una población aproximada a los tres millones de habitantes según Sánchez, quien menciona las crónicas de Fray Bartolomé de las Casas, la población habría disminuido sustancialmente hasta descender a las 10.000 almas en 1517, como efecto del patógeno los resultados secundarios que produjo la pandemia en las comunidades, fue la disminución de las siembras lo que provocó la notable baja de la producción de alimentos y en consecuencia, sobrevino una generalizada hambruna.

El impacto que provocó la conquista durante el siglo XVI., fue más bien la lucha que tuvo lugar en el intercambio biológico entre culturas que por la tecnología de guerra de la que eran portadores los conquistadores. Es evidente, que las condiciones geográficas tuvieron una incidencia favorable para su propagación y el progreso de los vectores que causaron enfermedades como el tifus, la escarlatina, la varicela, la fiebre amarilla y la tos convulsiva. Todas ellas, enfermedades absolutamente desconocidas para la población nativa que no había desarrollado inmunidad a diferencia de los europeos que la adquirieron a través de los siglos. Es así como los indígenas sufren sus efectos devastadores. Su propagación también sería facilitada por el desplazamiento de aquellos que no habían sido afectados en el periodo de incubación de 10 a 14 días, en el caso de la viruela y las ropas contaminadas también serían vector de la infección.

Los europeos trajeron una enorme carga de epidemias como la viruela, registrada por primera vez en 1518 en Santo Domingo y Cuba. Esta enfermedad provocaba, en todos los casos, la muerte de los nativos que fallecían en tales cantidades que no era posible sepultarlos. El Sucesor de Moctezuma y miles de otros guerreros, por ejemplo, no murieron a causa de heridas de guerra sino por esta epidemia.

No existen datos confiables que permitan cuantificar el impacto de la epidemia pero se calcula que unos tres millones y medio de personas murieron en México, en un período indeterminado de tiempo". (Diomedi, 2003)

Diomedi señala una crónica que es referida por el fraile Toribio de Benavente: *"…que ya entrado en esta Nueva España el capitán y gobernador Dn. Fernando Cortés con su gente, al tiempo que el capitán Pánfilo de Narváez desembarcó en esta tierra, en uno de sus navíos vino un negro herido de viruelas, la cual enfermedad nunca en esta tierra se había visto, y a esta sazón estaba toda esta Nueva España en extremo muy llena de gente, y como las viruelas se comenzasen a pegar a los indios, fue entre ellos tan grande enfermedad y pestilencia mortal en toda la tierra, en los otros la proporción fue menor …"*

Los contagios por viruela serían utilizados por los españoles y posteriormente por los ingleses, como arma biológica de dominación es así que las crónicas de la conquista castellana del imperio inca refieren estos hechos. En efecto, el autor menciona las exploraciones que tienen su punto de partida desde Panamá en los años 1525 y 1527, en procura de la conquista del Tahuantinsuyo (Cuzco) la que sería conquistada con avanzadas que habían advertido la inmensa mortandad amerindia producto de la viruela y la expansión del patógeno, enviando vanguardias fuera ella de esclavos, aliados y soldados con alabardas en cuyos extremos pendían ropas o telas con las secreciones que habían pertenecido a los enfermos de la viruela, dejándolas en los poblados o regalándolas. De esta forma se lograba esparcir entre la población local el germen esperando que en ellas provocaran la debilidad de sus oponentes, y la victoria militar sobre las fuerzas imperiales en la dominación de los territorios.

Cordero (2000) indica que el rol de las enfermedades infecciosas entre ellas la influenza, viruela, sarampión y tifus exantemático, en el exterminio de las comunidades indígenas en América contribuyó enormemente a permear la resistencia al invasor europeo. También señala el autor en la referencia lo que indica Lazárraga que previo a la conquista las comunidades indígenas se hallaban disminuidas por: *"…una enfermedad de romadizo (coriza) y dolor de costado (pleuresía) que consumió a la mayor parte de ellos"* A propósito de ello, los mismos indígenas apuntaban que sin aquellas dolencias los españoles no habrían podido doblegarles.

Como resultado de los contagios, se indica que solo en el Valle del Rimac en Perú, la tasa de mortalidad se habría empinado por sobre el 95% en el litoral las cifras serían abismantes con pérdidas que bordeaban el 100% El Marqués de Varinas señaló cien años después de la llegada de Pizarro al Perú: *"Observa uno que en algunos lugares, era posible ver aun las calaveras y huesos de estos desdichados, que horrorizaban a quienes viajan por el camino"*

Por otro lado, también como un factor de sometimiento de las poblaciones indígenas lo constituyó el consumo de alcohol a tal grado penetró que fue necesario proponer medidas que pudieran regular su consumo ante el vicio y las malas costumbres. Es así como Carlos I dictó en Toledo una disposición real (1529) restringiendo el número de pulquerías (lugares de venta de la bebida alcohólica *Pulque,* destilado del maguey) autorizadas en Nueva España prohibiendo el consumo y la adicción de sustancias perniciosas para la salud y que recogen las *Leyes de Indios,* decretando que:

"…no se venda vino, ni beban pulque, que los obliga a perder el sentido, abraza los miembros principales del cuerpo y mata con grandísima facilidad, además de que es nocivo para la salud espiritual".

Es evidente que, para los intereses de la corona española, convenía mantener las poblaciones indígenas, en oposición del interés proyectual británico de suplir las poblaciones indígenas por colonos anglosajones.

La inmensa catástrofe que tuvo lugar en América, indica que solo bastó un período no superior a los sesenta años en que tuvieron lugar esas pestes, como el sarampión y la viruela llegando a más de 50 millones de habitantes en una proporción del 90%b de la población amerindia, provocando un cuello de botella poblacional, no comparable en magnitud en la historia de la humanidad.

Con respecto a la epidemiología africana, es muy poco lo que podemos advertir de ella, en relación a su contacto previo con Europa y Asia, dado que el horizonte epidemiológico de Europa se hallaba en su fase configurativa. La falta de escritos limita sus estudios, se cree que el impacto con Eurasia supuso una colisión epidémica pero los escasas investigaciones no permiten afirmar su epidemiologia en tanto las asimetrías epidemiológicas de los esclavos africanos indicarían una realidad diferente a las de los conquistadores europeos,

la evidencia indica que con ellos se añadieron escasas enfermedades en relación a las que provocaron grandes catástrofes en la población americana en cambio el aporte de dichas enfermedades tenían más un carácter tropical las que no poseían un espacio ecológico en Europa la que tampoco se obtuvo en las zonas geográficas que no fueran las tropicales como lo fue la fiebre amarilla.

Conclusiones

El tributo que debió pagar la población amerindia, tuvo profundas repercusiones en la ocupación castellana, portuguesa, inglesa y holandesa, en el inicio este tuvo las características de un desastre demográfico incuantificable ya que en menos de un siglo las poblaciones naturales disminuyeron en un 90% la del Caribe y Arawak Las patologías infecciosas, provocaron esta tragedia ecológica de proporciones en mundos separados por miles de años y por un océano. Las enfermedades por contagio respiratoria (gripe, viruela, sarampión, otras por contacto directo (viruela), en cambio otras por acceso digestivo (Diarreas, fiebre tifoidea, picaduras de piojos (tifus exantemático) sin mencionar malaria y fiebre amarilla. Estas enfermedades, tuvieron mayores efectos que las mismas armas que traían los conquistadores, logrando frenar cualquier foco de resistencia. Facilitando la apropiación de tierras y toda la riqueza americana, y la consiguiente pérdida de culturas milenarias para siempre. Más allá de estas características, la población europea y africana con las mezclas poblacionales también serían alcanzadas por las infecciones, como parte integrante del componente ambiental de la salud. A la luz de las investigaciones podemos concluir que faltan investigaciones profundas en el área médica desarrolladas por las prácticas chamánicas, que ejercieron las distintas culturas amerindias. Lo que puede traer luz con respecto a los conocimientos ancestrales, en torno a la inmensa riqueza de su herbolaria que hoy ha cobrado vigencia en el uso de medicinas alternativas, para tratar las enfermedades actuales.

En efecto, la colisión entre el viejo y el nuevo mundo en su cartografía histórica, sin duda generaron procesos profundos para la humanidad, los ingentes recursos que llegaron a Europa aunaron riquezas inestimables al mismo tiempo que el aporte nutricional.

El mapa alimentario americano, como contribución se sumó el maíz que era la plataforma alimenticia de las culturas maya, azteca e inca. La yuca lo era en la región de Brasil, la papa también fue un gran aporte de la cultura incaica, sin mencionar el cacao cuyas propiedades se componen de altos niveles de grasas saturadas, hidratos de carbono y proteínas, magnesio, fósforo, potasio, teobromina, cafeína, antioxidantes y agua entre otros.

Finalmente, la invasión de América provocó la caída de civilizaciones y un mundo de creencias ante las plagas diezmando poblaciones completas sin afectar mayormente a los invasores por el intercambio de cepas patógenas, pero al mismo tiempo el invasor que vio asegurada su permanencia en el nuevo mundo, contribuyó notablemente a la consolidación europea a las que se sumo la introducción del alcohol como mercancía aumentando sus efectos devastadores como una forma de epidemiología de la violencia y la dominación. Consolidando a lo largo de siglos de explotación la constitución de un capitalismo central versus un capitalismo periférico y la introducción del pensamiento eurocéntrico desmantelando el conjunto de creencias que poseían los pueblos originarios y que hoy a la luz de las investigaciones, comienzan a reincorporarse nuevamente bajo la crisis del paradigma dominante.

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Psychological aspects of cyber socialization among modern students

Aspectos psicológicos de la socialización cibernética entre estudiantes modernos

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ABSTRACT

The article presents the psychological analysis of cyber socialization process among modern students. The main sources of empirical research are the results of student subjective perception of activity diagnostics in the information and communication space of Internet and the analysis of data on the symptoms of information stress due to the active use of cyber-resources by students.

Keywords: personality cyber socialization, cyber socialization factors, the cyber socialization of modern students.

RESUMEN

El artículo presenta el análisis psicológico del proceso de socialización cibernética entre los estudiantes modernos. Las principales fuentes de investigación empírica son los resultados de la percepción subjetiva de los estudiantes de los diagnósticos de actividad en el espacio de información y comunicación de Internet y el análisis de datos sobre los síntomas de estrés de la información debido al uso activo de los recursos cibernéticos por parte de los estudiantes.

Palabras clave: personalidad, socialización cibernética, factores de socialización cibernética, socialización cibernética de estudiantes modernos.

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Introduction

During the period of socio-economic and spiritual-cultural changes in modern society, there is an intensive increase of Internet resource use in various spheres of human life. The problem of student youth modern generation interaction with the Internet environment is more relevant than ever. The students of higher educational institutions feel the need for the availability of the necessary virtual information and the provision of social connections online. The process of an individual socialization takes on a "cyber-active" character.

The specifics of the psychological and pedagogical aspects of the socialization process in the Internet space are described in studies of domestic and foreign scholars, such as E.P. Belinskaya, S.V. Bondarenko, I.A. Vasiliev, A.E. Voiskunsky, E.I. Goroshko, V.V. Gudimov, A.E. Zhichkina, L.Yu. Ivanov, T. Köhler, A.V. Minakov, A.V. Mudrik, V.A. Pleshakov, V.V. Nesterov, M.Yu. Sidorova, F.O. Smirnov, J. Suler, V. Frindte, N.I. Chudova, K.S. Young et al.

According to V.A. Pleshakov, for modern youth - the active users of social networks and other resources of the Internet environment - life activities are organized and cognitive abilities develop differently from the "cybersterile" representatives of the population, they perceive the world around them differently. It is not only about the skills of modern information and communication technologies and computer equipment mastering, but also about the changes of the conceptual field and diverse representations, and world outlook in the fundamental spiritual and cultural structures [Pleshakov, 2012].

The definition of "cyber socialization" (virtual computer socialization) was first introduced in 2005 by the Russian scientist, the candidate of pedagogical sciences, professor V.A. Pleshakov from FSBEI HE "MPGU". He defines "cybersocialization" as a local process of qualitative changes in the personality structure that occurs as the result of a person's socialization in cyberspace, a virtual socializing Internet environment, that is, in the process of its resource use and the communication with virtual socialization agents that a person encounters on the global Internet (first of all, in the process of correspondence by e-mail, in forums, in chat rooms, blogs, newsgroups and online games).

Currently, the definition of "personality cyber socialization" is being refined as follows (from the English Cyber - associated with computer and digital technologies, in particular, with the global Internet, the prefix that is used referring to various electronic and/or network resources, information, objects, events when the thing is about computer technology + socialization) - the socialization of personality in cyberspace as the process of qualitative changes in the structure of personality self-awareness and the need-motivational sphere of individual occurring under the influence and as the result of human use of modern information and communication, digital and computer technology in the context of learning and reproduction of culture within the framework of the personal life activity [Pleshakov 2005].

As an alternative term in foreign psychology, they use the concept of "virtual socialization". N. Saleem, considers this phenomenon as the factor in the transformation of modern man consciousness [Saleem, 2016]. In the studies of American scholars, the process of cyber socialization is analyzed exclusively from a positive position and its negative influence on the personality is refuted [Horrigan, 2006).

The theory of human cyber socialization is based on the principles of an integrative approach within the framework of the concepts of pedagogy and personality psychology (psycho-age ontology), based on the leading positions of scientific schools: "Social education in the context of socialization" (A.V. Mudrik), "Person-oriented professional education" (V.A. Slastenin), "Phenomenology of personality development and existence" (V.S. Mukhina), "Psycho flexibility of personality in education" (E.A. Levanova).

The cyberontological concept of personality and modern person life development is called upon to justify the potential of socializing, training and educational opportunities of information and communication technology application based on sociocultural, age, gender, ethnic-confessional, personal and individual characteristics of a person [Pleshakov, 2010].

Applied branches of cyber psychology and media pedagogy are developing rapidly, and combine the research methodology, theory and practice of social Internet service types, methods and principle use for personal development [Voiskounsky, 2013).

Today, no one is surprised by the active use of the following terms and phrases: "cyber attack", "cyber security", "cyber sport", "cyber threat", "e-democracy", "cyber crime", "cyber terrorism", "electronic journal", "cyber economics", "cyberspace" and other similar neologisms not only in speech of scientists, journalists, politicians, businessmen, but also in the everyday communication of people.

Foreign researchers describe the positive impact of cyber socialization on the communicative development of people. Due to the Internet space, social connections have no time and territorial restrictions. In addition, the Internet environment allows people with disabilities to use its resources for work and communication [Howe

2008).

The factors of cyber socialization can be represented on the basis of the classification of general socialization factors by A.V. Mudrik, who identified megafactors, macro factors, mesofactors, and microfactors of the social environment that influence the development of personality. Based on this classification V.A. Pleshakov identifies the factors of cyber socialization of personality. He defines cyberspace, the global Internet and cellular communication as megafactors. The macro factors are represented by the national domain zone, the mail services of the Internet environment, social networks of the Internet environment, Internet portals and sites, the search engines of the Internet environment, file-sharing networks, online advertising, the blogosphere, and massive multiplayer online games.

V.A. Pleshakov relates wiki projects and Internet dictionaries, Internet television and Internet radio, IP telephony and video calls via computer networks and cellular communications, Internet forums as a space for cyber-communication with its specific characteristics, instant messaging and chat rooms, Internet-stores, online auctions and electronic payment systems, computer (and/or console) games to the mesofactors of cyber socialization.

V.A. Pleshakov singles out the software for personal computer equipment and cellular (mobile) telephones, a personal cyberspace zone, and game characters in a computer game as the microfactors of cyber socialization.

According to V.A. Pleshakov, the components of the personality cyber socialization model in the modern information society, represent a person:

1) as an object of cyber socialization (the impact of cyberspace on livelihoods);

2) as a subject of cyber socialization (meeting the needs in cyberspace);

3) as a victim of cyber socialization (negative consequences);

4) as a victim of cyber socialization unfavorable conditions (the dangers of cyberspace and their sources).

Conditions, materials and methods of research

An empirical study of students' subjective perception of activities in the information and communication Internet space was carried out in the Stary Oskol branch of Belgorod State National Research University. The respondents were 112 full-time bachelors of the full-time education at pedagogical faculty (PF) and 86 students of the Faculty of Economics and Management (FEM), 198 respondents in total. The age of the empirical study participants was 19-22 years old, of which 84 were boys and 114 were girls.

Students' subjective perception of activities in the information and communication Internet space was determined using the questionnaire that included questions about the attitude to the means of cyber environment, the assessment of the usefulness and effectiveness of cyberspace resources, the presence of skills to interact with the means of cyber environment, the time of information and communication resource application, as well as about problematic aspects and negative consequences from interaction with information and communication technologies, about the changes in cultural, educational and leisure aspects of respondents' lives. Based on the analysis of the answers, the conclusions were drawn about the specifics of the cyber socialization of bachelor students and their use of cyberspace resources in the context of their professional training.

Results and Discussion

The vast majority (96% of respondents) gave an affirmative answer to the question of whether they are looking for information to study via the Internet. Only 4% of respondents admitted that they visit the library for this purpose. Perhaps this result is closely related to the following question: "Have you been an active Internet user for more than 5 years?". 72% of respondents answered affirmatively to this question, which may indicate the priority of this type of information.

The analysis of the results showed that when the respondents enter the network, they use entertainment resources (42%), and educational systems (87%); 39% of students turn to news portals (Figure 1).

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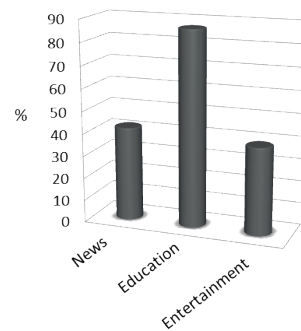
Fig. 1. The use of portals by students in Internet sources

These results indicate that the bulk of students is interested in educational information through cyberspace and use online resources for training actively. Entertainment and news portals are less interested in students. At the same time, among entertainment, respondents are focused on online games, and in the news feed they look at reference information on exchange rates and weather.

The negative consequences of interaction with the cyber environment can be ascertained by the presence of symptoms of information stress (sleep disturbances, increased fatigue, headaches, concentration difficulty, increased distractibility, the problems of perception and memory). To do this, we used the information stress scale of the main types of stress measuring method "Stress-FIE" by E.S. Ivanova (2018). (Kor,, 2019) We instructed students preliminary to conduct self-tests using the specified methodology, asked them to fill out a test form immediately after the sessions on the Internet or their usual mode of communication in social networks and instant messengers. (Martínez-Alcalá, 2018). Diagnostic results are presented in Figure 2.
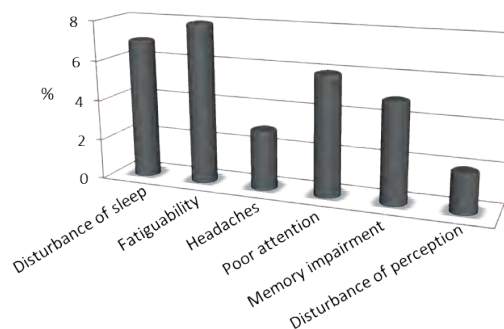
Fig. 2. Information stress symptoms among students

The figure shows that 7% of student experience sleep disturbance after active work on the Internet, 8% noted increased fatigue, and 3% of student experience headaches after communication sessions and the work with Internet resources. These symptoms are psychophysiological in nature. Cognitive problems are revealed: 6% - the violation of consciousness concentration and distraction (inattention), 5% - the violation of memorization processes, 2% - the violation of perception processes.

Conclusions

Thus, the results of the empirical study of the cyber socialization among modern student youth have shown that bachelor students actively use online resources for training. They are easily guided in a variety of cyber-environment tools and turn mainly to educational portals to receive educational information.

A small number of respondents revealed negative consequences of cyberspace active use. These students were given recommendations to optimize the process of interaction with the cyber environment and the mode of Internet resource use.

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Understanding the concept of fractions among mathematics trainee teachers*

Comprender el concepto de fracciones entre profesores en prácticas de matemáticas

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ABSTRACT

Students seem to have difficulty in fractions is an evidence of poor understanding or misconception. Understanding the concept of fraction is important for students to perform the procedure algorithm. Since teachers are the first-hand person by which students learn formal mathematics in our country, it is very important for teachers to identify the understanding of concepts and misconceptions about fractions to further improve conceptual understanding and overcome misunderstandings of the concept. Therefore, a study aimed to assess trainee teachers' levels of understanding in fundamental fraction knowledge was conducted. The participants in this study consisted of 23 trainee teachers that enrolled in a 4-years teacher education program in Mathematics major at Raja Melewar Teachers' Training Institute, Seremban. The instrument used in this study is Incorporating Fraction Knowledge Test, adapted from Chelsea Diagnostic Mathematics Tests. The findings show that the level of understanding of fraction among trainee teachers is at a moderate level. This implicated that there is a need for elevating trainee teachers' knowledge in fraction.

Keywords: fraction, trainee teachers, level of understanding.

RESUMEN

Los estudiantes parecen tener dificultades en las fracciones es una evidencia de una comprensión pobre o un concepto erróneo. Comprender el concepto de fracción es importante para que los estudiantes realicen el algoritmo de procedimiento. Dado que los maestros son la persona de primera mano por la cual los estudiantes aprenden matemáticas formales en nuestro país, es muy importante que los maestros identifiquen la comprensión de conceptos y conceptos erróneos sobre fracciones para mejorar aún más la comprensión conceptual y superar los malentendidos del concepto. Por lo tanto, se realizó un estudio destinado a evaluar los niveles de comprensión de los maestros en formación en el conocimiento de la fracción fundamental. Los participantes en este estudio consistieron en 23 maestros en formación que se inscribieron en un programa de educación docente de 4 años en la especialidad de Matemáticas en el Instituto de Capacitación de Maestros Raja Melewar, Seremban. El instrumento utilizado en este estudio es Incorporando Fraction Knowledge Test, adaptado de Chelsea Diagnostic Mathematics Tests. Los resultados muestran que el nivel de comprensión de la fracción entre los profesores en formación está en un nivel moderado. Esto implicaba que existe la necesidad de elevar el conocimiento de los profesores en prácticas en fracción.

Palabras clave: fracción, docentes en formación, nivel de comprensión.

INTRODUCTION

Fraction plays an important role in mathematics subject in primary school syllabus in Malaysia. Fraction is one of the topics in the Kurikulum Standard Sekolah Rendah (KSSR) syllabus taught to the students from Year 1 to Year 6. Fraction is a topic that needs to be mastered before learning ratios, proportions, decimals and percentages. Somehow, fraction is known as a critical component in mathematics subject (Rosli, Han, Capraro, & Capraro, 2013). Tests conducted by The National Assessment of Educational Progress (NAEP) against students show consistent results where students have a poor understanding of the concept of fractions (Sowder & Wearne, 2006). Melissa DeWolf et al. (2015) stated that students appear to have difficulty in fractions is an evidence of poor understanding or misconception. Understanding the concept of fraction is important for students to perform the procedure algorithm. Kerslake (1986) in his study stated that students often perform calculations without knowing the reason.

Understanding fractions concept occurs when students are able to relate the concepts and procedures as well as the relationship between words. In fact, students can develop an understanding of the concepts when they can make the relationship between the concepts and procedures (Fadzilah, 2012; National Research Council (NRC), 2001; Wong & Evans, 2007). According to NCTM (2000) all students should learn mathematical content and the process meaningfully with understanding.

It is known that teachers are the first-hand person by which students learn formal mathematics in our country, therefore teachers must be effective (Amran, Rahman & Surat 2018). According to Schoenfeld (2002) and Shulman (1986) a teacher must hold a profound understanding of mathematics that they teach. This statement was also supported by Baek et al. (2016) that to be effective, teachers have to understand the mathematical content of fractions other than computational procedures such as developing their pictorial representation for fraction and many others. Therefore, it is very important for teachers to identify the understanding of concepts and misconceptions about fractions to further improve conceptual understanding and overcome misunderstandings of the concept. Zhou et al. (2006) in his research, discovered that Chinese teachers achieved much better on the content knowledge of fraction in terms of concepts, computations and word problems and this is proven by the results of their student mathematics achievement. We are not going to discuss about Chinese teacher, but instead, we are focusing on pre-service teachers (trainee teachers) because previous research has consistently revealed that pre-service teachers were weak in their knowledge of fractions (Cramer, Post & del Mas, 2002; Davis & Thipkong, 1991; Tirosh, 2000). Chinnapan (2000) said that these trainee teachers having problems in explaining fractions to students and why the procedures work. This is because according to Becker and Lin (2005) even though the trainee teachers have a correct answer but they failed to carry out the procedures or strategies in the approved manner.

As a matter of fact, Marchionda (2006) reported that it is a teacher's job to be able to analyze (Nurshahira Alwani & Siti Mistima, 2016) these invented strategies to see where student's misconceptions lies (Halim, Yong, & Meerah, 2014) and to also determine the validity of the strategy. The students also may have a correct answer, but his method may not be correct. For that, a teacher should be able to understand the concept well enough to be able to explain to the students in various procedures (Mohankathan, Rosli, & Zakaria, 2019). The latest research was conducted by Baek et al. (2016) stated that trainee teachers are having difficulties in understanding fractions concepts and operations and this is leading to the misconception.

From all of the above, it is understood that a poor performance of trainee teachers at fraction can cause a serious problem to the students at school later on because they will be teaching mathematics in primary schools. It is very important that trainee teachers are equipped with the level of knowledge that meets the standards for their future quality and globally competed students (Mazlini & Effandi, 2012). Even though researchers have documented that trainee teachers are weak in their knowledge of fractions, little is known about trainee teachers' knowledge of fractions here in Malaysia. There are 27 campuses of Teachers' Training Institute producing over 1500 trainee teachers every year. It is essentially a significant issue and should be addressed in this research. Therefore, this study aimed to assess trainee teachers' fundamental fraction knowledge. The following questions directed the flow of this study:

> 1. How do trainee teachers perform in fractional mathematics knowledge according to the levels of understanding?
>
> 2. Do the trainee teachers perform equally between male and female in fractional knowledge according to the levels of understanding?
>
> 3. Do the trainee teachers that have undergone practical experience perform better than trainee teachers that have not undergone practical experience in fractional knowledge according to the levels of understanding?

METHODOLOGY

Participants

This study used a quantitative approach using test to collect data. All the participants were chosen using purposive random sampling technique. Participants consisted of 23 trainee teachers enrolled in a 4-years teacher education program in Matematics major at Raja Melewar Teachers' Training Institute, Seremban. These trainee teachers will require to take 5 credit hours in mathematics education, 35 professional education courses, and six months of practical at school (in a 3 phase) before entering primary school to teach mathematics. The participant details are as below:

Table 1. Participants involve in the research

Gender	Practical Experienced	No Practical Experience	Total
Male	6	4	10
Female	8	5	13
Total	14	9	23

Instruments

The instrument that used in this study is Incorporating Fraction Knowledge Test. It was a test of fraction concepts adapted from Chelsea Diagnostic Mathematics Tests (Kathleen Hart et al, 1985). The test consisted of 29 items and was specifically designed to measure the level of understanding in fraction knowledge. The instrument was then verified by two qualified Mathematics lecturer before administered to the participants. No items were eliminated. The criterions for Level of Understanding were modified since the participants are trainee teachers and the test level is for the primary school students. The reliability of the test was considered appropriate since, in the diagnostics test, the items are designed to be of different levels of difficulty and to test different aspects of the concept area. The test was also being used by the previous researcher twice with a large number of samples and the results are very consistent. This suggests that the test is reliable measures.

The areas covered in the test are related to concepts (meaning of fraction), equivalent fractions, ordering unit of fractions and addition, subtraction, multiplication and division of fraction. Item posed in the test such as "a, b and c are positive whole numbers. is less than when ..", "5 eggs in a box of 12 are found to be cracked. What fraction of the box of eggs is not cracked?", Fill in the missing number cased: .."

An instruction was given by researcher before the test was administered. Participants were given one hour to finish the test and were asked to show their work on the space provided in each item. General instructions for marking the test were given by the Chelsea Mathematics Diagnostic Test. There are certain codes given for marking the test. These codes can be used in future research for identifying common errors in fractions. There are several items that present certain levels of understanding. After all items were marked, researcher will then assign the students in each level of understanding. Percentage of participants were scored for each level. Below is the overview of the formulation of levels of understanding for all the items given in the test:

Table 2. Level of Understanding in Fraction Knowledge

Criterion	Level	Description
All correct of items 4(a), 4(b), 5(a), 5(b), 5(c), 7(b), 9(a), 9(c), 14, 16(a)	1	The meaning of fraction, seen as part of a whole, no equivalence needed. Equivalent fractions obtained by doubling. Addition of fractions with the same denominator
All correct of items 8, 9(d), 9(e), 10(a), 17, 19, 20, 21	2	Equivalent fractions not obtained by doubling. Using equivalence to name parts, with familiar fractions or when diagram provided. Ordering unit fractions.
All correct of items 10(b), 15, 16(b)	3	Questions where more than one operation is required; example: equivalence followed by addition or subtraction.
All correct of items 22, 23, 24, 26(a), 27	4	Division and multiplication of fractions. Generalisation.

RESULTS AND DISCUSSION

Trainee teachers' Levels of Understanding in Fraction Knowledge

Table 3. Levels of understanding achieved by trainee teachers

Level	Number of Respondents	Percentage
Level 1	21	91.3
Level 2	13	56.5
Level 3	16	69.6
Level 4	5	21.7

Table 3 shows the percentage of trainee teachers achieved according to each level of understanding. The highest percentage trainee teachers achieve is at Level 1 that is 91.3%. Only 21.7% of trainee teachers were able to

achieved Level 4. This shows that the students are poor at generalization and have a low understanding when involving multiplication and division of fraction. Results also show that 56.5% of trainee teachers achieved at Level 2 which is lower if compares with Level 3 that is 69.6%. There are certain studies shows that trainee teachers always difficulty in understanding division of fraction because they font have ample knowledge about it (Unlu & Ertekin, 2012). Leung and Carbone (2013) stated that there is an inconsistency between trainee teachers' level of knowledge about fraction division and their actual knowledge.

Trainee teachers Level of Understanding in Fraction Knowledge between male and female

Table 4. Trainee teachers gender comparison achieved at Level 1

Level 1	Number of Respondents	Percentage
Male	10	100
Female	11	84.6

Table 5. Trainee teachers gender comparison achieved at Level 2

Level 2	Number of Respondents	Percentage
Male	6	60
Female	7	53.8

Table 6. Trainee teachers gender comparison achieved at Level 3

Level 3	Number of Respondents	Percentage
Male	8	80
Female	8	61.5

Table 7. Trainee teachers gender comparison achieved at Level 4

Level 4	Number of Respondents	Percentage
Male	3	30
Female	2	15.38

Table 4 shows the percentage achieved according to Level 1 among male and female trainee teachers. Female trainee teachers scored 15.4% lower than male trainee teachers. All male trainee teachers have answered all items correctly. 2 females' trainees' teacher have wrongly answer one question on the addition of fraction with the same denominator.

Percentage achieved according to Level 2 among male and female trainee teachers in Table 5 shows that male trainee teachers' percentage is the highest that is 60% compare to female trainee teachers scored 53.8%. The results show that some of the trainee teachers still having difficulties in understanding equivalent fraction and its ordering units. Gabriel et al. (2013) agree that most students have problems with equivalent fractions were not understood by the majority of children. This maybe because trainee teacher's mathematical knowledge is poor. This statement is supported by results in Turnuklu and Yesildere (2007) research that stated trainee teachers in their research have insufficient mathematical knowledge.

Table 6 shows that at Level 3 male trainee teachers' percentage is the highest that is 80% compare to female trainee teachers scored 61.5%. The female trainee teachers show that they have a poor understanding when it involves questions more than one operation. Male trainee teacher's percentage again is the highest that is 30% compare to female trainee teachers scored 15.38% at Level 4 as shown in Table 7. However, both gender achieved poorly in this level. Only five respondents were getting all five items correctly. As mention earlier, both having difficulties in questions that require them to generalize fraction.

Overall, this study shows that male trainee teachers achieved highly in each level compared to female trainee teachers. This contradicts with recent research stated that female does better than male in mathematics. In Bezina (2010) research, shows that female mathematics achievement is higher than male. There also research found that there is actually no gap among genders in mathematics. In fact, Hyde et al (2008) in his studies prove that there is no difference between male and female in mathematics performance. As a conclusion, we can say that maybe there are other factors that influence this to happen as according to Segal (2008) understanding or performance are swayed by cognitive as well as non-cognitive abilities such as motivation, effort and strive.

Trainee teachers Level of Understanding in Fraction Knowledge between practical experienced (PE) and no practical experience (NPE).

Table 8. Trainee teachers practical experience comparison achieved at Level 1

Level 1	Number of Respondents	Percentage
PE	14	100
NPE	7	77.7

Table 9. Trainee teachers practical experience comparison achieved at Level 2

Level 2	Number of Respondents	Percentage
PE	8	57.1
NPE	5	55.5

Table 10. Trainee teachers practical experience comparison achieved at Level 3

Level 3	Number of Respondents	Percentage
PE	10	71.4
NPE	6	66.7

Table 11. Trainee teachers practical experience comparison achieved at Level 4

Level 4	Number of Respondents	Percentage
PE	3	21.4
NPE	2	22.2

Table 8 shows the percentage achieved according to Level 1 among PE and NPE trainee teachers. 100 % of PE trainee teachers achieved Level 1 compared to NPE trainee teachers. All PE trainee teachers have answered all 10 items correctly in the Level 1. At Level 2 as shown in Table 9, 57.1 % of PE scored highest than NPE where only 55.5% NPE able to achieve that level. Table 10 shows that at Level 3 PE trainee teachers' percentage is the highest that is 71.4% of them compared to 66.7 of NPE trainee teachers. However, at Level 4, 22.2 % of NPE trainee teachers achieved that level compared to only 21.4% of PE as shown in Table 11.

Overall, this study shows that practically experienced trainee teachers achieved highly in each level except level 4 compared to no practical experience trainee teachers. This is because according to Shelby (2015) experienced teacher has this reasoning approach that students at school might use. Bayoud (2011) also stated that there is a significance difference between an experienced teacher and trainee teachers in all fraction operations. Trainee teachers that have gone for six months practical at school can be considered as "experienced trainee teachers" compare to trainee teachers that have not gone for practical at school. This "experienced trainee teachers" might have found quite a number of strategies to guide students at the school, thus they perform better in this test. Lin (2017) also supported that experienced teacher has more content knowledge compare to trainee teachers.

CONCLUSION

Based on these findings it can be concluded that the level of understanding of fraction among trainee teachers is at a moderate level. The study also reported that trainee teacher has difficulty in multiplication and division of fraction. Moreover, the results also showed that they have problems in ordering units of fraction. This implicated that there is a need for elevating trainee teachers in fraction knowledge. Therefore, mathematics department at teaching institute should create more pedagogical activities that have sufficient knowledge of basic concept such as fraction. The limitation of this study is the sample size. Researcher only used the respondents that enrolled in Raja Melewar Campus. If same research is conducted through all 27 campuses, and the results are the same, this will enhance the validity of the results

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The existential basis of consciousness: to the analysis of epistemological limits of symbolic description of the consciousness functions

La base existencial de la conciencia: al análisis de los límites epistemológicos de la descripción simbólica de las funciones de la conciencia

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ABSTRACT

The purpose of the study is to establish the epistemological limits of the symbolic description of the consciousness functions. As a result of the study, the author comes to the conclusion that consciousness cannot be explained in computational terms, as there is something in its activity that goes beyond purely algorithmic actions. This is due to the small resource of human memory and there is no clearly fixed, clear purpose. In a situation of such uncertainty, it is impossible to build a clear algorithm of actions in advance, so a person is "doomed" to be a free and creative being. According to the author, consciousness is always opened through activity when it correlates behavior with space-time, cultural contexts, therefore, the existential basis of consciousness is revealed through its manifestation in the "world of ideas", in the "world of values", as well as in the "world of activity", which helps to overcome the boundaries between these worlds in a single integrity of being.

Keywords: consciousness, artificial intelligence, meme, being, culture, behaviorism, functionalism

RESUMEN

El propósito del estudio es establecer los límites epistemológicos de la descripción simbólica de las funciones de conciencia. Como resultado del estudio, el autor llega a la conclusión de que la conciencia no puede explicarse en términos computacionales, ya que hay algo en su actividad que va más allá de las acciones puramente algorítmicas. Esto se debe al pequeño recurso de la memoria humana y no existe un propósito claro y fijo. En una situación de tanta incertidumbre, es imposible construir un algoritmo claro de acciones por adelantado, por lo que una persona está "condenada" a ser un ser libre y creativo. Según el autor, la conciencia siempre se abre a través de la actividad cuando correlaciona el comportamiento con el espacio-tiempo, los contextos culturales, por lo tanto, la base existencial de la conciencia se revela a través de su manifestación en el "mundo de las ideas", en el "mundo de los valores", así como en el "mundo de la actividad", que ayuda a superar los límites entre estos mundos en una sola integridad de ser.

Palabras clave: conciencia, inteligencia artificial, meme, ser, cultura, conductismo, funcionalismo

Introduction

Modern philosophy of consciousness cannot be imagined in isolation from cybernetics, especially from research in the field of AI. The reason for this convergence is, first of all, methodological prerequisites. For the methodology of classical science an exemplary example of rational thinking is the logical conclusion. The emergence of a new "symbolic" logic in the late XIX century is based on the idea that the rules of such a conclusion can be set purely symbolic (formal, syntactic) means. This led to the idea that one could "think" of all cognitive operations in terms of symbol manipulation. One of the embodiments of this idea is the use of concepts such as "language of thought". According to the thought of Ya. Hintikka, this ideology of symbolic logic helped to inspire the development of computer technology (Hintikka, 2011: p. 10).

Computers do perform, in electronic or mechanical terms, operations that were previously performed only by consciously directed actions of the human mind. AI technology is trying to reproduce cognitive operations with the help of computer programs. However, it was found that actual reasoning could not be fully represented by purely symbolic means. For example, it is possible to present all truths of elementary arithmetic as logical consequences of the corresponding logical axioms, but it is impossible to program the computer so that it consistently, one after another, deduced all these consequences. Therefore, it is necessary to investigate the basic epistemological limits of the paradigm of thinking as a symbolic process, which is a purely philosophical task, as these limitations are conceptual and methodological (Abuzjarova, 2018: 21).

Another question becomes relevant: how legitimate is the very comparison of the human mind with a digital computer, consciousness with a computer program? The comparison of consciousness with a computer program leads to the emergence of an erroneous hypothesis based on logical substitution, that the peculiarity of the brain, which serves as a conductor of consciousness, is its computational nature. Tens of billions of neurons in the brain are able to implement complex algorithms, the totality of which can be called consciousness. The program involves the implementation of an algorithm for formal character processing, without taking into account their possible interpretation. Classic computers work with such syntactic programs. However, the problem is that NI does not work as a program at all. If I say, "She is beautiful like a flower", it does not mean that I have to study botany to understand her better. The same logical substitution lies in the hypothesis of the "computational nature of consciousness".

However, the idea of the computational nature of consciousness has a large number of supporters. It is reflected in the concepts of functionalism: the functionalism of the Turing machine (Putnam, 1960), information-procedural AI theory (Dennett, 1991), the functionalism of the "language of thought" (Fodor, 1975), neurophysiological functionalism (Churchland, 2005), etc. (See table 1)

Table 1. The idea of consciousness and mental processes in functionalism

The concepts of functionalism	Basic ideas
The functionalism of the Turing machine (Putnam)	Mental states of consciousness are neutral functional states similar to the logical states of the Turing machine. The same mental state can be realized on different material carriers. In the study of mental states of consciousness, a relational methodology is used to study the causal relations of logical states in their interaction with physical and behavioral states.
Information-procedural AI theory (Dennett)	The optimal language for describing the mental activity of consciousness is neutral computer language, not mental or physical. The ratio of consciousness to the brain is compared with the ratio of the "soft" computer program to its "hard" structure. Consciousness is reduced to cognitive information processes. Subjective experiences of consciousness ("qualia") are excluded from its theoretical description.
Functionalism of the "language of thought" (Fodor)	Mental processes of consciousness are carried out through mental representations, which should be considered as intermediaries, which have all the key characteristics of language. There are different forms of physical embodiment of mental representations. In living organisms, they are represented by neurophysiological structures of the brain.

Neurophysiological functionalism (Churchland)	Consciousness is represented by countless information systems and operations that were created by billions of years of evolution, they are difficult to simulate. The key to understanding consciousness should be sought in the study of the dynamic properties of biological neural networks with high-frequency physical architecture.

H. Dreyfus was the first who subjected to detailed criticism the comparison of consciousness with artificial intelligence (computer program). In his work "What computers cannot do" the philosopher concludes that algorithmic modeling of human needs, motives and goal-setting activities is not feasible (Dreyfus, 1975). A great contribution to the disclosure of this problem was made by John Lucas, stating "Godel's argument" against artificial intelligence. Subsequently this argument was updated and significantly increased by R. Penrose, arguing that conscious brain activity is fundamentally impossible to explain in computational terms (Penrose, 2003: p. 7). In the ability of man to know and in his conscious activity as a whole there is something beyond purely algorithmic actions (See table 2).

Table 2. Criticism of artificial intelligence

The position of AI supporters	Criticism of the AI supporters position
The brain works like a computer, and the mind works like software. Any activity can be mathematically formalized in the form of rules and laws.	Reasoning and intellectual behavior of a person depend primarily on unconscious instincts that are opposed to conscious manipulation of symbolic information. The unconscious inherent in man cannot be embodied in a machine using formal rules (H. Dreyfus).
The brain is a kind of "machine" whose functions can be described quite clearly and unambiguously in the form of a final instruction.	It is problematic to write a clear, unambiguous, final instruction for AI, based on which it would be possible to simulate the activity of the human psyche. Gödel's theorem proves that the functions of consciousness are not computable algorithmically. This gives the superiority of consciousness over the machine, because due to this feature it is able to solve problems that are insoluble for algorithmic systems (J. Lucas.)
Mind performs discrete calculations (in the form of algorithmic rules), therefore, it is a formal system that functions similarly to AI.	Gödel's theorem proves that not only mathematical conclusions, but all the processes associated with the work of the brain, consciousness and thinking, cannot be fully formalized and "quantifiable". Human consciousness is a deterministic system without being algorithmic. Such deterministic and at the same time non-algorithmic processes can play a role in the quantum mechanical wave reduction function and can be used by the brain (R. Penrose).

Methods

We consider phenomenological, constructivist and informational approaches to be methodologically productive in the study of consciousness. Constructivist approach allows expanding the boundaries of the phenomenon of consciousness, overcoming its "specifically human" characteristics. It is possible to postulate the presence of a certain "consciousness in general", reflecting in its ideal plan a much larger totality of being than only human consciousness, but everywhere realizing itself in constructive activity (Bogdanova, 2016). The constructivist approach focuses attention on the activity side of consciousness, which in its ideal plan leads to the supervent conjugation of the basic structures of being. Phenomenological approach allows us to explore the value-semantic and activity-volitional structure of subjective reality (consciousness) and the ability to implement all this in the information interaction through a sign-symbolic code. Information campaign allows discovering the genetic prerequisites of consciousness (information, information interaction), which should be considered as an attribute property of existence.

Results

The question of "smart machines" is largely mythologized in modern culture. Those who work directly in the field of AI, robotics (e.g., H. Ishiguro) are especially clearly aware of this because neither they nor other scientists or philosophers have not defined the goals and prospects for further research in this area. "It is impossible not to notice, – notes Yu. Yu. Petrunin, – that even the most sophisticated and effective program, skillfully imitating human intellectual activity, for the person, understanding mechanisms of its work, loses all visibility of "reasonableness" (Petrunin, 1994: p. 32).

For those who in their research is on the methodological position of classical science, the question of "thinking" machine is relevant, because from the point of view of this methodology, consciousness is largely identical to thinking. The fact is that thinking is a very broad concept, so in the classical philosophical tradition, certainty

was achieved through additional clarifying concepts that characterize "thinking" – the concepts of "intelligence" and "mind". In relation to the intellectual manifestation of the intelligence is the action pattern, a manifestation of the mind – the action of new, not pre-specified way. The machine chooses from the already available options, but it is not able to synthesize a new method of action. For example, the choice of a word's meaning in a person is determined by the context of that or other situation, but the context itself cannot be built into the whole variety of meanings, therefore, the choice of context cannot be programmed to the machine. But the machine can be programmed with a goal to which it must strive, in addition, it should be borne in mind that the patterns of actions that can be stored in the memory of the machine, disproportionately more than can buy an individual in his life. Man is forced to resort to creativity at his own risk, largely due to lack of information. The machine has no such information deficit. If there is a clear goal and defined "rules of the game" (because not only technology, but also culture is based on such principles), the greater chance of success in targeted activities has improved "intelligence" than the creative "mind". So to the question "Can a computer think?" one can answer in the affirmative if thinking means following the defining rules.

The problem of the comparison of consciousness with the program

The assumption of creating artificial intelligence, which is not inferior to the human mind, leads to the idea that consciousness is not a material property of man. But what is it in this case? The method of analytical philosophy, which is dominant in almost all modern concepts of the philosophy of consciousness, requires starting with the study of the vocabulary, through which we express the phenomena given in the experience. Language and its contexts is a socially guaranteed tool. However, the meaning of language expressions may also be closely related to neurophysiological states. For example, it can be recorded empirically that certain thoughts correspond to certain wave oscillations in the cerebral cortex, in which it is possible to distinguish alpha, beta, delta and tetra waves.

In this "cognitive behaviorism" philosophers rightly saw a strong simplification of real life and activities related to consciousness. Based on the experimental data of cognitive sciences, one can see a huge variety of rules, schemes, conventions, etc., used as an explanation of the observed patterns of human activity, including social life. All this shows that social cognitive process is primary in relation to individual acts of thinking. The mental is nothing but a stream of individual and social symbolic patterns created and managed by human agents in accordance with local norms and conventions. That is why D. Dennett comes to the idea that for a rational explanation of consciousness it is enough to turn to the analysis of culture. Solving the problem of explaining consciousness, Dennett applies the R. Dawkins' hypothesis of "memes". "Memes" are the fundamental units of culture. "Memes" are created, perceived, transmitted and "introduced" into the hereditary program of a person in the form of so-called "selfish genes" of the brain (Vasilyev,, 2009: p. 122). "Human consciousness itself is a huge complex of memes (or, more precisely, memo-effects in the brain)" (Dennett, 1991: p. 210). "Each "meme" is an algorithm, a cultural or behavioral simulation; therefore "meme" can be given a scientific formalized description in the form of a simple program. However, Dennett does not offer a clear procedure to identify and describe these "memes". In this case, "meme" is nothing more than another concept designed to explain the nature and functions of consciousness, but it does not have the status of a scientific fact, because it is not available for empirical fixation.

In his theoretical constructions, Dennett draws an analogy between the work of consciousness and a computer program, which brings his views closer to functionalism. Functionalism is based on relational methodology in the study of consciousness, without linking its characteristic properties with the nature of its carrier. The basic principle of functionalism on the multiple implementations of functions indicates the isomorphism of systems that may have different properties and structures, but perform the same functions. This means that the functions of mental states can be traced not only on the material of the brain, a computer or theoretically any conceivable artificial intelligent systems ("silicone brains") can be considered as their carrier with some degree of conditionality. It is not the material properties of the system and not the special "spirituality" of conscious processes, but the stable nature of the functional connection. In this approach, the binary oppositions of classical scientific rationality (mind-body, monism-dualism, and reductionism-non-reductionism) have no methodological meaning (Vinnik, 2010: p. 39). The comparison of consciousness with a computer program leads Dennett to the idea that the functional relations of psychological states of consciousness can be described in a neutral language, which is neither physicalist nor mentalist, although the functions of consciousness are associated with the work of physical structures.

The mechanism of thinking, whatever it is, must be meaningful. Understanding involves setting goals and objectives of thinking by the subject. In the Dennett's concept, the work of human consciousness is not different from the behavior of a complex robot. The main function of the psyche is to process information. The nervous system can be compared to an information network that is connected to the body through special nodes – sensors (or input devices) and effectors (or output devices). A sensor is any device that receives information from one environment and transmits it to another. In a computer, the role of input devices is performed by a keyboard, mouse, microphone, television camera, which translate external information into an electronic environment, where it is stored in the form of "bits".

However, in a computer there is a very clear boundary between the "outside" world and information channels, which cannot be said about a person. In humans, much of the information generated by its own structures, and the existence of the structures of the "external" world independent of them is always in question. On the basis of this representative of radical constructivism G. Roth defines the human brain as an autonomous and operationally closed system. The incoming information from the environment is translated into neurodynamic processes of the brain and thus already loses its original properties and characteristics. Receptors in the form of neural code transmit information to the brain, but it is completely modified. Only one hundred thousandth part of the brain activity is caused by the work of the senses, the rest of the brain activity is aimed at constructive activities carried out on the basis of their own information. Thus, the brain does not "reflect" the world, but constructs reality from "raw" data obtained from the senses and a large number of innate and acquired cognitive structures (Kezin, 2004: p. 14).

Such designs are not arbitrary; they are created according to criteria that are either innate or based on individual experience. Not only the process of transformation of information from the outside into neurodynamic processes is interesting and inexplicable, but also the transition of material processes of the brain into intangible states of consciousness. Dennett notes that if nerve impulses are to be regarded as the matter of consciousness, then the nervous system should resemble a telephone network without subscribers or a television network without spectators. A person used to believe that there should be a Central Agent, a Spectator, and Boss who accepts, transforms, evaluates information and uses it in his activities. Many people consider consciousness as a certain essence of such "Boss". Dennett believes that this approach is wrong, because it is impossible to separate the individual from his body, containing a large amount of coded information. Consequently, the brain cannot be considered as the host of the body, it is just one of the organs among many others. The functions of the brain can only be properly understood if you consider it not as a master, but as another rather restless servant working for the body (Dennett, 2004: p. 83-86).

However, Dennett calls to abandon the identification of the psyche not only with the brain, but also with the body as such. If a person's consciousness is like a program, and behind any program there is a programmer who determines its content, then who or what performs the role of the programmer of consciousness? Dennett argues that the programmer is Darwinian natural selection, which contributes to the formation of behavioral patterns, the implementation of which is conducive to survival and procreation. It is natural selection that establishes appropriate, "intelligent" behavior that helps to adapt to the conditions of the environment. Intelligent behavior is usually described with intentional idioms, in the language of mental, conscious states (Vasilyev,, 2009: p. 116). Significant for the body reactions to environmental stimuli are formed under the influence of natural selection and are fixed at the level of neural connections in the brain. Schemes of neural connections can be interpreted as a kind of programs that control the behavior of the body (Vasilyev, 2009: p. 119).

But in addition to genetically determined schemes human consciousness contains data of individual experience that a person receives, plunging into the socio-cultural environment. In this environment, the individual essence of consciousness also disappears, because it is completely dissolved in this environment, is derived from it. The appearance of the individual consciousness, the one Self, creates a natural language that connects the sketches of "texts" from the received sensory information. Human consciousness is formed as a result of the superposition of language and culture structures on the biological substrate (brain) through training and education (Yulina, 2011). Thus, according to Dennett, human consciousness is not only a product of natural selection, but also the result of socio-cultural construction. Consciousness seems to man something individual, unique, personal, because a person simply has no idea about all its components and its genesis (Dennett, 2004: p.158).

The Dennett's concept can be attributed to a kind of behaviorism. Consciousness consists of many information flows caused by physical mechanisms and culture. Information flows compete for access to the brain. Human behavior depends on what information flow will take over the function of control. There is no single control center in the subject, which would direct these flows in the right direction. Dennett has no evaluative consciousness, and no "qualia". He ignores those aspects of consciousness that are the most mysterious and in need of explanation. But even this is not the main problem of his theory, and that the activity of consciousness becomes programmed and meaningless. It is only the unconscious realization of cultural and evolutionary programs.

Conclusion

The intentionality of consciousness is impossible without understanding. It is necessary to use a dynamic approach to mental phenomena, considering them as attributes of samples of meaningful actions, unfolding in close connection with each other, which opens up opportunities for new models of explanation of the sequential development of events instead of the model of cause-and-effect relations, borrowed from classical physics. For example, many events can be understood if we take into account the need to follow conventions, goals, ideals. This is something like a compass needle, consistent with the local (and global) structures of the magnetic field. This deviation of the trajectory of movement can be called a "discursive turn" (R. Harre), the transition of the system

from the readiness to react less differentially to the readiness in the same situation to react more differentially, which marks the rejection of the principles of causality and opens up new opportunities for solving the problem of consciousness. Mental activity of consciousness is the manipulation of symbols in accordance with the rules, designed for certain purposes. If we want to determine the meaning of a particular behavior of the system or understand the purpose of some of its actions, we must know what rules the system followed in this case, to what purpose it sought. It should be noted that the target conditionality of search in humans is fundamentally non-algorithmic. People cannot search for a goal using a single algorithm. But when a person has a clear goal, he "finds" it; he will inevitably perceive it as a kind of reality, objectivity, truth, and not as a figment of his own imagination. Therefore, it can be assumed that successful work requires a clear goal. To move effectively towards the goal you need to work with the available information consistently and systematically, weed out the excess and leave the main thing, that is, in fact, to set goals. The psychologist V.P. Zinchenko believes that successful results in any kind of activity, where a person is involved, are possible only because of his freedom. "The existence of freedom in choosing and positing goals inevitably entails freedom in the choice of means and methods of achieving the result. The absence of any of these components or its rigid fixation transforms mental activity into something else, for example, into artificial intelligence" (Zinchenko, 2011: p. 191). We fully agree with that statement. AI frees a person from the routine "rational" functions to develop an algorithm of actions and sequence of tasks, providing NI with time and effort for the "creative" goal search. Thus, if we compare human consciousness with AI, we can find qualitative differences in the flow of information processes in consciousness and artificial intelligence (the differences are reflected in the table 3).

Table 3. Comparative analysis of consciousness and artificial intelligence

Parameter to compare	Consciousness	Artificial intelligence
The ability to store information and operate it in the presence of a specific task	Capable	capable
Feature of information processing	Parallel processing of huge amounts of information data in the structures of the brain	Linear information processing
The existence of "qualia"	Having "qualia"	No
The ability to synthesize a new way of acting based on the context of the situation	Capable to develop a new strategy	Selects from available pre-programmed options
The ability to understand the context of an expression (situation)	Captures the context and thinks within it (acts on it)	Does not capture the context as its selection cannot be programmed
Having a clear goal before the start of active actions	Active action can be taken without a clear objective	The goal is programmed and implemented in the actions of the system
Target search	Not implemented by a single algorithm	To be carried out by a single algorithm
Formalization of activities	It goes beyond the algorithmic rules, because the purpose of the activity is not always clearly expressed, the consciousness functions in conditions of lack of information	There is no shortage of information, a goal is clearly set, so there is the full formalization of activities
The ability to exercise freedom and creativity	Capable	Incapable

Orientation of consciousness to the purposes, ideal plans is the evidence that existence is much richer than the content of initial representations of consciousness, but implementation of this or that activity is impossible without these representations. To overcome this contradictory position, it is believed that consciousness from the very beginning is a social product. However, it can be assumed that the social nature of consciousness hides an even more large-scale and powerful source of its genesis and development. Public consciousness should be considered only as a private form of reflection of real life, which in its totality includes both society and nature as a whole. Therefore, for the formation of ideal plans of this real integral being, new permanent improving structures of consciousness, overcoming its individual and social forms, are required.

Consciousness opens up through activity when it relates behavior to spatial-temporal, cultural contexts. Thus consciousness and activity are a contradictory unity. "Consciousness" is not just an epithet used in relation to the concept of "activity", it is its essential property is included in the definition of activity. Although society, at first glance, always emphasizes the importance of consciousness, nevertheless, its real measures are directed to transformative activities. Social, mental and technical aspects of these activities represent the functional manifestations of a single in its existential basis of consciousness. Consciousness is present in the "world of ideas", concepts, meanings, scientific knowledge; and in the "world of values", emotions and meanings; and in the "world

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of images", representations, symbols and signs; as well as in the "world of activity" (projective and reproducing). As consciousness exists in each of these worlds, it possesses not only reflexive but also existential features. It solves certain essential problems in the structure of being, responds to its "calling", directs, according to V. I. Vernadsky, "unconscious aspirations of science and technology" and in general human activity to overcome the boundaries between these worlds in the unity of being (Vernadsky, 2012).

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Main directions of deepening the BRICS country partnership: based on a comparative analysis of national development strategies

Direcciones principales para profundizar la asociación de los países BRICS: basado en un análisis comparativo de las estrategias nacionales de desarrollo

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ABSTRACT

The article presents the data of a comparative analysis of national development strategies developed in the BRICS countries, which are considered from the angle of three guidelines for deepening the partnership - political, economic and humanitarian; considered the main comparative characteristics of the development of the BRICS countries, identified the most pressing issues of national socio-economic development. Proposals have been made to ensure the synchronization of the vectors of development of national economies, to increase the effectiveness of the BRICS countries on the world stage on the basis of respect for international law and the leading role of the UN, to deepen the humanitarian component of the partnership.

Keywords: BRICS countries partnership, national development strategies, BRICS Summit, politics, economics, the humanitarian sphere of partnership.

RESUMEN

El artículo presenta los datos de un análisis comparativo de las estrategias nacionales de desarrollo desarrolladas en los países BRICS, que se consideran desde el ángulo de tres pautas para profundizar la asociación: política, económica y humanitaria; consideró las principales características comparativas del desarrollo de los países BRICS, identificó los problemas más apremiantes del desarrollo socioeconómico nacional. Se han hecho propuestas para garantizar la sincronización de los vectores de desarrollo de las economías nacionales, para aumentar la eficacia de los países BRICS en el escenario mundial sobre la base del respeto al derecho internacional y el papel principal de la ONU, para profundizar el componente humanitario de la asociación.

Palabras clave: asociación de países BRICS, estrategias nacionales de desarrollo, cumbre BRICS, política, economía, esfera humanitaria de asociación.

Introduction

The main aim of cooperation of the BRICS states, as it is positioned in the Johannesburg Declaration [1], is to ensure peace, harmony, common development and prosperity. At the same time, the question of further strengthening cooperation is one of those that is on the agenda of almost every of the BRICS summits that were held. Symptomatic for the interaction of the BRICS states is that this non-formalized organization realizes its activities, seeking to find consensus and common points of concurrence of partnership in terms of the obligation to ensure the national interests and to improve the living standards of the participating countries.

Based on a comprehensive analysis of the national economy development strategies in the BRICS states, it has been substantiated that all of them are subordinated to the goal of enhancing the role and importance of positioning states in the world community; it is proven that the national economies of the BRICS states do not pursue integration goals, but at the same time develop the potential for deepening regional integration; it is proven that the formation of a consolidated position of the BRICS states within the framework of the Security Council and other UN organizations is the guarantor of the preservation of the dominance of international law and the preservation of the role of the UN Security Council.

Thus, the expansion of the strategic partnership of the BRICS is aimed at enhancing the well-being of peoples in the conditions of preserving peace, the establishment of a more equitable international order, the achievement of sustainable development and inclusive growth. At the same time, strengthening cooperation, as defined in the Johannesburg Declaration [1], should be implemented in three key areas - in the sphere of economy, peace and security, and humanitarian exchanges.

Overview of information sources, assessing the place of BRICS in the global community.

Most Western experts (Jim O'Neill (2001); Miskimmon, O'Loughlin and Rozeld, 2013; A. Svetlichny, 2017, etc.) view the BRICS group exclusively from the standpoint of a diplomatic platform that allows countries to produce a kind of "watch reconciliation" in terms of positioning in the international arena. Researchers point out that BRICS is not a formalized organization or partnership that is not formalized by strict contractual obligations, but this is precisely the potential of BRICS as a soft power for realizing agreed goals and solving strategically important tasks [2, 3]. At the same time, Western analysts emphasize that the BRICS countries cannot be a single actor, since there is no cementing basis for this to implement a truly new foreign policy strategy to increase their soft influence in the world, and they are focused on their own values and objectives.

Questions assessing the significance of the transition to a multipolar world community, reflected in international agreements and national development concepts of the BRICS countries, as well as the conditions for the realization of national interests in a polycentric world, which form a single political platform of the BRICS countries, are considered in the works of V.Perskaya, M.A. .Eskindarov [4,5].

The assessment of BRICS as a civilization unification of a new generation with a more pronounced manifestation of the historical trend of a shift in the center of civilizational progress to the East is explored in the works of V. A. Sadovnichy, Yu.V. Yakovets, A.A. Akayeva (2014), and also the place of BRICS in the geo-civilization space of the 21st century is determined, and a forecast of the dynamics of BRICS for the period up to 2050 is made on the basis of global models. The strategic priorities of development and partnership of the BRICS, enhancing its role in the development of an integral world civilization are justified. "[6]

The role of the international innovation activity of the BRICS countries and the degree of their involvement in the international innovation market as a factor influencing the overall level of competition of these economies, analyzing the innovative development of the BRICS countries and identifying the prerequisites and prospects for deepening their cooperation in this field affect the competitiveness of each country are considered in the work of EA Sidorova (2018). [7]

The purpose of this study.

The purpose of the study is to identify drivers for the development of mutual cooperation, allowing to strengthen the partnership of the BRICS countries, including in the field of economics, consolidated political positioning and humanitarian nature. The organization of the BRICS countries does not pursue the goal of integration, is not institutionally formalized, and therefore the partnership of countries is aimed at identifying common approaches and tasks that will ensure the continuity and sustainability of the development of national economies and the growth of welfare of the population.

The research methodology is based on general and special methods of cognition, on an empirical approach to identify the specifics of the modern development of economic partnership processes, on current and prospective analyzes and synthesis of materials of theoretical and practical nature. The main conclusions are verified by an imitation econometric model.

Discussion.

The BRICS partnership is a new approach to the development of international cooperation, which is fundamentally different from the existing global leadership of Western civilization. The interaction of the BRICS countries on the basis of preventing the imperial domination of the Anglo-American oligarchy, the unconditional preservation of the national sovereignty of countries and the diversity of cultures and mutual respect for the national identity of the population of each country all serve as a prototype for the formation of a new global political and economic world order [8].

To identify the effectiveness of the implementation of the national development strategies of the BRICS countries, it is advisable to present comparative statistical data for the period 2000-2016. (Tables 1 and 2).

Table 1 - GDP at current prices in billions of US dollars // GDP per capita in 2000-2016 (at current prices in US dollars)

Country	2000	2007	2008	2009	2010	2011	2012	2015	2016
Brazil	655 // 3.788	1.397 // 7.373	1.695 // 8.852	1.669 // 8.623	2.208 // 11.295	2.612 // 13.231	2.459 // 12.343	1.801 // 8.810	1.797 // 8.713
Russia	260 // 1.772	1.300 // 9.101	1.661 // 11.635	1.223 // 8.563	1.525 // 10.675	2.034 // 14.227	2.154 // 15.044	1.372 // 9.372	1.286 // 8.768
India	477 // 468	1.247 // 1.096	1.105 // 958	1.435 // 1.227	1.744 // 1.490	1.824 // 1.480	1.828 // 1.485	2.089 // 1.628	2.273 // 1.750
China	1.211 // 959	3.554 // 2.697	4.601 // 3.473	5.110 // 3.839	6.100 // 4.561	7.576 // 5.653	8.560 // 6.338	11.063 // 8.068	11.203 // 8.127
SouthAfrica	136 // 3.073	299 // 6.153	287 // 5.818	297 //5.944	375 // 7.389	417 // 8.086	396 // 7.564	318 // 5.775	295 // 5.276

Sources: BRICS Joint Statistical Publication 2017. - Beijing, China Statistics Press, 2017. - P. 48 - URL: http://nkibrics.ru/system/asset_publications/data/5ae1/a5fb/6272/6904/0013/0000/ original / BRICS_Joint_Statistical_Publication__2017.pdf? 1524737531 / (appeal date 08/22/2018); The World Factbook. - URL: https: //www.cia.gov/library/publications/the-world-factbook/geos... (contact date 08/22/2018).

Table 2 - GDP growth rates (% per year)

Country	2015	2016	2017 (assessment)	The Gini Index 2015-2017
Brazil	-3.8	-3.6	0.7	49.7
Russia	-2.8	-0.2	1.8	41.2
India	8,0	7.1	6.7	35.2 (2011)
China	6.9	6.7	6.8	46.2 - 46.5
SouthAfrica	-3.8	-3.6	0.7	62.5 (2013)

Sources: BRICS Joint Statistical Publication 2017. - Beijing, China Statistics Press, 2017. - P. 48 - URL: http://nkibrics.ru/system/asset_publications/data/5ae1/a5fb/6272/6904/0013/0000/ original / BRICS_Joint_Statistical_Publication__2017.pdf? 1524737531 / (appeal date 08/22/2018); The World Factbook. - URL: https: //www.cia.gov/library/publications/the-world-factbook/geos ..... (contact date 08/22/2018).

Graphically, the dynamics of changes in the GDP of the BRICS countries can be reflected in the following figure (Figure 1).
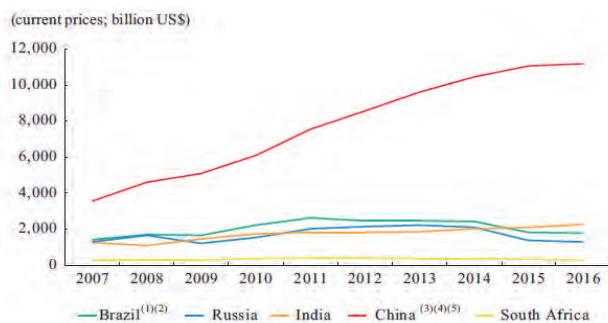
Figure 1 - Dynamics of changes in the GDP of the BRICS countries in 2007-2016 (billion dollars at current prices)

Source: BRICS Joint Statistical Publication 2017. - Beijing, China Statistics Press, 2017. - p. 56 - URL: http://nkibrics.ru/system/asset_publications/data/5ae1/a5fb/6272/6904/0013/0000/ original / BRICS_Joint_Statistical_Publication__2017.pdf? 1524737531 / (appeal date 08/22/2018).

Thus, there is a sharp increase in the GDP of China, and in terms of volume it is incomparable with any of the BRICS countries, but at a rate close to that of India. The GDP dynamics of Russia and Brazil, as evidenced by Figure 1, is similar, which is explained by the real economic policies of these countries, which have accepted the determinants of global regulation and have made their economies financially dependent on the global capital market. South Africa, with a good average GDP per capita, was able to increase GDP in the period 2000-2016 only 2.2 times, while Chine's GDP increase is almost 11 times, India about 6 times, Russia 5 times, Brazil about 3 times. It is also characterized that the disproportionality of household income is quite high in South Africa and Brazil, while in India the Gini index is like in the EU, although the GDP per capita among the BRICS countries is the lowest.

To characterize the national development of the BRICS countries, it is advisable to present data on the comparability of the consumer price index in 2000-2016 (table 3).

Table 3. Consumer price index in the BRICS countries (% of last year)

											(% change from the preceding year)
	2000	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Brazil	6.0	4.5	5.9	4.3	5.9	6.5	5.8	5.9	6.4	10.7	6.3
Russia	20.8	9.0	14.1	11.7	6.9	8.4	5.1	6.8	7.8	15.5	7.1
India [(1)]	4.0	6.5	8.4	10.6	12.1	9.1	8.9	11.0	6.5	5.7	5.0
China	0.4	4.8	5.9	-0.7	3.3	5.4	2.6	2.6	2.0	1.4	2.0
South Africa	5.3	7.1	11.5	7.1	4.3	5.0	5.6	5.7	6.1	4.6	6.4

Source: BRICS Joint Statistical Publication 2017. Beijing, China Statistics Press, 2017. - P. 64. - URL: http://nkibrics.ru/system/asset_publications/data/5ae1/a5fb/6272/6904/0013/0000 /original/BRICS_Joint_Statistical_Publication_2017.pdf?1524737531/ (appeal date 08/22/2018).

These data indicate that China and South Africa regulate domestic prices and stimulate business lending from the resources of the national monetary system. India is trying to combine the strategy of state regulation of the financial sector and its dependence on financial resources from the world market, focusing on the UK and the countries of the British Commonwealth, and Brazil and Russia are in the very paradigm when the national financial system is focused exclusively on targeting inflation, and sources of investment in the national economy should be external borrowed resources or foreign direct investment (FDI), as well as funds of business entities. Hence the investment in fixed assets in 2016-2017 in Russia did not exceed 21.1% [9]. For comparison, according to the calculated data of the same source, investment in fixed assets in 2016-2017 in China they accounted for 43.3%, in India - 27.5%, Brazil - 16.6%, South Africa - 16.6% [9].

During the study, the following national program documents of the BRICS countries were considered.

Within the framework of India's strategic priorities, the following programs were developed: Political participation as a great strategy [10] or geopolitical positioning in the world community. National Education Policy [11]. India's National Energy Security Strategy till 2047 [12].National Standardization Strategy.National infrastructure development strategy.Social reforms in the social model - caste politics. India is an innovation platform or innovation policy aimed at accelerated growth of the green economy, accelerated introduction and development according to national progressive standards [13].

In the PRC, China's 13th Five Year Plan: 2016–2020 [14] were analyzed. The initiative "One Belt - One Way" is an important substantive part of the bilateral intergovernmental relations of the PRC with practically all states of Eurasia. Outline of China's National Plan for Medium and Long-term Education Reform and Development (2010-2020)[15]. The 13th Five-Year Plan for the Development of Renewable Energy (2016-2020) [16]

For South Africa, the National Development Plan (NDP) until 2030. [17] As for the national strategies of Brazil, they were analyzed: Growth Strat-egy Brazil. Brazil´s Adjusted Growth Strategies for 2017. {18}. Programa de Investimento em Energia Elétrica (PIEE). Brazilian Power Investment Program (PIEE) . Plano Estratégico de Desenvolvimento do Centro-Oeste - PED-CO [19,20,21].

The analysis of Russia was based on the provisions of the Decree of the President of the Russian Federation "On the national goals and strategic objectives of the development of the Russian Federation for the period up to 2024." [22]

An analysis of the national development strategies of the BRICS countries allowed us to identify the strategic orientations of all the BRICS countries, which are positioned for the medium and long term. The table is compiled

according to the priority of the tasks designated by each country in various program and strategic documents.

Table 4 - Strategic goals and objectives identified in the program documents of the BRICS countries, starting from 2018

Brazil	Russia	India	China	South Africa
Recovery the environment	Demography	Political participation as a great strategy or geopolitical positioning in the world community	Innovation	Health and life expectancy
Reform in the field of employment and wage growth	Healthcare	National Education Policy	Coordination	Education and training system
Reforming the social and pension benefits	Education	India's National Energy Security Strategy up to 2047	Openness to open: 1. a new model of openness; 2. export due to crediting; 3. optimal financial openness; 4. development of market economy - from copying to domestic initiative.	Economic growth with a variety of forms of ownership
Education Reform - Permanent and Accessible	Housing and urban environment	National Standardization Strategy	Green growth and renewable energy	Safety and security, independence of judges, police
Gender equality of women and girls	Ecology	National Infrastructure Development Strategy	Inclusive development, including priority of education and its modernization	Elimination of the ideological heritage of apartheid, humanism and environmental sustainability
Availability of energy supply to all	Safe and high-quality roads	Social reforms in the social model - caste politics, gender equality of women and girls	Innovation	Effective public administration
Inclusive growth for all populations	Labor productivity and employment support	India - innovation platform and innovation policy: accelerated growth of the green economy, accelerated implementation and development according to national progressive standards, "smart village"	Reform: strengthening the link between the market and the government; improving the national incentive mechanism; from managing innovation and promoting endogenous economic growth by increasing to the overall productivity of production factors; restructuring; balance of growth and quality.	Equality of rural and urban communities
Fighting climate change and ecosystems	Science		Regulated Globalization	Fighting climate change and ecosystems
Territorial and economic integrity and equalization of income levels of citizens	Digital Economy		Made in China 2025	
	Culture		Industrial Policy: 1. information technology 2. automatic machines and robotics 3. aerospace and avitechnika 4. railway transport and engineering 5. vehicles and equipment 6. power equipment 7. agricultural equipment 8. new materials 9. biopharmaceuticals and medical products	

Source: compiled by the author on the basis of an analysis of the national development strategies of the BRICS countries and arranged in order of priority, defined in national strategies.

Conclusions and offers.

Thus, the following segments and sectors of the economy *can be drivers of growth of the national economies* of the BRICS countries:

- Information and communication technologies, including artificial intelligence, the development of new digital platforms, the introduction of new technologies, including blockchains, the creation of supercomputers, the transfer of automated infrastructure and logistics systems, the transition to an accessible for widespread use of the digital system of the national economy. "Smart Village" for India, "Smart City" for China, "Smart Home" for Russia are absolute drivers of national development.

- The task of leveling the disproportionality of the development of territories, the levels of real incomes of citizens, the eradication of poverty determines the direction of public resources, primarily to the development of health care, social welfare and services to citizens who need social support and protection, to an affordable quality education that meets modern requirements for the development of national economies.

- The development of the real sector in the segments that ensure self-sufficiency and economic security, including job creation policy.

- For India and China, national programs "made in the country" imply a developed system of support for financial, organizational and legal tools, which, of course, stimulates the national producer.

- The national interests of each of the BRICS countries clearly formulate a system of priority sectors and sectors to stimulate national development. The potential of their interrelationship with partners from the BRICS countries in the form of a foreign economic partnership is currently determined mainly by the commercial benefit of direct economic entities. In the absence of established long-term regular contacts in the field of research and development work between universities, research institutes and, respectively, in the real sector of the industry or the service segment (i.e., reproduction value chains are focused exclusively on national partners, if they, however, are not involved in the resources and interests of Western TNCs), the real partnership does not have the opportunity to be realized without an appropriate state support. In other words, in the context of the planning of the national economy of the PRC, programmatic forecasting in India and Brazil, state planning in South Africa, national drivers of economic growth of the BRICS countries may be the subject of foreign economic cooperation and production horizontal cooperation subject to the existence of an appropriate interstate agreement or framework agreement, where all the resource support of the project is being worked out and the direct economic entities are indicated for its realization (including universities and research institutes and universities), including: stipulates rules for the protection of copyright and intellectual property.

The credibility of our proposals is recorded in the 2018 BRICS Summit Declaration (paragraph 56), which states that the partnership's goal is to deepen BRICS cooperation in the field of digital technologies, industrialization, innovation, inclusion and investment to maximize opportunities and to find solutions of challenges arising from the Fourth Industrial Revolution.

The partnership aims to strengthen comparative advantages, stimulate economic growth and promote economic transformation of the BRICS countries, strengthen sustainable industrial production capacity, create networks of science parks and technological business incubators, as well as support small and medium-sized enterprises in high-tech sectors. At the same time, a more active regulatory function of state actions is needed, brought to the level of direct economic entities, which is determined by the specifics of the formation and development of entrepreneurship in the BRICS countries.

In the political sphere, the partnership of the BRICS countries is aimed at the formation of a multipolar world order. It is the collective actions of the BRICS countries to ensure a peaceful transition to polycentrism as the growth driver of political partnership and mutual support in the international arena. In national strategies this aspect is indicated, but to a greater extent it is analyzed in the programs of foreign policy positioning of countries in the world arena and in joint declarations of BRICS summits [4].

As indicated in the joint statements of the annual summits, starting in 2009, the group's mission is to create conditions for the world community to move towards a more just and democratic world order based on the principles of multipolarity. It is the transition to multipolarity, recorded in the Johannesburg Declaration (2018), p. 15-17 [1] stipulates the coordinated position of the BRICS countries in the global co-society, suggesting equality and preservation of national sovereignty, adherence to the central role of the universal system of collective security enshrined in the UN Charter. The BRICS states unanimously adhere to the principle of forming such an international system, which is based on the norms of international law, where the base is the UN Charter. It is this approach that contributes to the strengthening of cooperation and stability in a multi-polar world order. At the same time, the BRICS countries support the point of view regarding the proper representation of developing countries in the activities of UN organizations, especially with regard to resolving issues of peace and security.

It is a multipolarity, which is the presence of equal rights of the sovereign fields - states of international relations, ensures the formation of a more honest, fair and representative polycentric world order in order to flourish all of humanity, which fully respects the general ban on the use of force and eliminates the use of unilateral coercive measures in violation of the UN Charter. At the same time, the BRICS countries emphasize in their joint documents and national development strategies that no country should strengthen its security at the expense of the security of others. At the same time, the BRICS states stand on the position of expediency of reforming the UN, including the UN Security Council, in order to increase its representativeness, efficiency and effectiveness, ensuring the possibility of its effective response to global challenges. China and Russia are consistently in favor of raising the profile and role of Brazil, India and South Africa in international affairs and support their desire to play a more significant role in the UN.

To ensure effective work in this direction, the BRICS group formulates "strategic goals" that allow the BRICS countries to be considered as a collective actor in the international arena. This is a kind of "means for political actors to build a common sense of the past, present and future of international politics, to shape the behavior of domestic and international actors."

The effect of the soft power of BRICS should not be interpreted from the standpoint of state propaganda or agitation. Rather, it manifests itself in strengthening the socio-economic, cultural and political interests of growing countries by spreading the ideology and determinants of world development in the world community that meet the aspirations of the overwhelming majority of the population of the world community countries [23]. In other words, the conviction of others is a soft means of foreign policy, which is also implemented in the field of cultural interaction and cooperation in the field of education [24].

Based on the task of the BRICS countries, to demonstrate to the world community a new approach to the development of international interaction and the realization of national interests, based on the realities of modern world politics (excluding the unilateral imposition of trade policy, ignoring decisions of the UN Security Council, which is immanent to the US policy) , BRICS states should strengthen their partnerships in the framework of the UN Security Council, the OPCW, the WTO, the IMF, etc.

This interaction should be aimed at the inadmissibility of ignoring international law, the unilateral refusal of international agreements, contrary to the practice of denunciation specified in the treaties, and calling for crimes against humanity in the framework of the UN Security Council.

To ensure the effectiveness of the opposition of the position of Western countries that recognize the US right to dictate its rules of conduct contrary to international law, form a consolidated position of the BRICS countries within the UN Security Council and other UN organizations, which imposes real demands on US responsibility for violating international law. Otherwise, quite active actions of the opposite side will be expected, aimed at restructuring the UN system and the UN Security Council, including regarding the withdrawal of the right of veto from Russia and China.

The growth driver *in the sphere of humanitarian partnership*, is that, in addition to intercultural exchanges and holding culture days in each of the countries, BRICS countries can interact in the development of the educational environment.

The BRICS countries are experiencing roughly the same problems in the development of the education sector (lack of modern educational infrastructure, insufficient harmonization of national standards for personnel training, a weak link between curricula and labor market needs, etc.). The task of creating high-quality national educational systems that are focused both on solving national development tasks and expanding the network of attracting foreign students (internationalization of education) is a common interest of the BRICS countries. Students receive a good level of professional training in the People's Republic of China, India, Russia and South Africa. This allows you to establish cooperation in the programs of double diplomas, to conduct joint research. By virtue of having the task of shaping the image of the prestige of the working professions, the BRICS countries should coordinate their actions in this area, including in the following areas: - the creation of systems for monitoring the labor market and forecasting personnel requirements; - campaigning to increase the attractiveness of working professions; - establishing closer cooperation between enterprises in various sectors of the economy and educational institutions; - implementation of agreed measures aimed at increasing mobility between types of education and teacher qualifications; - implementation of programs of production training;

In addition, it is advisable: - to intensify the exchange of best practices for the training of qualified personnel in the BRICS countries; - to exchange experience on the development and implementation of student performance assessments in the BRICS countries; - analyze and try to introduce in Russia the experience of other BRICS member states in attracting financial resources from the private sector to education; - use foreign experience

with school students, including measures for the purpose of their prior professional orientation; - support the participation of schoolchildren of the BRICS countries in various international projects; - when implementing joint programs, to use modern educational methods and forms, including distance learning, more widely; - to work on the harmonization of national qualification standards. At the same time, taking into account the demographic potential of India and South Africa and the lack of young specialists in Russia, it is advisable at the technical and cultural centers of Russia in India, South Africa to organize professional training of young people in areas of mutual interest and filling the staff shortage in Russia. The organization of such an approach to the educational system should be carried out on the basis of interstate agreements.

As a driver for deepening the partnership of the BRICS countries, the strengthening of the focus of national news agencies on the coverage of the partnership of the BRICS countries, on the sociocultural and ethno-historical, religious traditions of the formation and development of societies, on changing their foreign policy and economic orientation . This is due to the fact that the information policy of the BRICS countries, with the exception of the PRC, which has already taken certain steps towards Russia and India, is characterized by excessive enthusiasm for the policies of the EU and the USA, its analysis, that communicatively orients citizens towards the prospects of partnership with these countries as the only responsible for the tasks of the progressive development of nations. In other words, as applied to Russia, "turning to the East" and activating its "soft power" in this direction is a real prospect of sustainable development.

The practical significance of the study lies in the fact that the analysis made it possible to ascertain that the operation of the non-formalized organization of the BRICS countries allows for a "verification of the development vectors" of the partners and to ensure a consolidated position of the countries in the geopolitical arena. However, national development strategies are not yet synchronized, although they have common goals and objectives. Consequently, when deepening interstate, mainly bilateral cooperation, development drivers agreed by the parties can be incorporated into these programs and strategies. In this regard, the main recommendations formulated may be applicable to strengthen interstate cooperation in the framework of the partnership of the BRICS countries.

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Understanding key factors for creating news media brand

Comprender los factores clave para crear una marca de medios de comunicación

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ABSTRACT

The purpose of the present research is to answer the question of what factors influence building a brand for news media. To answer the question, we used the meta-synthesis method. The statistical population of this research is qualitative articles that have been published on the media brand, in particular, the news media brand, between 2000 and 2017. Using content analysis, a total of 87 codes, 18 concepts and 5 categories for the brand of news media were discovered and labeled. Findings showed that the elements of the organization, message, communication, audience, and values are used in creating a brand for news media.

Keywords: Mass Media, Brand, News Media Brand, Meta-synthesis.

RESUMEN

El propósito de la presente investigación es responder a la pregunta de qué factores influyen en la construcción de una marca para los medios de comunicación. Para responder a la pregunta, utilizamos el método de meta-síntesis. La población estadística de esta investigación son los artículos cualitativos que se han publicado sobre la marca de medios, en particular, la marca de medios de comunicación, entre 2000 y 2017. Utilizando el análisis de contenido, un total de 87 códigos, 18 conceptos y 5 categorías para la marca de los medios de comunicación fueron descubiertos y etiquetados. Los resultados mostraron que los elementos de la organización, el mensaje, la comunicación, la audiencia y los valores se utilizan para crear una marca para los medios de comunicación.

Palabras clave: Medios de comunicación, Marca, Marca de medios de comunicación, Meta-síntesis.

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1. INTRODUCTION

Attracting and retaining the audience is one of the main problems of mass media. Because the audiences are the most important asset of media, and without them, there will be no media. It is important for media organization in order for audiences to be successful. Companies are set up to carry out audience research for media producers to see how many people would be interested. The concern to attract and retain them in the media is like concern for profitability in business. As every company tends to become more profitable, any news media tends to be successful in attracting and retaining the audience. This is a global issue, and certainly the empires of the news media of Europe and the United States are also concerned about attracting and retaining the audience.

Now, media competition is more likely to attract audiences, as increasing the sender's sources are important to media competition; a competition that attracts more and more audiences. Today audiences are characterized by diverse, active and selective behavior. An important criterion in evaluating the success of each media is to examine the number and extent of the use of the audience from that media (Rezaei, 2007; Sohrabi, 2017), and the motivation or change that occurs in the behavior of the audience, and this is when a media possesses distinct characteristics from another media. Media branding can be considered as one of the solutions available to attract and retain audiences in any media.

In other words, the number of mass media and content producers has grown, and it has become more difficult to attract attention and loyalty ratio similar to the past. In this atmosphere of attention crisis, the mass media faces a dilemma with increasing social networking medias such as Facebook, Twitter, and mobile messaging channels like Telegram and Instagram; the need for brand creation has become more crucial for the media and has endowed the brand an essential place in media management literature and media economics. Because in the age of attention economy, the brand as a management tool can, empowerthe market of media business by being different from competitors. Communicating with audiences over the long term (i.e. loyalty of the audience) creates competitive advantage and thus gives the brand a more loyal audience.

In a challenging media environment, attracting audiences has become difficult just by functional features like news content. In a context where news organizations provide similar news, distinctive media brands are needed to survive. (Kim et al., 2010; Silva et al., 2016).

The brand theme is the subject of competition. Since the customer chooses where to go and what to choose, wherever the competition goes up, brand matters becomes more important. In the media competition, audiences are turning to brand media, and advertisements will be given to the brand. Typically, non-branded media have a marketing and advertising section to get advertisements and attract customers, but usually, media brands do not have these segments. Instead, they have a section that accepts the order of advertisements. This shows the importance of the brand. A branded media is located at a point where it is no longer sought after by the customer or audience, but by the target audience.

Brand and media research is divided into two parts. The first part of the study has examined brand issues and has used mass media as a tool for the branding of products and services. Related to the subject of this article, the second part examines the media brand. Researchers such as Siegert et al. (2011) introduced the MBAC model (media, brand, activists, and communications) with a new approach to the theoretical understanding of identity-based brand decision-making, and the responsibilities and tensions between the two poles of the content-based and market-based in news production are included in this model. Also, Forster (2011) investigated the key components of the success of TV brand management by analyzing ten different television brands in the United States, England, Spain and Germany, saying that researchers are on a special field of branding and focusing on the impact of television news programming. the studies and similar researches show that the media brand has not been thoroughly identified so far, and this is a research vacuum, because in the many studies that have been done, only a part of brand and media domains, for example, brand identity (in Kim et al., 2010), or brand management (in Baetzgen & Tropp, 2015; Bazzi & Naimi Nezamabad, 2019) or brand equity.

Finally, Across the 26 countries covered in the 2016 Reuters Institute Digital News Report, the majority of internet users go to established news media organizations for online news, and more people go to newspaper brands and broadcaster brands than go to digital–born outlets like BuzzFeed, the Huffington Post, or various domestic online–only news sites.

The purpose of this study is to introduce the brand as a management tool for Attracting and retaining the audience. The question of the research is what factors influence creating a brand for news media? This research uses the meta-synthesis method to answer this question. Regarding the nature of this research, the study of past research can show media brand factors on the international level. Therefore, meta-synthesis or meta-analysis could be used. Compared to the meta-analysis, meta-synthesis is used to integrate multiple studies to provide comprehensive and interpretive findings. In fact, meta-analysis reduces quantitative studies into averages, while meta-synthesis enriches qualitative findings through the evaluation of studies and the creation of a comprehensive and interpretive whole (Lee, 2010; Dehdar et al., 2019). Therefore, according to the research goal, meta-synthesis method was selected.

2. LITERATURE REVIEW

2-1. News media

The role of the media in social, economic, political and cultural processes has received great attention in the past decades. Media education is an inseparable part of the recent development of modern society, in which the production and distribution of symbolic products have not only affected the communication flows and the relationships between institutions, organizations, and individuals but also increased these relationships. (Falkheimer, 2014). Mass media operate

in the community and various fields of news, education, and entertainment. Meanwhile, the main task of the mass media is to disseminate the flow of social events (Motamednejad, 2007, p. 4). Thus, the organization and organization of mass media in each country have been created according to its socio-cultural needs, and although there are differences in the structure of the news organizations of America, Europe, Asia and Africa, however, similarities are not so few (Badie and Ghandi, 2008).

Harold Lasswell (1960) lists three functions for mass media: environmental monitoring, social solidarity in response to the environment, and the transfer of social heritage from one generation to the next. The first function, which oversees, cares, prepare and delivers news, including news that media provides and is essential for the economy and society. The second function is the selection and interpretation of information in the environment. Media often includes criticisms and prescriptions for how people react to events. The work of solidarity, the strengthening of social habits and the preservation of the unanimity is achieved by showing the deviations and highlighting the chosen people and this acts as oversighting the state's performance. In the third function, the media takes the form of a transfer of culture: for the transfer of information, values, and norms from one generation to another and from the community to the newcomers (Severin & Tankard, 2000). In this research, the function of news is considered, and the news media is examined.

The signal of the media quality in the news coverage is transmitted through its brands. If this is done successfully, the audience of the media will expect a significant quality of news coverage. From a normative point of view, it is important to get information about the political and economic development of the audience. Therefore, the media have an important contribution to modern democratic societies. At a certain level, media carries information, discloses, criticizes, and controls the political and economic spheres and activists of these areas. Also, activists present their views in the media and public discourse. Therefore, the media informs and acts as the fourth pillar of democracy (Siegert et al., 2011).

2-2. Brand

A brand is a term, sign, design, or combination of these, used to identify the goods or services of the seller or a group of vendors and to distinguish those goods or services with the goods or services of competitors (definition of the American Marketing Association, AMA). In the industry, it is only used when it has been able to gain popularity and credibility in the marketplace (Keller, 2017). David Aaker (2014), father of science of branding, says the brand is something more than a name or badge, which not only shows the organization's commitment to its customer and promises to offer functional benefits to the customer, but also expresses the organization's commitment to providing emotional, social and self-expression benefits to the client. In this research, the concept proposed by Keller and Aaker is desirable. In today's materialist world, people are seeking to make sense of their consumption. These are the brands that add value to the product; they narrate a story about its buyers, or use it on the ladder of immaterial values, and can create this meaning. So surprisingly, all types of organizations and individuals tend to be branded. No one will only earn money by selling the product, but by selling a brand (a set of tangible and intangible values).

In his book "Strategic Brand Management", Kevin Lane Keller has paid a great deal of importance to brand and branding for organizations and companies:

- Brands can provide valuable functions for companies. In general, the main role of each brand is to introduce and distinguish the product and facilitate the processes of trading for customers. In practice, brands help companies manage their assets and inventories and organize their accounting reports. Also, the brand helps companies to securely protect their asset and product features from the competition. Brands can better maintain their intellectual property and have the freedom to act more legally.
- Investing in the brand brings the product into a unique concept in the minds of the consumers and, as a result, distinguishes from other products. Brands represent a certain level of quality; so that the satisfied customers can re-select the product more confidently. Brand loyalty provides predictability and security of demand for the company and creates barriers to the entry of other companies in the field of competition.
- Production and product design processes may be easily copyrighted, but the image and pivotal role that has survived in the minds of individuals and organizations (based on the years of marketing and product experience) is not easily replaceable. Customers are "raised" in some cases in the exact sense with some brands. Therefore, having superior brands is a powerful tool to ensure the organization achieves competitive advantage.

There are two very different concepts: Sometimes, the company has a product that sells. But, sometimes the company owns a brand and the brand does not sell. When there is no intense competition, the company sells its goods, but when it comes to competition, it is not the company that sells the product, but it is the buyer who will eventually choose, and he/she selects the brand to buy. Let us say so, as long as the competition is not strong, companies that are not a brand or do not have brand can sell in any business or political field, but when competition becomes intense, the product is purchased that is a brand because the customer chooses a brand.

The brand is one of the key concepts in contemporary marketing theory. In the media management literature, Brands and branding have not been sufficiently considered, while brand-related concepts are gradually replaced by scientific discussions in the field of media products and services, and now they are referred to as a developing research field (Malmelin & Moisander, 2014).

2-3. News media brand

Branding and media are two inseparable parts, the latter is usually used for the sake of the former. However, if we look at the advanced countries that are leading the way in new media management, we see that branding is also at the service of the media. Like other industries, the media have felt the need for branding. For example, it is clear that a newspaper that has branded itself has many advantages over other newspapers. At the very least, there are more loyal readers who are less sensitive to price changes and feel that the reading of this newspaper is feeling better, Loyal readers have a sense of belonging to a particular group, which means the guarantee of having an audience for the advertisers in the media.

For a long time, books, newspapers, magazines, films, radio and television have been characterized as distinct media with products and with different consumer characteristics; with digitization and convergence, the distinctions and limitations are eliminated. Therefore, what is known as the general audience is divided into smaller target groups that can choose between different products in a particular position. The number of possible options has flared up and applications have been diversified. As a result, the only way to attract more audiences is to take the market from direct competitors. These growing changes have forced media companies to create brand identity. Name, term, sign, design or combination of them to identify and distinguish a product or service from its competitors. Media brands and branding strategies are designed to connect with the thoughts and feelings of the audience to increase the value of a product beyond its group and its functional value. Media brands create a unique environment that is independent of the means and methods of distribution (Sommer & Marty, 2015). Therefore, brands can act through semantic rationality and the passage of reason and logic and communicate emotionally with the audience to be successful in attracting and retaining audiences.

Today, media products, as brands, have entered into the research of media economics, and related research is on the rise. In a common definition by the researchers of the field, media branding is an interdisciplinary research field derived from media economics, media management, media studies, media psychology, and social psychology. However, it has attributes that distinguishes it from other domains (Siegert et al., 2015).

Nowadays, due to the increased media competition and the use of multichannel media, brand creation and its improvement for media companies have become necessary. Technology advances in the media field have changed the production, distribution and consumption of media content. Types of mass media such as newspapers, magazines, books, radios, TVs and films are presented with different producing, marketing and consumption patterns. Of course, considering that the process of media convergence has eliminated the difference between media types; the prominent media brands and their effective management for the success and survival of the media company are important in this context. (McDowell, 2006; Siegert et al., 2011; Chan-Olmstead, 2011).

Research on media branding success factors is a broad and distinct field. Previous research was focused solely on a media type. Since products and services, and developments and production processes are converging and matched, today, this technology-based separation has no longer any value. As a result, media brands have become more and more important (Malmelin & Moisander, 2014, quoted by Sommer et al., 2016). Media branding is a context for determining and recognizing media content that is independent of the presentation and distribution templates. For example, consider the news outlets that provide their services through a newspaper, a website, a mobile app, or a writer who draws his story through a book, movie or social network available to the audience. Therefore, any success factor in media branding should be consistent with these conditions and changes (Sommer et al., 2016).

Therefore, given the fact that today, we are faced with media convergence, and media companies are increasingly using a variety of platforms and medias; in this research, we will not look at a specific kind of media. However, the media, whether printed, visual or audio, or the news agency as a whole and in the form of a media company, will be considered.

Because media elements have not been identified so far comprehensively, in this research, the meta-synthesis method has been used to identify these factors and to investigate the relationship between them.

2-4. the role of the media brand in attracting and retaining the audience

Generally, media directors have chosen one of two strategies for brand building in recent years:

The first strategy is to increase the facets of the difference between their media and competing media so that in the minds of the audience they have a different position from competitors. The second strategy is to create various dimensions of meaning for the media in the minds of the audience and to transform the brand into something more than its practical benefits. In this way, instead of being different, the brand focuses on emotional links between the media and the audience. Therefore, there is a stronger connection between the audience and the media brand and emotional loyalty is formed. At this strategy, brand and brand communication networks are becoming more and more important for the brand's media-seekers, and thus media brands in two parallel markets, one in the market of the audience and the other in the market of advertisers, are successful. Many international news media such as CNN, BBC, Al Jazeera and its members have been able to relate to their audience and become media brands in the world (salavatian et al, 2017).

Media brands are worthwhile in the various fields that the audience or media consumer expects to expect: subjects such as media content, media engagement, and experience for the media consumer. Traditional medias, usually rely on content branding, however, new media are engaging in interaction and creating a leading experience.

The main assets of each media are audiences, and brand management is a tool that generates a strong, long-term relationship between the media and the audience, which is one of the dimensions of differentiation. As Al Ries and Jack Trout (1994) say, branding helps the reader to recall the offer that marks the brand from competitors. Another important point is that brand strategy brings to the media the added value that makes the audience come to brand for something

more than the functional aspects of a media. The added value that is supposed to be transferred to the audience with a unique identity is only from the media, which means the distinction of the media from competing media.

Finally, brand and media relations are inevitable for improving the economy and media industry in today's modern societies. Brands play an important role in the production and sale of media content (Baetzgen & Tropp, 2015). Branding has been more influential in the media industry than before, since, in addition to adopting a strategy for differentiating between rising competitors, it is used as a tool for changing the behavior of customers or audiences and can serve as a quality signal for media content, and In the audience guide for choosing among the media, it can play a decisive role (Crebs & Siegert, 2015).

3. METHODOLOGY

In this research, meta-synthesis method is used. Meta-synthesis is a qualitative study that utilizes the findings of other qualitative research in the field of a subject as data. Therefore, samples of the meta-synthesis study are qualitative studies that the researcher enters into their study based on research questions. In fact, meta-synthesis refers to a group of approaches and methods that are trying to synthesize and combine the findings of qualitative studies to present a new interpretation of the phenomenon (Najafi, 1392).

This method done in two steps. Searching for related studies and analyzing the data obtained from the research. The first stage involves the use of the criteria for selecting and systematic search for finding relevant sources, and the second stage involves systematically reviewing these studies and analyzing the content of the extracted data from the review of resources (Pekkala et al., 2013).

In general, meta-synthesis provide a systematic approach for researchers to combine different researches, identify hidden themes and metaphors to develop existing knowledge and create a comprehensive view (Siau & Long, 2005). This research method has a hermeneutical approach and seeks to understand and describe a phenomenon (Walsh & Downe, 2005).

In this research, we use the seven-step method of Sandelowski and Barroso (2007) to realize the meta-synthesis:

Step 1: Select a research question to guide the study; Step 2: Search for candidate sources; Step 3: Retrieve the sources; Step 4: Review and appraise the sources; Step 5: Analyze the findings found in the sources; Step 6: Quality control and Step 7: Present the results of the analytical process.

In the present study, the information gathering method is library-based and taking notes is used for information gathering.

Qualitative research is one of the best research methods for studying social and human phenomena because in this way the scholar analyzes and analyzes tangible and real issues (Alwani, 1998). Considering the purpose of the research and the importance of the qualitative method in social phenomena studies, the study population of this study is qualitative studies in English with the subject of the media brand, especially the news media brand. For time limits, resources are selected from the period 2000 to 2017.

Schreiber et al. (1997) argue that the number of studies included in the synthesis depends on the subject of the research and the goal of the investigator to do so. The size of the sample depends on the complexity of the question and the depth and extent of the available research reports. The saturation of the encoded classes is a suitable criterion for sampling adequacy (Najafi, 1392). Sandelowski and colleagues have suggested at least 10 to 12 studies for meta-synthesis research (Xu, 2008).

In this research data analysis method is content analysis. Content analysis has been introduced in some sources as a research method (Sarmed et al., 2008), and in others it is considered as a data analysis method (Saroukhani, 2007) used for interpretation, reasoning and inference for data analysis.

Also, for the validation of the final resources extracted for coding, the Glynn tool (2006) is used. One of the tools used to evaluate the quality of the initial studies of qualitative research is the Glynn tool. Although there is various checklist for systematic review of meta-synthesis, the Glynn tool is used to evaluate both qualitative studies and quantitative studies (Catalano, 2013). Glynn's questions are categorized into four categories: statistical society, data aggregation, research design and results. Answers to these questions and the use of the Glynn formula determine the credibility of the resource.

In the meta-synthesis method, the reliability of the extracted codes from the findings of the articles is examined by obtaining the views and approvals of some non-authors about the codes (Walsh & Downe, 2005).

To ensure the accuracy of the findings and their validity in the qualitative method, the following measures are taken:

- Member checking: Some authors review the reviewed articles, analysis processor categories, and express their views on them.

- Peer examination: Guidance and consultant teachers, and several experts from the field, are looking at the findings and comments on them.

- Researcher reflexivity: As far as possible, attempts are made to control the bias and prejudices of the researcher

(Denise, 1970; quoted from Johnson, 1997).

In qualitative research, including the research constraints, one can generalize the results of the research and the scholar-centeredness that poses the risk of bias in the research; considering the use of the qualitative method for the present study, the constraint of the Qualitative content analysis method includes this research but credit is done.

4. DATA ANALYSIS

The seven-step method of meta-synthesis of Sanedelowski and Barroso (2003) was used to identify the factors shaping the news media brand:

Step 1: Select a research question to guide the study: To set up research questions, the first step is to focus on what to study. In this study, the identification of factors and components of the news media brand were studied. This parameter is set by answering the following questions:

1) Who: Determines the community under study. In this research, databases (ISI, ScienceDirect, Scopus, Emerald, Ebsco, Mexican, Noormags, etc.), magazines, conferences and various search engines were studied.

2) When: Defines the timeframe for the research. The sources studied in this study are from 2000 to 2017.

3) How: How to conduct research and analyze data. In this research, content analysis method (secondary data analysis method) was used. The researcher, taking into account the criteria, identifies the appropriate resources that come into the meta-synthesis process and identifies the resources that come out of the process.

After expressing the parameters, the research question was expressed as follows: What are the factors of news media brand?

Step 2: Search for candidate sources: In this research, databases, publications and various search engines were investigated between 2000 and 2017. Keywords such as brand, news media, media branding, and their combinations are searched for in Persian and English research sources. At the end of the search of databases, journals and various search engines, 357 sources were found using the keywords.

Step 3: Retrieve the sources: To select appropriate resources based on the algorithm shown in the figure, various parameters such as source type, title, abstract, content and research method were evaluated.
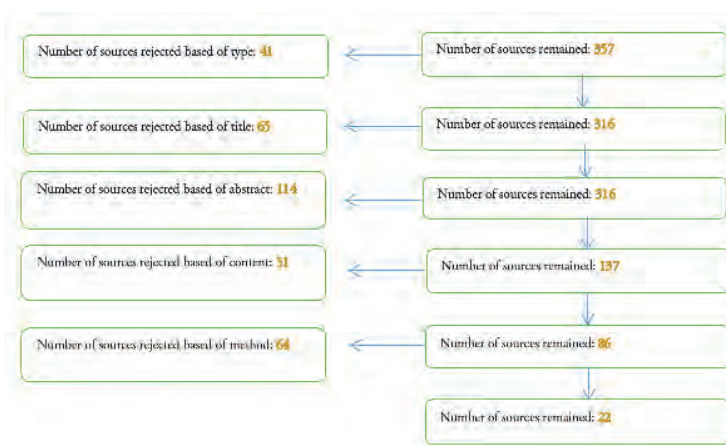
Figure: Final Source Selection Algorithm

According to the figure, 357 sources were first identified, of which 314 sources (which were articles) were selected, and the rest were excluded. These articles were reviewed based on title, abstract, content and methodology. Therefore, unrelated articles were deleted and finally 22 sources were selected for meta-synthesis. The Glynn tool was used to assess the quality of the 22 final sources. All of the 22 final sources were able to score over 75%, so they got the credit rating.

Step 4: Review and appraise the sources: Out of the 22 sources, two sources were also removed due to the sufficiency and saturation level, and finally the data was extracted from 20 sources. The resource information was extracted as follows: bibliographic information for each source including title, author, and year of publication; research topic, keywords, role of media brand and research method (appendix).

Step 5: Analyze the findings found in the sources: In this study, first we summarize all the factors extracted from the previous studies; then we assign codes for each of them. In the next step, taking into account the concept of each of these, the codes were categorized in the same sense. In this way, the concepts of research were identified. Three of the examples were Bridging Electronic Newspapers, "Development of the Traditional Media Media Platform" and "Priority

in Focusing on Updating News in Current Reports with YouTube", which were summarized as follows: The codes for "use of e-media", "the use of alternative media" and "social media as a branding opportunity" were identified. These three codes were combined on the concept of "media convergence". Finally, this concept, together with other related concepts, formed the category of "communications".

Based on the analysis of the content analysis method, 74 codes, 18 concepts and 5 categories for the brand of news media were identified and labeled. The findings from this stage indicate that such a systematic study has not been carried out in previous studies, and each study focused only on a specific aspect of the media brand, and multiple dimensions formulated in a coherent and systematic framework was not intended (tables 1 to 5).

Table1. Concepts and categories finded

Gerth (2012) Sommer(2015)	Perception of managers	News Media Identity		
Gerth (2012) Siegert (2011) Sommer(2015) Zeng(2012)	Mission of news media			
Gerth (2012) McDowell (2004) Hoynes (2003) Zeng(2012)	Spirit of organization			
Sommer (2016) Sommer(2015)	Internal processes	Organization of news media	Administration & Organization	1
Sommer(2016) Sommer(2015)	Leadership			
Sommer (2016) Sommer(2015) Hoynes(2003)	Structure of news media			
Sommer (2016) Sommer(2015)	Human resources			
Sommer (2016) Sommer(2015) al Nashmi(2017)	Distribution mechanism			
Sommer(2016) Sommer(2015)	Media planning process			
Sommer(2016) Sommer(2015)	Organization sources			
Forster(2014) Sommer(2016) Machin(2008)	Physical space	News media architecture		
Forster (2014) Sommer (2016) Nienstedt (2012)	Hybrid brand			
Forster(2014)	House of brands			
Forster(2014)	Branded house			
Nienstedt (2012)	Plausibility	Credibility of source		
Nienstedt (2012)	Affiliation to professional communities			

Table2. concepts and categories find

Baetzger (2015) Bakshi(2016)	The importance of content	Credibility of content	
Baetzger (2015) Bakshi(2016)	The attractiveness of content		
Baetzger(2015) Bakshi (2016) Sommer (2016) Doyle(2006) Machin(2008)	Content quality		
Baetzger(2015) Bakshi(2016) Machin(2008)	Structure of news		
Baetzger(2015) Bakshi(2016)	Sub-content features		
Baetzger(2015) Bakshi (2016) Machin(2008)	Packaging of news		
Baetzger (2015)Forster (2014) Bakshi(2016)	Diversity of content		
Baetzger (2015) Bakshi(2016) Sommer(2016)	Localization of content		

			Message	2
Baetzgen(2015) Siegert(2011)	Brand mission fit of the content			
Baetzgen(2015) McDowell(2004)	News monopoly			
Baetzgen(2015) Forster (2014) Siegert(2011) Sommer (2015) McDowell(2004)	Competitive Advantage			
Baetzgen(2015) Forster (2014) Siegert (2011) Bakshi (2016) Sommer(2015) McDowell(2004)	Economic value of brand	Message equity		
Baetzgen(2015) Forster (2014) Siegert (2011) Bakshi (2016) Sommer (2005) McDowell (2004)	The spiritual value of the message			
Baetzgen(2015)	The power to interpret events			
Baetzgen (2015) Forster(2014) McDowell(2004)	Distinction with competitors			
Doyle(2006) Machin(2008)	creativity			
Doyle(2006) Machin(2008)	Forward-thinking	Innovation in produce and present of message		
McDowell(2004) Zeng(2012)	The Soul of Brand Keeping			
Doyle (2006) Machin (2008) Zeng(2012)	Do creative ideas			
Doyle(2006)	Use of development Indicators			
Doyle (2006) Machin(2008)	Long-term strategy compilation			
Baetzgen (2015) Doyle(2006)	Up to dating of message	Extension of message		
Doyle (2006) Van Den Bulck(2011)	Extra service			
Siegert (2011) Sommer (2015) Doyle(2006)	Expanding Partnership			

Table 3. concepts and categories find

			Communications	3
Sommer(2015)	Engagement with Stakeholders	Public relations		
al Nashmi (2017) Nienstedt(2012)	Communication between media			
al Nashmi (2017) Nienstedt(2012)	Communication within the media			
Siegert (2011) Ghachem (2011) Nienstedt(2012)	Communication with audience			
Sommer (2016) Ghachem(2011)	Recruitment on social networks			
Sommer (2016) Sommer(2015)	Manufacturer Criticism	Feedback		
Sommer(2016)	Elites evaluation			
Sommer (2016) Sommer(2015)	Target audience evaluation			
Sommer (2016) Sommer(2015)	Advertising	Marketing and advertising		
Sommer (2016) Sommer(2015)	Marketing			
Sommer (2016) Sommer(2015)	Promotion			
Sommer (2016) Sommer(2015)	Facilitating Access			
Sommer (2016) Sommer(2015)	Market scrolling			
Ghachem (2011) al Nashmi(2017)	Use of e-media	Media convergence		
Ghachem (2011) al Nashmi(2017)	The use of alternative media			
Sommer(2016) Ghachem(2011) Al Nashmi (2017) Molyneux(2017)	Social media as a branding opportunity			
Ghachem (2011) al Nashmi(2017) Kim(2017)	Transmedia storytelling			
Sommer (2016) Ghachem (2011) al Nashmi (2017) Molyneux (2017)	Use of multi-platform			

Table 4. concepts and categories find

Gerth (2012) Siegert (2011) Bakshi(2016) Nienstedt (2012) McDowell(2004)	Perception of consumers	Audience image	Audiences	4
mcdowell(2004)	Experience the audience from competitors			
Siegert (2011) Nienstedt(2012)	Brand image			
Zeng(2012)	Brand awareness			
Nienstedt(2012)	Characterization of audience			
mcdowell(2008)	The audience's dependence on the media	Loyalty of audience		
McDowell(2008)	Attracting of audience			
Baetzgen (2015) mcdowell(2008)	Satisfying of audience			
mcdowell(2008)	retaining of audience			
Baetzgen (2015) Doyle(2006)	Broadcast the target audience's news needs	Target audiences		
Baetzgen (2015) Doyle(2006)	Understanding the norms of the audience			
Doyle(2006)	Social and Democratic Participation of the Audience			
Bakshi(2016) Machin(2008)	Language of target groups			

Table 5. concepts and categories find

Gerth (2012) Kim (2010) Molyneux(2017)	Professional principles	Principles of journalism	Values	5
Kim (2010) Baetzgen (2015) Hoyzen(2003)	Independence of the media			
Gerth (2012) Molyneux(2017)	Media economic factors			
Gerth (2012) Kim (2010) Molyneux(2017)	Professionalism			
Kim (2010) Molyneux(2017)	Social responsibility of the media			
Kim (2010) Molyneux(2017)	Cultural and social services			
Baetzgen (2015) Molyneux(2017)	Non advertising elements			
Baetzgen (2015) Sommer (2015) Machin (2008) Van Der Dulch (2011) Hoyzen(2003)	The commodification of news media	Market oriented journalism		
Baetzgen (2015) Sommer (2015) Machin (2008) Van Den Bulck (2011) Hoyzen(2003)	Commercialization of the news media			
Baetzgen(2015) Machin(2008)	Blog journalism			
Kim (2010) McDowell (2004) Kim(2017)	News media dynamism	New media productivity		
Kim (2010) McDowell (2004) Kim(2017)	News media creativity			
Kim (2010) McDowell (2004) Kim(2017)	News media novelty			
Kim (2010) McDowell (2004) Kim(2017)	News media heroism			
Kim (2010) McDowell (2004) Kim(2017)	Personality of anchors			
Kim (2010) McDowell (2004) Kim(2017)	News media sophistication			

Table 6. Concepts and categories finded at a glance

Values	Audiences	Communications	Message	Administration & Organization
Principles of journalism	Audience image	Public relations	Validity of message	News media identity
Market-oriented journalism	Loyalty of audience	Feedback	Message equity	Organization of news media
News media personality	Target audiences	Marketing and advertising	Innovation in produce and present of message	News media architecture
		Media convergence	Extension of message	Credibility of source

Step 6: Quality Control: At this stage, the researcher examined the reliability of the extracted codes from the resource findings by obtaining the views and approvals of some source creators. In this way, the researcher extracted the codes from sources for five authors from these sources and asked them to comment on the correct encoding of the findings forth researcher (Walsh and Down, 2005). Four researchers replied to the email and verified the findings of the study.

In addition to the opinions of the authors of the articles, the counseling and collaboration of the supervisors and counselors and several experts in the field of media management and media brand were also used to validate the codes and concepts.

Step 7: Present the results of the analytical process: The research showed that five factors are effective in the emergence of a news media:

1) Administration and Organization: One of the factors that creates a media brand is administration and organization. Accordingly, the news media brand is considered as an organizational and managerial phenomenon, which includes the identity of the news media, the organization of the news media, the architecture of the news media and the credibility of the source. In other words, from this perspective, the following factors influence the formation of the brand news media: the nature and reason of the organization, the mission and objectives of the news organization, elements and processes of internal organization (including planning, leadership, organizational resources, human resources and distribution) and the credibility of the news organization.

2) Message: In this category, the news media brand is considered as branded content. Content constitutes the core of every news media, which includes credibility of message, message equity, innovation in the production and presentation of message and extension of message. In fact, the structure of the news, the diversity of content, news package, quality of content, content relevance, innovation in the creation and presentation of content, the equity and the competitive advantage of any news media in the category of message or content-oriented news media is crystallized.

3) Communications: This topic is referred to as market communication, which includes public relations, audience feedback, marketing and advertising, and media convergence. The category of communications, interactions and relations between the news media and the external environment of the organization through marketing and advertising, public relations, the use of various media platforms and obtaining external evaluations are established.

4) Audience: This category is referred to as an audience-based approach to the news organization, which includes the concepts of imagery, audience loyalty, and target audience identification. The audience issue focuses on the mental image of the audience from the news media, his loyalty, attracting and retaining the audience, making confidence in the audience, and ultimately the focus of the news media on the target audience.

5) Values: This topic depicts the tension between media brand and community expectations and includes concepts of professional journalism, market-oriented journalism, and news media personality. In this category, the following issues are depicted: the functional values of the news media, the independence of the news media, its follow-up to the principles of journalism, their relationship with the commodification and commercialization of news media, in addition to the Professional media personalities.

5. DISCUSSION

Increasing competition in a challenging environment of media to attract and retain audiences has led news organizations to take advantage of the principles of branding that comes from the field of strategic media management.

The present research leads to significant theoretical and practical consequences. This research showed that one of the factors influencing the creation of the news media brand is the characteristics of the administration and the organization. These features include news media identity, news media organization, news media architecture and credibility of source. The identity of a news media reflects the nature, quiddity and purpose of being branded (Siegert, 2011, p. 58). Along with identity, news media organization determines the organizational structure for brand acquisition. The relations and communications of this organizational structure is formed by the architecture of the news media (Baker, 2088, p. 53). Finally, the credibility of the source indicates that the news organization is credible and capable of being branded (Berlo et al., 1969).

The second factor affecting the media brand is the characteristics of the message. These features include validity of message, message equity, innovation in message generation and presentation, and extension of the message. In order to

become a media brand in addition to the media organization, the content and message from the media outlet should have the features of objectivity and news values. It should also have attraction to attract the audience to it. The validity of the message reflects the features of objectivity and the value of the news (Vindal et al., 1997). The message equity can distinguish the news media from its rivals, which, along with the component of innovation in the production and presentation of the message, can gain competitive advantage and create a monopoly of news (Siegert et al., 2011, p. 64). Extension of message will also help to improve the quality of the message and update the content (Zeng & Wang, 2012).

The third factor is the communication properties that include public relations, feedback, marketing and advertising and media convergence. One of the important issues in the news media brand is communication. The news organization, and the public relations are responsible for interaction with stakeholders (Siegert et al., 2011). Audience feedback and external evaluation will help to improve brand performance (Mohsenian rad, 1382, p. 352-353). Advertising and marketing are essential for the brand's introduction and promotion (Kotler, and Armstrong, 1990). Convergence makes content flow in various media platforms possible; Among such platforms one can name mobile, radio and television, newspapers, websites, blogs, etc. Therefore, the brand message becomes available to everyone (Jenkins, 2006).

The fourth factor is the characteristics of the audience, which includes the audience's imagination, loyalty, and his awareness of the target audience. The audience's imagination is the understanding of news media by the audience (in other words, audience's perceptions of prominent news media features). News media brand customers are audiences, and their perception of the various news media will determine the brand. It is the audience's perception that creates meaning in his mind. The audience's perception is a form of loyalty or lack of loyalty to the news media. For example, local coverage of news is one of the things that creates loyalty to the audience (Hedding et al., 2014). Each media has its audience; therefore, one of the elements of the success of any news media is to identify target audiences. In the media industry, the audience will follow a brand that is in line with his ideology, and the ideological consistency of the audience with the media brand helps the media credibility and affects the equity of the message.

The fifth factor in creating a news media brand is the values' features. These features include the principles of professional journalism and market-oriented journalism, which range the two heads of a spectrum. The former focuses on media independence, professional ethics and social responsibility (Badie, 1382) and the so-called journalist dimension, but the latter looks at the subject from the market dimension and attend two categories of product (content sales To the audience, the sales of the audience to the advertising companies (Nemati & Kohan Hushnejad, 2011). Naturally, the media that pursues the principles of professional journalism increases the chances of being branded. Although the business aspect is important in the media organization, but the nature of the media is a human nature and affects the culture and society and even the personality of human beings, and as with humans, epistemic, ethical, and humanistic principles, in the media organization, the same concepts can be developed and pursued (Ali Askari, 1394). Therefore, in addition to influencing the audience, the character of the news media plays an important role in attracting target audiences. The honesty and intimacy of the news media, the heroism of the news media, and the professional character of the executives in the acquisition of a media are significant factors and create meaning in the minds of the audiences.

6. CONCLUSION

In this research, five agents of administration and organization, message, audience, communications, and values were identified through 18 elements in the creation of news media brands.

The elements of equity of the message, the innovation in the production and presentation of messages and the extension of the message make the news media differentiate their competitors. The elements of media identity, audience image, audience loyalty, media personality, and news media architecture forms the creation of meaning in the audience. In this case, instead of being different, emotional links between the media and the audience are considered to create a stronger relationship between the audience and the media brand and produce emotional loyalty. Of course, brand loyalty, as Keller says (2012), provides predictability and security for demand for the company, and creates barriers to competing for other companies.

The components of marketing and advertising, public relations, news media organization, and source credibility play the role of signal for qualification of the news media and helps it attract more audiences. According to Keller (2012), extension of product and product development processes can be easily copied, but the image and pivotal role that has remained in the minds of individuals and organizations based on several years of marketing activity and product experience are neither easily replaced nor copied.

In general, the elements and components of the news media brand identified in this research can be useful in policy making by any of the news medias to attract and retain the audience.

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The Learning Process in Cultural of Fourth Industrial Revolution 4.0 (4IR)*

El proceso de aprendizaje en cultura de la cuarta revolución industrial 4.0 (4IR)

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ABSTRACT

This study is focus to emergence of a new technology known as 'The Fourth Industrial Revolution' or the Industrial Revolution 4.0 has led to the current development of technology that predicts 50 billion electronic devices will interact with each other. Meeting the challenges of the Industrial Revolution 4.0, all students at the Institute of Higher Education (IPT) need to be prepared with this new era. Accordingly, a study was conducted on 30 students of the Faculty of Information Science and Technology (FTSM) Universiti Kebangsaan Malaysia (UKM) in Bangi, Selangor. This study aims to identify the level of knowledge, willingness and skills among students to pursue the Challenge of Industrial Revolution 4.0. This research is a descriptive study which use Likert scale. The data was analyzed using SPSS software. The findings show that the students' knowledge level towards the Industrial Revolution 4.0 is at a moderate level. Meanwhile, the study also found that student readiness was at moderate level. The findings also found that the skills level towards the Industrial Revolution 4.0 is at a moderate level. Researchers suggest that students should focus on maintaining the identity, sustainability of the mind, culture and the identity of students in the face of the new National Development and Transformation Plan 2050. Students need to get out of the habit and master the 4C elements of Critical Thinking & Problem Solving, Communication, Collaboration and Creativity.

Keywords: 4IR, Culture, Revolution.

RESUMEN

Este está studio enfocado al surgimiento de una nueva tecnología conocida como 'La Cuarta Revolución Industrial' o la Revolución Industrial 4.0 ha llevado al desarrollo actual de tecnología que predice que 50 mil millones de dispositivos electrónicos interactuarán entre sí. Al enfrentar los desafíos de la Revolución Industrial 4.0, todos los estudiantes del Instituto de Educación Superior (IPT) deben estar preparados para esta nueva era. En consecuencia, se realizó un estudio en 30 estudiantes de la Facultad de Ciencias de la Información y Tecnología (FTSM) Universiti Kebangsaan Malaysia (UKM) en Bangi, Selangor. Este estudio tiene como objetivo identificar el nivel de conocimiento, disposición y habilidades entre los estudiantes para perseguir el Desafío de la Revolución Industrial 4.0. Esta investigación es un estudio descriptivo que utiliza la escala Likert. Los datos se analizaron utilizando el software SPSS. Los resultados muestran que el nivel de conocimiento de los estudiantes hacia la Revolución Industrial 4.0 está en un nivel moderado. Mientras tanto, el estudio también encontró que la preparación de los estudiantes estaba en un nivel moderado. Los resultados también encontraron que el nivel de habilidades hacia la Revolución Industrial 4.0 está en un nivel moderado. Los investigadores sugieren que los estudiantes deben centrarse en mantener la identidad, la sostenibilidad de la mente, la cultura y la identidad de los estudiantes frente al nuevo Plan Nacional de Desarrollo y Transformación 2050. Los estudiantes deben salir del hábito y dominar los elementos 4C de Critical Pensamiento y resolución de problemas, comunicación, colaboración y creatividad.

Palabras clave: 4IR, Cultura, Revolución.

INTRODUCTION

The 4IR have been announced during the presentation of Budget 2018 and been highlighted rapidly due to tremendous movement on technology. Historically, over 25 years since Sir Timothy John Berners-Lee created the World Wide Web, the internet has become part of the daily life of not only social, but also economic and political development. The Industrial Revolution 4.0 (IR 4.0) is now widely spoken around the world. The emergence of a new technological wave known as 'The Fourth Industrial Revolution' or the Industrial Revolution 4.0 (Industry 4.0) and the era of 'Digital Economy' or the Digital Economy led the government to continue to work towards the success of the Malaysian Digital Policy. History states that the first Industrial Revolution (RP) 1760 – 1830 referred to the use of water or steam technology capable of moving machinery. The next technological development involved electrical forces that triggered the second RP around 1870 - 1914. The third RP began at the end of the 20th century through information or digital technology. Now the world is said to have entered RP 4.0 phase.

Therefore, Malaysia as a development country was working hard on research about the readiness of Malaysian citizen to face out 4IR revolution. This phenomena included UKM that move forward into 4IR. UKM analyze 4IR as one of agenda that need to be implanted in the University to cope with government need and industrial development. Therefore, prefect preparation from all sectors needs to be done due to the development of current technology. It was in line with the higher education transformation of the Malaysian Education Development Plan (Higher Education). In addition, the teaching methods that accompany the Industrial Revolution 4.0 should be widely practiced.

Hence, PwC (2017) believed that the emergence of a cyber-physical system involving fully new capabilities for humans, machines and new methods of technology. In other words, automation technology is seen as a technology capability that does not require human involvement.

Therefore this preliminary study was to examine the student's readiness, knowledge and challenges about IR 4.0. The outcomes in this study will be help the University to come out with an appropriate framework to suit students' needs and diversify the pedagogy that integrate and blended with the technology.

METHOD

In this qualitative study, the questionnaire with likert scale have been used. The likert scale consists of 5 level of agreement which is Strongly Agree (SS) to Strongly Disagree (STS). The 5 options are "Strongly Disagree", "Disagree", "Neutral", "Agree", "Strongly Agree." Furthermore, the questionnaire consists of four sections, Part A, Part B, Part C, and Part D. Part A is about the background of respondents with items such as name, age, and race. Part B contains 10 items relating to students' level of knowledge of the Industrial Revolution 4.0. Whereas section C is about students' readiness level facing the challenges of Industrial Revolution 4.0 and has 10 themed items. Part D contains 10 items containing questions related to students' level of competence in the 4th Industrial Revolution. The data obtained from this study were analyzed using SPSS software and supplemented by the findings

There are 30 respondent within the ages of 19 and above have been selected using simple sampling method to obtain the empirical data. All the respondent were the student from Faculty of Technology and Information Sciences, National University of Malaysia from various programs offered such as Bachelor of Computer Science, Bachelor of Information Technology, Bachelor of Software Engineering (Information System Development) and Bachelor of Software Engineering (Multimedia System Development).

RESULTS AND DISCUSSION

A total of 30 respondents involve in this study and all of them consists of student from Faculty of Technology and Science, Information (FTSM), National University of Malaysia.
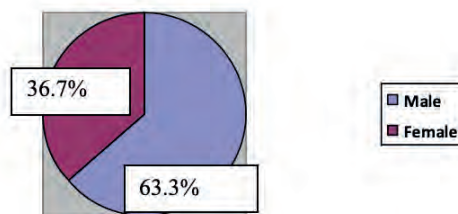
Figure 1.1 Distribution of respondent based on gender

Figure 1.1 above shows the pie chart of the respondents based on gender. There were 63.3 % respondent were male whereby 36.7% were female. From this number of students as the respondent a total of 15 students (50%) were 22 years old, 9 students (30%) 21 years old, 3 students (10%) 20 years old and 3 students (10%) 19 years old whom consists of which 19 (63.3%) were Malay, 9 (26.7%) were Chinese, 1 (3.3%) was Indian and 2 were (6.7%) of other nationalities.

Student's Knowledge Regarding 4IR

Bil	Items	Min	Standard Deviation
1	I have heard about Industrial Revolution (4IR).	4.0667	1.31131
2	I understand and able to explain the meaning of IR 4.0.	3.8000	1.12648
3	I really understand about IR 4.0 especially about Internet of Things, Cloud, Big Data and others.	3.6667	1.12444
4	Industrial Revolution 4.0 is a digital economic that make life easier.	4.1333	0.86037
5	This revolution is the emergence of cyber system that involves technology but do not need to involve humans directly.	3.8000	1.15669
6	The Industrial Revolution able to solve the problem in human resource.	3.9333	0.90719
7	I am do not interested about 4IR	2.8333	1.44039
8	The Industrial Revolution 4.0 was more about allowing robots to rely on human resources.	3.8000	1.09545
9	I am really interested in hiring more about the Revolution Industry 4.0	4.2667	0.86834
10	Education 4.0 have been adapted in IR 4.0. Do you know about this? Ask about this?	3.6000	1.37966

Table 1.1 Student's Knowledge Regarding 4.0 IR

From above table, it indicated that student knowledge score higher on item no 1 with min (4.0667) and that show that most of the student in this study know about 4IR. However the lowest score was the item no 7 with min 2.8333. It indicated that most of respondents didn't agree with that item. The highest score was item no 9 with min 4.2667 and that shown that respondent really interested regarding 4IR.

Student's readiness toward challenges in IR 4.0

Bil	Items	Min	Standard Deviation
1	I understood about the challenges in IR 4.0 era's	3.8667	1.33218
2	I ready to face up IR 4.0 era's	3.8000	1.09545
3	I have a lot of expose on IR 4.0	3.7333	0.82768
4	The University provide a platform for students to meet this challenge of IR 4.0	4.1000	1.12495
5	The Students need to out of the comfort zone to lead the IR 4.0	4.0667	0.78492
6	Creative and innovative are needed to meet this challenge IR 4.0	4.1000	0.95953
7	IR 4.0 was a threat to the student's especially to the lower secondary school in job opportunity	4.0000	1.01710
8	Student didn't take their own initiative to improve themselves in preparation for the IR 4.0	3.8333	1.14721
9	The University by itself was less in implementing the latest technology in learning.	3.6333	1.03335
10	I feel that IR 4.0 was a treat	3.3000	1.39333

Table 1.2 student's readiness towards IR .40

Table 1.2 above shows the level of student readiness towards the Industrial Revolution 4.0. The findings show that the highest level of student readiness 'The University provides a great platform for students to meet the challenges of the Industrial Revolution 4.0' and the item 6 regarding the creative and innovative that need to meet the challenges of IR 4.0 with the 4.1000 mean score which means that most respondents agree with both item. The lowest mean is 3.3000 which is in the question 'I feel Industrial Revolution 4.0 is a threat' where respondents still express their agreement. In conclusion, most students are not yet ready to face the challenges of the Industrial Revolution 4.0.

Student's proficiency in IR 4.0

Bil	Items	Min	Standard Deviation
1	I believed I have enough to go through IR 4.0	4.0333	1.18855
2	Communication skill on speaking and writing needed in IR 4.0	4.0667	0.86834
3	Student had a problem in English face a problem in IR 4.0	3.9333	1.08066

4	Student have to increase their proficiency to be more competence with robot.	3.8667	0.97320
5	Conflict analysis skill needed in IR 4.0 era's to overcome the problem quickly.	4.0333	0.99943
6	Cognitive skill needed in IR 4.0 era to overcome complex issue with aggressively and holistic.	3.9333	0.90719
7	'The skills of emotional control are important for social and professional management because IR 4.0 not just about robots.	4.2333	0.93526
8	I will left behind in IR 4.0 era's if I didn't increase my skills.	4.0000	0.83045
9	The University provide a platform for me to increase my skill on IR 4.0	3.7667	1.25075
10	I attended the courses or seminar to increase my knowledge and skill in IR 4.0	3.6667	0.99424

Table 1.3 Student proficiency on IR 4.0

Table 1.3 above shows the level of proficiency of students facing the Industrial Revolution 4.0. The findings of the study show that the highest level of students' skills is on the question 'The skills of emotional control are important for social and professional management because Industrial Revolution 4.0 is not just about robots.' min 4.2333 where most respondents agree that emotional skills are very important because in the real world, more personality can be seen especially in the workplace. While the highest percentage of strongly disagree was 6.7% with 3 people on the question 'I believe I have enough skills to go through the Industrial Revolution 4.0'. The highest mean was 4.2333 where most respondents strongly agreed with the above statement of emotional skills. The lowest mean was 3.6667 on the question 'I attend to courses or seminars to increase my knowledge and skills in the face of the Industrial Revolution 4.0' where respondents still agreed to this statement. Concluding these 3 objectives, students' skills are still at a moderate level in preparing for the industrial revolution 4.0.

CONCLUSIONS

According to the founder of the World Economic Forum, Klaus Schwab in his book The Fourth Industrial Revolution marked by the emergence of supercomputers, smart robots, driverless vehicles, genetic modifications and the development of terotechnology that enable humans to better optimize brain function. In other words, human life will be simplified with the help of robots becoming "friends" who will manage the day-to-day affairs and tasks of humans.

The results show that students of the Faculty of Information Science (FTSM) are in line with the development of the Industrial Revolution 4.0. However, there are some students from FTSM who know about the Industrial Revolution 4.0 but they are unable to explain the elements of the Industrial Revolution 4.0. FTSM students need to be equipped with knowledge in the areas of information technology, software engineering, entrepreneurship, communication as well as religious knowledge in order to produce outstanding graduates and be prepared to face a more complex environment in the wake of the Industrial Revolution 4.0 wave.

Suggestion

The current education system does not work in accordance with the philosophy of education and should be changed to a better system. However, there is no need to seek a new educational vision as our educational philosophy is well-prepared to address any challenges but we do not use and refer to that philosophy when designing and implementing educational programs. For example, we are increasing the number of classes that are guided by digital technologies that are more interactive and flexible.

Responsible educators need to be actively introducing new courses in line with the industrial revolution 4.0 based on creative and innovative thinking. These courses will greatly help students to know about the fast-growing 4.0 industry around the world. By gaining an in-depth knowledge of the programs or courses offered by the university, students can transform themselves to better prepare for the industry 4.0 era that is being talked about today.

Focuses on maintaining students' identity, thinking, culture and identity in the face of the new National Development and Transformation Plan 2050. Students need to get out of the habit and master the 4C elements of Critical Thinking & Problem Solving, Communication, Collaboration and Creativity. 4C skills must be honed in every corner of life, in residential colleges, college halls, across volunteer and entrepreneurial activities. In preparation for the 4.0 industry challenges, university students need to consider the action.

One of the areas that should be emphasized in the 4C element is that students also need to prepare for the increasingly complex environment. 21st Century graduates must reinforce themselves in terms of some of the traits outlined in a student's superior skills, including: Emphasize complex problem solving skills, Improve oral, written communication skills, Embrace yourself as a leader and team member, Feel yourself with emotional intelligence as well as take advantage of all opportunities, always be creative.

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Thomas Moore's creative works in Russian literary-critical reception of the second half of the 1830s – 1850s

Las obras creativas de Thomas Moore en la recepción literaria crítica rusa de la segunda mitad de 1830-1850

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ABSTRACT

In this research, based on the common or at least great similarities between the problems of large- and small-scale habitats in the geographies where cultural interactions are experienced, the cultural structure of the Near East University, which is blended with more than 100 countries and thus culture, in the multicultural living area has been examined. Higher education in North Cyprus, which carries the mission of an educational island, is in an important process of development. North Cyprus, where almost one-third of the official population comes from, carries the impact of multicultural life. In this study, the interview method was used in Qualitative Research Methods. Stewart and Cash (1985) defined the interview as a serious process of mutual and interactive communication based on the way of asking and answering questions for a predetermined and serious purpose Stew. Student at the Near East University, who is from Nigeria, Zimbabwe, Turkey, Jordan, Egypt, Iraq, attended by 20 students from different countries such as Iran. The students were asked open-ended questions and analyzed in terms of their ability to express themselves freely and analyzed by qualitative research method.

Keywords: Multiculturalism, higher education, culture, conflict, migration

RESUMEN

En esta investigación, basada en las similitudes comunes o al menos grandes entre los problemas de los hábitats a gran y pequeña escala en las geografías donde se experimentan las interacciones culturales, la estructura cultural de la Near East University, que se combina con más de 100 países y, por lo tanto, se ha examinado la cultura en el área de vida multicultural. La educación superior en el norte de Chipre, que lleva la misión de una isla educativa, se encuentra en un importante proceso de desarrollo. El norte de Chipre, de donde proviene casi un tercio de la población oficial, tiene el impacto de la vida multicultural. En este estudio, el método de la entrevista se utilizó en los métodos de investigación cualitativa. Stewart y Cash (1985) definieron la entrevista como un proceso serio de comunicación mutua e interactiva basado en la forma de hacer y responder preguntas con un propósito predeterminado y serio. Estudiante de la Near East University, que es de Nigeria, Zimbabwe, Turquía, Jordania, Egipto, Iraq, al que asistieron 20 estudiantes de diferentes países, como Irán. A los estudiantes se les hicieron preguntas abiertas y se analizaron en términos de su capacidad de expresarse libremente y se analizaron mediante un método de investigación cualitativa.

Palabras clave: multiculturalismo, educación superior, cultura, conflicto, migración.

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Introduction

Our developing world is also changing. Change, as a dictionary meaning, "value as a previous situation or varieties of existence" finds value. Change is a vital differentiation in which all societies cannot escape and sometimes they do not want to escape. For this reason, all nations and people communities, both traditional and / or local, and modern and / or universal, will not avoid social differentiation. Although multiculturalism was used as a concept in Switzerland in 1957 for the first time in the world, it became widespread in Canada in the late 1960s, and this concept was rapidly spread to other English-speaking countries (Sengstock, 2009, Shayakhmetova & Chaklikova, 2018; Matandare, (2018).

The migration of the populations that have been going on at a fast pace in the world has brought with them constant or constant change of time and cultural harmony and confrontations. Many villages, towns, cities, and country stagnant had to meet with different cultures and then a rapidly changing group of people. But the shape, form and numeracy of this change differed according to the attractiveness of the target settlements.

Especially in countries with small populations (in this case, TRNC is one of the most suitable examples), the rate of population growth is very significant. According to the data of the Ministry of Interior, the population of the Near East University, which is the country where the Near East University is located, is 350 thousand. A country with a population of 350 thousand, 150 countries, a total of around 100 thousand foreign students host the pains of multicultural life at the same time.

 The social structure, constantly changing and developing in a continuous movement, is forced to change by social elements within its structure and which have different characteristics and activities. These elements are often transformed with the speed of quantitative and qualitative developments in the economy, advances in technology, and demographic formations.

According to Castles and Miller (2009: 10), there are five forms of migration. These are accelerated migration as a result of the increase in the number of immigrants involved in migration, differentiation of migration as a result of the emergence of different immigrant classes in the migration processes, women's migration with the inclusion of half of the immigrants in the international migration movements, the politicization of migration as a result of the migration to the international agenda, the migration of the immigrant countries. It is the transformation of migration with transit country position.

However, the dynamics of the society have been renewed with great speed, depending on the foreigners who have recently penetrated other societies. No one has the right to criticize the value of another. The limit of self-realization can be achieved by securing an equal chance for others to accomplish this (Taylor, 1995; Ahmadi, et al, (2014; Melo, et al, 2017; Radhy, 2019).

The structure of the society and the individual in the study areas of sociologists is of utmost importance to reveal the change. The behavior of the individual in the society is very important in terms of forming the society. New norms, values, changes in material elements and symbols take place between the different perceptions of social man and thus society.

Changes in small groups on behalf of the science of sociology and temporary (Popular Culture) changes such as fashion may not be of great importance. However, one of the main problems is to examine the behavioral changes and the consequences it creates, which are important for communication science. While investigating the change dynamics of societies, the factors that cause change cannot be excluded. While the change processes of the communities are inevitable, the change in the interaction and the result of communication, which is one of the reasons for these changes, is seen as the factors to be examined.

Those who migrate to a new place or who have to stay there for a short period of time (those coming to the country for temporary work, asylum seekers, those who are in the country of study, or for any other reason) need information about destroying anxiety and uncertainty. This will not pose a big problem for similar cultures, which can create a distressing situation for people living in different cultural settings. These people's troubles and treasures are not just economic or vital concerns. These people also experience concerns about maintaining their lives due to intercultural changes.

In different cultural settings, migrants face many problems, not only by the governance system regulated by different laws and rules, but also by people with different cultural understandings. Those who migrate to different cultural settings may have different perceptions about the host country and may not agree on the common point within themselves. This makes it difficult for the host countries to adopt a common approach to all refugees who take refuge in them. Therefore, host countries have to behave differently to immigrants with different cultural backgrounds.

Language of the culture the language of human

Multicultural social rights are also related to human rights and sanctity of human rights outside the constitutional order. Perhaps each person in the living community must live by recognizing that they reflect different cultures, but by recognizing that they are candidates for another culture. It may be natural for individuals in communities to be alienated and / or personalized or compared to cultures that do not have their own cultural characteristics, but conflicts are inevitable as soon as the trial situation is entered. It would not be wrong to say that the results of alienation in large masses and cultural differences of ethnic groups are more radical. However, it is possible to say that there are more tolerance levels and tolerance in smaller communities and especially in communities where relations and contacts are experienced more.

Especially in societies where high level of development and universal values are internalized, tolerant view and capacity to understand cultures develop accordingly. From this point of view, one of the most important universities of the Turkish Republic of Northern Cyprus, which can be seen as a realistic part of the big picture, is the Near East University and its campus, its ethnic origins, vital environments, religious beliefs, food cultures, daily habits, languages, religions, all of them and so on. It is worth examining as an important center where habits differ.

Made in this investigation, this campus that has collected more than 100 countries, students, Middle East, Asia, Europe, the Arabian Peninsula and a full cultural structure with students from Turkey and seen as multiculturalism inspection area properties. Especially in Turkey and TRNC students' cultures are big problems do not happen in the process of harmonization of its proximity to one another.

Social and family structures to one participant stating that the importance of Turkey and Cyprus to the students coming from different regions, could meet in a common communication within the same class, and himself, with students switching to more communication stated that it provides. (Kasımoğlu; 2012)

It is inevitable that the cultures experienced with migration across the world are affected. However, these processes of change may be painful and sometimes problematic for the affected and affected cultures. In this sense, it is seen that the adaptation of the students of African origin to the cultural behaviors specific to the TRNC is more troubling than the students from the Middle East countries.

During the meeting with African students, they stated that they are very happy to be living and studying in this country and they are among the lucky individuals studying here. The biggest problem they experienced during the adaptation process is that although they are extremely normal, they express some of the things that are disturbed here. For example, when we were cooking at home, we wouldn't have thought whether this smell would disturb the environment or our neighbors in our own country; but we were reminded that we should not ignore this in this country. (!) This experience was important to us. Now we have chosen to be in harmony with our neighbors. Because even if we move out of this house, we'll have the same problem in other houses. For example, while cooking or listening to music (they say they have trouble with neighbors because of loud voices), keep the environment in mind and cut the sound of music a little more. Along with complaints, our compliance problem is also decreasing. However, the neighbors are more understanding. In this case, the problems almost disappear. Thus, a bit we are demonstrating some neighbors tolerance and resolving the problem. They are saying their opinions.

In addition to all these adaptation problems, the problems of their friends studying in European countries are higher. Some of the students (especially Muslim students) who stated that they were having difficulties in performing their worship by their religious beliefs stated that they did not feel uncomfortable here.

Negative reflections of the dominant or widespread culture, especially in the negative reflections of economic culture is recorded. The meat prices are very suitable for the places where they come from and their meat is defeated in their own culture.

Migration and adaptation

Migration movements have changed and differed in a numerically and factually unpredictable manner. In a world that has become globalized and transformed into a small village, mobility has expanded and increased with the mobility of migratory movements. This situation led to the diversity of the target, source and transit countries in the migration processes. This situation has also caused changes in the types, causes and consequences of migration. (T.C. Kalkınma Bakanlığı, 2014: 3)

Although the negative aspects of the differences in religious beliefs in Europe and compliance problems are always at the forefront, it is possible to see places where religious differences do not become problematic.

Tolerance, different cultures and religions to respect the universal values of the reflexes to be in the European peoples are expected to live in particular, especially in the religion of Islam and rights and worship restrictions in the areas of the European countries, unfortunately, more often seen. The two paradoxical concepts, such as development and intolerance, come side by side, and the groups of more than 100 different countries from the

TRNC Near East University and Christian-Muslim groups lived freely in the sense of religious beliefs. It is seen.

In particular, it is seen that the ceremonies and worship of the students of Christian religion, as a result of their religious beliefs, are not favored by any major culture, and on the contrary, places of worship are occasionally provided by the main culture.

This is because learning environments gradually become places where interaction with different cultures is inevitable. Teachers have an important function in the effective management of cultural differences in the learning environment. For this reason, teachers need to have knowledge about creating a learning environment that supports multiculturalism and organizing the classroom environment in a way that will bring about various ideas (Banks, 2013).

Ethnocentric individuals are the evaluation of other social communities according to their own ethnic group or culture, especially according to language, life, age and religion. These ethnic distinctions and subdivisions serve to define the unique cultural identity of each ethnicity. Ethnocentric views may cause conflicts at extreme points. Political incompatibilities can result in war, terrorism and even genocides. (Meydan Larousse, Great Lûgat and encyclopedia, 4th volume, ethnocentrism)

One of the serious problems experienced in multicultural settings is the prejudices of individuals or groups on each other. These prejudices can lead to communication disruption, interdependence and conflicts. Prejudice is one of the biggest obstacles to integration in these teams. Behfar et al. (2006: 233).

We tried to look at some of the troubles that emerged with the formation of a multicultural structure throughout the Turkish Republic of Northern Cyprus and the Near East University.

An African student from the Near East University said: The country we come from is very different in terms of its economic and political conditions, ethnicity, cultural structure and languages. The group we define as African migrants in North Cyprus includes those who come from African countries and often come with black identities and choose to live long-term with their student identities. Our countries are different, but sometimes we are united here by being an African, Ül he says. A Nigerian student who speaks of the problems, he says, is important for them to have mosques in Cyprus and to live their religious freedom freely. However, in the Turkish Republic of Northern Cyprus where there is a great deal of freedom in terms of religious freedoms, there are very few sacred places that can be worshiped according to Christian beliefs. by renting these cultural and religious requirements. An African student we are talking with says they want a lot of money when they talk to the owners of the store they are going to rent. But then when they told the shopkeeper that they wanted to use them for religious reasons, the shop owners stated that they made a discount on the rent and said that they were happy.

In addition, another Christian Nigerian said that although they were Christians, they had no problems realizing their worship, and that the majority of the situation in a Muslim country showed the development of that country. It is stated that the students talk about this issue and they are welcomed by emphasizing the development and tolerance of the country. However, the same students still live in their religious understanding, but from time to time they cannot find culture-based living conditions here.

Christian and / or Muslim students, who expressed problems in house leases, tell that they had problems with their hosts during or after their studentship. Especially in order to stay in a house sometimes 8-10 people have to come together to say that the students have difficulty in understanding why they find it inappropriate. In addition, the issues of cleanliness, noise, friendship, alcohol habits and traffic mismatches are also the main actors of the disputes.

For these immigrants, being African is a much less insignificant identity in their own country, and when they come to Cyprus, a supra-identity, the ken African daha identity, begins to form. African immigrants say that they do not feel the importance of unity and solidarity in their own countries.

The ones from Africa say almost brother without making any distinction between the countries. As a matter of fact, this group or a group of people consists of tribes or ethnic groups that can be called enemies in Africa. However, these divergences abroad are replaced by solidarity.

The prejudices in multicultural teams are mostly in the context of gender, religion and active origin. These prejudices are reflected in team and relationships, and as a result of various problems arise naturally. Behfar et al. (2006: 233)

One of the problems that arise is that students want to live the same way in the Turkish Republic of Northern Cyprus, which is another country. It is natural to see that life styles of different cultures are not compatible with each

other. However, it can be said that the problems that arise are mainly due to the efforts of different ethnic groups, religious beliefs and cultures to dominate each other. However, empathy and educational saturation, which is one of the important facts of communication, can be solved through peaceful and understanding when conflicts are put into use here.

Especially in multicultural groups, we stated that groupings were seen in them and they affected the functioning and performance of the teams. Especially when a group feels more superior to the other group, it makes the other side feel and the prejudices that exist between the groups are damaging the effectiveness of the team. On the other hand, being together with different individuals in the team may cause some negative consequences such as not feeling tension and not being comfortable. They need to be managed in some way. Especially in the groupings, the strong group may want to keep the other group under control and the other non-dominant group cannot reveal their creative potential because they do not feel comfortable. (Dalyan 2004, p.102),

The things that cultural images are predominant are on the side of culture that we can see more. Individuals with the same culture have the same meanings as the words, words, hearing or what they see. The answer to the question of why this is so is hidden in the invisible cultural infrastructure. Many cultural elements have chosen symbols and provided associations through these symbols. (Religious symbols, greetings, food culture, spiritual senses, etc.)

Multiculturalism also informs people of diversity within their own culture. When the differences between cultures are tried to be seen, they are sought in the culture grown in differences and the ways to be more fair to them are learned. The dialogue between cultures creates a space for critical and independent thought and strengthens the tolerant approach of the parties. (Milena et al. Istanbul 2009, p.12.)

It is a proven fact that people can live together, no matter how different their cultural structures and lifestyles. Migrants and / or post-occupants are the most important indicators of this in many countries.

The form of cultural pluralism, which is basically called multiculturalism, is a political movement that has begun to develop as a liberal pluralistic society. In this sense, this concept has emerged as an expression of a political and social system that expresses that there is no problem in the existence of different cultural traditions on the basis of equality regardless of their cultural origin (Erdoğan, 1998: 195).

Multiculturalism can become a problem where conflicts between groups on values and their interpretation are not easily reconcilable within a social structure. (Milena et al. Istanbul 2009, p.12.)

Conclusion

When multicultural life becomes an inevitable life-cycle, it is sometimes seen that the opposites dissolve in the same pot and that the ends of the pointed views are rasped. The Near East University and its multicultural life form, which can be described as the almost one-on-one reduction of the large picture that appears, can be seen as a platform where changes and differences are accepted or contrasts can be minimized.

The students in different beliefs and cultures participated in the research, how they responded to detailed and open-ended questions, how cultural differences were met in the same living environment, and how opposites, contradictions and beliefs that could be seen as incompatible could live together. According to the research, it can be thought that the beliefs in which they can live together seem to be peaceful, compatible with the reality of tolerance, often with a non-written agreement among themselves. Consequently, in contrast to an understanding where cultural differences are not seen or ignored, the prevailing conception of an understanding that reduces the interactions between different lifestyles centered on culture and faith, to a level that can be said to be negligible, is seen as the most important factor that hinders conflicts and contradictions.

The fact that religion-based disagreements in Europe and some other continents are seen as a different color and a different way of life in the TRNC, which is a small island country, is an important indication that a peaceful way of life is adopted by all different religious groups. The groups of students who are more interested in their partners rather than differences, especially in dormitory buildings, take care not to interfere in their habitat and culture.

The problems encountered in the example of Near East University instead of the religious beliefs that cause the most problems in the areas of immigration and common living, are mostly seen as disagreements in cleaning, order, food smells, noise and rest times. One of the important issues in which compliance is observed is that the imbalance in economic life can be tolerated by the parties. The fact that other groups who are in need of economic support and other groups are assisted is an important dimension that should not be overlooked.

This research carried out in the Near East University, which is one of the multinational universities where multi-

cultural life can be seen as the best indicator, increases in parallel with the increase of tolerance of individuals and tolerance of cultural differences. From this point of view, no matter how much intercultural variability is, interpersonal communication and cohesion make the differences more bearable and sustainable.

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Morena y la construcción de lo Nacional-Popular en México

Morena and the construction of the National-Popular in Mexico

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RESUMEN

En este trabajo se argumenta que Morena y sus antecedentes, han sido un factor importante en la lucha por la democracia en México además de su oposición a la política económica neoliberal. La transición democrática mexicana ha sido fallida y esto es debido a los atavismos autoritarios del régimen emanado de la revolución mexicana combinados con una acumulación neoliberal cada vez más incompatible con la democracia liberal y representativa. Por ello, Morena representa hoy una fuerza política que busca hacer realidad esta democracia y al mismo tiempo profundizarla con la democracia participativa. Sin embargo, en Morena coexiste al lado de una voluntad democrática real, una heterogeneidad ideológica que presenta atavismos centralistas y verticales y el peso del liderazgo personal de Andrés Manuel López Obrador. Finalmente se propone una breve agenda política alternativa de lo que nosotros llamamos el proyecto Nacional-Popular, que acorde con los principios programáticos y políticos que animan al movimiento y partido, podría ser la base para la ejecución de políticas de Estado ante una eventual llegada al poder de Estado.

Keywords: México, Anderés Manuel López Obrador, Morena, Nacional-Popular

ABSTRACT

This article contends that Morena and its precedents, has been an important factor in the struggle for democracy in Mexico, besides its opposition to neoliberalism. The democratic transition in Mexico has failed due the authoritarian atavisms coming from the Mexican revolution regimen combined with a neoliberal accumulation more and more incompatible with liberal and representative democracy. Therefore, Morena represents today a political force that is looking for this kind of democracy and to go more deeply in the direction of a participative democracy. Nevertheless, in Morena a real will for democracy coexists with an ideological heterogeneity that has centralists and vertical atavisms and the weight of the personal leadership of Andrés Manuel López Obrador. Finally, we propose an alternative agenda of the National-Popular project, that could be a base to exercise the power of State.

Keywords: Mexico, Anderés Manuel López Obrador, Morena, National-Popular

1.   Introducción

En este trabajo, producto de un proyecto de investigación conjunto que se ha venido desarrollando desde hace algunos años, analizamos a un movimiento político y social que se ha venido fraguando en los últimos diez años y que lleva por nombre Morena, aunque también ha sido llamado en algún momento Movimiento Regeneración Nacional.[1] Dicho movimiento ha sido uno de los más decididos opositores al modelo neoliberal implantado en México a partir de 1982. En esa lucha, ha encarnado al lado de sus aliados un proyecto político y social contrario al neoliberalismo, el Proyecto Alternativo de Nación. El surgimiento de dicho proyecto ha mostrado las profundas limitaciones de lo que después de las elecciones de 2000 se consideraba una transición democrática exitosa. En realidad, Morena ha tenido que luchar contra una transición democrática fallida y un régimen liberal y representativo cargado de autoritarismo, represión y corrupción. Por ello mismo, en este trabajo pretendemos argumentar que Morena y sus antecedentes, han sido un factor importante en la lucha por la democracia en México además de su oposición a la política económica neoliberal. Partimos de plantearnos tres preguntas cruciales en relación al proceso político mexicano más reciente: ¿ha sido la transición democrática mexicana exitosa aun en los parámetros de la democracia liberal y representativa? ¿es compatible dicha democracia con el modelo económico neoliberal? ¿la profundización democrática en México implica hacer realidad el formalismo liberal y representativo y realizar la democracia representativa? La respuesta inicial que se pretende fundamentar en este trabajo es que la transición democrática mexicana ha sido fallida y que la causa fundamental radica en los atavismos autoritarios del régimen emanado de la revolución mexicana combinados con una acumulación neoliberal cada vez más incompatible con la democracia liberal y representativa.

Morena persigue hacer realidad a esta democracia liberal y representativa, pero también profundizarla a través de la democracia participativa. La democracia participativa se sustenta en el principio de que la ciudadanía no debe limitar su participación al voto y al día de las elecciones. Referendums, plebiscitos, consultas populares, revocación del mandato, rendición de cuentas, deben ser instrumentos ciudadanos que complementen la participación electoral. Además de ello, la participación ciudadana debe ser hecha realidad con la organización territorial en secciones electorales, municipios y Distritos electorales. En este trabajo buscamos reconstruir la concepción de la democracia participativa en Morena y contrastarla con la práctica real que se observa en dicho movimiento. La voluntad democrática radical que forma parte del Proyecto Alternativo de Nación y la práctica política de un sector importante de la base del movimiento, puede contrastarse con su heterogeneidad ideológica, con atavismos centralistas y verticales y con el peso del liderazgo personal de Andrés Manuel López Obrador. Con ello, se pretende hacer un análisis realista de lo que está aconteciendo en el movimiento progresista más importante del México actual.

2.   La ruptura del pacto de la revolución mexicana. La crisis hegemónica del PRI.

El ascenso del liderazgo personal de Andrés Manuel López Obrador, realidad política que resulta insoslayable para Morena, tiene sus antecedentes en el movimiento político que emergió de la ruptura del pacto histórico de la revolución mexicana. Esta ruptura comenzó a observarse en el contexto de la crisis surgida al final del sexenio de José López Portillo (1976-1982) y se cristalizó durante el de Miguel de la Madrid (1982-1988). La política económica realizada durante ese sexenio rompió con el nacionalismo revolucionario que había caracterizado al partido dominante durante décadas, el Partido Revolucionario Institucional (PRI), y lo sustituyó por un ideario y una práctica neoliberal. Al final del sexenio, ya había surgido una disidencia que tomando el nombre de Corriente Democrática y encabezada por Cuauhtémoc Cárdenas, Porfirio Muñoz Ledo e Ifigenia Martínez, intentó reencauzar al PRI por la senda ideológica por muchos años mantenida (Monsiváis, 2008:23-24). Al fracasar en la lucha interna, la Corriente Democrática se coaligó con algunos partidos y fundó el Frente Democrático Nacional quien rápidamente se volvió escenario de una insurgencia electoral (Memoria, 1988) y encabezado por Cuauhtémoc Cárdenas, muy probablemente ganó las elecciones presidenciales de 1988 (Rodríguez, 1989: 40-50).

El fraude de 1988 forma parte del imaginario político mexicano desde entonces y el acontecimiento marcó una nueva época de la izquierda mexicana. Ya no se trataba de la izquierda de tendencia socialista o marxista de carácter marginal en términos electorales. Ahora se expresaba en un frente que pronto se convirtió en un partido -el Partido de la Revolución Democrática (PRD) (fundado en 1989)-, que tenía una ideología antineoliberal. En las elecciones de 1988 el candidato de la izquierda electoral tuvo según las cuestionadas cifras oficiales, aproximadamente 6 millones de votos lo que implicó un 31% de los votos. En las elecciones sucesivas de 1994 y 2000, Cuauhtémoc Cárdenas obtendría entre un 15 y 16%, porcentaje que llegaría a convertirse en el voto duro del PRD. No fue la izquierda histórica, la oposición socialista y marxista al régimen de la revolución mexicana, la que logró este salto electoral. La contribución de esta oposición de izquierda, no fue desdeñable en términos de cuadros políticos y

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experiencia organizativa. Pero el salto provino de la ideología de la revolución mexicana inmersa en el imaginario popular mexicano.

La ideología de la revolución mexicana fue un elemento poderoso en la hegemonía del PRI en sus diversas etapas. Como veremos líneas adelante, esta hegemonía no provino solamente de un recurso ideológico, sino de las distintas medidas de gobierno que constituyeron el pacto histórico entre la élite revolucionaria, la clase obrera, el campesinado y las clases medias. Con esta ideología y pacto, el PRI con diversos nombres gobernó de manera imbatible durante 70 años. Fue el abandono de la ideología de la revolución mexicana, lo que inició su declinación como partido hegemónico en el sistema político mexicano. La ideología de la revolución mexicana se había nutrido del liberalismo del siglo XIX y de la impronta campesina y obrera en la lucha revolucionaria entre 1910 y 1917. He aquí algunos de sus elementos: la convicción de la necesidad de un Estado fuerte, autoritario (idea que provenía del régimen de Porfirio Díaz); a diferencia del tradicional ideal liberal, el Estado fuerte y autoritario era interventor y autoconcebido como "motor del desarrollo" capitalista que encaminaba en la senda del progreso al país incluso a costa del sacrificio de la democracia; desarrollo económico concebido con fuerte presencia de empresas estatales en sectores estratégicos combinado con cúspides empresariales privadas (economía mixta); liderazgo político personalizado que transitó del caudillismo militar que generó la guerra revolucionaria (Álvaro Obregón), se institucionalizó en la figura del hombre fuerte (Plutarco Elías Calles) y terminó en un régimen de un fuerte presidencialismo ("presidencia imperial") (Krauze, 2006); la cooptación de las demandas obreras, populares y campesinas, en un programa político de reformas sociales que aspiraba controlar a estos sectores sociales a través de su organización y corporativización desde el Estado. Por lo tanto, una política de masas que irradiaba al Estado en ellas; un Estado árbitro que mantenía una autonomía relativa frente a la clase dominante, frente a la inversión extranjera, frente a las potencias mundiales (Doctrina Carranza) y que nutría su poder de los dividendos políticos de las reformas sociales y control de masas (Córdova 1976: 146-176; Córdova, 1985: pp 11-38, Caps.V y VI). Hasta aquí una apretada síntesis de la ideología de la revolución mexicana que sustentó al Partido Nacional Revolucionario (PNR) (1928-1938), al Partido de la Revolución Mexicana (PRM) (1938-1946) y finalmente al PRI (1946), organización que se vio a sí misma como un partido de masas, popular y de unidad nacional (Garrido, 1991: Caps. IV-VI).

Sin embargo, la estabilidad del príato no se explica solamente por la potencia de la ideología del nacionalismo revolucionario. Durante más de 50 años de los 70 que el PNR, el PRM y su sucesor el PRI mantuvieron el poder, las reformas sociales consolidaron el pacto histórico corporativizado en el propio PRI pero también en la Confederación de Trabajadores de México (CTM) (fundada en 1936), la Confederación Nacional Campesina (CNC) (1938) y la Confederación Nacional de Organizaciones Populares (CNOP) (1943) (Córdova 1976: 146-176). PRI, CTM, CNC y CNOP fueron los principales tentáculos a través de los cuales el Estado atrapó a la sociedad civil. El pacto corporativo se sustentó en una extensa reforma agraria que durante el gobierno de Cárdenas vertiginosamente incrementó su ritmo. Desde el gobierno de Lázaro Cárdenas el nacionalismo revolucionario habría de repartir 80 millones de hectáreas (Tello, 2010: 157, 160, 213). Cantidad considerable cuando sabemos que el territorio mexicano cuenta con 198 millones de hectáreas (FAO, 2009: 36), lo que implica que un 41% del territorio fue distribuido en forma revolucionaria porque el reparto agrario no fue hecho a través de la propiedad privada sino de la ejidal.

En lo que se refiere a la estabilidad salarial en ese período, el cuadro I nos indica que entre 1941 y 1956, el salario real se mantuvo prácticamente igual. Otras estimaciones indican que el salario mínimo se mantuvo al alza hasta el sexenio de Luis Echeverría para después observarse un descenso vertiginoso a partir de 1982 hasta 2000. A partir de ese año el salario mínimo real se mantuvo estancado, aun cuando si se comparaba el salario mínimo real de 2012 con el que prevalecía en 1970, se concluía que con el de 2012 solamente se podía comprar el 30% de lo que se compraba con el de 1970 (Aguirre, s/f).

Cuadro I. **Salario Mínimo Real 1941-1956.** (1941: 100)

1941-1942	100.0
1943-1944	75.4
1945-1946	66.9
1947-1948	73.1
1949-1950	78.9
1951-1952	65.6
1953-1954	104.5
1955-1956	99.5

Fuente: en base a datos del INEGI y la Comisión Nacional de Salarios Mínimos y datos del Banco de México.

El nacionalismo revolucionario también fundó instituciones de seguridad social tales como el Instituto de Seguridad Social Para las Fuerzas Armadas Mexicanas (ISSFAM) (1929), la Secretaría de Trabajo y Previsión Social (1941), Hospital Infantil de México (1943), Instituto Mexicano del Seguro Social (IMSS) (1943), Secretaría de Salud (1943), Instituto de Seguridad Social y Servicios Sociales de los Trabajadores del Estado (ISSSTE) (1959), Instituto del Fondo Nacional para la Vivienda de los Trabajadores (INFONAVIT) (1972) y el Fondo Nacional para el Consumo de los Trabajadores (1974). Al tiempo que se observaba esto la pobreza nunca fue resuelta: en 1950 el 88.4% de la población vivía en situación de pobreza patrimonial y en 1984 en el eclipse del nacionalismo revolucionario dicha pobreza alcanzaba el 53% (INEGI).

Reforma agraria, sindicatos, salarios estables, seguridad social, control corporativo de la sociedad civil hegemonía y al mismo tiempo pobreza irresuelta autoritarismo y corrupción, tales fueron los rasgos del régimen de la revolución mexicana. Su ocaso tal vez haya comenzado con las crisis de fin de sexenio de Luis Echeverría Álvarez (1976) y de José López Portillo (1982). En el primer caso, el modelo de sustitución de importaciones resultó insuficiente para hacerle frente a los vaivenes de la economía internacional y las medidas gubernamentales provocaron una fuga de capitales que incrementó aún más la crisis. En el segundo, el descubrimiento de nuevos yacimientos petrolíferos generó un optimismo que disparó la deuda externa de 37 mil millones de dólares en 1978 a 71 mil millones en 1981 (Jiménez, 2006-2007). El aumento de las tasas de interés y el descenso del precio del petróleo habría de generar la crisis terminal del Estado desarrollista mexicano. Se vivía, además, un contexto mundial de agotamiento de la fase fordista keynesiana de la acumulación capitalista y del Estado socialdemócrata (Harvey, 2009).

Desde el fin del sexenio de Cárdenas se había hablado de la muerte de la revolución mexicana. En efecto, los sexenios de Manuel Ávila Camacho (1940-1946) y de Miguel Alemán (1946-1952), atemperaron el ímpetu del nacionalismo revolucionario aun cuando el de Adolfo López Mateos (1958-1964) pareció darle un nuevo impulso. Desde mediados de los años cuarenta del siglo XX, se debatía acaloradamente si la revolución mexicana había muerto. Mientras Jesús Silva Herzog, José R. Colín y Daniel Cosío Villegas la sepultaban, todavía a fines de los sesenta Luis Echeverría Álvarez defendía la vitalidad de la revolución mexicana (una recopilación del debate puede verse en Ross, 1972). Mientras desde la antesala de la presidencia, Echeverría defendía la vigencia de la revolución mexicana, desde la cárcel de Lecumberri, Adolfo Gilly la interpretaba como una revolución interrumpida (Gilly, 1974). Siguiendo una veta iniciada por el dirigente trotskista J. Posadas (Homero Cristali), Gilly concibió a la revolución mexicana como parte de la revolución mundial y como una revolución permanente en forma de guerra campesina que había sido interrumpida en su curso hacia su conclusión socialista (Gilly, 1974: VIII). La interpretación de Gilly estaría en las antípodas de la de Arnaldo Córdova, para quien los campesinos solamente impulsaron programas agrarios primitivos y localistas (Córdova, 1985:25) y el período de Cárdenas solamente fue la culminación de la instauración de un régimen populista que buscó el desarrollo capitalista (Ibid.: 34). Este planteamiento lo había hecho con anterioridad en *La formación del poder político en México* (Córdova, 1972: 33,34) y lo reafirmaría en *La política de masas del cardenismo* (Córdova, 1976).

Como quiera que haya sido, el hecho cierto es que la asunción del neoliberalismo en 1982 y las medidas económicas que comenzó a tomar, terminaron por desmantelar el legado de la revolución mexicana. Si con los gobiernos de Ávila Camacho y Alemán la revolución había muerto o sido interrumpida, con los que van de Miguel de la Madrid y Carlos Salinas de Gortari (1988-1994) hasta Enrique Peña Nieto (2012-2018) el régimen construido por el nacionalismo revolucionario fue aniquilado. No en balde en el momento climático del salinismo, se habló de "la segunda muerte de la revolución mexicana" (Meyer, 1992: 8-12). Sin embargo, esta muerte fue larga: habría comenzado en la década de los cuarenta del siglo XX, continuada en los ochenta y finiquitada en los albores de la segunda década del siglo XXI. La sustitución del nacionalismo revolucionario por el neoliberalismo como su ideología articuladora, le costó al PRI el derrumbe de la hegemonía tal como la mantuvo durante décadas.

La crisis del neoliberalismo en México y la interrupción de la transición democrática en México.

En el momento en que ascendía, el neoliberalismo hizo varias promesas. Entre ellas, la de que una vez desatada la economía de las asfixiantes ataduras que tenía, el mercado habría de propiciar un incremento de la productividad que habría de derramar riqueza al conjunto de la sociedad. Advendría con ello una etapa de democracia, prosperidad social y por tanto de paz social. La historia de México en las últimas tres décadas ha sido todo lo contrario a las anteriores aseveraciones.

Empecemos por lo de una productividad desatada como consecuencia de la eliminación del intervencionismo estatal. Los datos del crecimiento del PIB por sexenio entre 1936 y 2012, nos revelan que el crecimiento económico durante los años del Estado desarrollista fue superior a los de la época neoliberal. El llamado "milagro mexicano" se hizo evidente en tasas de crecimiento del PIB que rondaron en un promedio del 6% por sexenio.

Todavía el último sexenio del nacionalismo revolucionario (el de López Portillo), pese a las crisis con las cuales comenzó y terminó, estuvo en 6.4%. A partir de ese momento, cuando comenzaron los gobiernos neoliberales, los promedios de crecimiento del PIB fueron malos o mediocres. Cada uno de los sexenios neoliberales a partir del de Salinas de Gortari, ha tenido un promedio de crecimiento menor que el anterior. Los cinco sexenios neoliberales hasta el de Felipe Calderón, tuvieron en total un promedio de crecimiento del PIB de un 2.34% en contraste con el 6% de los ocho sexenios desarrollistas. En cuanto a la inflación, puede observarse que la misma fue oscilante en los gobiernos del nacionalismo revolucionario tendiendo a subir a niveles nunca vistos durante todo el período, cuando al final del gobierno de López Portillo arrancó la crisis de la deuda externa que asoló a toda América latina ("la década perdida") (Rodríguez, 1991). El neoliberalismo en México arrancó con una crisis económica profunda y una inflación desbocada, la catástrofe ideal (Klein, 2007) para crear la disponibilidad social necesaria para romper con el paradigma del nacionalismo revolucionario.

Cuadro II

PIB, Inflación y Salario Mínimo por sexenio (1936-2012)

Presidente	Sexenio	PIB%	Inflación%	Salario mínimo*
Lázaro Cárdenas del Río	1934-1940	4.5	36.7	2.4
Manuel Ávila Camacho	1940-1946	6.1	131.7	3.4
Miguel Alemán	1946-1952	5.7	47.2	6.7
Adolfo Ruiz Cortines	1952-1958	6.3	44.8	12.0
Adolfo López Mateos	1958-1964	6.3	13.7	21.5
Gustavo Díaz Ordaz	1964-1970	6.2	17.7	32.0
Luis Echeverría Álvarez	1970-1976	5.9	129.6	96.7
José López Portillo	1976-1982	6.4	458.9	364.0
Miguel de la Madrid	1982-1988	0.3	3719.7	8000.0
Carlos Salinas de Gortari	1988-1994	3.9	139.1	15.2
Ernesto Zedillo	1994-2000	3.6	225.9	37.9
Vicente Fox	2000-2006	2.1	29.7	48.6
Felipe Calderón.	2006-2012	1.8	28.5	62.3

Fuente: Elaborado en base a datos de INEGI, Banco de México.   * Viejos pesos (1935-1988). Nuevos Pesos (1988-2012).

Las Gráficas I y II muestran un panorama comparativo entre los últimos años del nacionalismo revolucionario y el régimen neoliberal, que comenzó a instaurarse en 1982. No solamente el comportamiento del crecimiento económico es en promedio más elevado en el primero, sino sus oscilaciones son menos brutales que las observadas en el período neoliberal. Puede decirse que, en un clima de volatilidad económica mundial, el comportamiento del PIB durante el régimen neoliberal ha sido errático y sujeto a cambios drásticos. Además del crecimiento negativo observado al principio y el final del gobierno de De la Madrid, podemos observar la crisis profunda de 1995 y 1996 para finalizar el período con una nueva debacle económica entre 2008 y 2010, una recuperación al final de ese lapso para finalmente observar un descenso entre 2012-2014.

Gráfica I
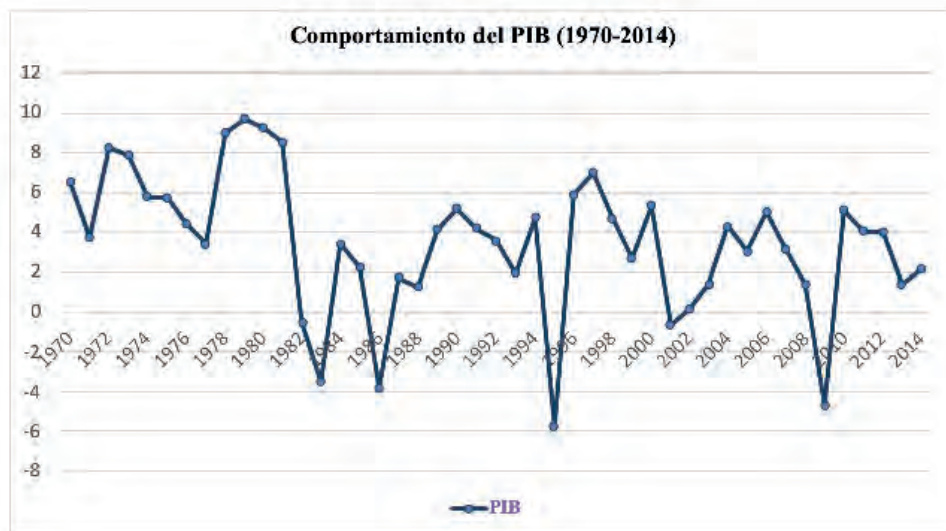
Fuente: Elaborado en base a la información del Banco de Datos Económicos del INEGI.

Igualmente puede contrastarse el comportamiento de la inflación entre los últimos diez años del nacionalismo revolucionario y las más de tres décadas de neoliberalismo. En general puede decirse que la inflación fue grande en el primer sexenio neoliberal como consecuencia de la crisis que asoló al mismo, tuvo un nuevo repunte con motivo de la crisis observada al final del sexenio de Salinas de Gortari, pero no sucedió así con motivo de la crisis que comenzó en 2008.

Grafica II

Fuente: elaborado en base a la información del Banco de Datos Económicos del INEGI

A más de tres décadas de la implantación del neoliberalismo en México, el país dista mucho de tener una paz social. Un informe en el que han colaborado Edgardo Buscaglia, Anabel Hernández y José Reveles entre otros (Cruz, 2012) revela las cifras estremecedoras que podían observarse al final del primer sexenio de la alternancia neoliberal, el de Felipe Calderón (2006-2012). Electo presidente en medio de una crisis de legitimidad por el fraude electoral de 2006, Calderón hizo de la guerra contra el narcotráfico un medio para recuperar dicha legitimidad (Aguilar y Castañeda, 2009). Declaró al país en guerra contra el narcotráfico desde diciembre de 2006 en el contexto de una ofensiva contra el narco en Michoacán ("El Operativo Conjunto Michoacán"). Entre 2006 y 2012 ocurrieron 53 homicidios al día, 1,620 al mes, 19,442 al mes y 136,100 en los seis años de los cuales 20,000 son atribuibles a la delincuencia común y 116,000 al crimen organizado. El escenario se evidencia como cruento cuando se compara con la guerra de Afganistán la cual durante el mismo período arrojó 13 mil muertos. Entre 2008 y 2011 se habían registrado 14,300 desaparecidos; mientras que en 2008 se calculaba que el 63% de los municipios se encontraba bajo el control o influencia del narcotráfico, en 2012 tal porcentaje ascendía a 80; 56 periodistas habían sido asesinados y otros 16 había sido desaparecidos; un promedio de 22 mil migrantes al año (principalmente centroamericanos) eran secuestrados para reclutamiento de los cárteles o extorsión; 1,685

niños habían sido asesinados y se contabilizaban 3,726 mujeres asesinadas la mayor parte de ellas en el contexto de violencia doméstica; medio millón de personas trabajaban para el crimen organizado entre ellas aproximadamente 30 mil niños; en un país que contabilizaba a poco más de 7 millones de jóvenes que no estudiaban ni trabajaban, la cantera de sicarios y delincuentes era grande (Cruz, 2012: 6-9, 13, 16, 26, 27). El mismo informe revelaba la existencia de al menos 10 cárteles de narcotráfico en el país, entre los cuales los más destacados serían el Cártel de Sinaloa, Los Zetas y el Cártel del Golfo; México había dejado ser país de tránsito para ser también productor de droga y cocaína, marihuana, anfetamina, ketamina y desde 2010 la heroína eran un negocio que generaba 280 billones de dólares (Cruz, 2012: 13). El informe concedía a la corrupción un papel fundamental en la penetración del narcotráfico en las distintas esferas del Estado (Cruz, 2012: 4-5) (Hernández, 2011).

Finalmente, en lo que se refiere a la promesa democrática del neoliberalismo, el balance de los últimos 15 años tampoco es positivo. La alternancia electoral que se observó en el 2000, -el tránsito de la presidencia de la república del PRI hacia el PAN-, generó esperanzas en una transición aterciopelada hacia la democracia. Un proceso electoral ponía fin a un dilatado período de hegemonía del PRI y esto se hacía por medio de una vía pacífica. Lo que se observó en los seis años siguientes, fue el derrumbe de dicha transición cuando se hizo previsible que Andrés Manuel López Obrador podía ganar la presidencia en 2006. La transición democrática en México, en realidad siempre fue pensada en términos de mantener el *establishment* neoliberal. PRI y PAN en medio de sus diferencias siempre tuvieron un acuerdo sustancial: la política económica sería la que ellos habían consensuado desde 1982. Una alternancia entre PRI y PAN, o como sucedió ya en 2012 de PAN a PRI, no afectaba en lo más mínimo el desenvolvimiento neoliberal en el país. El triunfo de López Obrador al frente de una coalición de izquierda antineoliberal (la "Coalición por el Bien de Todos") si hubiera puesto en duda el rumbo que había puesto fin al nacionalismo revolucionario.

Finalmente, deben mencionarse las elecciones fraudulentas de 2006. En las elecciones de 2006, según cifras oficiales Felipe Calderón habría ganado la presidencia por un margen de 0.56% de los votos (Figueroa y Moreno, 2008; Figueroa y Larrondo 2008). Lo que se sostiene de las elecciones de 2006, al igual que las de 1988, es que hubo una adulteración esencial de los resultados. El fraude electoral de 2006 se hizo de diversas vías: adulteración el padrón electoral, sustracción de boletas, alteración en el programa de resultados preliminares, desaparición de al menos 2 millones de votos en los resultados iniciales, adulteración de las actas electorales levantadas en las casillas, anulación de votos que eran para López Obrador etc., (Figueroa y Sosa, 2010).

Los hechos transcurridos entre 2004 y 2006 revelaron que el neoliberalismo no podía ni siquiera ser consecuente con la democracia procedimental (Figueroa y Moreno, 2008).

    3. El autoritarismo neoliberal. Luchando por la democracia liberal y representativa, soñando con la democracia participativa.

En las elecciones de 2006, el movimiento encabezado por López Obrador, la Coalición por el Bien de Todos alcanzó de acuerdo a las cifras oficiales poco más de 14,756,350 votos mientras que Felipe Calderón habría alcanzado 15,000,284. Una diferencia mínima de 244 mil votos (0.56% del total de votos). Se expresó nuevamente la tendencia, salvo unas cuantas excepciones, de que los estados del norte del país votaron por la derecha neoliberal encabezada por Calderón mientras que los del sur lo hicieron por la izquierda antineoliberal. En las elecciones de 2012 López Obrador, esta vez encabezando la coalición Movimiento Progresista, obtuvo más de un millón de votos adicionales (15.899,999) pero la derecha neoliberal esta vez representada por Enrique Peña Nieto y una coalición encabezada por el PRI, obtuvo 4 millones más (19.226,784). A diferencia de 2006, el triunfo en los estados estuvo dividido entre los del norte que votaron por la coalición priísta, buena parte de los del sur que votaron por el Movimiento Progresista y los estados que dan hacia el Golfo de México que lo hicieron por el PAN.[2] En esta ocasión la estrategia para derrotar a López Obrador fue la compra masiva de votos sobre todo en las regiones de población más pobre y por tanto más vulnerable. Además de las despensas (bolsas con artículos básicos de consumo) se observaron los monederos electrónicos (vales para comprar artículos de consumo) repartidos masivamente entre la población como una suerte de soborno para asegurar el voto para el PRI (Herrera, 2012; Redacción Aristegui Noticias, 2012). En pocas palabras, como dijo una afiliada a Morena "si en el 2006 nos robaron la elección, en el 2012 nos la compraron".[3]

Contrariamente a lo pregonado por la ideología neoliberal, el empobrecimiento, desigualdad y despojo que genera el neoliberalismo no es algo que genere las mejores condiciones para la democracia liberal y representativa. El pensar a

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2   Tanto en 2006 como en 2012, Andrés encabezó coaliciones integradas por el Partido de la Revolución Democrática, Movimiento Ciudadano (antes Convergencia) y el Partido del Trabajo (PT).

3   Frase escuchada por el autor a Guadalupe Trejo Ávila, activista de Morena en Puebla, en el contexto de la frustración poselectoral de 2012.

la ciudadanía como un conjunto de derechos, entre los cuales estarían los sociales como lo hizo T.H. Marshall en sus famosas conferencias sobre ciudadanía y clase social en Cambridge en 1949 (publicadas en 1950) (Marshall, 1950), sólo era posible hacerlo en el contexto del capitalismo fordista keynesiano y el Estado de bienestar. Desde hace más de 30 años el capitalismo neoliberal al desmantelar la previa fase de acumulación y el Estado que le correspondía ha ido desciudadanizando a amplios sectores de la población al irles quitando en los hechos sus derechos civiles, políticos y sociales. Desde una perspectiva posmoderna, Boaventura Sousa Santos ha expresado la crisis del contrato social de la modernidad que tuvo su esplendor en el Estado de bienestar del centro del sistema mundial y en el desarrollista de su periferia y semiperiferia (Santos, 2004: 7). Vivimos hoy una situación "precontractualista" y otra "poscontractualista", caracterizada la primera porque hay sectores sociales que hubieran podido ser incorporados al contrato social y ya no lo serán y sectores que ya lo estaban, es muy probable que terminarán siendo excluidos del mismo. Más que hacia la profundización de la democracia hacia donde nos dirigiríamos sería hacia un *fascismo societal* caracterizado por la pérdida de derechos al mismo tiempo que "no se sacrifica a la democracia" (Santos, 2004: 15, 21-28). Desde una perspectiva marxista, Harvey preconiza la continuidad del capitalismo neoliberal a través de la degradación progresiva del planeta, el empobrecimiento de masas, el aumento de las desigualdades, la intensificación de una vigilancia policial totalitaria, el control militarizado y la existencia de una "democracia totalitaria" que ya estamos viviendo (Harvey, 2014: 217,282). Usando la metáfora que alguna vez usó Gramsci, el orden neoliberal esconde en el pañuelo de seda de la democracia el puñal de acero del autoritarismo y la represión.

La lucha por la democracia liberal y representativa fue el sentido de las movilizaciones de cientos de miles de ciudadanos contra el desafuero de López Obrador en el transcurso de 2004 y 2005. En el proceso que le antecedió, miles de personas se manifestaron el 14 de julio de 2004 en "la marcha de las cien horas" en la capital del país y en diversos estados del país; el 29 de agosto de ese mismo año, en "la marcha contra el desafuero" aproximadamente 450 mil personas inundaron la plaza central (el Zócalo) de la capital del país y calles aledañas. Después del desafuero consumado el 7 de abril de 2005, el 24 de ese mes, se convocó a "la marcha del silencio", a la cual concurrirían un millón 200 mil personas, mientras que al mismo tiempo se realizaban mítines y marchas frente a sedes de palacios de gobierno o congresos locales una decena de estados en el país. El gobierno de Vicente Fox comenzó a enfrentar una crisis de legitimidad. Peor aún, el descontento popular comenzó a expresarse en un liderazgo incontenible que podría tener consecuencias imprevisibles en el proceso electoral de 2006. El 28 de abril, Fox anunció la "renuncia" del Procurador General y un procedimiento para dejar sin efecto el desafuero (Figueroa y Moreno, 2008: 34-35). El movimiento encabezado por López Obrador y sus aliados, lograron una victoria democrática que se expresaba en el derecho de todo ciudadano de elegir y ser electo y el derecho pluralista a participar de todas las corrientes políticas.

En lo que se refiere a sus raíces más próximas, Morena las tiene en la insurgencia electoral que surgió en 1987 y se extendió en 1988 con el Frente Democrático Nacional encabezado por Cuauhtémoc Cárdenas. Más recientemente, hay que mencionar el establecimiento de "las redes ciudadanas" que a partir del 2004 se extendieron por todo el país y que imbricadas con las bases de los partidos que apoyaron a López Obrador, fueron la infraestructura social del movimiento electoral de 2006. Otros antecedentes cercanos de Morena son: el controversial plantón de 50 días en el conflicto poselectoral de 2006, que partió en dos a la ciudad de México pero que sirvió para darle un cauce al descontento popular por el fraude; el surgimiento de la Convención Nacional Democrática (CND) en septiembre de 2006; la convocatoria a fundar "Casas del Movimiento" en todo el país; la instauración de un "Gobierno Legítimo" en diciembre de ese año; los 200 mil brigadistas constituidos en el Movimiento Nacional en Defensa del Petróleo que lograron detener en 2008 la privatización (Figueroa, Sosa, 2010: 81-85). Todos estos hechos fueron movimientos de masas que forman parte de la historia de la democracia participativa de la que hoy se nutre Morena.

Un rasgo que es esencial en la historia más próxima de Morena es la movilización y la participación de sus militantes en las brigadas que buscan hacer "la revolución de las conciencias" tocando las puertas de las casas en las distintas ciudades del país. El propio López Obrador es un convencido de esta manera de hacer política y en la primera campaña electoral de Morena en el primer semestre de 2015, insistió en la necesidad de hacer campaña "casa por casa". Él mismo ha realizado dos giras y media por cada uno de los 2,417 municipios de un país de casi dos millones de kilómetros cuadrados. Este hecho prueba su voluntad política de contacto del dirigente con el pueblo y su planteamiento de que "solo el pueblo salva al pueblo". Otro hecho más son las "asambleas informativas", movilizaciones masivas de decenas (acaso centenares) de miles de los simpatizantes de López Obrador son informados por éste de las decisiones que competen al movimiento. Por todo ello, Morena hoy se concibe como un "partido movimiento" apelación que aspira a deslindarse del electoralismo del resto de los partidos y al mismo tiempo expresar que se está luchando por el poder.[4] Fue el carácter movimientista de Morena, el que se observó

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4   Quien fuera uno de los dirigentes de Morena en el D.F. expresó el camino para el "cambio de régimen" será pacíf co y "deberá basarse en la movilización social y la part cipación electoral, lo que implica inequívocamente su registro como part do polít co" (Cervantes, 2012).

en la gran concentración de septiembre de 2012 mediante la cual López Obrador anunció su separación del PRD y de la alianza con MC y PT para iniciar el proceso de constitución de Morena como partido (Méndez y Muñoz, 2012). El proceso de constitución de Morena en partido fue también un proceso masivo de gran participación. Más de 100 mil adherentes de la asociación civil Morena y simpatizantes de López Obrador, participaron en las 300 asambleas distritales en las cuales se eligieron a 2,500 coordinadores distritales y se decidió en votación por un 80% que Morena se convertiría en partido (Cervantes, 2012).[5] En los dos años siguientes, Morena tuvo como grandes tareas de masas la realización de las asambleas constitutivas entre septiembre de 2013 y enero de 2014, en cada uno de los estados de la república (las cuales tuvieron que tener un quórum mínimo de 4 mil afiliados) hasta llegar a la asamblea nacional constitutiva el 16 de enero de este último año. Durante ese tiempo, la militancia de Morena estuvo dedicada a la afiliación para cumplir uno de los requisitos para constituirse como partido político. Al final del proceso, juntando las afiliaciones hechas en las asambleas constitutivas y las realizadas por los miles de brigadistas en el proceso de casa por casa, se habían reclutado a poco más de 600 mil personas, tres veces más de lo requerido por la ley electoral (Cruz, 2014). Aprobada la reforma energética en diciembre de 2013, durante buena parte del año 2014 la militancia de Morena constituida en brigadas se dedicó a recopilar las más de 2 millones 800 mil firmas necesarias para solicitar una consulta popular que sometiera a la consideración ciudadana la pertinencia de la reforma privatizadora. Por mayoría aplastante (9 a 1) la Suprema Corte de Justicia desechó esa solicitud por considerar que eran un tema relacionado con los ingresos y gastos del Estado los cuales constitucionalmente están vetados a someterse a consultas populares (Torres, 2014).

Para Morena la democracia representativa es necesaria pero no es lo esencial de la democracia. La esencia de la democracia se encuentra en la democracia participativa: mientras que la representación es la forma de la democracia su fundamento es la participación. La participación debe ser diaria, activa, permanente, organizada desde la base y fiscalizadora de la actuación de los legisladores y gobernantes. Más aún, la democracia representativa puede corromperse como ha sucedido en México, por lo que el papel de la democracia participativa es el de vigilar y castigar a los representantes cuando no cumplen sus obligaciones: "el contrapeso efectivo a las debilidades y vicios de la representatividad política es la democracia participativa" (Ramírez et al, 2011: 61,67). Además de la participación ciudadana permanente, la democracia participativa se cristaliza en instituciones como el plebiscito, el referéndum, la iniciativa popular y la revocación de mandato.

No basta tomar el *poder político* sino es necesario construir el *poder social*, por lo que la transformación de la sociedad debe realizarse simultáneamente en el poder político y en la sociedad. El poder social empieza por la familia, continua en las comunidades, cooperativas, sindicatos, barrios y gremios, en suma, es la sociedad civil que debe controlar al poder económico y al poder político. La democracia participativa debe además recobrar plenamente el sentido de comunidad desde el nivel nacional hasta el familiar y en un proceso de reforma cultural y moral que pone a la comunidad y a la vida comunitaria en el centro de la nueva sociedad debe nacer un nuevo sujeto social crítico del individualismo neoliberal. Debe recuperar las notables experiencias autogestivas que en México y en otros países se están observando. Práctica nociva ha sido el colocar los derechos individuales por encima de los colectivos (derechos socioeconómicos y culturales) y los derechos civiles y políticos no pueden estar por encima de los derechos de todos a una vida con dignidad social. La nueva democracia requiere de un régimen de autonomía que permita a los pueblos indígenas autodeterminarse política y culturalmente: "la autonomía es una pieza maestra de la democracia que nos proponemos".[6]

4.   El peso avasallador del liderazgo de Andrés Manuel López Obrador.

En el desenvolvimiento de la izquierda mexicana en los últimos años sería inexplicable sin la presencia carismática de Andrés Manuel López Obrador. Hasta antes del primer lustro del siglo XXI, López Obrador era un reconocido dirigente del PRD cuya presidencia ocupó entre 1996 y 1999. Su liderazgo se había ido construyendo desde que en 1988 se unió a la Corriente Democrática del PRI. Al fundarse el PRD en 1989, fue candidato a gobernador del estado de Tabasco y se enfrentó por primera vez a un fraude electoral. Posteriormente ocupó la presidencia de dicho partido en su estado natal Tabasco y en 1994 fue nuevamente candidato a gobernador del estado en las cuales nuevamente fue víctima del fraude. Su lucha por el sufragio efectivo lo hizo encabezar marchas a la ciudad de México ("Éxodos por la democracia") y en esas luchas se hizo conocido nacionalmente. Ocuparía de manera exitosa la presidencia nacional del PRD entre 1996 y 1999 y en marzo de 2000 fue registrado como candidato a la Jefatura de Gobierno del Distrito Federal (Morena s/f). Hasta ese momento su liderazgo era importante pero no tenía la dimensión excepcional que tiene hasta este momento. Su propia candidatura a la jefatura de gobierno

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5   El 20% restante votó porque Morena fuera nada más un movimiento.

6   La apretada síntesis que hemos hecho sobre la concepción de la democracia representat va y part cipat va de Morena t ene referencias puntuales en Ramírez et al, 2011: 33, 36, 37, 39, 46, 49, 51,53- 54, 61, 69, 88. Esta concepción también puede encontrarse en La declaración de principios de Morena (Morena, 2014a), El Programa de Morena (2014b) y el Estatuto de Morena (Morena, 2014c)

fue ferozmente competida por compañeros suyos del PRD que tenían similares aspiraciones. Y en las elecciones de 2000 en las cuales ganó la jefatura de gobierno, obtuvo un apretado triunfo con apenas el 1% de diferencia frente a Santiago Creel, el candidato del PAN.

A partir de ese momento y gracias a su eficacia y probidad en la gestión de gobierno del D.F., López Obrador se convirtió en un histórico líder carismático con un índice de aprobación elevado. Electoralmente puede medirse el ascenso meteórico de López Obrador: mientras en las elecciones de 1994 la alianza de izquierda había obtenido más de 6 millones de votos y casi 17% de los sufragios, en 2006 según las dudosas cifras oficiales, López Obrador alcanzó 15 millones y el 35%. Una diferencia de 18% que evidenciaba que un nuevo líder histórico había aparecido en el escenario político del país. En el corto plazo acaso cuatro elementos podrían ser la clave del vertiginoso ascenso de López Obrador: la relación entre ética y política que lo proyectó como alguien incorruptible; su compromiso con la justicia social que se evidenció en los programas sociales de su gestión de gobierno (2000-2005); su rescate del nacionalismo revolucionario que lo proyectó como patriota y nacionalista y finalmente, su compromiso con la causa democrática que tenía una larga trayectoria de luchas contra los fraudes electorales pero que se consolidó en el conflicto poselectoral de 2006 (Aceves y Figueroa, 2008: 48-56).

El poderoso liderazgo carismático de López Obrador es la gran fortaleza del movimiento que encabeza y al mismo tiempo es su gran debilidad. Para empezar la fuerza de Morena depende de ese carisma como lo demuestra el traspiés sufrido cuando el líder tuvo que ser hospitalizado en diciembre de 2013 con motivo de un infarto: disminuyó la intensidad de la protesta contra la privatización del petróleo y su hijo se convirtió en el vocero de la protesta (Villamil, 2013; García, 2013). Como práctica interna, en Morena existen elementos de un enorme valor estratégico en la práctica de la democracia participativa. Sus estatutos solamente permiten la reelección en los cargos ejecutivos (Comités Ejecutivos) por una única ocasión después de tres años, y en la reelección de cargos directivos (Consejo Nacional y Estatales) solamente de un 30% de ellos (Arts. 10, 11). Dos terceras partes de los candidatos a diputados por representación proporcional se eligen por sorteo entre los 3 mil precandidatos electos en las asambleas distritales (Art. 44).

Pero no es posible soslayar que el magnetismo de López Obrador genera centralismo y verticalismo en Morena. En el seno de la vida partidaria, su opinión es de un enorme peso en torno a decisiones políticas, elecciones de candidaturas y otros temas. A lo anterior se une el acoso al que está sujeto Morena por el orden neoliberal. Esto provoca decisiones centralizadas y los órganos intermedios (comités ejecutivos estatales, por ejemplo), corren el riesgo de volverse simples correas de transmisión de las tareas urgentes que la coyuntura impone. Un ejemplo más de ello se puede ver en la manera en que se eligieron los candidatos a diputados por mayoría relativa en las elecciones de junio de 2015, la primera en la que Morena participó como partido. Estableciendo el Estatuto que estos se elegirían entre diversas opciones en las asambleas distritales electorales, en la práctica dichas asambleas eligieron a candidatos o candidatas únicas. Estas candidaturas únicas surgieron de una acumulación de imagen y fuerzas hechas por los candidatos en su calidad de "Promotores de la Soberanía Nacional", una figura que no está sancionada en el Estatuto.

Hasta aquí una sucinta exposición de las raíces históricas, características y contradicciones de la lucha de Morena por la democracia representativa y la participativa en México. En términos históricos, el trayecto de Morena es todavía joven y por tanto es prematuro aventurar aseveraciones sobre su curso final. El cometido es no repetir la historia de burocratización, oportunismo transpartidario y corrupción de los partidos de izquierda que le antecedieron. Falta mucho por andar para saber si lo logrará.

5.   Una agenda política alternativa para MORENA

En este trabajo se ha propuesto que en la construcción de MORENA ha resultado fundamental la influencia de la participación ciudadana y popular desde abajo, habida cuenta de las limitaciones del entorno político y nacional y las propias limitaciones organizativas internas que ya se han señalado. En este sentido el fortalecimiento del sentido nacional-popular en MORENA depende del impulso a formas organizativas que se alimenten de la presencia activa de movimientos sociales, organizaciones independientes, sindicatos, uniones, etc. Generando una situación en la que, aunque se mantengan las prácticas de la democracia liberal y representativa, existan vínculos y vías de participación mucho más intensas que apuntan a la posible consolidación de la democracia participativa.

La propuesta política de MORENA considera la necesidad de generar un cambio no solo en la institucionalidad propiamente estatal, esto es un cambio desde arriba, sino también en el propio interior de la sociedad civil, un cambio desde abajo. Para ello, y siguiendo el ejemplo de los gobiernos progresistas que se han presentado en América Latina desde la última década del siglo XX, una política posible de emplazar sería el impulso de un

proyecto de reforma constitucional amplia. Este tipo de proyecto que tomaron la forma de reforma indigenista en el caso de Bolivia, de reforma constitucional ciudadana en Ecuador y en Venezuela la "Nueva Constitución" de 1999, son herramientas de transformación que buscan generar una condición renovadora del derecho en los Estados, aspiran a dar los cimientos de una transformación amplia de la organización política, social y económica. Una reforma que busca volver al ciudadano un agente activo en el funcionamiento del poder estatal a través del efectivo reconocimiento de derechos sociales, civiles y políticos, además de un proyecto de reforma económica y social amplia que aspira a romper con la hegemonía neoliberal en el país.

Así por ejemplo, a cuatro meses de inicio del gobierno de MORENA a nivel federal, se han observado una serie de reformas constitucionales importantes, como una ley de extinción de dominio dedicada a permitir que el gobierno federal expropie bienes pertenecientes a grupos del crimen organizado; una importante reforma al artículo 19 de la constitución para tipificar como delito grave la corrupción ejercida por representantes populares o empleados del sector público, el robo de combustible y el fraude electoral; una reforma para la creación de una nueva guarda nacional; y una reforma para eliminar el fuero constitucional que impedía poder juzgar al Presidente de la República.

Consideramos que existen siete ejes de acción política esenciales que podrían ser la base de la propuesta de transformación social e institucional de MORENA:

1)   La adopción de políticas de *integración ciudadana en la política estatal a través de mecanismos de democracia participativa*. Esto es la consideración de herramientas como los plebiscitos, que pueden ser empleados cuando se trate de definir la voluntad ciudadana en temas de interés público; las consultas ciudadanas, que pueden ser una herramienta para impulsar nuevas iniciativas de reformas constitucionales; la celebración de referéndums para consultar con la ciudadanía acerca de la adopción o definición de determinadas políticas estatales que requieran la participación de la ciudadanía; la organización de foros especializados y abiertos a los diferentes grupos cuando se trate de decidir acercar de la implementación o definición de programas y políticas públicas; la consideración de referéndums revocatorios para decidir la continuidad o no de presidente de la república o gobernadores.

A poco tiempo de iniciado el gobierno de López Obrador, ya existen algunas experiencias concretas de consultas a nivel nacional para determinar la continuidad o suspensión de diferentes obras: un megaproyecto de aeropuerto iniciado por la administración federal pasada, la construcción de un gasoducto y de una planta termoeléctrica en el estado de Morelos y la construcción del llamado Tren Maya que recorrería la región sur del país. Todas estas consultas han sido fuertemente criticadas por la oposición en el país, principalmente debido a que fueron organizadas e implementadas por grupos partidistas afines al gobierno de Obrador, sin la participación del Instituto Nacional Electoral o de organismos externos. A pesar de esta crítica los resultados fueron abiertamente favorables a la intención original del gobierno federal logrando más del 80% de apoyo. Más allá de estos primeros ejercicios, Obrador ha anunciado que, en el año 2021 de manera concurrente con la elección de nuevos congresistas y algunas gubernaturas estatales, se celebrará un referéndum revocatorio de su mandato. De igual manera la oposición partidista ha manifestado un fuerte desacuerdo con esta propuesta ya que prevén que la presencia de Obrador en las boletas de ese año podría provocar un nuevo efecto de arrastre de voto.

2)   *Postulación de una política estatal de integración socioeconómica de las mayorías populares*, basada en la creación de una institucionalidad destinada a dotar de servicios públicos de protección como: salud, alimentación, educación y empleo. Debido a la crisis económica y social que ha provocado el neoliberalismo, es necesario reintegrar socioeconómicamente a la mayoría poblacional del país, ya que esta ha terminado por excluir y desposeer materialmente a amplias capas de la población. En este sentido, además de la integración política posibilitada por la democracia participativa, es necesario implementar programas y políticas públicas que, mediante ampliados programas de transferencia de recursos, sea posible comenzar a subsanar esta exclusión que experimenta buena parte de la población nacional. La perspectiva propuesta pasa por el ejercicio de recursos públicos para dotar de servicios básicos a la población, pero no bajo una lógica meramente asistencialista, sino en una perspectiva de largo plazo en la que el gasto se ejerza como una forma de inversión social-productiva. Esto es, a través de esta serie de programas se apunta a bien impulsar la creación de riqueza social o invertir en sectores clave para posteriormente evitar otros gastos de los recursos públicos.

Tres solo algunos meses después de la entrada en funciones del gobierno de MORENA tenemos que ya se han creado al menos ocho programas de transferencia de recursos: un programa especial de transferencia de recursos enfocado a la población indígena, la duplicación en el monto a la pensión para

adultos mayores, becas a jóvenes, un programa de "tandas" para el bienestar, becas mensuales para estudiantes pobres en todos los niveles educativos, apoyo para la siembra de 575 mil hectáreas de árboles frutales y maderables y créditos ganaderos a la palabra de los productores. Además de ello se impulsó un aumento salarial del 16%, negociado con sectores empresariales y sindicatos de trabajadores.

3)   *Propuesta política-programática de fortalecimiento del Estado como agente econ*ómico activo y de control en la economía nacional. Como producto de la implantación del neoliberalismo en el país, la privatización de antiguas empresas paraestatales o bien la cesión de áreas completas a la iniciativa privada han provocado una progresiva pérdida del control económico por parte del Estado en favor de intereses económicos y políticos particulares. De igual forma la presencia de grandes capitales transnacionales en áreas clave de la economía nacional, han puesto en cuestión el carácter soberano del Estado mexicano ya que debido al control que tienen han estado en condiciones incluso de imponer intereses económicos y políticos extranjeros por sobre el interés público nacional. En específico a través de la reforma constitucional sería posible impulsar nuevos proyectos de renacionalización de sectores claves de la economía nacional, en especial en lo relativo a la industria de los hidrocarburos; así como también en sectores claves de la producción de materias primas tanto para la exportación como para la producción industrial interna. Estas son reformas que buscarían incidir directamente sobre las fuerzas económicas y en consecuencia sobre las condiciones materiales de vida de la mayoría de la población nacional que se encuentra urgida de ser subsanada. Visto en una perspectiva histórica es necesario rescatar los principios del pacto social nacionalista que alguna vez tuvo el Estado mexicano, pero en esta nueva propuesta complementado por la democracia participativa, para evitar la reconstrucción del autoritarismo.

Particularmente el gobierno de Obrador comenzó declarando una campaña frontal en contra del robo de combustible, el llamado "huachicoleo", que se generaba mediante la extracción en ductos y se auspiciaba desde la propia empresa de Petróleos Mexicanos (PEMEX). Otro rasgo importante de este tipo de política lo encontramos en la política federal de combate a la corrupción en toda la estructura de la administración pública federal, que ha sido declarado como un eje central en la política de administración pública. Esta política apunta no solo a acabar con las prácticas de mal uso de recursos públicos sino también a acabar con el influyentismo y el "compadrismo", es decir, el favorecimiento de empresas y contratistas particulares, relacionadas con los funcionarios públicos. Por otro lado, la regulación de capitales extranjeros se basa más en una aplicación correcta de la ley para generar condiciones de confianza y lograr mayor atracción.

4)   Una propuesta de gobierno que pasa por la *renacionalización de las decisiones de interés público*, en demérito de las agendas de subordinación internacional de los intereses nacionales. Como producto del fortalecimiento del Estado en el control de la economía resulta fundamental que también el Estado recobre la rectoría en él tome decisiones públicas para recobrar la soberanía efectiva y complementada por el logro de la democracia participativa. Esto en términos prácticos implica la reconsideración de la relación que se tiene con organizaciones internacionales como el Fondo Monetario Internacionales o el Banco Mundial, ya que durante los últimos veinte años buena parte de la agenda neoliberal se ha impulsado justo desde estas organizaciones que responden más a intereses transnacionales que a propiamente los intereses internos del Estado y la sociedad mexicana.

Hasta el momento el gobierno de MORENA no ha mostrado una posición de confrontación con instituciones supranacionales como el FMI o el BM, un fenómeno que si se observó en los progresismos del cono sur. Sin embargo, si se ha mostrado una postura política de independencia, y en momentos también de colaboración, con el gobierno federal de los Estados Unidos. En particular el tema de los transmigrantes centroamericanos se ha mantenido abierto presente, ante las amenazas de Donald Trump de construir un muro fronterizo y de militarizar la frontera. Ante estas posturas el gobierno mexicano no se ha mostrado sumiso como gobiernos anteriores, sino ha mostrado una postura independiente sin llegar a la confrontación. Además de ello ya se observa una voluntad de orientar al Estado como un agente organizador de la vida económica en cooperación con los capitales privados y el orden global internacional. Las políticas económicas actuales del estado mexicano lo apuntan como una palanca directa de desarrollo y crecimiento económico.

5)   Un *proceso de integración político- social identitaria a nivel nacional*, en la que se considera la existencia efectiva de múltiples nacionalidades en el país, así como la integración indiferenciada de los diferentes grupos étnicos nacionales. Uno de los pendientes esenciales del Estado mexicano hasta la

actualidad es la efectiva integración igualitaria de los diferentes grupos étnicos que existen en el país, que si bien han gozado de algunas políticas focalizadas se les sigue tratando desde la particularidad. En este sentido se propone que debe existir una verdadera política que no sólo se les considere en una efectiva perspectiva igualitaria, sino que además se les dote de las herramientas necesarias para que puedan impulsar formas más autónomas en cuanto a su organización y definición de sus propios intereses. Esta resulta una política esencial ante la urgente necesidad de proteger los territorios y recursos en zona indígenas que actualmente se encuentran gravemente amenazadas por las explotaciones mineras y en general de recursos naturales en el país.

El gobierno de López Obrador ha manifestado una abierta voluntad por atender a los pueblos originarios o indígenas como un área prioritaria. Por un lado, ya se encuentra en funciones un programa de transferencias económicas condicionadas que aspira a ayudar a cubrir las necesidades básicas de consumo de estas poblaciones. Por otro lado, se ha creado un agresivo programa de construcción de universidades en el entorno rural a lo largo de todo el país, estas escuelas se concentrarían en desarrollar programas de estudios directamente enfocados a resolver problemáticas locales. Además de ello simbólicamente el gobierno de Obrador comenzó en la toma de protesta con un ritual indígena de purificación y la entrega de un bastón de mando tradicional ambos símbolos que buscan generar integración y legitimidad con este grupo poblacional del país.

6)   *Postulación de una plataforma de integración alternativa diversifica que vaya más allá de la relación con los Estados Unidos de Norteamérica.* Si bien las expectativas en el mediano plazo a nivel global es la integración regional por zonas, es necesario que el Estado mexicano diversifique y alterne su relación con otras potencias globales para romper la fuerte lógica de dependencia económica que se ha creado con los Estados Unidos. Esto a largo plazo representa una política fundamental que busca generar sustentabilidad y fortalecer la soberanía que se ha visto fuertemente afectada debido a los intereses políticos y económicos trasnacionales. Hasta el momento este es el rasgo menos desarrollado en la política de MORENA, ya que la cercana relación e interdependencia de los Estados Unidos vuelven difícil un tome de postura más radical.

En conjunto estos seis puntos y sus primeras políticas dirigidas podrían resumir la agenda de transformación que caracterizaría el proyecto nacional-popular de MORENA en México. En este sentido consideramos que lo Nacional-Popular como proyecto de transformación política, económica y social en México posee un fuerte contenido de transformación progresista. Siempre considerando que la fuerza política que puede impulsar todas estas reformas, detrás del proyecto de una nueva gran reforma constitucional, es la amplia participación popular, basada en la democracia participativa y que busca utilizar al Estado como una herramienta a favor de la transformación de las condiciones imperantes. Una propuesta que posee se sentido fundamental en la asociación entre el gobierno nacional, sus políticas estatales y la mayoría poblacional, posibilitando una reapropiación gradual de las propias estructuras de Estado por parte de la sociedad mexicana.

Los primeros meses de gobierno de López Obrador y MORENA en México no permiten tener al día de hoy una evaluación completa de los límites y alcances de sus propuestas, sin embargo, es posible tener ya un sentido aproximado a lo que será el conjunto de su programa. Por otro lado, la viabilidad y éxito no podrán ser evaluables sino hasta aproximarse al final de su período de gobierno, aunque las diferencias con el tipo de administraciones anteriores plegadas hacia el neoliberalismo ya son evidentes.

6.   Conclusiones.

El proyecto democrático máximo de Morena es la democracia participativa y por tanto el mismo tendría un sentido de democracia radical. Varias de las acciones del movimiento lopezobradorista, ahora institucionalizado en el partido-movimiento Morena, han tenido rasgos de lo que Negri ha llamado "poder constituyente" (Negri, 1992; 2015) al menos al lograr cambiar hechos que el poder constituido quería imponer. La derogación del desafuero de López Obrador en 2005, la suspensión de la privatización del petróleo en 2008, el influir poderosamente en la agenda del Estado neoliberal y de sus distintos gobiernos, son algunos de los ejemplos de estos rasgos de poder constituyente. Ciertamente este poder constituyente no ha podido crear un régimen distinto porque no ha podido combinarse con el movimiento "desde arriba". Esto es así, porque el lopezobradorismo no conquistó el poder ejecutivo en las elecciones presidenciales de 2006 y en 2012. No ha sido posible entonces, la sinergia de "los dos lados" ("desde arriba" y "desde abajo") que ha sido observada en Venezuela (Azzelini, 2015) y también en Bolivia y Ecuador. La actuación de Morena está en contrapunto a la visión elitista, procedimental de la democracia neoliberal. Pero el neoliberalismo con sus efectos en la desigualdad y en la pobreza que sustentan a una desciudadanización de hecho, con sus rasgos de despojo propio de una acumulación sustentada en la desposesión, fomenta continuos brotes de descontento y movimientos sociales que están en el campo de la insubordinación. Y es una regularidad

que sociedades civiles insubordinadas tienen a generar Estados represivos. El Estado neoliberal en México y en otras partes no escapa a esta regularidad. Esta es la razón por la cual, alejándose a la autocomplacencia de analistas ubicados en la teoría de la transición democrática, el politólogo John M. Ackerman recientemente ha expresado que la transición democrática en México no es más que un mito. Se sustenta esta aseveración en la existencia de la dictadura mediática que desinforma o malinforma a millones de personas, el propiciamiento de la enajenación consumista, el uso ideológico de los medios de comunicación, los ciclos represivos contra movimientos sociales y dirigentes y activistas, el uso faccioso de las instituciones electorales, el fraude sistemático y las contrarreformas neoliberales que se han efectuado sin las debidas consultas populares. Todo ello en el contexto del baño de sangre en que la guerra contra el narcotráfico ha sumido a México desde el inicio de la presidencia de Felipe Calderón (Ackerman, 2015). Esta guerra que ha sido continuada por el gobierno de Enrique Peña Nieto lleva ya un saldo de casi 150 mil ejecuciones y en los últimos cuatro años, más de 25 mil desaparecidos.

Esta situación paulatinamente ha formalizado a la democracia liberal y representativa en México. De acuerdo a los analistas inscritos en la teoría de la transición democrática, la alternancia a nivel nacional entre el PRI y el PAN -y en las entidades federativas entre estos dos partidos y el PRD-, sería una muestra de que el autoritarismo propio del período de la hegemonía priísta ha quedado atrás. En realidad, en la perspectiva nacional, la alternancia no es más que la cristalización de un régimen bipartidista que en realidad no es más que un solo monstruo bicéfalo cuyas dos cabezas tienen diferencias secundarias. Acaso suceda que la derecha neoliberal que se expresa en el PAN tiene atavismos clericales derivados de su origen conservador, mientras el PRI manifiesta en ocasiones una visión más moderna sobre los temas de género y preferencias sexuales. Las diferencias entre estos dos partidos no trascienden estos límites, por lo que esta suerte de bipartidismo es totalmente funcional al régimen neoliberal. Por ello es que la prueba de fuego para la transición democrática mexicana se observó cuando en el primer lustro del presente siglo, surgió de nueva cuenta un proyecto antineoliberal que llegó a convertirse en una verdadera opción de poder. La máscara de la alternancia que encubre al autoritarismo neoliberal corría el riesgo de ser destruida si resultaba triunfador un proyecto político y social posneoliberal. El proyecto encabezado por Andrés Manuel López Obrador solamente pudo ser frenado en las elecciones de 2006 a través del fraude que adulteró los resultados electorales y en las de 2012, a través del fraude que compró el voto de cientos de miles, acaso millones, de pobres que lo vendieron debido a su vulnerabilidad.

He aquí pues la razón por la cual el movimiento encabezado por López Obrador, convencido de un proyecto democrático que va más allá de la democracia liberal y representativa, ha tenido que luchar porque valores e instituciones de dicha democracia se hagan realidad. No otra cosa ha hecho, cuando combatió la exclusión de López Obrador como candidato presidencial y derrotó el desafuero en 2005. Igualmente, cuando ha combatido los fraudes electorales, sea por adulteración de resultados o compra de votos, en las elecciones presidenciales de 2006 y 2012 y en otros procesos electorales. Cuando ha planteado una ley de comunicación que desmantele la dictadura mediática que se implanta a través del duopolio televisivo de Televisa y TVAzteca, las dos hegemónicas cadenas de medios de comunicación. También en el momento en que ha planteado que las llamadas reformas estructurales (contrarreformas neoliberales) sean sometidas a consultas populares.

Finalmente, no es posible soslayar que los dos grandes momentos de expansión de una fuerza de izquierda en 1988 y en el primer lustro del siglo XXI, han estado asociadas a figuras carismáticas (Cuauhtémoc Cárdenas y López Obrador). Pero estas personalidades han sustentado dicho carisma más que en su atractivo personal, en el hecho de ser encarnación de un imaginario que se sustenta en la revolución mexicana. Resultó así premonitoria la afirmación de Adolfo Gilly de fines de los sesenta, que ya hemos consignado páginas atrás: que la revolución seguía viva en la conciencia del pueblo mexicano y que ninguna organización y política revolucionaria podría construirse al margen de dicha revolución. Tanto el PRD en su momento, como Morena en la actualidad, deben su creciente arraigo de masas a los liderazgos carismáticos que los han encabezado. En el caso de López Obrador, el carisma está asociado a su imagen de incorruptible pero también a la evocación de lo que se perdió cuando el neoliberalismo desmanteló al nacionalismo revolucionario. La izquierda mexicana, al menos la que ha estado contenida en Morena, tiene pues indudables raíces nacional-populares.

En el momento de terminar de escribir estas líneas, el partido-movimiento que hemos estado analizando ocupa la presidencia de la república y tiene mayoría en el congreso, además de lograr numerosas victorias en gubernaturas estatales. Pero tiene un adversario interno: la cultura política que construyó el nacionalismo revolucionario y el PRI en particular. Esta cultura política es una atmósfera difusa que trasciende fronteras ideológicas y políticas y que se expresa en atavismos autoritarios, caudillismos, relaciones clientelares, mediaciones prebendales. El cambio de régimen por el cual lucha Morena, tiene pues un sustento moral e intelectual. Este es, el construir una nueva cultura política.

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Sociocultural gaps and the ways of their elimination during foreign language study

Brechas socioculturales y las formas de su eliminación durante el estudio de lenguas extranjeras

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ABSTRACT

In order to take part in the intercultural communication of students, an idea of national traditions, cultural values, customs, and realities of the studied language country must be developed. Lacunae are the gaps in knowledge of the country and the people culture who speak the language being studied. When you work with lacunae, it is necessary to check the correct understanding of their meaning constantly, as well as introduce them into the active vocabulary of students. This is why this study seeks to address the sociocultural gaps and the ways of transfer during the study of foreign languages

Keywords: foreign language teaching, intercultural communication, lacunae, sociocultural context

RESUMEN

Para participar en la comunicación intercultural de los estudiantes, se debe desarrollar una idea de las tradiciones nacionales, los valores culturales, las costumbres y las realidades del país de la lengua estudiada. Las lagunas son las lagunas en el conocimiento del país y la cultura de las personas que hablan el idioma que se estudia. Cuando trabajas con lagunas, es necesario verificar constantemente la comprensión correcta de su significado, así como introducirlos en el vocabulario activo de los estudiantes. Es por esto que este estudio busca tratar la Brechas socioculturales y las formas de su eliminación durante el estudio de lenguas extranjeras

Palabras clave: enseñanza de lenguas extranjeras, comunicación intercultural, lagunas, contexto sociocultural.

Introduction

Currently, a significant place is given to the training of intercultural communication in educational systems, which contributes to the successful interaction of representatives of various national cultures (Abdurazakova, 2016). Communication problems arise as the result of a lack of understanding of their partner cultural features (Henslin, 1993). Without knowledge of the sociocultural background, the development of communicative competence will be difficult, since foreign language communication teaching is inextricably linked with sociocultural and regional knowledge, with the development of a "secondary linguistic personality".

The criteria of a developed secondary linguistic personality are usually mainly the ability to interact with the representatives of the culture of the language being studied, with the knowledge of lexical and grammatical material, syntax, the knowledge of the phonetic norms of the language, etc. S. Ter-Minasova says: "The need for restructuring of thinking, reshaping one's own, familiar, native picture of the world according to a foreign, unusual model is one of the main difficulties in foreign language mastering" (Ter-Minasova, 2000).

The following criterion is also important - the style of speech. If the phrase "   " is translated "She is not at home", it will sound like "in Russian" and the native speaker will say "She is out". The next criterion is the mastering of behavioral patterns characteristic of a foreign language culture representatives. These include: facial expressions, gestures, etiquette of communication, everyday behavior, conditioned by traditions and customs. For example, the British have a tradition of drinking tea at five o'clock in the evening, other peoples do not have such a custom. Ignorance of the norms of behavior accepted in the recipient's country can create difficulties in communication.

The knowledge of the native speaker country characteristics of the language being studied has an impact on the motivational-personal sphere of the learner in the process of a secondary language personality development. This includes value orientations, motivational structure and personality traits (Ter-Minasova, 2000).

The discrepancies in terms of language and culture among the participants in intercultural communication are usually called lacunae. Lacunae define national realities that are unknown to the native speaker of another language and culture.

Research methods

In linguistics, the term "lacuna" was first introduced by Yu.S. Stepanov, who called them "spaces", "white spots on the semantic map of the language" (Stepanov,, 1985).

The methodological basis of this work is the study of Russian linguists who have dealt with socio-cultural issues: L. S. Barkhudarov, E. M. Vereshchagin, I. G. Kostomarov, R. A. Budagov, G.D. Gachev, Yu. S. Stepanov and others. We are attracted by the definition of lacunae proposed by V.N. Komissarov, who calls lacunae "the designations of phenomena specific to a given culture, which are the product of the cumulative function of the language and can be considered as the containers of background knowledge, i.e. the knowledge in the minds of speakers" (Komissarov., 1999).

Language lacunae are usually divided into absolute and relative. Absolute lacunae are the words that have no equivalent in the form of a word in another language, for example, it is a day, peer, birthday, boiling water for English, and grandparents, siblings for Russian. Relative lacunae include the words that are used in special cases - these are the Russian words: longing, soul, fate (Muraviev 1975).

Domestic scholars A.A. Makhonin, M.A. Sternin subdivide interlanguage lacunae into the groups: nominative, generalizing, and concretizing (Makhonina 2005).

Nominative lacunae appear if there is no corresponding definition in the language (fortnight – two weeks). Generalizing lacunae arise if the language does not have the appropriate generalization according to various criteria: (by action: eye-opener – something that causes a lot of surprise; according to assessment). Concretizing lacunae appear if the language does not have an appropriate concretization by a certain attribute: (by the manner of behavior: nosyparker – a person sticking his nose everywhere; by some reason: cross-purpose – confusion based on mutual misunderstanding). There are also other definitions that designate the concept of "lacuna", namely: ethno-eidems, linguistic cultural rhemes, ethnolinguistic cultural rhemes.

Main part

In the process of teaching a foreign language, it is important to consider how the elimination of lacunae occurs. Two main methods are offered: filling and compensation. Filling is the explanation of any definition using the translation-description, explanatory translation (Glazunov, 2013).

Compensation is used when it is necessary to overcome the national barrier in communication between the

representatives of two cultures. In this case, the translation of the value is transmitted using the "analog" or calque. They often use such methods of lacuna elimination as transcription (the transmission at the level of phonemes) or transliteration (the transmission at the level of graphemes), which are accompanied by descriptive translation. Transcription and transliteration convey the sound and graphic appearance of a word and do not provide text volume increase (Kamalova, 2015) (Koskenoja 2019).

Calquing - the translation of a compound word which is used when a translated unit has components (skyscraper -   , brain drain -   ). Among the compound lacunae there are the phrases that cannot be translated verbatim, as this will lead to inaccuracies: red tape is not a "red ribbon", but bureaucracy (Solovova, 2016) (Bahremand, 2015) (Martins, 2018).

Analog is a ready-made approximate equivalent of lacuna. The English word drugstore is translated into Russian as a pharmacy, but it is also important to know the background information, that is, this is the place where you can have a snack and buy not only pharmacy products. Using an explanatory translation, as the method of sociocultural lacuna elimination, it is possible to determine its lack - it leads to a text expansion. For example, the explanation of the lacunae can take several lines: townhouse - a residential building within the city, usually of two floors, the walls of which are adjacent to such houses, and a continuous line of buildings is formed.

Students have to deal with different types of lacunae: linguistic, ethnographic, cultural, behavioral and others. Analyzing the teaching materials in English, we conclude that the number of lacunae in the educational material varies depending on the stage of training. The number of gaps in the textbooks of the initial stage of training is small. The purpose of lacunae at this stage is to increase the motivation to a foreign language learning, since they carry sociocultural information that is interesting for students.

At further stages of language learning in authentic texts, there is a large number of language expressions that are used in the situations of natural communication, phraseological units, set phrases and, of course, various lacunae. At these stages, it is important that students understand the national-cultural and national-mental characteristics of the language being studied.

Let's consider the difference between the lacunae and foreign language material unknown for students (Solovova, 2006) (Nuriyev, 2018) (Sazesh, 2018).

The method of working with gaps begins with highlighting a gap in a text. If students do not indicate a gap, they may not fully understand the proposed text. First of all, a teacher must initially and carefully study the training text in order to identify gaps.

The following are the stages of working with gaps: the stage of language unit semantization, the stage of speech skill development; the stage of speech skill improvement and development.

When you work with gaps according to the methodology of a foreign language teaching, the main link is semantization. Then the formation of speech skills and their development takes place.

Students can offer the following exercises to enhance the use of sociocultural vocabulary in speech. The following exercises are effective at the sentence level and over-phrasal unity:

1. Explain the following words: Killjoy, Fogy, Shagrag, Pighead, Gasbag.

2. Here are the nicknames of several states. Explain the implicit meaning of the nickname.

      1) The Pilgrim State
      2) The Land of Milk and Honey
      3) Midway, U.S.A.
      4) The Border State
      5) The Grand Canyon State
      6) The El Dorado State

1. Massachusetts was named "The Pilgrim State" because of the Pilgrims settlement in Massachusetts and the establishment of the Plymouth Colony. The Pilgrims set up a government in Massachusetts with the "Mayflower Compact". In 1621, the first Thanksgiving was held.

2. California is called "The Land of Milk and Honey" as in a land of opportunity, with reference to "Promised Land" in the Bible.

3. Kansas is called "Midway, U.S.A." because it is located close to the middle of the contiguous 48 states.

4. The nickname "The Border State" was given to Maine because its northern border is with Canada

5. The popular nickname for Arizona "The Grand Canyon State" references the incomparable Grand Canyon in the northern part of the state, one of the world's natural wonders.

6. The first nickname for California was "The El Dorado State". This nickname was used for California after gold was discovered there in 1848.

2. All the words have been defined by an American student. But he was watching TV at that moment and accidentally made 4 mistakes. Read the definitions and find mistakes.

Potluck – a party to which every family has to bring own special dish to share it with the others;

Buck – a 25 cent coin;

Grace (to say grace) – most American families do that before starting dinner. It is like saying thank you to God for the food given;

Nuts (to go nuts, to be nuts about something) – crazy;

S'mores – any shoes for sport or walking;

Sandwich Man –a guy who likes sandwiches very much.

Storytime – a children's section in a large bookstore. It is an area with toys, building blocks where kids can play while their parents rummage through the books on the shelves;

Open House –one that is open because the owners forgot to close and lock the door.

Buck–1 dollar; S'mores – sweet sandwiches with warmed-up marshmallows and waffles; Sandwich Man– a person, who carriesan advertising. Open House –it is a time when an institution is open to the public.

In order to intensify the use of non-equivalent and background vocabulary the following game is effective: "More words." During the game, students are divided into two teams. It is assumed that team members name as many words as possible on the topic being studied. The team that names the most words wins.

During the game "The Most Interesting Story", you also need to organize two teams and each team makes a story using the vocabulary that they could remember and all the material covered. The team that makes the most interesting story and uses the most vocabulary wins.

The next game is «Do you believe or not»

T: Now I'm going to read some statements and you must tell me if they are true or false.

Do you believe that…
+… the English are individuals.
-… the Irish have a strong sense of being different from others (British).
-… the Scots are mainly Anglo-Saxon in origin (the English).
-… the Welsh have a strong sense of national identity (the Scots).
+… the Welsh pride themselves on being the true Britons.

It is important to teach students the tactics of group communication for a teacher. Pupils should be able to speak logically, coherently and productively. It is important to introduce communicative speech stamps into the speech so that students can express their opinion (As for me ..., In my opinion ...); consent and disagreement (I think the same, I agree with you, That's true, No, I can't say ..., I'm not sure ..., I'm afraid you're wrong); conclusion (On the whole..., In general).

Results and discussion

Analyzing the test work on improving the lexical skill of high school students using the method of filling in sociocultural gaps, at MAOU "Secondary School No. 24 with UIOP", Stary Oskol, in which 28 people took part, we concluded the following:

High school students have the need to acquire knowledge and information about the culture, customs and traditions of the country of the language being studied. To do this, one should study new vocabulary and improve already familiar one. As follows from our study, the methods described by us for filling in sociocultural gaps, as well as speech exercises, which are the productive means for the studied non-equivalent and background vocabulary

assimilation, serve this purpose. At the first stage of the experiment, the test was conducted that allowed us to determine the level of sociocultural competence development among high school students.

For half a year of work, training lessons were held using the method of filling in sociocultural gaps, which made it possible to determine the levels of students learning new vocabulary, the ability to use it in speech during the developing experiment.

At the end of the experimental work, the second test was conducted to identify the level of lexical skill development among high school students. The obtained and processed data showed that the high level of the lexical skill development after carrying out experimental work increased by 25.1%, the average level of knowledge increased by 18.3%, there were no students with a low level on a given topic.

Conclusions

Thus, we can conclude that the work done to improve the lexical skill of high school students during the filling in of sociocultural gaps has increased their level of vocabulary on a given topic. It is important to note that participation in the communication process requires something more, namely the possession of equivalent and background vocabulary, the use of various speech cliches and colloquial forms. Mastering a foreign language is inextricably linked with mastering a new vocabulary, which must be improved, for example, by filling in sociocultural gaps, as described in this paper. Using this technique helps to improve the lexical skill.

Summing up, it should be emphasized that it is important to semantize lacuna correctly and control the correctness of its understanding. Besides, the studied equivalent units should be introduced into student speech. The absence of a foreign language equivalent of a lacuna implies a thorough working out of the lacunae and a sufficient amount of time to develop the sense of language and linguistic intuition of students.

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From Text-based to AR-based: an investigation of students' motivation in learning history topics for secondary school*

Del Texto a la Realidad Aumentada: una investigación de la motivación de los estudiantes para aprender temas de historia para la escuela secundaria

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ABSTRACT

History is a subject to which students may be resistant due to the nature of the content and the length of the texts involved. Studies had also shown that for this subject, students find it difficult to memorize facts and events. However, technologies may help to improve students' learning, if designed in a meaningful way. Augmented Reality (AR) has been widely used in many areas in enhancing students' learning and understanding. Among the advantages of AR is that it offers a fun way of learning and also triggers learners' motivation to learn abstract topics. This study aims to examine the challenges students face in learning history and their views on the use of AR-based learning materials in history. This single case study involved a group of form four students (16-year-old secondary school students) who scored less than 40 percent during their early year assessment. The data for this research was collected through one-to-one semi-structured interviews with all the respondents. The findings indicate factors the made learning History a challenge to the students. However, students showed positive feedbacks on the use of AR-based booklet. This paper further discusses the benefits of AR-based material to enhance students' engagement as well as the limitations of AR-based integration in teaching and learning. The findings of this study also highlight the importance of learning activities designed by educators to ensure that the planned activities have a positive impact on students' meaningful learning.

Keywords: Argument Reality, Motivation, History, Technology, meaningful learning.

RESUMEN

La historia es un tema al que los estudiantes pueden resistirse debido a la naturaleza del contenido y la longitud de los textos involucrados. Los estudios también han demostrado que para este tema, a los estudiantes les resulta difícil memorizar hechos y eventos. Sin embargo, las tecnologías pueden ayudar a mejorar el aprendizaje de los estudiantes, si se diseñan de manera significativa. La Realidad Aumentada (AR) se ha utilizado ampliamente en muchas áreas para mejorar el aprendizaje y la comprensión de los estudiantes. Una de las ventajas de AR es que ofrece una forma divertida de aprender y también activa la motivación de los alumnos para aprender temas abstractos. Este estudio tiene como objetivo examinar los desafíos que enfrentan los estudiantes en el aprendizaje de la historia y sus puntos de vista sobre el uso de materiales de aprendizaje basados en AR en la historia. Este único estudio de caso involucró a un grupo de cuatro estudiantes de forma (estudiantes de secundaria de 16 años) que obtuvieron menos del 40 por ciento durante la evaluación de principios de año. Los datos para esta investigación se recopilaron a través de entrevistas semiestructuradas uno a uno con todos los encuestados. Los hallazgos indican factores que hicieron del aprendizaje de la Historia un desafío para los estudiantes. Sin embargo, los estudiantes mostraron comentarios positivos sobre el uso del folleto basado en AR. Este documento analiza los beneficios del material basado en AR para mejorar la participación de los estudiantes, así como las limitaciones de la integración basada en AR en la enseñanza y el aprendizaje. Los resultados de este estudio también destacan la importancia de las actividades de aprendizaje diseñadas por educadores para garantizar que las actividades planificadas tengan un impacto positivo en el aprendizaje significativo de los estudiantes.

Palabras clave: Realidad del argumento, Motivación, Historia, Tecnología, aprendizaje significativo.

INTRODUCTION

It is an undeniable fact that learning with the assistance of technology has been proven to enhance students' motivation (Tekedere & Goker, 2016; Zakaria & Khalid, 2016), has an impact on students' learning capabilities (Koutromanos, Sofos & Avraamidou, 2015; Daud & Khalid, 2014), and increases students' understanding of the topics they learn (Coimbra, Cardoso & Mateus, 2015; Herron, 2016; Joan, 2015; Kysela & Storkova, 2015, Khalid et al., 2014). However, despite the rapid growth in available technology for teaching and learning, teachers in schools still practice traditional methods that focus more on teachers as the source of knowledge (Yusuf Hashim, 2015; Mohiddin & Khalid, 2014). Traditional approaches such as the use of static hardcopy books, however, have been found to be less interesting due to their inflexibility, and are less effective in promoting active learning (Rongting et al., 2017; Zhu, 2016). Among the current technologies that have vast potential in promoting more meaningful and fun learning is Augmented Reality (AR) (Saidin, Halim & Yahaya, 2015; Uluyol & Sahin, 2016). AR refers to "human-computer-interaction, which adds virtual objects to real senses that are provided by a video camera in real time" (Ludwig & Reimann, 2005, p. 4); in other words, AR is a technology that "allows computer generated virtual imagery to exactly overlay physical objects in real time" (Zhou, Doh & Billinghurst, 2008, p. 193).

Researchers in this area have proven that AR-based material has been found to raise students' motivational levels, and to have a positive impact on learning experiences, especially for weaker students (Liberati, 2016; Vidal et al., 2016; Dieck & Jung, 2017). Learners who use AR materials are also reported to show improvements in their creative thinking, as well as their understanding of the subjects they were exposed to. AR-based material also helps students to be able to describe abstract concepts as it contains visual (2D or 3D) and audio elements (Kraut & Jeknic, 2015). AR applications have been found to offer a new, fun learning experience that encourages students to carry out self-exploration based on the topics learned (Baccs et al., 2015; Okimoto et al., 2015). Since AR technology can help produce more interactive and fun learning experiences, it has been widely adopted by educators (Mahale, 2016). The adoption of AR technology in the education field has made learning and teaching processes more meaningful (Mesarosova et al., 2015; Kersten, Tschrchwitz, & Deggim, 2017).

An abundance of research has been conducted by researchers in different educational settings, for example in primary schools (Alkbattabi, 2017), secondary schools (Bacca et al., 2015; Saltan & Arslan, 2017) and higher educational (Khalid & Su Luan, 2017; Dinis et al., 2017; Huang et al., 2016; Le et al., 2015). AR research has covered a range of subjects, from technical and vocational education (Bacca, Baldiris, Febregat, Hinshuk & Graf, 2015), sports (Vidal, Ty, Caluya & Rodrigo, 2016), architecture (Mesarosova, Hernendez & Mesaros, 2015), mathematics (Coimbra et al., 2015), welding (Okimoto et al., 2015), medicine (Herron, 2016) and engineering (Dinis et al., 2017; Le et al., 2015). However, little research has focused on subject such as history that involve long texts (Kersten et al., 2017; Kysela & Storkova, 2015; Persefoni & Tsinakos, 2016; Zaibon et al., 2015). Learning history involves reading long texts and learning dates, and it has been found that it is difficult for students to memorize the necessary facts and events (Persefoni & Tsinakos, 2016). This difficulty is understandable, as Joan (2015) asserts that a human will not be able to imagine what they have never seen, unless they are given supportive learning materials such as pictorial descriptions or animation. Having to memorize facts without being able to relate them to their real lives may cause low motivation for students (Persefoni & Tsikanos, 2016). Kersten et al. (2017) also add that history is a tough subject without the help of learning aids like videos, acting, and so on. In response to this, Persefoni & Tsinakos (2016) promote the integration of AR technology in schools to support students in mastering history. With the use of AR technology, learning history can be more fun, and spur students' interest to learn about the subject (Zaibon et al., 2015). For the purpose of this study, we developed a booklet using AR technology that covers one of the main topics in the history syllabus, early civilization kingdoms in South East Asia. The syllabus was derived from the textbook for form four secondary school students in Malaysian schools. The selection of the topic was based on its complexity, which covers nine sub-topics and was found to be daunting for students to imagine the different activities and positions of the governments in early kingdoms in South East Asia (Yusup Hashim, 2012). This study aimed to explore the challenges students face when learning history, and the impact of this AR-based booklet on history students.

ARCS Model

In the design and development of our AR-based booklet, we carefully embedded the ARCS model that focuses on learners' motivation, as the ARCS model component plays a critical role in motivating students throughout the learning process (Serio et al., 2013). Keller's (2008) model illustrates a motivational design process, which first involves gaining and sustaining students' attention, which will spur their curiosity to explore the topics that they should learn. Secondly, it is vital to design learning activities that fulfill the actual and personal needs of the learners so that the learning will become relevant for them. The next step is to help learners to build their confidence by feeling in control and having an expectation of success. According to the model, learners should build their confidence because the degree of success achieved will determine the amount of effort learners will invest to complete activities. Finally, according to this model, to ensure learners to feel motivated towards their learning, there must be a sense of satisfaction, which can be assessed through their performance as well as their reflection.

Figure 1. Steps in ARCS Model (Keller, 2008)

AR-based booklet

The topic covered in the AR booklet developed by the researchers and used in this study was early civilization kingdoms in South East Asia. The nine sub-topics included in the booklet were: a) Introduction to countries in South East Asia, b) Introduction to two early civilizations in South East Asia, c) Agrarian civilizations, d) Maritime civilizations, e) The relationships between agrarian and maritime civilizations, f) The influence of Buddhism and Hinduism on South East Asia, g) The influence of Buddhism and Hinduism on government systems in South East Asia, h) The influence of Buddhism and Hinduism on architecture in South East Asia, i) The influence of Buddhism and Hinduism on language, and j) Writing in South East Asia. The trigger images and overlay videos for this AR booklet were developed using Adobe Photoshop CS4, Adobe Animate CS5, and Adobe Premiere Pro CS5. The completed animation and trigger images were then uploaded to HP Reveal (previously known by Aurasma) before it was ready to be used.
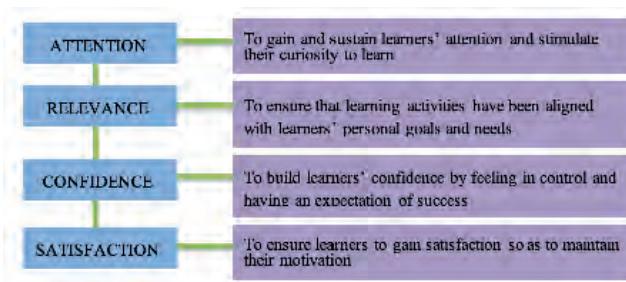
Figure 2. AR booklet used in the study on early civilization kingdoms in South East Asia

Figure 3. An example in the AR-based

of trigger images and overlay videos booklet

METHODOLOGY

This study employed (Denscombe, 2014) students (eight male old). The case study or a small number of phenomenon within purpose of gaining a single case study research design that involved 20 secondary school and female) in form four (16 years is an approach that focuses on one groups to investigate a contemporary its real context (Yin, 2009), for the an in-depth understanding of the "events, relationships, experiences or processes occurring in that particular instance" (Denscombe, 2010, p. 52). All the students were studying history as a compulsory subject at school. The selection of the participants was done based on a purposive sampling. The selected participants were among those who scored lower than 40 percent in this subject, based on their first exam of the year, which indirectly indicates a low level of achievement in history. For the purpose of this study, research participants were involved in learning activities using our AR-based booklet, and they were provided with smart phones and tablets to scan the trigger images as a way of facilitating their access. The overall duration of this study was five weeks, as summarized in Table 1. In the first week, the participants were given a briefing on how AR works and how to use the AR-based booklet, i.e. by scanning the trigger images. We also conducted one-to-one interviews with the participants, asking them to share how they valued history as a subject, their motivation to learn the subject, the challenges they were facing in learning the subject, and possible factors leading to their current state of motivation.

In the second week, participants were asked to learn Topics 1 to 3, followed by active discussions about these topics. A similar approach was conducted in Weeks 3 and 4, with each session taking two hours. In the fifth week, we

once again conducted one-to-one interviews with the participants. In this interview we focused more on students' motivation to learn the subject after they had undertaken the learning experience using the AR-based booklet.

Table 1. The activities during the project

Week	Activities
1	Introduction to the use of AR and the booklet One-to-one interview
2	Topics 1 to 3
3	Topics 4 to 6
4	Topics 7 to 9
5	One-to-one interview

Interview data was analyzed using a thematic analysis (Braun & Clarke, 2006). After the coding was completed, the codes were classified into categories (Miles & Huberman, 1994). In doing this, we made links between the data (Denscombe, 2010). As a result, several categories emerged, as presented in the findings section.

Research findings

The challenges students have in learning History

Based on the analysis (Figure 4), four main factors leading to students' low performance in history emerged, namely: a) the nature of the subject, b) teachers' teaching approach, c) learning materials, and d) learning techniques.

Figure 4. Four main factors leading to students' low performance in history

One of the themes was the nature of the subject itself. It was found that the students were traumatized by having to memorize so many years and events. This difficulty was not only because of their cognitive capacity, but also due to the lack of ability to relate the events with their current world. For example, the students stated:

> "I was having trouble memorizing all the years and events, and I kept mixing them up no matter how hard I tried. I got fed up, and to a certain extent I felt unmotivated. I failed the subject many times and I don't see any other way to solve this problem." (Shanita)

> "I really hate to say that I don't like history. Of course I cannot say this to my teacher but I just know it. Maybe I am not the type of person who can memorize all the numbers, years and the strange names. I gave up." (Azam)

Students also revealed that they did not appreciate history because they could not understand why should they take the subject and the importance of it for their future. For example:

> "I know as a student I must learn all the subjects given to us in school. But to be honest, I cannot see the relevance of learning it [history]. I cannot spend time to study all the chapters." (Zaleha)

> "Maybe not everyone is in favor of history, just like mathematics or physics. I wish we were given an option to take or to drop [the subjects]." (Haida)

The teacher was also a theme that emerged from the analysis. Based on the data, it was found that students were concerned about the teaching techniques used by their history teachers. Some of them described their learning experiences in history as "dry". This can be seen from these answers:

> "I know I shouldn't have said this, but I think if our teacher could make the learning more fun, it would be easier for me to absorb the content. But, all this while, we just have to read the long notes and create our own summary. It was not motivating at all." (Sham)

> "When it comes to the history period, my mood will swing. I think our teacher is not interested in teaching the subject as well! We just learn from the textbook and the only activities that we have in class are group discussions and then presentations." (Hamdi)

The students also complained that their teachers were not creative enough in designing learning activities that were

fun and enjoyable. For example:

> "There was once, I remember she [the teacher] brought us to the computer lab and asked us to search for information related to the topic that we were supposed to learn that day. I had a good time searching on websites and YouTube. I think if she could let us do this more often, I would be more interested in learning history." (Azam)

The next theme was learning materials. The majority of the students shared their concerns about the lack of learning materials and references for them to learn history. Their only references were the textbook and the reference books they had bought from bookshops. For example:

> "Since the subject is boring, I think we need something that can help spur our motivation. Unfortunately, we only have the textbook and reference books as our primary sources." (Rahim)

The final theme was students' learning techniques. The students admitted having limited learning techniques for history. When asked to describe their learning techniques for history, the majority mentioned memorization as the main technique they used. Aside from that, a few students named mind mapping and infographic notes.

Students' views on the use of the AR-based booklet

Another aim of this study was to examine the impact of the AR booklet on students learning history. Based on the analysis (Figure 5), the students gave positive feedback on the AR-based booklet. The themes that emerged were: a) easy to memorize, b) motivating, c) fun, d) contextual, e) user-friendly, and f) attractive.

Figure 5. Students' views on the use of the AR-based booklet

Satisfying

The students had mentioned in the previous interviews that they found it difficult to memorize all the facts and dates in history. However, using the AR-based booklet, many of the students shared their joyful feelings about the new learning approach. Since the booklet is equipped with animated videos for each sub-topic, students found it to be helpful for them to memorize better and thus made them feel more satisfied with their learning process. For example:

> "To be honest, when you find something to be different and fun, you tend to remember it even better. I think I can memorize many facts in the videos as I can actually visualize the animation in my head, and this new experience helped me to fell more satisfied with my own achievement." (Azam)

> "Satisfaction! That's all I can say. I feel like I have learned something meaningful. I could easily differentiate the differences between the civilizations." (Sapura)

Motivating

The students in this study shared how they feel about learning history. Many of them admitted having low motivation to learn the subject due to the reasons presented in the previous section. Based on the analysis, we found much evidence of how they the AR-based booklet had elevated their motivation to learn the topic. Some examples are:

> "Okay, on a scale of 1 to 10, I would choose 8.5 [answering the question 'how much do you think the AR-based booklet motivated you to learn the topic?']." (Daniel)

> "This is so motivating! I was shocked to see how sophisticated the booklet was. The design itself is appealing but the videos are even more outstanding! I give a ten score! Thank you for this opportunity to let me learn something interesting!" (Haida)

> "I wish we could have this kind of booklet for all the history topics. This is the first time I have felt that I am in love with history. I give it ten out of ten." (Zaleha)

Fun

The students found that it was undeniable that learning with something new injected elements of fun. The majority of the students agreed that using the AR-based booklet was a fun learning activity. The excitement to explore the AR-based booklet made learning more interesting and was valued as a positive experience among the students. For example:

> "This is the best experience I have ever had. Never had I imagined using such an interesting app like HP Reveal and what is more, to use it for learning history. I think this is also considered as part of the history of my life! [laughs]." (Hashim)

> "Very excited about this type of learning method. It's easy to remember and very fun to learn with." (Leo)

> "I am a gamer. I spend a long time playing games on my smartphone. But AR is rather interesting and fun too. I wish our teachers in school could provide us with more of such things." (Daniel)

Contextual learning

The AR-based booklet was found to be relevant to the students' learning context. The topics about ancient civilizations seemed to be disconnected from the students' current world, but with the booklet, the students were able to visualize and imagine the situation of each civilization through the animation available in the booklet. For example:

> "Because it is just like a real one ... I felt like I was in that era. At least I could imagine myself being there for a while. It is effective in that it helped me to relate myself with the situation in the animation, and thus helped me to remember the differences between the different governments we learned about in the topics." (Shuhada)

> "My biggest weakness is imagining the situation in each civilization. It is so disconnected from my own life. What I did before was to sketch and use symbols to help myself to memorize the civilizations. But having this kind of animation or video I think helped me a lot to visualize the situation." (Hashim)

User friendly

The students also found the AR booklet to be user-friendly. All they had to do was to use a smartphone to scan the trigger image and the video would appear on their smartphone. For example:

> "The application is so simple and easy to use. We just have to scan the images and the video will be played. You just have to have a mobile phone and the internet." (Bakhtiar)

> "Surprisingly, we don't need laptops to use this technology. Once you have the apps on your mobile phone then you are ready to learn." (Shauqi)

Attractive

The attraction for learning came from the learning material itself. The majority of students cited that they were amazed by the attractive illustrations in the trigger images, and when they saw the animation their amazement grew. For example:

> "I was so amazed by this booklet. It is beautiful, it really caught my eye and is attractive. I can already memorize the flow of the stories by watching the video few times." (Timothy)

> "I found it easier to memorize [the information] now because of the different colors used. The animation was awesome. The characters were cute too. One of the most attractive materials I have ever dealt with." (Bashid)

> "I can't believe seeing the 'waves' coming from the animation .. and what amazed me more is the sound effect coming from the waves … it is so real! It makes me want to learn multimedia and create such stuff on my own! [laughs]" (Izzah)

> "The voice on the video is quite clear and masculine. There are sounds of birds chirping and the sea breeze. Very dynamic and interesting." (Juhaida)

Participants also stated how they were triggered to try out the quizzes due to the attractive booklet.

> "Initially, I didn't expect the booklet would have a 'wow' factor. I tried the quizzes once and it was not bad at all. The questions were clear, and really helped me to memorize the facts, unlike the one we have in school. All written questions in A4!" (Bustaman)

Discussion

This study aims to explore the challenges students face when they learned history, and the impact of an AR-based booklet on students learning history. The participants in this study were students who had low performance in history. Four factors were mentioned by the participants that made learning history a challenge. Among the factors was the nature of the subject itself. Students reported to have been struggling to memorize all the facts and events. This finding supports Persefoni and Tsinakos (2016), who posit that when learning history, which involves reading

long texts and learning dates, students find it difficult to memorize the facts and events. Another factor related to the challenge of learning history was the approach used by teachers. Most of the students complained about the way their teachers taught the subject. Teaching approaches and the design of learning activities have an impact upon students' motivation and interest to learn. This is not a surprising fact, as other researchers have also noted that students may be struggling with learning history due to the lack of effective teaching strategies (Tok, 2016). With more initiative, teachers could design learning activities more creatively, for instance by involving students in drama based on certain events in history. While participating in drama, students would be intensely involved in history and able to relate the events and morals into their present lives and become connected to the issues and concerns of the past (Kernfeld & Leyden, 2005). Another interesting approach that has been frequently used in teaching history is storytelling; a combination of the art of telling stories and a variety of digital multimedia, such as images, audio, and video. This type of activity can generate interest, attention and motivation for the students (Robin, 2008). This is in line with Burmark's (2004) findings that the integration of digital storytelling is helpful in engaging students with the content, in facilitating discussions about the topics presented in the story, and in helping make abstract or conceptual content more understandable.

The majority of the students also shared their concerns about the lack of learning materials and references for them to learn history. Their only references were the textbook and the reference books they had bought. The status quo is worrying, and students may develop less and less motivation and interest to learn history. In relation to this, Joan (2015) and Kersten et al. (2017) urge for history students to be given more supportive learning materials, for instance visual materials and animations, as Joan (2015) asserts that students will not be able to imagine what they have never seen unless they are given supportive learning materials such as pictorial descriptions or animations. Persefoni and Tsikanos (2016) also note that if students are not able to memorize the facts and to relate them to their real lives, their motivation will go down.

In this study, students mentioned having limited learning techniques to learn history. The majority of the students, when asked to describe their learning techniques for history, cited memorization as the main technique they used. Aside from that, very few students named mind mapping and infographic notes. Having effective learning techniques will help students to master the subject more effectively. Based on Tok (2016), learning history should not only involve the memorization of names, years, or events, but should be associated with the process of building historical knowledge through the use of primary sources, conducting historical inquiry, and encouraging students to think chronologically, and to analyze and interpret historical evidence. For these expectations to be realized, students should be helped to develop various learning techniques, not just memorization alone.

With regard to the use of the AR-based booklet, students gave positive feedback. Among the feedback given was that the AR-based booklet helped them to memorize facts more easily. This finding supports Liberati (2016) and Dieck and Jung (2017), who report how AR-based material has a positive impact on students' learning, especially among weaker students. The AR booklet was found to be motivating for the students to learn the topics over the weeks. This is in line with other research that proves that AR-based material raises students' motivational levels (Liberati, 2016; Vidal et al., 2016). In addition, the findings reveal that the students perceived the AR-based booklet as fun, and it encouraged them to explore all the quizzes and to scan the trigger images repeatedly. When learning is perceived to be fun, it will encourage students to do self-exploration based on the learned topics (Baccs et al., 2015; Okimoto et al., 2015). These findings further confirm the suitability of AR materials to promote learning, increase students' levels of motivation, and make learning more fun (Martín et al., 2012).

As mentioned previously, the development of the AR-based booklet was based on the ARCS model (Keller, 2008), through which we tried to make the booklet something meaningful for the students and a source of motivation for them while learning history. ARCS is an abbreviation of Attention-Relevance-Confidence-Satisfaction. From the students' feedback, they found the booklet attractive and it successfully grabbed their *attention*. Students also cited having more contextual learning using the AR booklet, which is associated with the *relevance* element. However, the third element, *confidence*, did not clearly emerge from the analysis of the students' interviews. This might be due to the fact that these students are weaker students in history, and therefore, it may take a little while for them to develop more confidence about their ability and performance in this subject. The final element, *satisfaction*, was clearly seen from the students' answers, which show that the learning experience in using the booklet helped them to feel more satisfied with their learning. All this evidence seems to further support the relevance of the ARCS model in the design of any learning materials, and AR-based material is no exception. These research findings also prove the effectiveness of AR materials in attracting students' interest to a difficult topic. This research is in line with past research conducted by Bacca et al. (2015), Koutromanos et al. (2015), Okimoto et al. (2015) and Saltan and Arslan (2017), who all found that students gain more understanding and develop more interest to learn difficult topics when they use AR-based materials.

CONCLUSION

This study gained an insight into the challenges that students face while learning history. It was found that the challenges are not merely related to the nature of the subject alone, but are also associated with other factors, namely teachers' teaching approaches, the lack of supportive learning materials, and students' current learning techniques. This study embedded the ARCS model in the design and development of an AR-based booklet. Overall, students gave positive feedback on the use of the AR booklet in increasing their motivation and satisfaction in learning history.

This study also highlights the importance of integrating technology in designing and developing more purposeful learning materials that benefit and fulfill the actual needs of students.

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Images as spontaneous speech tools

Imágenes como herramientas del habla espontánea

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ABSTRACT

The article presents a figurative component in spontaneous speech. It is proved that an image enriches speech, and provides its individualization. Imagery testifies to the creative potential of an individual. It represents a deviation from accepted communicative cliches. Experimental word formation is considered as a source of imagery. A significant role is played by the phenomenon of abbreviation semantics in the process of nomination and renomination.

Keywords: speech, word formation, image, communication unit, individualization of speech, word creation.

RESUMEN

El artículo presenta un componente figurativo en el habla espontánea. Está comprobado que una imagen enriquece el habla y proporciona su individualización. Las imágenes dan testimonio del potencial creativo de un individuo. Representa una desviación de los clichés comunicativos aceptados. La formación experimental de palabras se considera una fuente de imágenes. El fenómeno de la semántica de abreviatura desempeña un papel importante en el proceso de nominación y renominación.

Palabras clave: habla, formación de palabras, imagen, unidad de comunicación, individualización del habla, creación de palabras.

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Introduction

Imagery, as the initial category of artistic discourse, is based on spontaneous creativity of living colloquial speech, which is understood as a non-standard type of nomination or predication. In both cases, the appearance of an image is associated with the transforming action of an author or a speaker, his desire (sometimes subconscious one) not to use, but to "influence the language" (Budagov, 1979). This deviation from cliches and model conventions accepted in communication is aimed most often at the information flow or narrative sequence revitalization with a "spectacular" effect – a bright figurative "inlay" (Zemskaya et al, 1981). "shaking automatism" of perception (Norman, 2011). and enhancing the expressive aspect of an utterance. From a pragmatic point of view, speech expressiveness increase invariably reduces its information content, which, in turn, determines the functional limitation of figurative means (Vinogradov, 1980). However, this situation, traditional for stylistics, has recently undergone significant changes under the pressure of communication "image" nature in the public sphere (Adonina et al, 2018: Polyanskaya et al, 2018: Rumyantseva et al, 2018). The illocutionary power of a speech act and the perlocution that was not obvious in it is appreciated much higher than information accuracy. Imagery allows not only to draw the attention of the audience to certain (sometimes secondary, non-essential) aspects of a problem, but also to emphasize a speaker's individuality, including the degree of his creativity. Thus, the demand for imaginative means in modern communication technologies determines the relevance of research aimed at observing and clarifying the mechanisms of linguistic influence, also by the means of creative deviations (Nikolina, 2013).

The study is based on the material of creative phenomenon files of the Department of Russian, Slavic and General Linguistics, the Taurida Academy of the Crimean Federal University named after V.I. Vernadsky. The bank of figurative names of aircraft abbreviations was formed on the basis of Internet sources (Petrov, 2017).

Problem discussion

Experimental word formation as imagery resource

The very concept of deviation is based on the concept of "norm" (Krongauz, 2004). not only as a theoretical basis, but also as a source resource. The figurative component arises not only during various types of semantic transfers, but also during morphemic combinatorics or morphological category shifts (Remchukova, 2011). In this case, the degree of derivative expressivity will vary according to the degree of used base violation.

The basic concept of speech experiments in the field of morphemics is the concept of division. Contrary to the concept accepted in linguistics about the idiomatism of a word (Toroptsev, 2015). in live speech, a lexical or phraseological unit is perceived as "a construction consisting of individual elements with a clearly recognized meaning". During the stage of an utterance development, an active choice is made of those drill elements of a word that most accurately express the objectified perfect meaning. In a situation of synonymy of homogeneous elements, their spontaneous imposition can occur, causing unconscious reservations that do not have creative potential, but testifying to dissected perception of a word and morphemic combinatorics in a speaker's mind. Of course, the enrichment of speech with imagery has a purposeful nature and testifies to the creative potential of a personality as a whole.

The technique of morphemic combinations consists in the collision of a model with the grammatical task of the syntactic scheme, which is the factor stimulating creativity in practice. In such a sequence situational units arise, like   ,   , or verb derivative nominations   ,   ,   ,   . The creation of these units in speech is "provoked" in a certain way by situation components and statement structure. So, for example, the substitute for the verb   is represented by the noun: "   ,   " in response to the sentence "   ". Given the construction of the phrase, it cannot be ruled out that the noun   should have appeared in the position of the predicate (compare: *   ,), whose structural correlation with the semantic verb   brought to life an occasional nomination. The occurrence of the unit   in the speech of the child's offended friend is also dictated by syntactic parallelism and model scheme: ,   ! The element of spontaneous communication dictates the maxims of semantic compression when the normative prevalence of one part of a statement contradicts the task of expressiveness (cf.: *   ,   .!). Rhetorical conformity has a decisive effect on the derivational model violation: -   + -   -/   -   + -   -.

The change the part of speech belonging of the producing base is the most radical deviation within the productive type. However, expressivity can also be achieved with a smaller deviation, an example of which is the verb formant - -(   ). The wide range of verb derivation using this affix allows the production of situationally accurate predicates. The meanings of the verbs   ,   ,   ,   are open and interpreted out of context due to the visibility of the producing principles: 'to become rickets, to weaken'; 'to stain with lemon, lemon juice'; 'to turn into candied fruits, sugar'; 'Use something extremely bright'. In these occasionalisms, the verbal image is more consistently attracted to a specific object of content (Arutyunova, 1980). With equal clarity of situations, the degree of occasionalism expressiveness is different: - describes the action in accordance

with the model value 'to cover the surface with something uniformly', like the verb   , implementing the meaning of the model 'endow with the quality called derivative adjective' (compare: ,   ). At that, the prefixal-postfixal model   - + -   with the meaning of 'bringing the action on oneself to a certain limit' is implemented in the unit   with the omission of the verb stage (compare: *   ). The verb   has a smaller deviation from the meaning of the model 'to be filled or covered with something that is called a noun'. In this case, it is appropriate to talk not about violation of the model components, but about metaphorization, since the phrase "   ,   ", contains a convoluted comparison of jam density degree with the hardness of candied fruits and does not mean the actual conversion of products into each other.

The final distribution of occasionalisms on the expressivity scale is the following one: –   –   –   . Since the unusualness of word-formation violations invariably attracts attention and makes occasionalism the center of expression, a text-forming tool (Babenko, 1997)   , the verb expressiveness   is evaluated above the rest.

The separability of the word, recognized and exploited by the speakers, prevails over the laws of word formation, not only from model to derivative, but also in the opposite direction – with structural re-decomposition, or re-etymologization. The results of the "violent" division of the speech unit demonstrate that it concerns not only de-etymologized or unmotivated (borrowed, in particular) units, but also the words with obvious morphemic composition. The factors influencing this process are ambiguous: on the one hand, during re-etymologization, there is a steady tendency to create homonymous forms within the framework of the language game (- dachshund male,   – smear with cream), and on the other hand, redevelopment is often accompanied by the development of semantic shades laid in different models. So, in the word   , the single-root word "   " stands out, but not as a verbal substance, but as the homophone of the word   :   !   !   ! Naturally, re-etymologization relies on the model value of the formant   - /   - 'to deprive something, release it from something', which expresses the essence of the situation in a compressive form. The situational meaning also fits into the proper name "Proletarian" reproduced on the bus window as the hallmark of a glass factory. The name provokes the question of the child-passenger about the meaning of the word proletarian. After listening to the vocabulary interpretation, the child examines the window for some time through the slit of which an insect flies and draws a situational conclusion: Proletarian is the glass through which flies fly. This example, with all its obvious comic nature, clearly illustrates the mechanism of the morphemic "adaptation" of the word to situational parameters. At that, the abstract concept acquires all the same subject-specific concreteness.

The imagery that accompanies the visibility of reproduced information can also arise regardless of extralinguistic meanings. So, the husband's response to his wife's tedious and detailed instructions – I'm a donut! – is rather oriented toward systemic laws and, although it follows the above-mentioned tendency toward homonymous re-etymologization, it differs from other examples by the abstractness of the derivative value: donut – 'the one, who understood, clever'. At the same time, the influence of the value of the initial form is noticeable – the name of the sweet flour product, which is very appropriate as the means of communication intensification (Vinokur, 2009). Such cases give reason to talk about the simultaneous manifestation of both values in one unit. This technique, which is very characteristic of poetic speech, is also used in speech, enriching an informative act in a visual way.

Re-etymologization deals with indecomposable borrowed units. Moreover, this process currently gives the results of mixing different linguistic phenomena – the actual re-decomposition of the basis and the adaptation of foreign-language morphemes in Russian word formation. An example of such a mixture is   unit, acquired the meaning of 'master in floristry' in the phrase "   !", synonymous with the meaning of the word florist. When they compare two units, it becomes apparent that the speaker is striving to isolate the system root   - as the part of an indecomposable unit   . However, the factor of individual combinatorics in this case is the cognitive motivation for the subtype revealing: unit differs from the neutral synonym   not only by expressiveness, but also by the shade of superlative value – 'good, talented florist'. At the same time, the figurative component, which is the part of the occasionalism   , turns out to be more expressive than the ugly meaning 'a person by profession, occupation' of the borrowed affix -   -. The truncation of the root of a foreign word   -, observed during re-etymologization, can be considered as the indicator of its further adaptation in the Russian language system when the technique is repeated (Nechaeva, 2016).

The examples of renominations caused by a paronymic attraction can be attributed to a variety of structural redegradation (Gridina, 1996). These turn out to be the popular "nicknames" of cars popular in modern spontaneous speech: ,   ,   ,   . The phenomenon of such renaming is associated not only with the desire to russify and shorten the elongated names of the Mercedes, Infiniti, SsanYong brands, but also in some extent to create the car image through a specific type of personification – assigning the name of an

animal or a person to an inanimate object. During renaming, there is an axiological component that reflects the owner's satisfaction with his property. A critical assessment is expressed in such renames as   and   , each of which distinguishes obsolete car brands Moskvich and VAZ as completely devoid of class features. This is noted when a Moskvich car passes a difficult stretch of road with the comment of another driver: ,   ! The second lexical occasionalism arises in a brief description of an accident: :   ,   – 60-70   , –   . The paronymic influence of   -   -   forms allows, albeit with difficulty, to identify the brand, while   can mean any non-modern car, and not just VAZ (compare: -   –   ). The illocutionary power of a speech act is aimed in both cases at an expressive image development of a mechanism that has lost the right to be designated as a car.   unit is characterized by the presence of the content sarcastic component that appears in the structure of the predicate   ('make vain, preliminary meaningless efforts'). In this context, the meaning of the systemic form is synonymous with the word   , which is very common in colloquial speech (cf.:   ,   !   !). The emergence of the unit   can have not only a phonetic-morphemic explanation, but also a phrasemic one – it is impossible to exclude the appearance of such image as   from the value of a stable combination   fixed in usage as the designation of a faulty car. In occasionalism, the transfer of the nomination takes place on the basis of metal products uniting   and   . In contrast to the sarcastic connotation of the unit   , the nomination   is perceived more positively in the context, since the comic effect of this nomination is neutralized by the diminutive character of the affix -   - in its structure, which is reinforced by the diminutive and caressing value of the agreed definition   .

The phenomenon of abbreviation semantics in the process of nomination and renaming. The unit of modern speech communication is not only a word or idiom, but also a word-abbreviation. The high intensity of modern information exchange and the activity of the tendency towards language economy affect the productivity of nominations of the abbreviation type. The activity of this process is recorded in some studies as the "abbreviation outburst" (Baranova, 2016), which also has colloquial "origin." The phenomenon of abbreviation nominations confirms that neutral ugly language means have no less figurative potential than multi-valued units or proper names. Abbreviations easily enter into speech and give derivatives, and the plurality of abbreviations in one thematic area invariably leads to renaming of a figurative nature by the type of tropization or homonymization. In other words, an abbreviation is not limited by the possibilities of speech experiments, and thus appears in a number of means of imagery creation.

The most striking and already used version of the abbreviation nest is the reduction of the American company IBM – the world-famous leader in the production of digital technology. The tradition of the abbreviation nomination of new devices with the initial letter of the company name in English (I-phone, I-pad) is learned and developed in Russian. First of all, there are stylistic options for the original calque: iPhone -   and   , of which the first refers to the onymized model personification: .   . + -   - / -   -, and the second represents the contamination of the abbreviation and the Russian colloquial equivalent of "mobile phone" phrase. In addition to stylistic duplication in a modern spontaneous dialogue, the derivatives   and   are recorded, indicating further "sprouting" of abbreviation in Russian everyday life, despite the negative connotation of these units in the sentence: ,   ,   ?   ,   . It is noteworthy that inside the first phrase one more abbreviation derivative is contained as additional evidence of this type of figurative derivation activity. A neglectful tone of a generally neutral unit
arises during interaction with the verb occasionalism that combines the semantics of the abbreviation VIP and the system verb   . At the same time, occasionalism, formed by the substitution of the word segment, allows a vivid figurative assessment of the action: the value 'to attract attention, to show off' is specified as 'behave like a VIP person' or 'portray yourself as a VIP person'. The final semantics of the verb is distinguished by a certain diffuseness, which, in turn, is the indicator of the language game. The activity of the abbreviation VIP (from the English VIP) is also confirmed by the fact of its derivative   , in which the semantics is determined by the consituation – the unit is used to nominate the regulars of a night club VIP zone. Functionally, this abbreviation occasionalism is close to predication, since the affix model contains the indication of regularity, stability produced by an acting person (cf.:   ,   ,   , etc.). A stable phenomenon of colloquial speech is the formation of diminutives, which invariably include a figurative component in their semantics. In this process, the following abbreviations are also used: - from the contraction   / (homework),   - from okay (English ok). At that, the imagery of the latter diminutive is phonetically associated with a semantically similar Russian colloquial   formed from the predicate   .

The imaginative abilities of abbreviations can be developed along the semantic vector. To illustrate this thesis, the names of Soviet aircraft and helicopters were selected. Each aircraft model has one or more designations. They can be official or informal. The following system was adopted for the official designation of serial aircraft in the Russian

aircraft industry: the object had the initial letters of the name of the first general (or main) designer of the design bureau in which this artifact was developed, for example: An (Antonov), Be (Beriev), Il (Ilyushin), La (Lavochkin), Ka (Kamov), Po (Polikarpov), Su (Sukhoi), Tu (Tupolev), Yak (Yakovlev), etc. If there were several designers, then the initial letters of two or three creators of the authors were taken into account: MiG (Mikoyan and Gurevich), LaGG (Lavochkin, Gorbunov, Gudkov). More rarely, an object had one initial letter of its creator's name: M - an aircraft designed by V.M. Myasishchev. After the initial letters of the surname or surnames the number of the original model, the letter code of the modification (if there is a variant or variants of the model) and in some cases a name (for example, An-8, Be-6, Il-112V, Ka-50 "Black Shark" and etc.). An exception was the marking for fighters, not associated with the name of the chief designer: I-1, I-16, I-153.

The created aircraft in the professional environment and among the military personnel immediately acquired other names, usually figurative, which function in aviation jargon.

Most of the considered figurative nominations of aircraft are based on the design features of an aircraft, primarily on the shape of the fuselage (IL-86, MiG-15, MiG-27, Tu-134, Tu-334, Su-24, etc.), for example, Su-24 – "Suitcase" or "Chest; later, for the possibility of nuclear weapon location on board, they began to use another nickname – "Nuclear Suitcase";

The nose of the fuselage design of the MiG-27 fighter-bomber has an external resemblance to the corresponding parts of the animal world bodies, which was the basis for the names "Utkonos" and "Crocodile".

Due to the long narrow fuselage and the characteristic high-pitched sound of the engine, the supersonic aircraft of the 60-ies Tu-134 received the nickname "Whistle".

Due to the association, motivated by the apparent similarity of the fuselage shape with the barrel, the MiG-15 fighter received the figurative name "Beer keg". Why BEER keg? – Internet does not provide an answer.

On the basis of a "hot" fuselage with a bulky container on its back, the BM-T-1 transport aircraft was called the "Flying barrel" (although it would be more correct to call this aircraft a "flying barrel carrier," according to one of the participants of the aviation forum). The aircraft was deciphered as "Vladimir Myasischev-transport" (we pay attention to the appearance of the letter in the official name corresponding to the name of the designer, which has its own justification: see https: //www.aviaru.rf/aviamuseum/aviatsiya/ …). Later, the aircraft received its own name "Atlant".

In addition, the specific technical characteristics of aircraft (for An-72, An-148, Be-12, Il-18, Il-114, etc.) became the basis for the appearance of figurative names of abbreviations:

the unusual location of the engines on top of An-72 wing, which was nicknamed "Cheburashka" and "Binoculars" – from the outside they really resemble large ears or the eyepieces of a "fieldman";

the similarity of An-148 airplane engines with the animal ears brought to life the nickname "Sad Donkey", named after the sad donkey Ia, one of the heroes of the Soviet animated cartoon "Winnie the Pooh" from the tale of the same name by A. Milne;

the specificity of the external design of Tu-134UBL nose cone served as the basis for its name "Buratino", which has a cultural justification: Buratino (Italian Pinocchio – "a wooden doll-actor") – a fictional character, a long-nosed wooden boy, the main character of the fairy tale by A.N. Tolstoy's "Golden Key, or The Adventures of Buratino" (1936): https://www.ru.wikipedia.org/wiki;

many pylons under the almost direct wing of Su-25 were associated with a comb, which served as the emergence of a new name – "Comb";

deltoid triangular wing: MiG-21 – "Balalaika", Be-12 (patrol aircraft) – "Seagull";

The high-speed engine of the BLA-139 reconnaissance aircraft was associated with a hawk. The name "Hawk" was also supported by the accuracy of aircraft navigation systems; and military transport aircraft Il-18 and Il-114 received the name "Sawmill" due to the characteristic noise of the engine.

The form of AN aircraft is also significant for the nomination process:

elongated: civilian aircraft Yak-24 - "Flying Wagon";

conical, similar to a cigarette: multipurpose supersonic jet military aircraft Yak-28 - "Picket".

In the process of nomination, the size of the aircraft (large / small) was also taken into account:

large: Mi-26 helicopter – "Cow", Mi-26T2 – "flying cow";

Small: Be-39 – "Air minibus", Mi-2 – "Aeromol".

The color sign is the basis for the appearance of figurative names for aircraft Ka-50, Mi-24, I-301, etc.

The abbreviation Mi-24 implements the figurative names "Striped" and "Crocodile". The "Striped" nomination is motivated by the camouflage color of the object. I-301 fighter was named "Royal" due to the dark red color of polished varnish on the tree (https://topwar.ru ›), and the light anti-reflective coating of the supersonic strategic bomber Tu-160 became an associative background for its unofficial name "White swan".

The aesthetic appearance of an aircraft is equally important. So, An-24 was named "The Ugly Duckling" because of its repulsive appearance (https://www.livejournal.com›), which in the minds of a native speaker is associated with the "ugly duckling" from the Danish writer's tale of the same name and the poet Hans Christian Andersen, as well as with the name of a hand-drawn cartoon produced in the USSR in 1956. And the IL-62 for its appearance was nicknamed "Mr. Elegance" (https://nashamoskovia.ru›).

The signs underlying the unofficial names of aircraft can be very diverse. For example, a combat training aircraft, a light attack aircraft Yak-130, equipped with the latest technology, was named "Flying Computer", and the Yak-28, without weapons on board, was nicknamed "Peace Dove".

This or that nomination can be supported by several associative signs. For example, the Ka-50 super helicopter received the nickname "Black Shark", thereby emphasizing the color and power of the invention of domestic military engineering by the nomination. The name was also promoted by the extra-linguistic factor – the Black Shark action movie released on the screens, where this helicopter was shot in the main role (http://www.aviarf.ru). https: //webmaster.yandex.ru/siteinfo/? Site = back-in-ussr.info

The same artifact, depending on the associative perception, can have not one, but several names, for example, the MBR-2 seaplane received the ironic and affectionate nickname "Ambarchik" for its angular shapes, and the sublime romantic "Marine seagull" due to its silver color(http://www.detectivebooks.net›).

Conclusions

The figurative potential of a language is realized in spontaneous speech in the same range and with the same power of visual expressiveness as in the texts of masters of a literary word. Speech creativity is distinguished by a great connection with the pragmatic conditions for the implementation of a speech act and the absence of a preliminary attitude on artistry. The poetic function in live communication is often limited by the principles of communicative cooperation, which do not allow narrowly authorial, difficult to perceive deviations from the norms and laws of the language system. And at the same time, the heuristic phenomenon inherent in native speakers allows everyday collective language co-creation.

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Sociolinguistic Theory of Discourse

Teoría sociolingüística del discurso

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ABSTRACT

The present article tries to review definitions of discourse, their origin, and purposes of discourse analysis in order to accentuate the point that discourse emphasizes the dialectic relationship between language, community, and politics. It also attempts to show that under the light of discourse theory, it is possible to recognize the effects of language on political and social life of nations.

Keywords: discourse theory, discourse analysis, language, community, politics.

RESUMEN

El presente artículo trata de revisar las definiciones del discurso, su origen y los propósitos del análisis del discurso para acentuar el punto en que el discurso enfatiza la relación dialéctica entre el lenguaje, la comunidad y la política. También intenta mostrar que, a la luz de la teoría del discurso, es posible reconocer los efectos del lenguaje en la vida política y social de las naciones.

Palabras clave: teoría del discurso, análisis del discurso, lenguaje, comunidad, política.

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Introduction

According to some resources, history of the term discourse dates back to the 14th century. To illustrate its meaning, as it is used in everyday language and dictionaries, discourse is said to be a form of language in use; for instance, a speech or even more generally oral language or style of speaking (MirFakhraie, 2004: 24). Up to the turn of the 20th century, intellectuals were faithful that language plays the role of a tool to express the preexisting realities. However, after the turn of the century, they held the view that language shapes realities. At present, after the introduction of structuralism and under the influence of Nietzsche, Wittgenstein, and Hiedger a theory was presented which asserted that we know the world only through language forms and our human experiences gain meaning by means of language.

Previously and based Plato's theory of mimesis, literary and art texts were supposed to be copy of the world. However, after the turn of the 20th century, this premises turned opposite according to which it is the real world itself that gains implications from the texts preceding it. In other words, our everyday biological experiences have their roots in the texts, not only literary but also all linguistic and semiotic experience, which we have read. We access reality through language. It does not denote that there is no reality but it connotes that we recognize realities by means of language relations. Indeed, we mold our experiences through language so as to get hold of them. Reality makes sense only through language or discourse. Language helps shape social world, social identities, and social relations.

Over recent decades, discourse has been noticed and acted upon by intellectuals and theoreticians of a variety of domains like literary theories, philosophy, sociology, politics, psychoanalysis, even socio-psychology, and also other social sciences. The root of the term can be found in Greek verb "Discurrere", which literary means wandering, trekking, traversing, digressing, disseminating. Dialogue or Dialog is considered to be the prerequisite of any discourse. Every type of speech, be it oral or written, is a social issue, i.e. they have social disposition, nature, and structure. Discourses vary in accordance with place and time. Every country has its own different discourse. Moreover, inside every country discourses vary.

Discourses vary in accordance with different social institutions and applications, where they are formed. In addition, they are different depending on the situation, prestige, and dignity of the individuals who utter or write them or even their addressees. Therefore, background and domain of discourse is not homogenous, unique, and consistent. Discourse can be taken to be a social phenomenon, category, or issue. To put it in a better way, discourse is an issue or domain with a social background. Usage and meaning of all the mentioned expressions, speeches, statements, premises, words, or phrases depend on the point that the expressed materials, the presented statements, and the assumed premises, and the like are to answer the questions when? where? How? Who? Or against whom? They are used.

In other words, time and place setting of the applied cases or subjects of every point, statement and premises determine from, type, and content of every discourse. Discourses are embodiment of meaning and social interactions. Words and concepts, components of the structure of language, are not stable and consistent and depending on different times and places, their relationships undergo changes and they gain different meanings. Hence, structure of language is also instable. Given this, discourse can be claimed to be the representation of language presented above sentence, words, and phrases. Indeed, it should be sought after in nonverbal signs and practices and in all relationships between individuals. (Salimi, 2004: 55). It should be taken for granted that discourse is a multifaceted concept and basically is underdeveloped, vague, and controversial. Regardless of it etymology, which can be followed in Greek classic text, its new definition for various intellectuals is referring to a variety of signified so that every one of these individuals accentuates their own specific concept and takes it.

It is likely to assume to be a potential system. This potentiality is the one which allows us to create some principles that can be correct or incorrect. This issue makes discourse possible to be a branch of knowledge. Nevertheless, principles of discourse are not the ones followed by individuals unconsciously. Discourse is not a method or locus of an investigation but it is a collection of rules which provide the preconditions required for the establishment of these principles so that they are above interlocutors of discourse. In fact, prestige, practice, and characteristics of the knowers, writers, and listeners of discourse are duty and function of this type of discursive principles (Philip, 2002: 161).

By means of the help of institutions and organizations to which discourse is related and also based on situation or position from which discourse originates and positions or prestige it assumes for the speaker, discourse can be defined as a specific domain of language in use. However, this position or situation per se does not exist and is not independent but it can be taken to be a perspective or position which every discourse gains according to its relationship with other opposite discourses. Thus, every discourse, directly or indirectly, is administered through its relationship with or addressing another discourse. Nonetheless, every discourse relates to certain issues, subjects, and purposes and takes specific concepts and themes into account while putting other concepts aside.

Different discourses present different concepts and categories. From time to time, it is possible to take some concepts, which are presented in a specific discourse, and in a different discourse think it over and present it. But, this is not the case always. Everything which signifies something or is meaningful can be taken to be part of discourse. Meanings are embedded in technical processes, institutions, public etiquettes, different ways of communication, and dissemination of

different forms of education and training.

Different discourses make up different systems. The required conditions for meaning come together and get consolidated and by means of the help of social and institutional position from which discourse originates (not through structure of positive structures and interpretations) are framed as certain meanings (or they gain certain meanings). Terms, words, expressions, premises, and the like change their meaning depending on the positions their users take (McDaniel, 1998:41).

Background and significance of the study

Discourse today is considered by researchers and critics as one of the approaches to studying literary works. Discourse is term which has been widely used in such diverse areas and fields like philosophy, sociology, anthropology, and linguistics. Different philosophers and theoreticians have proposed a variety of theories concerning its domain, concept, role, and function and have had diverse perspectives towards it. Ever-increasing development of knowledge and sciences along with complexity, dynamicity, variety, and plurality of issues and needs of community has made higher education system of different countries move from field-dependent paradigms towards interdisciplinary and multidisciplinary paradigms.

By means of establishing a relationship and bond among various fields, discourse, as a practical science, not only helps develop cohesion and effectiveness in universities but also provides the possibility of removing gap and vacant spaces among sciences and also satisfying the needs of community. Hence, scientific communities increasingly seek to integrate knowledge originating from various science fields in the form of interdisciplinary integrated approaches. It is crystal clear that appraising the contemporary interdisciplinary discourse, particularly in linguistics and sociology, requires profound investigation and study. Over recent years, studying literary works from a sociological perspective has been one of the concerns of contemporary researchers and literary works have been considered by means of referring to Foucault, Habermas, and Fairclough theories. However, discourse theory has not been well-established in Iran, especially in linguistics and literature fields. Plus, there is no meticulous research available on discourse. Based on the emerging theory of discourse, the present study has made attempts to probe into sociolinguistics concepts present in this theory.

Up to now, various quantitative and qualitative methods of analysis have been used to study linguistic phenomena. However, since discourse analysis methods are new and unknown, still no attempt has been made to employ discourse methods in language studies fields. The main aim of the present study is to initiate this way. But, as both discourse approach and language field are of wide complexity and variety, elaboration of discourse analysis and its effects on deciphering linguistic phenomena is certainly of specific significance. In line with discourse theory, the primary purpose of the present study is to present a novel technic and method for studying text, language, and society. Data collection method of this study is library-based, content analysis, and descriptive-analytical with structuralist approach. The present research is to indicate the relationship between discourse theory and language and society.

Definitions

Discourse analysts endeavor to cross borders of definition. They take it for granted that discourse is a form of language in use. However, as still this definition is vague and often imprecise, discourse researchers resort to more theoretical concept of discourse, which has its own specific limits but at the same time has wider applications. They are willing to add some elements like who? How? Why? And when? intends to use language to the concept of discourse (MirFakhraie, 2004: 8 , 9).

The term "discourse" has been translated into Persian language as discussion, dialogue, speaking, conversation, and speech. Nevertheless, there is no clear consensus as to the nature of discourse, the way it functions, and its analysis. Even, there is no common agreement upon discourse analysis as well (Fazeli, 2010: 46).

There are a variety of definitions presented on discourse and discourse analysis some of which are pointed to here:

Jorgensen and Philips define discourse as "a specific style of speaking about the world and the way it is understood". (Jorgensen et al. , 2010: 17).

Teun A. van Dijk believes that discourse consists of three elements; namely "language use, communication between beliefs (cognition), and interaction in social situations" (van Dijk, 2002: 19).

Fairclough defines discourse and discourse analysis as: I see discourse as a collection of three integrated elements: social practice (deed), discursive practice (production, dissemination, and consumption of the text), and the text itself. Analysis of a specific discourse requires analysis of any of these aspects and their interrelationship. Our assumption is that there is a significant relationship between specific features of texts, the ways in texts interact with each other and

are interpreted, and the nature of social practice (Fairclough, 2000: 97-98).

Therefore, Fairclough views critical discourse analysis a combination of text analysis, analysis of the text's production, dissemination, and use, and socio-cultural analysis of discursive occurrence as a whole.

Stubbs sees discourse as language over sentence and phrase. (Jaworski, 2014: 28). Fasold also holds that studying any aspect of language use is studying discourse. (Blakemore, 2003: 31). Gee believes that discourse has to do with something more than language. Discourses always are to coordinate language with the style of practice, interaction, objects, tools, technologies, beliefs, and values. (Gee, 2015: 59). Javorsky and Kaplan present a more sociological definition of discourse. They assert that discourse is language use in terms of social, political, cultural, and linguistic formations which reflect social order; meanwhile, it forms social order and reactions of individuals to society. (Jaworski, 2014: 22).

Azdanlou considers discourse to be one of the effective means which is used to trap language, comprehend various features of the relationship between individuals, and also categorize their subject matters. He assumes discourse to be the indicator of linguistic elaboration over bigger criteria (Azdanlou, 2000:36). Further, Shaerie defines discourse as "discourse provides the text with a purposeful and cohesive meaning. Indeed, the text owes its contextual and semantic identity, which is formed in a specific and cohesive direction, to discourse. (Shaerie, 2006:45). To Shaerie, discourse is a sort of mind presence which as a mega-meaning discloses, appears, and presents gradually and dynamically in the form of a mega-sign (spoken or written text). He takes discourse to be a type of speech making process in which interactive position of discursive factors (speaker and speech) together with disclosing hidden aspects of language, leads to production of a text with a cohesive meaning (Shaerie, 2006:1-5).

Yar-Mohammadi, in his book *Common and Critical Study of Discourse*, points to three general and very common definitions of discourse.

1. Discourse is part of a meaningful language whose components are in a way related to each other and have a specific purpose.

2. Discourse is the production resulting from the relationship and interaction between interlocutors in a socio-cultural context.

3. Discourse is defined as speech practice or reaction against speech product or the text, which represents formal structure of the discourse (Yar-Mohammadi, 2014:12).

Michelle Foucault writes: we call a collection of statements discourse as long as they belong to a common discursive formation… it consists of a limited number of statements for which a collection of existential conditions can be defined (Soltani, 2005: 40).

Foucault considers discourse to be social knowledges which are formed based on some aspects of reality. He believes that these knowledges are formed in a specific social context and are created in a way which is compatible with the interests of social activists present in these contexts. Now, these contexts can be big, like multinational companies or small, like a family, or even it is likely that they are some institutionalized contexts like the press and/or somewhat informal contexts like discussion at dinner table and the like (Van Lion, 2016:189).

In terms of discourse, Foucault points to some discourses in which economics and ideology, as explanatory issues or in Foucauldian terms contents, are pronounced. The main point here is plurality of discourses, i.e. possibly there are various forms of awareness about a common knowledge object and indeed there are. Obviously, that object exists. However, our knowledge about it essentially is formed by discourse and depends on community. This point means that an individual can have different interpretations from one object. Plus, it is likely that depending on situation and also his specific interests and objectives of a certain subject; he may speak in different styles. On the whole, in terms of the definition of discourse from Foucauldian perspective it can be said:

1. Discourses are grounds for representations, i.e. they are knowledges about some aspects of reality which at the time of representing that aspect of reality, the given discourse may be referred to. Discourses do not determine what we can express about a certain aspect of reality; nevertheless, without them no knowledge can be represented. Therefore, we need them as a framework to comprehend the issues.

2. Discourses are plural. It is likely to have different discourses, i.e. different ways of understanding the same aspect of a reality, where different issues are taken into account or discarded or different interests are represented.

3. There is some evidence to indicate the presence of granted discourse in the text, whether spoken or written, and/or this evidence is expressed by means of other semiotic styles. Particularly, this evidence originates from the similarity between the points stated or written in different texts about the same aspect of reality. Based on these similar statements, which are repeated or represented in different texts and in different ways are disseminated in the texts, we can reconstruct the knowledge which is represented through these statements (Van Leeuwen, 2016:191).

As it was mentioned, there are a variety of definitions for discourse. On the whole and beyond all the approaches to discourse, it should be taken for granted that discourse is a meaningful piece of language whose components in a way are related to each other and follow a specific goal (Yar-Mohammadi, 2006: 1).

Discourse Analysis

Discourse analysis is an interdisciplinary field of study which emerged from the mid-1960s to the mid-1970s due to extensive developments in science and knowledge in the fields like anthropology, ethnography, microsociology of perception and sociology, poetry, semantics, linguistics, psychology, semiotics, and other social and human sciences concerning systematic study of structure, function, and process of producing speech and writing. This tendency, because of its being interdisciplinary, was very soon welcomed as one of the qualitative methods in different fields of political sciences, social sciences, communication sciences, and critical linguistics.

Discourse theory was basically born in linguistics and up to now has undergone various stages. Although linguistics was ignorant to discourse analysis for long, the term discourse analysis was first used by the famous English writer, Zelik Heris, in an article (Bahrampour, 2000: 7-8). In this article, Zelik Heris provided a formalistic view of statement and viewed discourse analysis to be merely a formalist (and structuralist) view of statement and text. In structuralist discourse analysis, discourse as language, is defined something more than a sentence. As functionalism developed in the 1960s and 1970s, some linguists brought the concept of context in discourse analysis and considered discourse to be language in use. This type of discourse analysis can be called functional discourse analysis. Context in functional discourse analysis means the limited time and place conditions in which language is used. The pitfall of this approach is that the given context is very limited and local. Hence, Fowler, Hatch, Crouse, and Tervo brought power and ideology in the form of critical linguistics into the current dominant discourse analysis in linguistics.

After Heris, many linguists considered discourse analysis to be opposite text analysis. They hold the view that discourse analysis includes analysis of the structure of spoken language (like dialogue, interview, and speech); while, text analysis includes analysis of the structure of written language (like article, story, report, and etc.). It took no long for some linguists to use this concept in different meanings. The latter group believed that discourse analysis has more to do with function or structure of sentences and discovering and describing their relationships.

In other words, for this group, discourse analysis was recognizing the relationship between sentences with each other and observing whole of the thing which is the outcome of such a relationship. According to this definition, in discourse analysis-unlike conventional linguistic analyses- we do not merely deal with syntactic and lexical elements forming a sentence as the major basis for explicating meaning, i.e. context, but more than that we resort to some factors out of text, i.e. cultural, social, and other contexts of situation (Bahrampour, 2000: 8).

Therefore, discourse analysis considers the way meaning is formed and presented along with the message of language units in conjunction with in-language factors (context of the text), language units (the immediate given linguistic setting and also the whole system of language), and out-language factors (social, cultural, and situational contexts) (Lotfipour Saedi, 1993: 10). But, Zoellick Harris uses it in a general sense. He believes that the discussion on discourse can be concluded from two aspects: the first is to develop conventional procedures and methods in descriptive linguistics and their usage at meta-sentence level (text) and the second is to create a relationship between lingual and non-lingual data like the relationship between language, culture, environment, and society. In the first aspect, merely lingual data are noticed. However, in the second aspect, non-lingual data like culture, environment, and society, which are out of linguistic domain, are considered (Bahrampour, 1999: 9).

Brown and Yule define discourse analysis as analysis of language in use. In this way, discourse analysis cannot merely be the description language forms independent from goals and functions to refer to which these forms are created in human affairs (Bahrampour, 1999: 9).

Discourse analysis tries to study meta-sentence system and order of language elements. Therefore, it considers language units like oral interactions or written texts. Hence, discourse analysis deals with language in use in social contexts particularly interactions or conversations between interlocutors (Lotfipour Saedi, 1993: 10). Juxtaposition of the quoted definitions of discourse analysis indicates that as to discourse analysis, linguists propose two perspectives: one which defines discourse analysis as a way to consider and analyze language units longer than sentence; while, the

other takes discourse analysis to be a specific focus on why and how language is used.

The first perspective, which considers form of text, is called structuralist; while, the second, which takes function of text into account, is called functional. The former sees discourse as a certain unit of language, which is longer than sentence, and discourse analysis is to analyze these units. The latter, however, holds that discourse analysis is studying different aspects of language in use, which concentrates on the functions of language units. The second group notice people's actions and deeds along with their certain purposes of using language. They make attempts to discover their social, cultural, and situational meanings (Bahrampour, 10).

Discourse analysis is studying the way texts are created, their functions in different contexts, and contradictions in them. This approach has a variety of sources ranging from speech act theory of Austin to structuralism, to post-structuralism, to hermeneutics, critical theory, and finally Foucauldian views. Recently, researchers of critical discourse analysis have employed discourse analysis in socio-linguistics, psycholinguistics, and raciolinguistics. The paramount studies in this sense are conducted by van Dijk, Halliday, Fairclough, and others. Intellectual foundations of discourse analysis are above just analyzing oral or written texts.

Discourse analysis is based on some presuppositions, which follow:

1. A unique text provokes different interpretations.

2. Reading is always reading text wrong.

3. Text a meaningful whole whose meaning is not essentially in the text itself.

4. Texts are laden with ideology.

5. Truth is always at risk.

6. Every text is produced under certain circumstances. Hence, social context of the text is very important (Emami, 2007).

For Zoellick Harris, discourse analysis is a way to analyze a constant oral or written text. This point assumes that descriptive linguistics extends over sentence limit at a time towards establishing a bridge between culture and language. Discourse analysis is analyzing such a language unit above sentence. Chief believes that such a unit is of high variety. (Yar-Mohammadi, 2003: 198-199). Discourse and text analysis are a branch of current linguistics whose purpose is to describe a meaningful constant speech which is over sentence (Aghagolzadeh, 2006: 46 & 57).

Purposes of Discourse Analysis

The most remarkable purposes of discourse analysis can be summarized as follow:

1. To indicate the relationship between author, text, and reader.

2. To clarify the deep and complex structure of producing text, i.e. the way discourse is produced.

3. To demonstrate effects of context of text (language units) and situational context (social, cultural, political, historical, and cognitive factors) on discourse.

4. To show the specific situation and circumstance of interlocutor (conditions of discourse production).

5. To prove instability of meaning, i.e. meaning always undergoes changes and never is it complete. It also is never fully comprehended.

6. To hold that written or oral text is never unbiased but it depends on a specific situation. This issue may be completely unintentional and unconscious.

7. To show that the primary purpose of discourse analysis is to establish a novel technique and method to study texts, media, cultures, politics, society, and the like. Intellectual foundations of this approach are akin to the presuppositions of postmodernism (Bahrampour, 1999: 25).

Discourse Theory: Language, Politics, and Society

Now discourse analysis has surpassed mere analysis stage, which is the initiative of any science, and has sufficiently achieved principles. Hence, it can be considered to be a science, which can be termed discoursology. (Yar-Mohammadi, 2003: 8). In general, discoursology is the science of studying theories concerning discourse. It includes all the discourse studies.

Discourse studies can be distinguished based on at least three criteria. These criteria are:

- Level of analysis (micro and macro)

- Moving from or toward text analysis

- Type of study (experimental, theoretical, and philosophical) (Fazelie, 2004: 50)

It can be claimed that the first steps in creating discourse theory were taken by Ferdinand de Saussure (1857-1931). Through introducing the term semiotics, which in his view is the science of studying the system of signs and signifiers and their meanings, he brought language, as one of the most important system of signs, to center of attention. For de Saussure, language as the system of signs encompasses the essential regulations through which the interlocutor establishes a meaningful relationship with others and stays faithful to it. He believes that structure of language as a system is a network of signs each of which gives meaning to others and relates the signifier and signified. He accentuates the point that language (langue) is different from speech (parole) because language is a social entity while speech is something personal. (de Saussure, 1999: 31).

 de Saussure pays a special attention to main structure of language and holds that because of being affected by tastes and mistakes of individuals, speech cannot be a valuable factor. In other words, the main elements of language in Saussurean structuralism are the signs which in spite of no predetermined and natural relationship between the signifier and signified, bring them together as a specific system of meaning. Therefore, the relationship between the signifier and signified is intentional and incidental (Sojoudi, 1991: 21). He assumes the relationship between language and outer world as a triangle whose sides are signifier, signified, and referent. Saussure likens language to chess where every sign acquires its identity and value in relation with others in a regulated system (Saussure, 1999:126).

Therefore, one element, either signifier or word, is important only when it is used in the whole system. Words and signs like components of chess require a common collection of values and regulations, too. Discourse theorists accept Saussure's theory about relational identity of signs but they do not accept his point concerning the precise distinction between language and speech. They believe that signs acquire meaning when they are in use. Every sign acquires a variety of meanings based on different situations. Hence, in this theory, fixing meaning of signs is transitory and time-dependent and structure of language constantly changes as it is used (Sadra, 2007: 173).

Referring to Saussure's theory, Straus, one of the prominent anthropologists of the 20th century, brought his structural analysis in social sciences. He emphasizes that there are some invariable elements among apparent discrepancies which can be discovered through structuralist approach (Straus, 2001: 7). Although development in structuralism drew science and philosophy domain's attention, some   Marxist thinkers were impressed as well. One of them was Louis Althusser, the French philosopher, who influenced discourse theories, particularly comprehension of subject, through integrating Marxism and structuralism. He held that subject is subdued by ideology and assumed no independence and freedom to it. In his view, ideology puts individual in specific situations and regrading it the individual is expected to have special actions. The emphasis of structuralism on structure and its characteristic; and itself determining them and denying time-dependency of structures and conservative characteristic of structuralism provided the ground for it to be marginalized and leave its place to poststructuralist reading (Davoodi, 2010: 54).

By means of accentuating the pitfalls of Saussure's theory and structuralism, poststructuralists and postmodernists revised these theories. The common index of these revisions was questioning the overall concept of the package which was the foundation of conventional structuralism. Hence, if identities are only the present differences in discourse system, then no identity is fully formed unless it is a closed system.

Jacques Derrida criticized and challenged Saussurean structuralism and through presenting a poststructuralist view, introduced deconstructuralism approach as the most important concepts of intellectual and social domains. Derridean deconstructuralism, which centers on deconstructing text, aims to surpass borderlines and limitations and discover uncharted domains of meaning concepts (Zamiran, 2000: 7). Through presenting this plot, Derrida not only emphasizes the stark suspension in overlap between mind and meaning but also questions and deconstructs distinctions and dual tradition, which has a lot to do with will to power; and, indicates how transcendental discourses are internally vulnerable and owe their entity and identity to otherness and contrast with the other (Hagigi, 2003: 272).

In Derrida's theory, discourses are incomplete language systems tending to disseminate plural meanings with endless interpretations which are produced through representation and play of distinctions. Indeed, they play the role of a medium to make us comprehend the world and help shape our experience of the world. In contrast to this reality, as signs enjoy historical aspects and depend on situation and text, discourse encounters restrictions as to representation of the world. Because of this, language system cannot consolidate identity of signs and also the relationship between theories, words, and objects. Therefore, complete consolidation of meaning and arriving at a closed discursive system is impossible. Plus, it is unlikely to overtake it because deconstructuralism always tends to move towards metaphorical and verbal aspects and does not see plot of language but a game (Norris, 2006: 115).

Michel Foucault brought about a substantial revolution in the concept of discourse. Foucault presents two relatively different interpretations titled archeology and genealogy. Foucauldian theory of discourse is part of his archeology. For Foucault, since discourse consists of a limited number of statements, a specific can be defined to help them emerge. He believes that discourse should be analyzed in archeology and genealogy framework. From Foucault's perspective, there is nothing eternal and ideal but from the very beginning it is historical and temporal and also embodies meaning and social relationship and forms mentality and socio-political relationship (Davoodi, 2010: 57).

In his works, Foucault moves towards genealogy. In these works, he often probes into the relationship between power, knowledge, and truth. In fact, genealogy secures centrality of power and dominance in forming discourses, identities, and institutions and tries to develop power dependent feature of master discourse. For Foucault, power should not be limited to political institutions but it should flow through the whole body of society and play a productive role (Dreyfus, 1997: 392).

The changes having occurred in the field of discourse indicate that modern methodologies, post-Saussurean linguistics, and Foucauldian hermeneutics rely on transcendental turn in modern philosophy and through surpassing the analysis concerning real affairs,   take the circumstances that make them possible seriously. The fundamental assumption of poststructuralism as to discourse is that the possibility of envisioning thought and action depends on structuralizing mindfulness domain, which exists before any objective immediacy (Laclau, 1998: 31)

Conclusion

Discourse theory is one of the novel and influential theories in linguistics, social sciences, and political sciences domain. Over recent decades, sociologists and politicians have widely benefited from this theory in analyzing social and political phenomena and structures. Discourse theory considers meaningful social practices and beliefs in political life. This theory investigates the method applied by semantic systems to discover the way people get aware of their roles in society. Plus, it analyzes the way these semantic systems or discourse influence political activities.

Discourses should not be assumed to be ideology in its conventional and limited sense, i.e. a collection of beliefs through which social individuals justify and explain their organized social practices. From discourse theory perspective, discourse encompasses all political and social practices including institutions and organizations. (Howarth, 1998: 45). Although in discourse theory mostly explanation of philosophical premises and theoretical concepts, a myriad of practical and experimental studies is to emerge social sciences based on discourse theory framework. Discourse theory integrates language, power, ideology, politics, and society and provides a dynamic domain to analyze political and social phenomena. History, religion, culture, and politics are embedded in language. Under the light of discourse theory, the impacts of language on social and political life of nations can be discovered. Since it entered the domain of theoretical discussions, discourse theory has left deep impressions on theories concerning language, power, and community.

Fontanille holds that the first and foremost important issue regarding discourse is language practice. The relationship between human and language is an interactive one. However, much human is affected by language affects it. Language and the world both have vacancy and only an interactive practice can fill up such a vacancy. Meanwhile, speech as a practice, which can lead to production of discourse or text, serves language and fills up its vacancy (Fontanille, 1998: 64).

Change in discourse is means to change the world. If we change our language, we will change our world. This is the primary goal of discourse and discourse analysis.

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Health and Safety Practitioner Competency Development Using Experiential Learning

Desarrollo de competencias para profesionales de la salud y la seguridad utilizando el aprendizaje experiencial

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ABSTRACT

During the construction of a copper mine in Kazakhstan, the contractor health and safety (H&S) team had members who lacked necessary competency in hazard recognition and intervention skills to support the projects Zero Harm philosophy. An action research method was used in this study to create, assess, and improve an intervention strategy of developing the contractor H&S team competencies using experiential learning at the worksite. A training and development program that used classroom instruction, hazard control bulletins for specific site hazards, and experiential learning activities supported by task observation checklists to aid in hazard identification in the work area was developed and implemented. The experiential learning process used a four-step cyclic process of planning for task observation in the work area, observation, engagement, and reflection. Task observation checklists were developed and became an effective tool to support hazard recognition. The average number of at-risk deficiencies identified and corrected per observation was three. Critical reflection after the task observation and engagement experience was used by the H&S practitioners to recognize what they learned, how the learning could be applied to future situations, and reflection allowed for the consideration of what knowledge and skills still required further development. This study found that the experiential learning approach implemented, supported by mentoring was effective to train health and safety practitioners in the evidence-based practice of hazard identification and risk management in their work areas.

Keywords: Experiential Learning, Competency Development, Construction Safety, Task Observations, Action Research.

RESUMEN

Durante la construcción de una mina de cobre en Kazajstán, el equipo de contratistas de salud y seguridad (H&S) tenía miembros que carecían de la competencia necesaria en el reconocimiento de peligros y las habilidades de intervención para respaldar la filosofía del proyecto Zero Harm. En este estudio se utilizó un método de investigación de acción para crear, evaluar y mejorar una estrategia de intervención para desarrollar las competencias del equipo de contratistas de H&S utilizando el aprendizaje experiencial en el lugar de trabajo. Se desarrolló e implementó un programa de capacitación y desarrollo que utilizó instrucción en el aula, boletines de control de peligros para peligros específicos del sitio y actividades de aprendizaje experiencial respaldadas por listas de verificación de tareas para ayudar en la identificación de peligros en el área de trabajo. El proceso de aprendizaje experiencial utilizó un proceso cíclico de cuatro pasos para planificar la observación de tareas en el área de trabajo, la observación, el compromiso y la reflexión. Las listas de verificación de observación de tareas se desarrollaron y se convirtieron en una herramienta efectiva para apoyar el reconocimiento de peligros. El número promedio de deficiencias de riesgo identificadas y corregidas por observación fue de tres. La reflexión crítica después de la observación de la tarea y la experiencia de participación fue utilizada por los profesionales de salud y seguridad para reconocer lo que aprendieron, cómo se podría aplicar el aprendizaje a situaciones futuras, y la reflexión permitió la consideración de qué conocimientos y habilidades requerían aún más desarrollo. Este estudio encontró que el enfoque de aprendizaje experiencial implementado, apoyado por la mentoría, fue efectivo para capacitar a los profesionales de la salud y la seguridad en la práctica basada en la evidencia de la identificación de peligros y la gestión de riesgos en sus áreas de trabajo.

Palabras clave: aprendizaje experiencial, desarrollo de competencias, seguridad en la construcción, observaciones de tareas, investigación para la acción.

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1. Introduction

Construction projects are dynamic with exposure conditions and exposure groups changing as the project progresses. No two construction projects are the same. People, work processes, tasks, equipment, tools, materials, and the work environment are not consistent, and they all influence the various determinants of exposures. If a hazard from an exposure source is not anticipated or recognized then it is not discussed, not assessed, not monitored, and not managed. Health and safety professionals use their technical ability in hazard identification, risk management, leadership influence, and effective communication to gain credibility and cooperation with others to prevent occupational injury and disease (Daud, Ismail, and Omar, 2010). During the construction of a copper mine in Kazakhstan, the work scope of the project from September 2015 to January 2016 transitioned from heavy civil construction of trenching, underground piping, underground power cables, and concrete foundation work to include structural steel erection, piping and equipment installation, electrical cable tray installation, scaffold work, and heavy crane lifts.

The Client had implemented international health, safety, and environment (HSE) standards on the project using OHSAS 18001 as a framework. As the scope of work increased to include multiple work disciplines located in several different work areas, it became evident that the contractor H&S team lacked the hazard recognition and intervention skills necessary to support the projects Zero Harm philosophy. The contractor H&S team needed to be trained and coached so they could self-manage and verify that project HSE standards were being implemented in their work areas, to recognize potential hazards, and to intervene effectively.

2. Methods

Action Research

An Action Research method was used to develop and monitor the implementation of using task observations as an experiential learning strategy to improve competency and engagement of the contractor H&S Team in managing risk in their work areas. Action research can be beneficial in an industrial setting because the study is practical, and the results can be meaningful to create relevant actions for improvements (Zhang, Levenson, and Crossley, 2014). Action research is a continuous process of four steps: Plan, Act, Observe, and Reflect. Upon reflection and data analysis, the intervention plan was revised. Within this continuous cycle of action and reflection, there were opportunities identified for action research cycles that could be explored for a deeper understanding of the full value that the experiential learning intervention could offer.

Experiential Learning Activities

Experiential learning theory (Kolb and Kolb, 2005) is based a constructivist approach that learning is an ongoing process of developing knowledge and skills through experience. Completion of the entire experiential learning cycle (Fig 1.) is needed for effective learning to occur and competency to be developed (Kolb and Kolb, 2005). Competency can be defined as demonstrating the expected application of knowledge, skills, attitudes, and values to perform professional practice in a realistic or closely simulated work setting (Pedro, Chien, and Park, 2018). Competency is enhanced through a repeated process of applying theory to practice; reflecting on the experience, developing meaning, and applying new understanding to more complex situations (Austin and Rust, 2015).
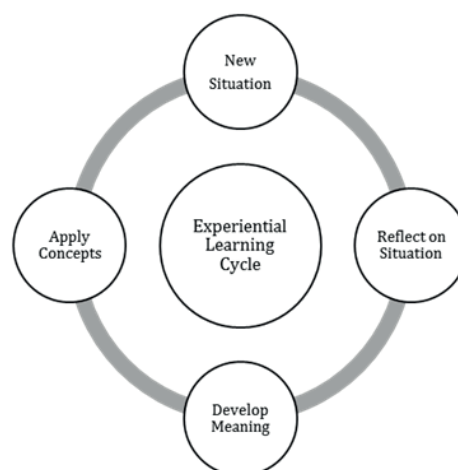

Figure 1. Kolb's Experiential Learning Cycle

Study Population and Context

A Chinese contractor employed 3200 people as part of their contract during the construction of the $2 billion USD Copper Mine located in eastern Kazakhstan. The contractor had a health and safety (H&S) team of 40 Chinese expatriates, of which 27 were work-area H&S practitioners. Only 7 of the 27 work-area based personnel had a certificate in Health, Safety, Environment from an internationally recognized body such as NEBOSH. Only 9 out of 27 had a post-secondary degree, the remaining had only completed high school. The average age was 38, with the oldest being 63 and the youngest was 27. The H&S team had an average of 14.9 years' experience in construction. Only 5 out of 27 had any experience working on a construction project using international HSE standards such as OHSAS 18001 and for 15 out of the 27 expatriates, this project was their first outside of China. The 27 work-area based H&S practitioners participated in this research study.

Training Development

A review was made of the types of incidents that had occurred on the project and the types of hazardous conditions identified during the client scheduled inspections. The project scheduled was referenced to anticipate the hazards associated with the type of work activities that would be occurring. An overall assessment was then conducted which evaluated the potential hazards from the types of tools and equipment used to perform the tasks, the quantity and types of hazardous materials, and the anticipated change in the work environment. The assessment identified nine categories of activities and HSE program elements that the contractor H&S practitioner needed hazard recognition and risk management competency. These categories were Crane Activities, Hot Work, Excavations, Working at Heights, Electricity (de-energization and isolation), Hazardous Materials, Confined Spaces, Environmental Protection, and General Activities.

A task observation checklist was developed for each hazard category. The checklist included specific items to meet the project HSE standards and the applicable HSE laws of Kazakhstan. The checklist served as a reminder of what items to look for and verify for different task hazard categories and the completed checklist would be a verification record of daily observations in the work area for each H&S practitioner.

A Task Observation and Engagement Training presentation was developed which included case studies from the project to assist the attendees in recognizing at-risk conditions and behaviors. The training was conducted in a workshop style that lasted 3 hours in a training room. The presentation included each of the nine categories of activities that observation checklists were created. The training presentation was developed in English and then translated into Chinese. A Chinese interpreter was utilized during the training workshop. Utilizing the project risk register created that identified over 90 specific hazards; 39 health and safety topics were developed into hazard awareness bulletins which were issued and discussed weekly to supplement the training.

Work Area Mentoring

The client H&S professionals provided one-on-one mentoring in the work areas to the contractor H&S practitioners. Coaching was provided on how to use the checklist to observe the activities that were occurring and interact with and confirm the understanding of the crew leader and workers in their responsibilities, training, and safe work procedures. The H&S practitioner were also coached in how to use the checklists to offer guidance to crew leaders on task planning and safe execution of the activities. The client H&S professionals used the mentoring interactions with the H&S practitioners to evaluate growth in competency by monitoring how task observations and engagements were being conducted, and by verifying understanding of risk management principles through discussions. The coaching of the contractor H&S practitioners occurred in their work area over a 4-week period and feedback was given on their completed task observation checklists.

Data collection

Data was collected from various sources: project inspection files and incident reports, observations of work areas and H&S practitioner interaction with others, structured and unstructured interviews, questionnaire surveys, and analysis of completed task observation checklists. To assess the effectiveness of the using the task observation checklist as an intervention, the Client monthly inspection records were compared for the 3-month period before the intervention to the 3-month period after the intervention strategy was implemented. The completed observation checklists were evaluated monthly to identify trends of hazards that were identified. A post-intervention questionnaire and interview were conducted on the use of the task observation checklist in August 2016, 4 months after implementation. The questionnaire was developed in English and then translated into Chinese. A Chinese interpreter was utilized during the completion of the questionnaire and a brief interview. All 27 H&S practitioners participated in a post-intervention questionnaire and interview on the use of the checklist 4 months after the implementation of the task observation checklist. All of those who participated in the questionnaire had received the 3-hour task observation course and completed task observations in their work area.

2. Results

Action research cycles

Action research cycles identified that the training workshop required followed-up with work area coaching. This resulted in the client assigning a mentor to each of the contractor trainees to provide up to one-hour of review, feedback, and coaching in their work areas. Another improvement identified was that the completed observation checklists needed to be reviewed by the contractor OHS area team managers to provide feedback and support to ensure corrective measures were assigned and implemented for open action items. A feedback loop to crew leaders and work area managers was needed to improve accountability and to incorporate into future task planning.

Task Observation and Engagement

After the implementation of task observation training and the observation checklist, the Client documented an average of 57 hazards each month for the period of April to June 2016, which was a 40% decrease as compared to the pre-intervention period of January to March 2016, which had an average of 93 hazards documented per month. In April 2016, the contractor completed 161 task observation checklists and 1121 at-risk deficiencies were identified in their work areas. In May 2016, 141 task observation checklists were completed, and 644 at-risk deficiencies were identified. In June 2016, 257 task observation checklists were completed, and 421 at-risk deficiencies were identified in their work areas. At-risk deficiencies included both physical hazards, non-compliance to project standards or legislation, and at-risk behavior of people.

Some deficiencies identified by the H&S practitioners were continuously repeated if the corrective measure could not be implemented by the work crew supervisor. Unresolved deficiencies were caused by a lack of resources, a lack of authority to make the correction, lack of cross-discipline coordination, or if an item needed to be purchased. The solution to this was to ensure that the area safety manager reviewed and followed up on the un-corrected deficiencies listed on the submitted observation checklists. The Client then decided to require the contractor construction manager to attend a scheduled weekly meeting with an agenda focused on HSE action items, to assign someone with the authority to rectify the deficiency.

On average, the task observation checklist took 45 minutes to document each day. Each day the H&S practitioner spent an average of 74% of their time in the work area. The average number of at-risk behaviors or conditions identified and corrected by each H&S practitioner was 3. Six of the twenty-seven H&S practitioners observed at least 5 at-risk deficiencies daily, with 8 at-risk deficiencies being the highest number reported by one individual. Through coaching, the H&S practitioner improved in making comments on the task observations, including both describing positive comments of their observations and in describing deficiencies that needed corrected and if they were corrected.

Trainee Feedback

The H&S practitioners said they give positive feedback to the work crew and supervisor most times or always when they observed work being safely executed. On a scale of 1-5 (1-never, 2-rarely, 3-sometimes, 4-most times, and 5-always) the 27 H&S practitioners were asked questions about workers and supervisors listening to safety instructions and about the safety leadership of crew leaders in their work areas. The H&S practitioners indicated that both workers (4.3) and work-crew supervisors (4.3) listen and follow "most times" the safety instructions to correct hazards and at-risk behaviors. The H&S practitioners responded that supervisors put safety first, sometimes to most times (3.8) over productivity. When asked to evaluate if they observed crew supervisors as excellent safety leaders who provided the work crews with safe work instruction, listen to workers concerns, provided correct tools and equipment to perform a job safely; the crew leaders were rated between sometimes and most time (3.7) as being excellent safety leaders. Three H&S practitioners said that in their work areas that crew supervisors never or rarely put safety as a priority.

The following are quotes from H&S practitioners regarding potential improvements to the Task Observation Checklists: "Need to modify the checklist as the project work scope changes and new hazards are introduced such as pre-commissioning activities", "Checklist should include manual material handling and body positioning", "Checklist should include tracking of corrective measures if not corrected immediately", "people should be assigned to areas and work tasks that match their skills and experience"

Experiential Learning Process

Planning For Task Observation
Review task planning for work area.
Review weekly hazard awareness bulletin.
Identify and review applicable safe work standards.
Select an activity for in-depth observation.

Task Observation
What tasks are occurring?
How many workers are involved or working in same area?
What exposures do you recognize or anticipate?
Is anyone at-risk of injury or ill health effect?
What exposure controls are in place?
Is the task being completed safely?

Engagement
Engage crew leader and work crew in conversation (proactive engagement and corrective reinforcement for at-risk conditions or behaviors).

Reflection
Document the observation and engagement.
Report to your manager any improvements needed to safe work standards.
Think of what you learned and how it can be applied.
Reflect on what additional knowledge and skills that you need to develop.

Mentoring
• Client assigned mentors to all trainees.
• 30-60 minutes of coaching was conducted daily in the work area.
• Feedback on performance discussed with trainee.
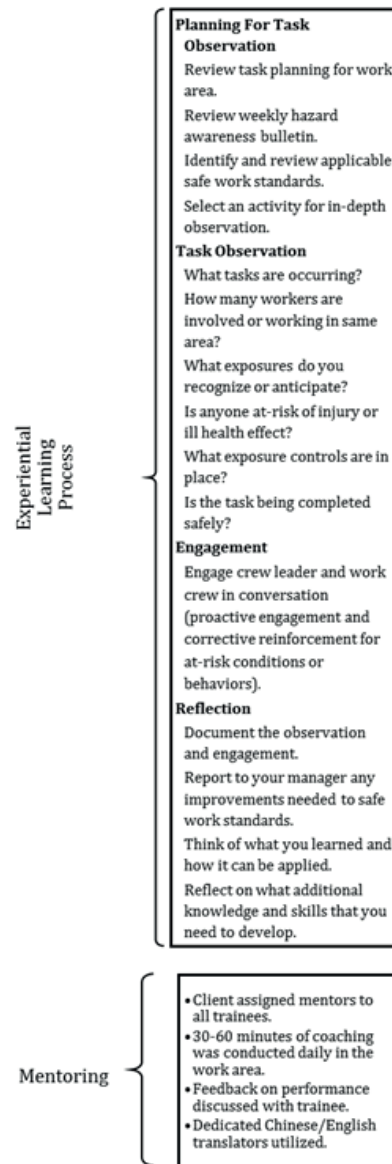• Dedicated Chinese/English translators utilized.

Figure 2. Experiential Learning Process and Mentoring

All (n=27) of the field H&S practitioners said they would use the same or similar task observation checklist on a future project. They also agreed that using the checklist helped them to learn to recognize hazards associated with different activities and to speak with workers or supervisors about deficiencies that needed to be corrected. The ongoing cycle of planning, observing, engaging, and reflecting created an opportunity for continuous learning and safety management systems improvement.

3. Discussion

The Action Research method used in this intervention was effective in identifying opportunities for improving consultation, communication, and generating opportunities for reflective practice in assessing different strategies for experiential learning improvement. Through the process of critical reflection on action taken, an individual can gain insight into management practices that need improving (Ronnie, 2016). This study found that the experiential learning approach implemented, supported by mentoring was effective to train health and safety practitioners in the evidence-based practice of hazard identification and risk management in their work areas. In a quantitative study of health and safety training of civil engineering students, the work site experiential learning group demonstrated significantly higher results in cognitive, affective, and psychomotor learning outcomes than a control group who attended only classroom instruction (Endroyo, Yuwono, Mardapi, and Soenarto, 2015).

Training for competency development is most effective when experiential learning activities are relevant to work-related application and supported by tutor or mentor engagement to give clarification and guidance when necessary

(Wang, Li, Pang, Liang, and Su, 2016). Negative group dynamics such as intimidation by others, power struggles, and feelings of being undervalued and disrespected can cause students to become discouraged and disengaged during experiential learning activities (Hoffman and Silverberg, 2015). It is believed that the strong presence of a client mentor in the work areas during the intervention program aided in keeping a respectful interaction between the work crews and the H&S practitioners during task observations and engagement.

Discussion with a mentor and receiving feedback was essential to confirm correct understanding, application, and usefulness. Development of health and safety practitioners can be impeded by a lack of mentoring support from experienced professionals to help them as they learn how to apply the course material in a working environment (Wells, 2014). Mentoring and discussing the completed observation checklists in the work area assisted in verifying that learning objectives were understood and could be applied. Reflecting on work-based experiences is aided when a student has a professional mentor or educational tutor to discuss learnings with or ask advice from (Wingrove and Turner, 2015).

The effectiveness of experiential learning is impacted when students feel overwhelmed due to cognitive overload, have a limited understanding of foundational knowledge, or lack a relevant opportunity to apply the theory in an authentic situation (Khalil and Elkhider, 2016). Learning objectives need to be performance-based and layered to build upon the previous knowledge, understanding, and experience. Research has shown that without the appropriate scaffolding of knowledge, students may fail to integrate the different components necessary to apply theory to practice during experiential learning activities (Susilo, van Merrienboer, Van Dalen, Claramita, and Scherpbier, 2013). Confined space entry is an example of a complex activity on the construction site that required scaffolding of various knowledge and skill (Fig. 3).
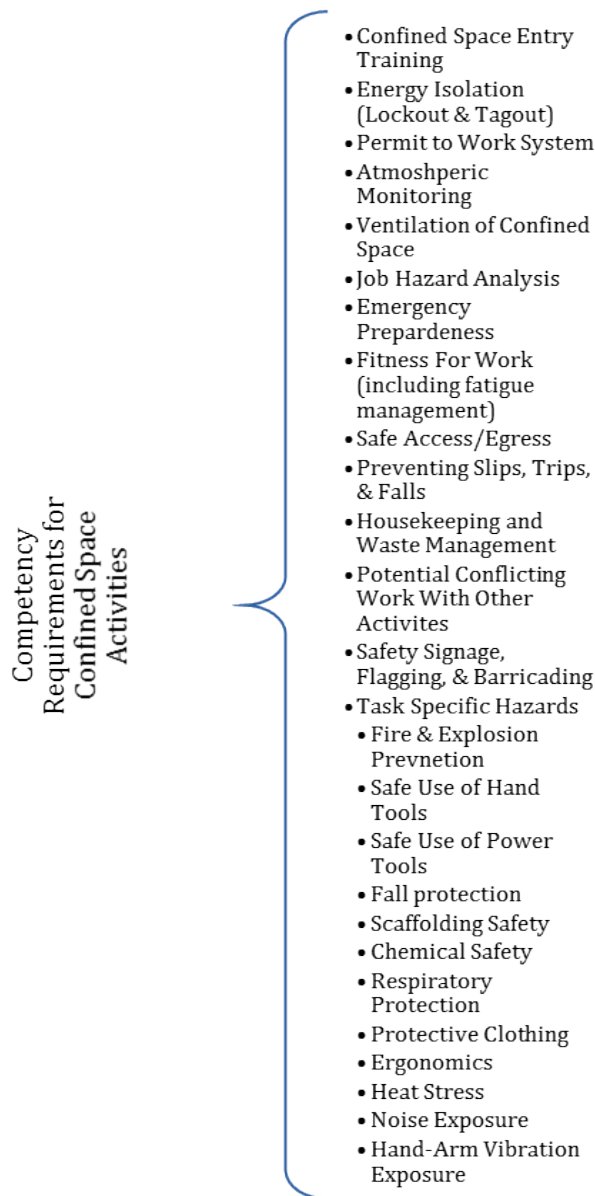

Figure 3. Competency for Confined space activities

The hazard awareness bulletins and observation checklists reminded trainees of key items to monitor during task observations. Hazard awareness bulletins need to be relevant to occurring and upcoming work activities or work environment to be utilized as applied learning aids. Checklists were not created for all types of work activities or sources of hazardous exposures. The trainees recommended that there was an opportunity to add occupational health hazards to some of the checklists that were used in this study, and in future projects, checklists for pressure testing and pre-commissioning activities which can be high risk should be created. Completing task observation checklists and field mentoring were effective in improving recognition of hazardous exposures, identifying non-compliance to project standards; providing a daily focus for consistent monitoring of work areas, and in creating opportunities for positive reinforcement of safe behavior or corrective intervention.

The observation checklists provided a daily focus for evaluating work areas and created opportunities for prompt intervention and positive reinforcement of safely executed work. Enhancement of learning has been reported to occur when the repeated practice of reflecting, recalling theory and applying to practice requires the development of a written summary or pictorial (Blunt and Karpicke, 2014). The quantity of time and quality of critical reflection during experiential learning has been reported to influence deeper understanding of course material and competency development of professional skills, applied theoretical understanding, and in the alignment of values with professional expectations (Stupans, March, and Own, 2013).

4. Conclusion

Professional competency is enhanced by reflecting on the resulting action and outcomes of an experience, to identify what was effective, what changes should be made, and how the knowledge learned can be generalized. The ongoing cycle of planning, observing, engaging, and reflecting provides an opportunity for continuous learning and safety management systems improvement. If the opportunity to observe or participate in a work situation to gain experience is not permitted by an organization or workgroup, then experiential learning will be inhibited.

Construction work environments are an opportunity for experiential learning. Health and safety practitioners need to develop knowledge and skills to anticipate, recognize, and effectively mitigate risk from hazardous exposures in the workplace to prevent occupational injury and illnesses. Experiential learning theory can be applied to train health and safety practitioners in the application of theoretical concepts in the workplace to gain knowledge and develop competency in the evidence-based practice of risk management.

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User acceptance of personal health records in Malaysia: pilot test

Aceptación del usuario de registros de salud personales en Malasia: prueba piloto

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ABSTRACT

The importance of Personal health record (PHRs) can be illustrated from its ability to improve information exchange among the patients, physicians, and healthcare service providers. PHRs enroll the patients directly to their health decision making through giving them the authority to control and share their health information. The user acceptance of PHRs is a vital issue. A combination of UTAUT2 and PMT models is going to be tested in this study in order to test the user acceptance of PHRs in Malaysia in the future. This paper involves the pilot testing of the proposed model in order to find out its validity and reliability using Smart PLS.

Keywords: PHRs; Personal Health Record; User Acceptance; UTAUT2; PMT; Malaysia; Pilot Test.

RESUMEN

La importancia de los registros personales de salud (PHR) puede ilustrarse por su capacidad para mejorar el intercambio de información entre los pacientes, los médicos y los proveedores de servicios de salud. Los PHR inscriben a los pacientes directamente en la toma de decisiones de salud dándoles la autoridad de controlar y compartir su información de salud. La aceptación de los usuarios de las PHRs es una cuestión vital. Una combinación de los modelos UTAUT2 y PMT se va a probar en este estudio para comprobar la aceptación de los usuarios de PHR en Malasia en el futuro. Este trabajo implica la prueba piloto del modelo propuesto para averiguar su validez y fiabilidad usando Smart PLS.

Palabras clave: PHRs; Registro de salud personal; Aceptacion de usuario; UTAUT2; PMT; Malasia; Prueba piloto.

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1-   INTRODUCTION

Medical information is stored in an electronic form in many countries nowadays. Several forms are used to store this information. The most common forms of storing the medical information are Electronic Health Records (EHRs), Medical Health Records (EMRs), and Personal Health Records (PHRs). This study focuses on the user acceptance of PHRs. PHRs are personally created and maintained health records in which patient can store, update, and share his medical information with their doctors or healthcare providers in a manner that user friendly and private. In PHRs patients have the

ability to store a variety of information such as name, address, weight, medical history, allergic status, medicine history, lab tests results, and more(Agrawal, 2010)(Barlow, Crawford, & Lansky, 2008)(Cruickshank, 2012)(Daglish E, 2013)(Demiris, 2012). Along the previous years, many definitions has been given to PHRs, the reason for that was the abilities offered by each PHRs system at those years(Miller H.D, Yasnoff W.A, & H.A, 2009). Many institution such as Markle Foundation, the National Alliance for Health Care Technology (NAHIT), the American Health Information Management Association (AHIMA) have given a different definition and addressed the importance and the wide adoption of PHRs in the globe (Jeongeun, 2011).

As one of the newest systems that has been introduced, PHRs have many benefits to the patients, doctors, and healthcare providers. The most important feature offered by the PHRs is the enrollment of the patients to make decisions related to their health condition. Another feature is the ability to share patients' medical information with their physicians or healthcare providers (Kumar, Sharanie, & Jaspaljeet, 2015). In the case of switching between two doctors for example; using PHRs to share the patient's health information will save a lot of time and procedures. Saving time and cost would be very beneficial for a wide segment of people, many studies has mentioned each or both time and cost (Cruickshank, 2012)(Cronin, 2012)(Bulajic, Stamatovic, & Cvetanovic, 2012)(Azliza, Ariffin, Yunus, & Embi, 2008)(Kumar et al., 2015)(Studeny & Coustasse, 2014)(Vance, Tomblin, Studney, & Coustasse, 2015)(Calvin et al., n.d.)(Majedi, 2014)(Barlow et al., 2008)(Syed-mohamad, Ali, & Mathusin, 2010)(Jeongeun, 2011)(Görlitz, 2013)(Richards, 2012). On the other hand, in some cases, PHRs may safe life. In a disaster for example, the paramedic team would save a life in case they could reach the medical history of an injured person in time. Many studies such as (Profile, Situation, Program, & Benefits, 2011)(Laugesen, 2013)(Ponnudurai, 2010)(Agrawal, 2010) have addressed the importance of PHRs in saving lives. Another issue has been mentioned by (Bliemel & Hassanein, 2006) that described the lack of information provided by the patients to their physicians. This lack might be a result of many reasons such as: the time offered by the physicians in some cases may not be enough for the patients to revile all the information required, another possible scenario is that the patient may forget to tell the physicians about or hide some information or symptoms (Bliemel & Hassanein, 2006). In both scenarios PHRs could help the patients to provide all the required information to their physicians since that the patients will have enough time to upgrade their medical information using PHRs. For all the previously mentioned reasons, PHRs are very useful tool that enhance the information exchange between the physicians and their patients, PHRs also enhance the physician to patient relationship.

2-   Issues to be Discussed While and Before Adopting PHRs

The important characteristics of PHR; the ability to access medical information, the ability to modify medical information, and the information sharing have been reviling many concerns regarding to the ease of use, privacy, and user attitude toward this technology. The ease of use is a significant issue especially to those elderly people who do not have good experience with technology. Privacy on the other hand has a significant influence on patient decision since they might not have a clear vision about the level of security applied in such technologies, and the laws that guarantee their rights to be secured and to their information to be private. The user acceptance of the technology is a key to success; investigating the user acceptance and behavioral intention toward new technology can be considered as a critical issue. Testing the user acceptance of PHR in certain society may revile the future of the interaction with this technology and prevent certain problems that the technology may face in the future.

3-   User Acceptance Theory

Testing the user acceptance for a specific product or technology can be considered as a critical aspect in deciding the future of this technology (Venkatesh, Davis, & Morris, 2007). In order to test the user acceptance of technology, a list of questions should be introduced to the respondents in order to build our vision according to their responses. Each list of questions is usually based on a specific model which have been introduced in order to describe certain factors. Along the previous years, there are a variety of models that have been described some factors that affect the user acceptance of technology. (Davis, Bagozzi, & Warshaw, 1989) introduced the Technology Acceptance Model (TAM), Theory of Reasoned Action (TRA) (Fishbein & Azjen, 1975), Theory of Planned Behavior (TPB) which can be considered as one of the first theories that described the behavioral intention toward technology (Ajzen, 1991), Innovation Diffusion Theory (IDT) (E. M. Rogers, 1995),and many other models.

A. Unified theory of acceptance and use of technology (UTAUT)

As mentioned before, many models and theories have been introduced over the previous decades. Each and every theory described a unique factor at least. (Venkatesh, Morris, Davis, & Fred Davis., 2003) introduced Unified

Theory of Acceptance and Use of Technology (UTAUT) as a unification of eight previous models. In total, UTAUT built on for major factors which are Performance Expectancy (PE) which describes the degree of benefit gained by an individual while using certain technology, Effort Expectancy (EE) describes the ease of use of a certain technology by an individual, Social Influence (SI) which describes the effective motivation by others (family, friends, or colleagues) to an individual intended to use certain technology, and Facilitating Conditions (FC) which describes the facilities available which may support the use of the new technology by an individual (Venkatesh et al., 2003). According to (Venkatesh, Thong, & Xu, 2012) UTAUT succeed to explain almost 70 percent of the disparity in behavioral intention to use certain technologies and about 50 percent of the disparity in the use of technology. Since its introduction in 2003, UTAUT has been used widely in many research fields; alone, extended, or as a combination with other models(Chang, 2012).
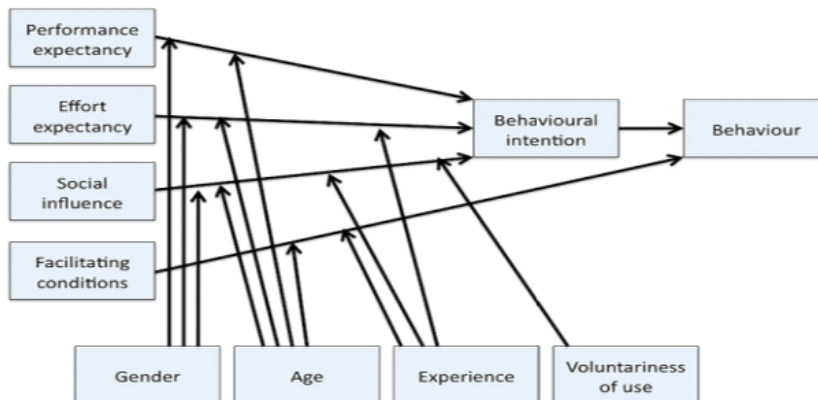
Figure 1. UTAUT

B. UTAUT2

According to (Chang, 2012) UTAUT has been widely used in various discipline. Despite the global success of UTAUT in describing and explaining the behavioral intention to use a new technology, (Venkatesh et al., 2012) upgraded UTAUT into UTAUT2 by adding three important factors as described by the authors. First, Price Value (PV) which describes the effect of the technology cost on the user who is willing to use it. Cost generally affects on our decisions in buying goods, technologies, or services. Second, Hedonic Motivation (HM) which describes whether the user is enjoying a certain technology or not. Generally, people tend to reuse technologies, goods, or services they have enjoyed. Third, Habit (HT) which describes the habitual behavior of the user of the new technology; being used to use similar technologies will motivate an individual to use the new technology. HT can be considered as one of the most significant factor in predicting the use of the technology in the near future. However, the three added factors showed an obvious success since that UTAUT2 has been widely applied in many research fields, except a noticeable lack in using this model in health information technology field (Alazzam et al., 2015).

Figure 2. UTAUT2

C. Protection Motivation Theory

PMT was originally introduced by (R. W. Rogers, 1975) based on the Health Belief Model. Due to early limitation noticed in PMT, (Maddux & Rogers, 1983) redesigned PMT in a way that fix these limitations. Over the previous years, PMT has been applied widely as a framework to predict the adoption of health related behavior in many previous research studies (Miln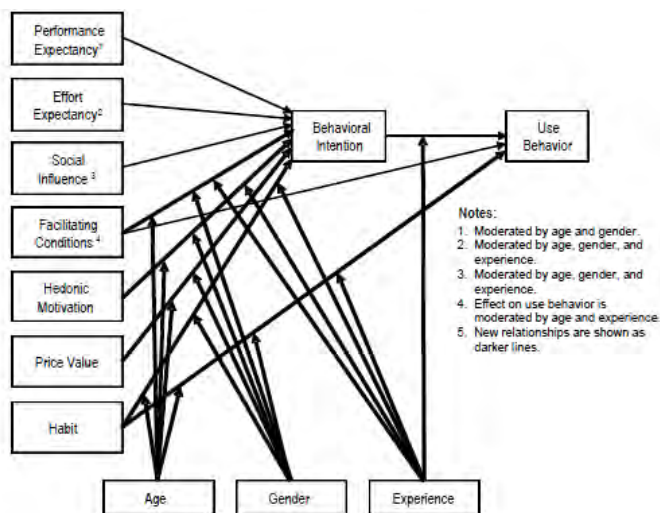e, Sheeran, & Orbell, 2000). PMT can be considered as a universal model to be used in predicting the health behavioral intention. In addition, PMT premised on cost-benefit analysis which can be considered as a significant aspect (Prentice-Dunn & Rogers, 1986). However, in a comparison study held by (Seydel, Taal, & Wiegman, 1990) PMT proven that its abilities to predict the health behavior goes stages beyond the abilities of Health Belief Model (HBM). PMT can be applied to any threat situation away from its being health issue or another issue (Prentice-Dunn & Rogers, 1986). All these evidences drive any researcher to involve PMT in any research.

PMT generally consist of two major variables which are Threat Appraisal and Coping Appraisal. Threat appraisal focuses on the source of the pain or the threat which causes the fear to the individual and the likelihood of this threat to be happen in real life. Coping appraisal focuses on the way or the decision made by the individual to deal with this kind of threat. The outcome of these two appraisals will be the Protection Motivation. Protection motivation focuses on the individual intention to perform an upcoming behavior (Sun, Wang, Guo, & Peng, 2013).

Coping appraisal can be either maladaptive or adaptive response. Maladaptive response reflects the individual intention to continue a specific behavior despite the warning of containing a specific threat such as continuing smoking. Adaptive response reflects the individual intention to follow the warning and stop a specific behavior such as quitting smoking. Figure illustrates the PMT components.
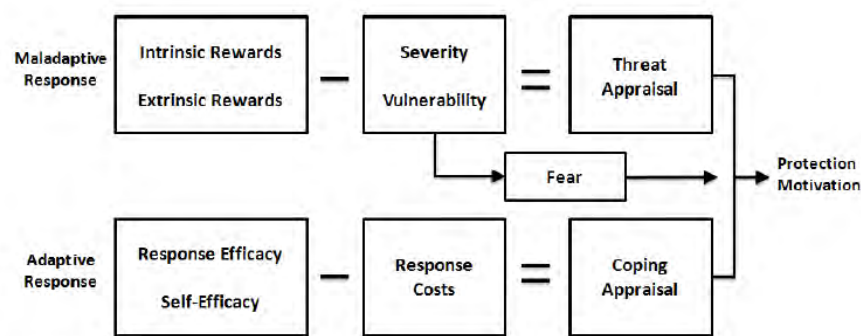
(Source: Floyd, et al., 2000)

Figure 3. PMT

D. Privacy

Privacy is known as the ability of control and use of someone's personal information (Liu, Marchewka, Lu, & Yu, 2004). The ability of controlling over information is a critical aspect that have been discussed by many researchers in various disciplines such as law, information systems, marketing, and social sciences (Hann, Hui, Lee, & Png, 2002)(Acquisti et al., 2014). Another definition of privacy is the right given to an individual to control his information sharing and exchange (Collste, 2008); the individual has the right to decide what information, when, why, and how would it be reviled to any other person or organization (Yee, Korba, & Song, 2006).

Over the previous years, many researchers expressed their concerns regarding to privacy in many fields such as business where the customers' information is being collected for decades and the introduction of information technology led to increasing of these concerns (Liu et al., 2004). On the other hand there is noticeable increment in employing IT in healthcare field which led to new concerns regarding to the patients' privacy(Fung & Paynter, 2006); PHRs for example as a website might be a target for hackers and viruses which may violate the privacy of patients. Internet provide a variety of services that can help healthcare provider to introduce their services to their customers. Some of these services violate the privacy of the patients such as tracking. On the other hand, healthcare providers developed their web-sites in a way that asks the customers to provide their personal information. These information must be used for a specific purpose and must not be reviled to any unauthorized person or organization (Goldman & Hudson, 2000). Therefore, the research on privacy is attracting healthcare providers to introduce the best to their customers

A considerable attention has been paid to the privacy over the previous years in many research studies. It is probably correct to say that the privacy is the most discussed issue along the past decades by the information and communication technology (ICT) ethicists (Kezer, Sevi, Cemalcilar, & Baruh, 2016).

E. Proposed Model

The availability of computers and information technologies in organizations is growing. The use of information technology in organization exceeded 50% of the total investments (Westland & Clark, 1999). In order to achieve higher productivity from the technologies used, they must be accepted in any environment. User acceptance toward new technology has been considered as one of the most mature research areas by many authors (Hu, Chau, Liu Sheng, & Tam, 1999). The researches held in this area since over than two decades has reviled a variety of models and theories which is aiming to describe the user acceptance toward new technology (Venkatesh et al., 2003).

The findings of our review have shown that Technology Acceptance Model was the most desirable model in the PHRs user acceptance research studies. From eight experimental studies six were using either TAM or a combination of TAM and other models or extensions. Whereas UTAUT used twice only in PHRs user acceptance research (Mamra et al., 2017). In order to decide the best model among the three; TAM, UTAUT, Proposed Model, a comparison has to be done in order to find out which model covers more factors than the other.

Table 1. Comparison

Factors	TAM	UTAUT	Proposed Model
Performance Expectancy	Available	Available	Available
Effort Expectancy	Available	Available	Available
Social Influence	Available	Available	Available
Facilitate Conditions	Missing	Available	Available
Price Value	Missing	Missing	Available
Hedonic Motivation	Missing	Missing	Available
Habit	Missing	Missing	Available
Threat Appraisal	Missing	Missing	Available
Coping Appraisal	Missing	Missing	Available
Privacy	Missing	Missing	Available

This comparison shows that the proposed model can cover more factors than the previous used models. Practically, analyzing the proposed model will revile the real effectiveness of the proposed model.

4-   Sample Size

In order to find out the effectiveness of the model practically, a survey is distributed to the targeted sample size. Deciding the number of the required participants must be done through reviewing the related books and papers. According to (Hill, 1998) the required sample size should be 10 as a minimum and 30 as a maximum number of participants. (Belle, 2008) suggested 12 as a minimum number of participants in pilot studies. According to (Connelly, 2008) the number of pilot studies participants should be 10 percent of the total number of survey participants; which means if the target sample size for the study is 250 then the required sample size for the pilot test is 25 participant. (Hartzog, 2008) suggested that the number of participants in a pilot study should be between 10 and 30 participants. (Julious, 2005) recommended that a minimum number of 12 participants should be taken into considerations in any pilot study. In conclusion, and since that the targeted sample size for the survey is 250 participants, a number of 25 participants is going to be needed in this study in order to test the proposed model.

5-   Hypothesis

According to (Mamra et al., 2017) TAM was the most used model to investigate the user acceptance of healthcare information technology, whereas UTAUT came in the second position which has been used in two studies. In order to predict the behavioral intention to use PHRs in Malaysia, UTAUT2 has been proposed as the main model which has a high percentage of predicting the behavioral intention to use certain technology. In order to improve the prediction of behavioral intention, Fear Appraisal, Coping Appraisal, and Privacy have been added to the UTAUT2. However, the components of UTAUT2 is supposed to have a positive impact on the behavioral intention to use PHRs in Malaysia. Fear Appraisal will lead to the Coping Appraisal which has a positive impact on the behavioral intention to use PHRs in Malaysia. Privacy on the other hand might be the only factor that has a negative impact on the behavioral intention to adopt PHRs by the individuals in Malaysia.

6-   Pilot test

Pilot test can be considered as a very useful and important tool to check the reliability of the questionnaires before starting the data collection process (Hartzog, 2008)(Thabane, Ma, & Chu, 2010). As mentioned in the Sample Size section, the number needed for respondents is 25. Thus, a survey has been distributed to 37 respondents to reach the number 25. Targeted sample size was the students and the staff of UTeM (Universiti Teknikal Malaysia Melaka). The reason behind choosing this sample size is; the knowledge related to surveys and questionnaires

among the students and the staff. On the other hand, the difficulty to collect data from the people at the hospitals due to the lack of cooperation from these hospitals. In addition to that, PHRs has been introduced and adopted in order to serve any human away from being sick or healthy(Kim, 2012)(Ponnudurai, 2010). Another reason is that students are more engaged with the new technologies and mobile applications, and some forms of PHRs are available nowadays as applications such as Apple Health and Samsung Health.

7-   Pilot Test Structure

The pilot test in this study is structured into three main categories. First, some information about PHRs are listed as an introduction to the survey, and some contact information and ethical statements. Second, respondents are required to fill some information about their age, gender, marital status, education level, and so on. Finally, a group of 64 statements that represent the survey questions. The 64 questions are built as a likert scale. Respondents need to give their impression regarding to each statement as the following: -

- •   I do not know

- •   Strongly disagree

- •   Disagree

- •   Neutral

- •   Agree

- •   Strongly agree

- •   I do not want to answer this question

The answers are written in a way that helps the respondents to answer the questions without getting confused. The answers from 1 to 5 can be considered as common answers to the most distributed surveys in nowadays. Option number 0 has been added to the survey to give the respondents the choice to inform the author that they have no idea about the meaning of the statement or their impression. On the other hand, and as an ethical procedure, respondents have the right to choose answer 6 if they are not willing to answer a specific question. However, the numbering procedure is not an important issue in analyzing likert scale since that; likert scale is an ordinal scale and the numbers appeared are actually ratings, not numbers (Norman, 2010).

Table 2. Frequencies

No.	Statements	Frequencies % (Ratings)						
0	1	2	3	4	5	6		
1-	I used to use the Internet for different purposes	4	0	0	8	40	48	0
2-	I used to use online applications on my phone or laptop	0	0	0	8	31	60	0
3-	I used to keep a copy of my medical information	8	0	12	44	16	20	0
4-	I used to share my health information online if its required	8	28	12	28	20	4	0
5-	Using PHR to contact doctors will help me to manage my health condition easily	4	0	8	8	60	20	0
6-	Using PHR to contact the doctor online will save time and cost	0	4	8	8	52	28	0
7-	Asking perceptions from doctor online will be helpful	0	4	8	24	56	8	0
8-	Using PHR applications to store my medical information will help me to manage my health condition	0	0	8	16	56	20	0
9-	Having my medical history in the electronic form may save my life in case of emergency	0	0	4	12	48	36	0
10-	It will be easy for me to update my health information online	0	4	4	24	44	24	0
11-	It will be easy to book appointments online	0	0	8	12	44	36	0
12-	It will be easier to access my medical lab tests results online	0	0	4	8	52	36	0
13-	Buying medicine online will be easy and free of efforts	0	4	0	24	40	32	0
14-	I will find it easy to use PHR in website form or application form	0	0	0	24	64	12	0
15-	Using PHR to get advises online will be useful and free of efforts	0	0	0	32	48	20	0
16-	It is easy to use mobile applications such as PHR	0	4	0	8	52	36	0
17-	It is easy for me to use laptops to surf PHR websites	0	0	4	12	56	28	0
18-	The Internet is available for me	0	0	0	8	56	36	0
19-	It is easy to use USB based PHR	4	0	4	16	60	16	0

20-	It is easy to print my lab tests using a printer	8	0	4	20	40	28	0
21-	It is easy to have my health information on a CD or DVD	0	8	8	32	36	16	0
22-	I can use the Internet at home	0	0	0	4	40	56	0
23-	I can use the Internet at work	0	0	0	8	48	44	0
24-	I can use the Internet at net-café	0	0	0	20	44	36	0
25-	I have the skills to use the Internet for different purposes	0	0	4	4	52	40	0
26-	I think I would be able to use PHR in my daily life	0	0	0	12	52	36	0
27-	People who I trust would advise me to have a copy of my health information	0	0	8	16	64	12	0
28-	People who inspire me would advise me to contact the doctor online	0	0	8	28	48	16	0
29-	People who I trust would advise me to update my health information personally	0	0	4	24	52	20	0
30-	People who inspire me would advise me to adopt Personal Health Record	0	4	4	28	56	8	0
31-	I enjoy surfing the Internet	0	0	4	8	32	56	0
32-	I enjoy using mobile applications	0	0	0	8	36	56	0
33-	I enjoy emailing	0	0	8	10	44	28	0
34-	I would enjoy surfing my health information online	0	0	8	10	60	12	0
35-	I would enjoy collecting my lab tests results online	0	0	8	16	48	28	0
36-	I would enjoy using PHR to do many health activities	0	0	0	36	40	24	0
37-	I used to buy online services and products at fair prices	0	0	8	16	44	32	0
38-	I would buy a life time PHR at a reasonable price	0	4	8	36	40	12	0
39-	I would buy a yearly licensed PHR at a reasonable price	0	12	8	28	40	12	0
40-	Price value is important for me	0	0	0	4	40	56	0
41-	My health condition is important for me	0	0	0	0	28	68	4
42-	I have concerns about having any health issues	0	0	4	4	32	60	0
43-	Being healthy is important thing for me	0	0	0	4	28	68	0
44-	Having any health issue will be a source of stress for me	0	4	0	8	28	60	0
45-	I am afraid to feel that me health condition is at risk	0	0	0	4	44	52	0
46-	I am worried of having any health issue which may become complex in the future	0	0	0	4	44	52	0
47-	Using Online health services may help me to manage my health condition	0	0	4	8	48	40	0
48-	My health condition could be improved if I self-manage it using PHR	0	0	0	24	64	12	0
49-	Using PHR could have the potential to help me to control my health condition	0	4	0	12	68	16	0
50-	I feel that self-management using PHR to manage my health condition could have a positive impact on my health	0	0	0	24	52	20	4
51-	I think that I would use PHR if there is someone around who would help me to use it	0	0	0	24	60	16	0
52-	I believe I could use PHR if I can call someone for help if I got stuck	0	0	0	20	54	26	0
53-	I believe I could use PHR if I have enough time to learn it	0	4	0	32	40	24	0
54-	I have concerns about my privacy while using PHR	0	0	0	16	28	56	0
55-	I can share my health information only with the people I trust	0	0	4	4	32	60	0
56-	I do not reveal my personal information on the Internet	0	0	8	0	36	56	0
57-	I am concerned when providing my credit card information online	0	4	4	4	24	64	0
58-	I am concerned about the privacy of my medical history	0	0	0	12	36	52	0
59-	I have the Intention to contact doctors online	0	0	0	24	32	40	4
60-	I have the intention to view my lab tests online	0	0	4	16	40	36	0
61-	I have the Intention to ask for prescriptions online	0	8	4	24	44	16	0
62-	I have the Intention to share my personal health information with trusted doctors online	0	0	0	24	48	24	4
63-	I have the intention to keep a copy of my medical history	0	0	4	16	44	36	0
64-	Overall, I have the intention to adopt PHR	0	4	0	28	40	28	0

As shown in table 2, the majority of the participants have a high intention to adopt PHR. Some participants have disagreed with some points but they still willing to adopt PHR. This disagreement may not be actually a disagreement to the point, participants may think that they are breaking the law is some cases e.g. question number 61 (I have the intention to ask for prescriptions online). On the other hand, a high percentage of the participants have chosen (Neutral) to answer the question number 3 (I used to keep a copy of my medical history), whereas they have chosen either (Agree) or (Strongly Agree) to answer the question number 64 (Overall, I have the intention to adopt PHR) which means that the question number 3 is not actually affecting on their intention to adopt PHR. In a result, this question will be kept or removed after reviewing the expert judgment report.

Some participants have provided their feedback after disagreeing with some statement. For example, some participants have disagreed with question number 21 (It is easy to have my health information on a CD or DVD) and commented that they would prefer the copy on pen drives (USB based PHR). This question also will either be removed or kept according to the expert judgement report.

This survey also shows that the additional factors such as Fear Appraisal, Copping Appraisal, and Privacy have an important effectiveness on the behavioral intention to adopt PHR among the participants.

Few participants have decided to choose either "I do not know" or " I do not want to answer this question" which actually shows that the questions were clear enough and do not cause any embarrassment to the participants

Overall, this pilot test shows that the majority of the participants have a high intention to adopt PHR despite being neutral or disagreeing with some questions.

8- Data Analysis

Partial Least Squares (PLS) analysis was employed to test the hypotheses. Nonparametric bootstrapping (Wetzels et al., 2009) with 2,000 replications was applied. PLS techniques was used as PLS is most suitable if the research purpose prediction or exploratory modelling (Garson, 2016). This study also aims to explore the factors influencing the user acceptance of PHRs in Malaysia. As such, PLS is appropriate technique for this study. PLS incorporates a two-stage procedure. The research model encompasses of two sub-models namely, UTAUT2 and PMT is to estimate the structural model (Garson, 2016).

9- Results

A- Profile of Respondents

The results reveal that the sex of the respondents was (60%) for males and (40%) for females. The respondents are generally in the middle age as mostly belonged to the two sets of 38-43 years old, which represents (40%) and 44-49 that represent (33.3%). Almost three-quarters of the respondents have a degree while only (16.7%) have finished a primary or secondary level. Furthermore, the majority of the respondents were married, however only (13.3%) were single.

B- Measurement Model

The constructs were examined in terms of reliability and validity. The reliability and validity of the research instrument and measurement model were examined by identifying the internal consistency, convergent validity and discriminant validity. According to (Hair et al., 2014) convergent validity is confirmed when items load highly (greater than 0.5), constructs have an Average Variance Extracted (AVE) of at least 0.5, and Composite Reliability (CR) measures of internal consistency reliability is above 0.7. Table (3) illustrates the results of (CR) for each latent variable, are higher than 0.7, which satisfies the rule of thumb proposed by (Hair et al., 2014). The reliability of individual indicators was tested. According to (Hair et al., 2014), outer loading above 0.5 is considered significant and the item should be remain. However, items with outer loading below 0.5 should be removed from the scale with condition that the removed item does not decrease the average variance extracted value. Table (3) shows that all loadings are more than 0.5, which satisfies the rule of thumb suggested by (Hair et al., 2014). The (AVE) was used to evaluate the convergent validity. The acceptable value for AVE is 0.5 or above, meaning the latent variable proposes at least 50% of the variance from its scale items. Nevertheless, when the value is less than 0.5, it means that there is more error and the latent variables do not reveal the underlying factors of the respective latent variable. (Hair et al., 2014). Table (3), shows that all AVE values are more than 0.5, which indicate that the convergent validity of these constructs was satisfactory (Fornell and Larcker, 1981).

Table 3. Evaluation of Measurement Model

Construct	Number of Items	Factor Loading (>0.5)	CR (>0.7)	AVE (>0.5)
Coping Appraisal (CA)	4	0.649-0.981	0.865	0.624
Effort Expectancy (EE)	4	0.674-0.848	0.846	0.580
Facilitate Condition (FC)	4	0.607-0.853	0.862	0.614

Habit (H)	4	0.836-0.899	0.921	0.744
Hedonic Motivation (HM)	4	0.567-0.893	0.841	0.578
Privacy (P)	2	0.942-0.970	0.809	0.915
Performance Expectancy (PE)	4	0.648-0.936	0.955	0.729
Price Value (PV)	4	0.614-0.860	0.914	0.552
Social Influence(SI)	2	0.840-0.912	0.829	0.769
Threat Appraisal (TA)	6	0.640-0.852	0.869	0.539
Intention to Use (IU)	4	0.646-0.804	0.809	0.517

Note: CR: Composite Reliability; AVE: Average Variance Extracted

According to (Henseler et al., 2015), Heterotrait-monotrate (HTMT) ratio is an adequate method for the assessment of the discriminant validity. As per Hensler et al. (2015) HTMT value below 0.85, indicate that the discriminant validity has been set up between a given pair of a reflective construct. Table (4 shows that all HTMT values are lesser than 0.85, hence, the results in the Heterotrait correlations confirm that there is discriminant validity.

Table 4. Heterotrait-Monotrsit Ratio (HTMT)

	CA	EE	FC	H	HM	P	PE	PV	SI	TA
CA										
EE	0.169									
FC	0.411	0.498								
H	0.247	0.195	0.263							
HM	0.312	0.294	0.246	0.219						
P	0.152	0.314	0.321	0.460	0.357					
PE	0.483	0.193	0.390	0.450	0.122	0.236				
PV	0.272	0.698	0.740	0.241	0.163	0.465	0.399			
SI	0.420	0.274	0.385	0.264	0.268	0.372	0.389	0.264		
TA	0.104	0.279	0.297	0.226	0.196	0.326	0.167	0.117	0.178	

Conclusion

Understanding the acceptance and intentional to use the PHRs is very important aspect which may revile the future of interaction between the users and the PHRs. This study is the first stage in building a new model based on UTAUT2 model with the addition of PMT model and privacy as new factors that may affect the intention to use PHRs in Malaysia. The result shows that the reliability and validity test of the new model were successful. Based on this result, the model is going to be sent to be validated by the experts in order to be used on higher population.

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Investigation of Jangal movement dependence on Islam alliance party

Investigación de la dependencia del movimiento Jangal en el partido de la Alianza Islam

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ABSTRACT

The aim of this study is to evaluate the Islam Alliance Party (IAP) and the influence it had on Islam Alliance Party of Gilan as known as Jangal Movement (JM). This study uses an analytical approach and reliable references. This is conceptual research with an analytical-descriptive approach which focuses on the literature as relevant evidence. Thus, a conceptual discussion about the influence of IAP on JM and an analytical and targeted review of related researches is presented. Historical background of IAP in the Islamic world and the history of JM. According to the related literature, it seems that many researchers believe that there isn't any strong relationship between IAP and JM; although they were established under the same title and many Mirza Kuchik Khan's beliefs about decolonization and independence were aligned with Sayyid Jamāl ad-Dīn Asadābādī. In this study, we tried to delineate the relationship, considering reliable sources.

Keywords: Islam Alliance Party, Jangal Movement, Iran

RESUMEN

El objetivo de este estudio es evaluar el Partido de la Alianza Islam (IAP) y la influencia que tuvo en el Partido de la Alianza Islam de Gilan, conocido como Movimiento Jangal (JM). Este estudio utiliza un enfoque analítico y referencias confiables. Esta es una investigación conceptual con un enfoque analítico-descriptivo que se enfoca en la literatura como evidencia relevante. Por lo tanto, se presenta una discusión conceptual sobre la influencia de IAP en JM y una revisión analítica y dirigida de investigaciones relacionadas. Antecedentes históricos de IAP en el mundo islámico y la historia de JM. Según la literatura relacionada, parece que muchos investigadores creen que no existe una relación sólida entre IAP y JM; aunque se establecieron con el mismo título y muchas de las creencias de Mirza Kuchik Khan sobre la descolonización y la independencia se alinearon con Sayyid Jamāl ad-Dīn Asadābādī. En este estudio, intentamos delinear la relación, considerando fuentes confiables.

Palabras clave: Partido de la Alianza del Islam, Movimiento Jangal, Irán

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Introduction

However the Islamic unity or harmony during the 19th century was rooted in the previous constructive efforts and benefited from their notions, motivations, and achievements, it can be argued that, in general, it had a more or less different origin and construction. Islamic Unity Movement or Pan-Islamism is known as Islam Alliance.

From the establishment of Safavid dynasty to the beginning of Qajar reign, it almost took three centuries for the Shia clergy to codify and present the theory of fiqh-sharia government as an alternative to the monarchy theory. In addition, Muhammad Baqir Behbahani provided the necessary focus by creating a hierarchical structure in the principled clergy. Here was the starting point of authentication of the clergy through the leadership of Sheikh Morteza Ansari as an adversary to the monarchy.

Islamic movement began with the tension between Qajar government and clergymen and the objection of the clergy to some changes in the education, administrative and judicial systems, to Western-modernity-based reforms, their interference in internal affairs, some common heresies, and threats made to the authority of the clergy. Pan-Islamic ideas of religious forces such as Sayyid Jamāl ad-Dīn Asadābādī encouraged this tension.

IAP was founded in 1915 coincided with the foundation of JM. Sayyid Jamāl ad-Dīn Asadābādī was of the very first individuals who played an important role in IAP and believed that progress of Muslims relies on the unity and returning to the early instructions of Islam.

The center and mastermind of JM was consisted of IAP people who were members of the clergy, except for one or two members. Foreigners who were aware of the domestic movements (such as the commander of British forces, General Dunsterville) knew that the JM was led by IAP.

Research Background

Plenty of books and paper have been dedicated to IAP and JA. However, there isn't any book about the subject of our study. This study is based on previous documents and books related to JA and IAP. In his famous book, Sardar Jangal, Fakhraie introduces the IAP and many other researchers and writers such as Qajar prince, Abol-Hassan Mirza (known as Sheikh al-Rais) in a paper titled Islam Alliance, Mohammad-Ali Gilak in a book titled History of the Gilan Revolution have written about it.

Historical Background

Mirza Kuchik Khan was a passionate theology student who traveled to Mazandaran along with Mirza Ali Khan Divsalar. In late 1915, he formed an organization called Islam Alliance near Talesh and passionate people of Gilan and Mazandaran helped him. He started many battles and thus, the Iranian government lost the authority in Northern Iran.

His ideas were inspired by leaders of Islamic movements in the last century such as Sayyid Jamāl ad-Dīn Asadābādī and his goal was to lead the rebellion in the form of an Islamic organization and prevent it from failure. Thus, he insisted on Islamic principles and religious foundations as the mastermind of JM.

It was said that the central office of IAP was located in Istanbul and it was established by some religious leaders such as Sayyid Jamāl ad-Dīn Asadābādī, Sheikh Abd al-Rahman al-Kawakibi, Rashid Reza and Sheikh Mohammad Abdeh to gather and unite the Muslims of the world in order to fight against colonialism and create a political point of strength in the Islamic world.

IAP organization was established in Iran, following the path of Sayyid Jamāl ad-Dīn Asadābādī and took broad and intense actions which led to him joining the organization.

Members of IAP took an oath to expel all the foreign invaders from Iran's land and they wouldn't shave their heads and henna their beards until the duty is done. Accordingly, they were referred to as "Jangali" (meaning "wild") as an insult. His followers were about 3,000 people but his influence was extraordinary. Undoubtedly, his sense of patriotism was the stimulus that drove him. He strongly believed that he couldn't consider himself as an elite. On the contrary, he considered him as the scum of society. He had no hesitation about harassing the Iranian government.

Gilan Islamic Alliance Party (GIAP) was led by a group of noble, sublime, people-oriented, committed to Islamic attributes individuals and prominent scholars and vigilant intellectuals each of whom were accepted and appreciated by people. GIAP popularity soared very soon and it played an important role in the social interactions and expanded its power throughout Northern Iran and beyond. It was mentioned in government documents that "almost a year ago and especially since few months ago, the influence and power of IAP in Gilan was so high that if

a government agent wanted to be able to perform his duties, he would have to make some connections with IAP."

IAP organized a commission to deal with the government and judicial affairs, inspect and investigate brokerage codes, coping with bribery in government offices (such as arresting the chief justice of Gilan for bribery), the establishment of research courts throughout Gilan, Tonekabon, Astara, Khalkhal, Taromat and etc.

All of these shows the authority and influence of IAP in Gilan and suburbs. IAP was expanded throughout Gilan and beyond (Gorgan in the east, Zanjan in the west, Astara and Ardabil in the north, Tarom Sofla in the south) and people came under the umbrella of IAP.

Kuchik Khan talks about how IAP expanded in Iran: "Under the supervision of some Iranian, participation of Turkey and Germany representatives and consent of some powerful people in Tehran and Najaf, this organization gradually become more powerful than others and its goal was to persuade all Iranians toward Islam and Shia. Many secret circles were formed all over the country which involved as many as 150,000 individuals.

Jangal Movement Objectives

There were two wings to JA: a non-religious-radical (left) wing based on the ideas of the social democratic party (Ehsan Allah Khan and Heydar Khan Amo-oghli) and a religious- landowner wing based on religious and patriotic ideas (Mirza Kuchik Khan, Haj Ahmad Kasmaie, and Dr. Ebrahim Heshmat).

Apparently, the two wings wanted the same thing in general but their interpretation and explanation were different. They demanded independence and territorial integrity, the expulsion of foreign forces, security, justice and campaign against autocracy and despotism. These goals are explained below:

Independence and Territorial Integrity: Mirza Kuchik Khan didn't support compromising with colonial countries. It was mentioned in the Jangal newspaper that ". . . first of all, we support the independence of our country . . . JA members believe that the government should be reformed without the involvement of neighboring countries." Their interpretation of independence is that "in every sense of the word, independence means no involvement of any foreign countries in the country's affair, whether they are a neighboring country or not."

They explicitly expressed their fight for independence: "Any country who send troops over to our country and violates our neutrality is considered as an aggressor, whether it's Russia, Britain, Ottoman or Germany."

In the 23rd edition of Jangal newspaper, there was an important article in which the main reason behind JA is expressed to be Iran's weakness and looting of Iran by British and Russian forces during World War I. They believe that the cause of these problems is the people who didn't cut off the hand of aggressors and JA was founded to do so: "Almost half the country is in ruins and people are wandering. Despite Iran's neutrality, we suffered more than fighting countries. . . Today, a movement called Jangal in Iran is a national movement. What is that we're looking for? A simple word: Independence and prosperity of Iranian people."

Social Justice: JA members demanded to end foreign abuse and development of industry, railways, and factories. After achieving independence and establishing a national government, JA members wanted the lands of great landlords to be divided between farmers and free education for all people.

The major idea of JA was to eliminate injustices and especially the ones due to the master- villein or owner-peasant system.

Upon the victory of the Bolshevik revolution in Russia, Lenin read a statement known as a land command. In addition, an order was attached to the command in which the right to private ownership of any land was permanently denied and the land was owned by the public. The lands were not divided between people, but rather owned by the government and the government replaced the private owner. The non-religious-radical wing which was ideologically dependent on Russian theorists put the land issue as one of their priorities.

Authoritarianism and Liberation: Mirza Kuchik Khan demanded liberty, welfare, and human rights and anyone who thought differently was a traitor in his opinion. He believed that the only way to save Iran from poverty and corruption is establishing a republican and socialist government.

Sayyid Jamāl ad-Dīn Asadābādī's Objectives

Formation of IAP was one of the most important intellectual solutions proposed by Sayyid Jamāl ad-Dīn Asadābādī to control and save the Islamic nation from existing harms and abnormalities. During the European military and economic attack against Muslims, he raised the issue of forming an Islamic community. He considered different

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goals, principles, and methods to form the IAP. The most important of those are:

- Unity of nation to reform their sociopolitical system.

- Accepting a powerful Islamic country as the resistance center against foreign countries which unites all Islamic nations against colonialism.

- Denouncing racism as a great plague to Muslims' alliance. Thus, not only he condemned religious fanaticism and racism in his speech, but he showed his commitment to unite Islamic society in practice and introduced himself sometimes as an Iranian, Afghan or Hejazi.

- Praise for Muslim's intolerance against foreign enemy and colonialism: He believed that sectarian prejudice of Muslims would lead to their disintegration and failure. Thus, he asked the followers of different Islamic branches to be patient and tolerate each other. Sometimes he angrily talked out that it seems that Muslims are united not to be united, while if they unite and use their fury against the foreigners, no power can resist them. He was committed to his agenda and sometimes called himself Twelver and sometimes Hanafi. His emphasis on the words like the nation of Mohammad, Islamic province and prosperity and best interests of people is a sign of deep belief to Islamic unity and avoiding disunity.

Dependence of JA to IAP

Between 1951 and 1954 due to implications of the Anglo-Russian Convention, Iran was unwittingly involved in World War I and the consequent invasion of Northern Iran by British and Russian forces created many problems.

In such circumstances, some scholars and politicians such as Sayyid Mohammad Kare'i, Soleyman Mohsen Eskandari, Sayyid Mohammad Reza Mosaverat, Sayyid Yahya Nademani, Mirza Taher Tonekaboni, Sayyid Hassan Modarres and Adib al-Saltaneh Sami'i argued that the only way out of colonialism was a united Islamic nation and through promoting this idea, they were trying to liberate Iran form this disaster.

At that time, Mirza Kuchik Khan who was familiar with the ideas of Sayyid Jamāl ad-Dīn Asadābādī and made some connections with people like Sayyid Hassan Modarres believed in and defended the idea of Islam unity. He holds that if there was a center to lead and policy-making, scattered fights would be avoided, the pressure on people would be reduced and it would create a stronghold against the interference of foreigners.

Therefore, IAP was founded by Mirza in Gilan. The name was chosen because the objectives of Mirza and his organization was similar to Sayyid Jamāl's.

Mirza spoke out many times about the unity of Muslims against foreigners: "My dear brothers! Such disastrous circumstances which are the result of foreigners' interference and the increasing pressures of northern and southern neighbors compels us and every proud Iranian to unite and end this disgraceful life . . . We follow the path of early Mujahideen of Islam i.e. Husayn ibn Ali; albeit the power and authority of Yazid and the Umayyad government was not much less than the tsarist government. Although Husayn ibn Ali was defeated in the battlefield, but his name and reputation always lights up the path for freedom."

After defeating the Cossack forces, Mirza states: "Dear brothers! You just saw the result of unity and met the angle of victory. . . I always told you and I tell you now: As long as we don't deviate from the truth and justice and we don't turn our back to unity, God will not leave us high and dry."

This movement which was formed through unity was expanded to Shahsevan Khans of Khalkhal. Mirza believed that unity is the solution and stated in his speech in Khalkhal: "People gathered here know about the last 12 years of disaster and you know how foreigners have invaded this land due to lack of unity and alliance and overwhelmed our 6,000 years old independence and rights. It was because of our disunity and disagreement that our nation is fighting and incensing each other. The foreigners take advantage of this situation and made our government weak so much that it can't even deal with the internal affairs. Those who arose in the recent years to fight for independence and national reforms knew that unity is the only solution but wasn't able to achieve it . . . but IAP which was founded 2 years ago in Gilan, like a qualified physician, diagnosed the illness of our country and prescribed unity of Iranian people as the solution. Internal security and independence wouldn't be achieved unless through creating a sincere unity of all groups of people including nomads, villagers, urbanites and so on. For a while, this innocent purpose was limited to Gilan, due to conflicting with foreigners' benefits. Since the obstacles were overcome, IAP, in all seriousness, has taken action and delivered this message near and far."

Through the idea of Islamic unity, Mirza was trying to interrupt the power of Britain, Russia, and communists over Iran. Through a statement, he reminded people to cleverly watch out anything that is going on and do not be deceived and do not forget unity: "communists interfere in our internal affairs, committed murder and looted the

country's resources. They will pay for this as British, Iran's government and tyrants will. They came here wearing the mask of a friend and they've hurt us more than anyone. What is your responsibility? Be aware! Do not be deceived! Save yourselves from waywardness and extremism of these people under the umbrella of unity. Anyone who interferes in the country's affairs should be considered as an enemy and anyone who sincerely gave you a helping hand should be considered as a friend. Expel those who plant the seed of dissension."

Islam unity in the form of GIAP caused some researchers to consider this social group politically and organizationally dependent on the Islamic Alliance Movement led by Ottoman government and ideologically dependent on the Sayyid Jamāl ad-Dīn Asadābādī's ideas about the unity of Islamic nations. Reviewing the articles published in Jangal newspaper explains that these two hypotheses are completely wrong. In the 23rd edition of the newspaper, the reason for using "Islam" in the name of the organization is explained: ". . . because most of the material and spiritual activities of this nation (i.e. Iran) are related to religion . . . and thus, the name reflects this mental state of people. It doesn't mean that the whole Islamic world is united to fight with . . . Christian countries . . . Islamic unity is not possible through political action . . . These days, national unity, as well as religious unity is not, is of no help unless unities of mutual interests." In explaining the definition of being an Iranian, it is said that ". . . due to the fact that we are Iranians and responsible for protecting this land, in our viewpoint, our homeland is preceded by all other countries. After successfully fulfilling all our duties as an Iranian, our Muslim brothers, as long as they fulfill their brotherly duties, have priority over others . . . any community that serves in the best interest of Iran is our brother and we part ways with groups and people who deviate from the path of Iran's prosperity . . . with the help of God, we can reach the top mountain of independence and reform and would be able to say with pride and courage that Iran belongs to Iranian and no one else."

JA interpretation of IAP is explained in Jangal newspaper: ". . . indeed, we arose in the name of IAP and we are attributed to this sacred community but it should be noted that we are supporting the slogan of "all Muslims are brothers" meaning while the disagreements between Muslims have put us in a weak position toward a common enemy, Muslims should not fight and kill each other in the name of being Shia, Sunni or other branches."

In his correspondence, Mirza Kuchik Khan frequently described his movement in support of national-religious objectives: "For a while, we've been at war with British forces and now, we are trying to defend our national and religious aspirations against their abuse and interference and we will not refrain from any effort."

Thus, the basis of JA activities was based on the idea of Islamic unity against foreign invaders and had no connection or proportion with the Ottoman Islamic Alliance.

Kasmaee denies any connection and dependence to IAP: "Because initially, the committee meetings were held once a week and Russian agents were aware of this, the committee suggested that a Rawda Khwani ceremony should be held in the house of each member as a cover because the Rawda Khwani was allowed by the government. Accordingly, it was decided to name the secret committee as IAP to publicize its activity. Therefore, the IAP founded by Mirza Kuchik Khan did not depend on any other organization or community of such name or title.

Mirza remained a believer and virtuous Muslim till his last day. Before moving to Rasht, he made some calls to people involved with IAP. After settling down in Rasht, he was a member of Rasht Islamic Alliance Party till the end of the first period of JA. This organization was dissolved at that time.

Conclusion

Considering the nationalistic and patriotic approach in JA activities which was the result of the national-religious wing of the organization, it seems that JA was not affiliated with worldwide IAP existing in Ottoman because the dependence of Mirza Kuchik Khan on Ottomans couldn't be justified by international proponent and opponents. Choosing this name, regardless of any connections to other groups with the same name, expresses some kind of religious devotion to the aforementioned organization which plays a major role in forming the ideological basis of JA.

It was determined that JA, as far as possible, took its own path and by taking advantage of great scholar's guidance and consulting with well-known intellectuals, it made some efforts in various social situations and services such as road construction, school construction, fighting famine and providing food for people in need, fighting bribery and hoarding, building and repairing houses for the poor, organizing orphanages for the orphans and so on. These important activities were their priority. The most important one was fighting against internal and external enemies of Islam and the people. They fought heroically and mobilized people against these criminals and created a great movement and revolution. Their actions showed that they are independent and they have no support from any foreign government.

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